

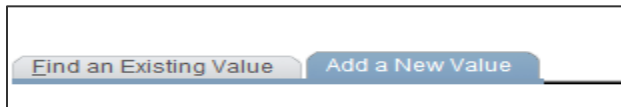
Business Process	Navigation
- Understand basic page navigation in PeopleSoft. - Adding Favorites	- See below Favorites > Add to Favorites

1. Navigating Pages

- Once you arrive to the final menu choice, the navigation path you took to get to the page will be displayed at the top left to the right of the **Main Menu**. This is called the **Breadcrumbs**. From any of the navigation that has the down arrow below, you can click that breadcrumb to get additional menu choices rather than having to go all the way back to the **Main Menu** to start your navigation again.

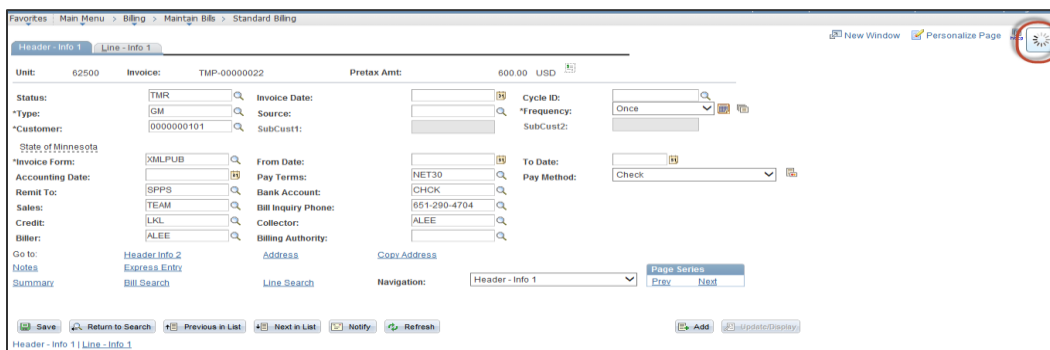


- The final menu choice will display a page where you can enter criteria. Different pages require different search criteria. However, when you see a search page, there will be 2 tabs displaying – **Add a New Value** and **Find an Existing Value**.



- Depending on the page, the default to either **Add a New Value** tab or **Find an Existing Value** tab may change. Add a New Value tab is used when you are ready to enter new data into the system. Find an Existing Value tab is used when you are looking to retrieve already existing data to review or update.
- After entering any data in the system, when the system goes to process your request whether it is search criteria you enter or

actual new or updated data, the system will display the **Processing** icon in the top right corner of the page . As long as the processing icon displays, do not enter any additional data. Wait for the processing icon to complete and go away before entering any additional data. If the **Processing** icon remains on your page but is no longer twirling then you need to contact the Finance Department for help.



- Once you are on a page there are several common attributes that will be seen on many pages.
- Additionally, many pages will have the **Add or Delete Lines** buttons. These buttons allow you to add additional lines or delete lines that are no longer needed. Sometimes the Add symbol will look like  indicating you can add multiple lines at one time. You will get a popup box in most cases to specify how many lines to add. The plus sign without the extra ... behind it means you can only add one line at a time.

Lines							Find View All	First	Last
Item	Description	'UOM	PO Qty	Category	Amount	Status			
☒ 1 AM1000	Laptop Computer	EA	6.0000	CYCLING	27600.00	USD Active			

7.

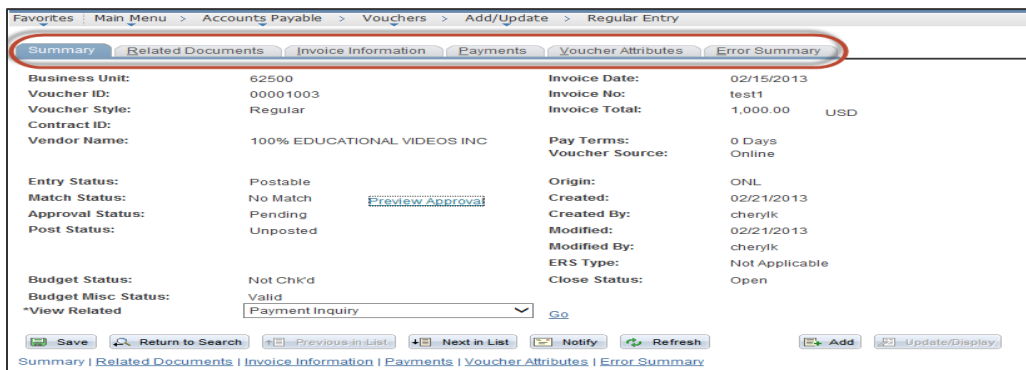
8. Then, there are various types of fields that appear on different pages.

