NAVIGATING IN THE SYSTEM

AUTHORIZED REQUESTERS AND AUTHORIZED APPROVERS

CHAPTER 2
NAVIGATING IN THE SYSTEM

Overview

Being able to navigate in Peoplesoft is essential. After signing on to PeopleSoft, the system displays a homepage with menu navigation and a universal navigation header. The browser-based navigation is designed to allow you to access your pages using the menu pagelet with navigation pages or by using drop-down menus. There is also a search feature on the menu that you can use to find your page.

The folder drilldown structure is the primary means of getting around your PeopleSoft application. This structure collapses and expands based on your selections. The main level, also known as Home is a blank page allowing you to access previously used pages from Favorites or to open the Main Menu.

You also have access to two bookmarks that allow you to make changes based on your own preferences: Change My Password and My System Profile. You can reset your own password.

Objectives

By the end of this chapter, you will be able to:

- Navigate in Peoplesoft.
- Access a page or component.
- Use a link to access related pages.
- Open pages.
- Save pages.
Navigation

The PeopleSoft application is internet browser-based. Point to the component that you want to access and a small hand appears. The hand means that the item is linked, and you can click it to open a new menu or access a component.

Home Page

After signing in you will see the Home page. It consists of the Navigation bar and the access to the menus.

Universal Navigation Header

The Universal Navigation Header includes hyperlinks to Home, Worklist, Add to Favorites, and Sign Out. You can access these commands from page.

Navigation

- eProcurement
- Manage
- Requisitions
Home
Click to close the current component and return to the default homepage.

Worklist
Click to access your workflow list, if you have access.

Add to Favorites
Click to add this page to your favorites list. Favorites are similar to standard browser bookmarks for frequently used folders and pages. Once a favorite is added, it is maintained in the My Favorites folder in the main menu pagelet. Favorites are specific to your workstation, not user ID.

Sign Out
Click to terminate a user session.

Drop-down Menu Navigation

Click on the Main Menu link at the top of the page, to open the menu. Hover the pointer over each folder in the navigation and a new menu opens. When you reach the component, click on the component to access the search page.

In the example below, you see the navigation that enables you to view or create a purchase requisition.

Navigation
• eProcurement
• Manage
• Requisitions

A Search field appears at the top of the Main Menu. Enter the name of the page you want to access and click . All content references that are in the portal registry will appear and you can click on the hyperlink of the one you need.

Menu Pages Navigation
Click on the Main Menu link at the top of the page, to open the menu. Click on a folder to display the menu page for that folder.

**Navigation**
- eProcurement
- Manage
- Requisitions

Breadcrumbs appear across the top of the page to show the current navigation. Other folder and components appear on the menu page. Access the one you want by clicking on the hyperlink for that object.

**Favorites – Recently Used**

Each time you access a component in the PeopleSoft application, it is added to a Recently Used list on the Favorites menu. This list contains the last five pages that you accessed. To go back to a page used previously in your online session, open the Favorites menu and click on the hyperlink for the component that you want to access.

**Navigation**
- Favorites
- Recently Used

**Component Search Page**
Use components to open up the pages where you perform specific actions such as data entry or running processes. The screen capture below shows the search page which is displayed when you access the *Manage Requisitions* page.

**Navigation**

- eProcurement
- Manage Requisitions

The *Search Requisitions* section contains fields for you to