Field Type	Symbol	Description
Checkbox	☒	When checked usually activates a 'YES' value.
Radio Button	☐	Usually only one button can be selected from the group of choices.
Lookup Button		Displays a list of available values for the field (usually a bigger list of values than displayed by the Drop Down field type described below).
Drop Downs		Displays a list of available values for the field (usually a small number of choices for values).
Hyperlinks	Details	Clicking on a hyperlink takes you to a new page.
Date Prompt		Displays a calendar to select the date from rather than manually keying the date, if desired.
Download		Download the data from within the grid on the page to Excel.

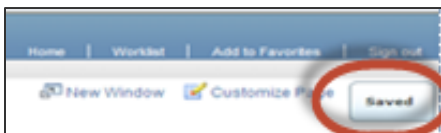
9. Many pages will have a blue bar area that allows you to display more information. There may be a choice of **View All** to bring all rows of data into the display. Or the choice may only be to bring in 100 or 300 rows at a time. After clicking on View All then the display in that area will be to **View XX** where the XX is the original amount of rows displayed prior to clicking on View All. You can use the **First**, **Last** or left or right arrows to navigate through all the rows of data that can be displayed. Depending on where you are within the data some or all of these features may be activated to use.



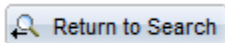
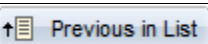
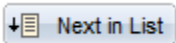
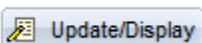
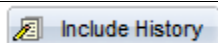
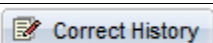
10. Some pages will have tabs at the top. This indicates that all the fields related to this transaction could not fit on one page so they are grouped on multiple pages.



11. When saving data you have entered, you will click the **Save** button  at the left bottom of the page. After doing this, in the top right corner of the page (same place as the Processing icon appears), **Saving** will be displayed while it is still processing and then when completed Saved will display as shown below. **Saved** only displays for a short period so you have to watch to see that it is saved.



12. Additional buttons available on many pages from the bottom of the page to the right of the Save button are as follows:

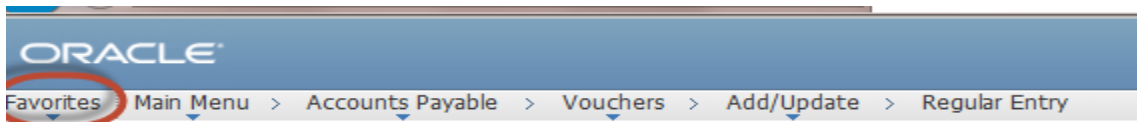
Button Name	Button Picture	Description
Return to Search		Allows you to go back to the search page that was used to enter the current page in order to search for new criteria or skip down the search list previously retrieved.
Previous in List		Allows you to go back to the previous transaction from the search list without having to go back to the list.
Next in List		Allows you to go forward to the next transaction from the search list without having to go back to the list.
Add		Allows you to add a new transaction without having to go back to the Search page and clicking on Add a New Value tab.
Update/Display		Allows you to update or display data already entered in the system.
Include History		This is only applicable to data that is effective dated. Allows you to view all rows of data for a transaction whether the date of the transaction is a current date, a future date, or a past date. See effective dating discussion below.
Correction		This is only applicable to data that is effective dated. Only a limited number of people will have security to this action type. Allows you to correct history rows instead of inserting a new effective dated row to make the necessary change. Using correction mode can destroy the effective dating audit trail if used improperly. See effective dating discussion below.

13. **EFFECTIVE DATING** - PeopleSoft stores data in tables. Some of these tables are called transaction tables. These are the tables that store your requisitions, purchase orders, vouchers, journal entries, etc. You can tell it is a transaction table because the main key to that table is Business Unit. However, some tables are considered control or configuration tables. These tables are not updated every day like many of the transaction tables. These tables may be effective dated. Effective dating on control tables allows the system to store an audit trail of events related to that transaction. For an example see the chart below and how the system treats these rows of data when effective dating is active. Normally when effective dating is on a table, the table will also have an effective status of either Active (A) or Inactive (I). If you add a more current effective dated row you do not have to go back and inactivate the old effective dated row. The system automatically assumes the only active row is the row closest to the current system date (today's date) but not greater than the current system date. The example below is for a department used in transactions.

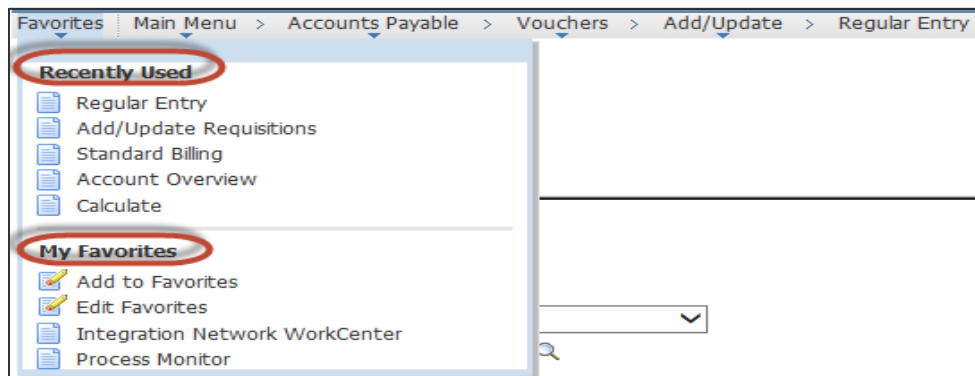
Transaction	Effective Date	Action	Description
Current System date is 05/06/2013			
Add a new Department (990 Test)	05/01/2013	Add	Initial row of data
Update Dept 990 Test	05/05/2013	Update/Display – Insert new effective dated row	Change description to Testing Use Only
Update Dept 990 Test	05/06/2013	Include History – Insert new effective dated row	Change description to This is a Bogis Deptid
Update Dept 990 Test	07/01/2013	Include History – Insert new effective dated row (future dated row)	Change Effective Status to Inactive (System will not recognize this row until the current system date = the effective date of this row.)

2. Favorites

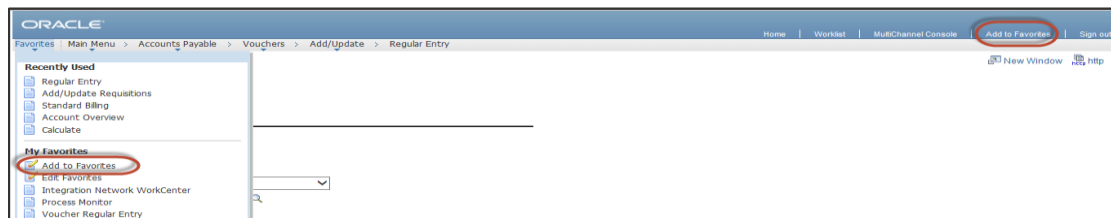
14. If you frequently use the same pages, you may want to use the Favorites menu. In this area are stored 2 types of information to help you with shortcuts to the navigation.



15. First, under the **Favorites**, there is the **Recently Used** section. This section displays the last 5 pages you accessed. If you click on any of these it will take you directly to that page without having to repeat the navigation steps. This section will continually update with the last 5 pages accessed. When you come in to work every morning, it will remember the last 5 pages you used yesterday.



16. Second, under the **Favorites**, there is the **My Favorites** section. This section allows you to save specific pages that you access frequently. Once you have navigated using the Main Menu and other sub-menus to a page that you plan to use frequently, click on either the Add to Favorites choice under the **Favorites > My Favorites** menu or click on Add to Favorites at the top right of page.



17. Either method will bring up a box to title the favorite to be saved. Leave the default name or change it to help you find that page in your favorites list going forward. Once you click **OK** from this box, it will be saved to your **Favorites**.

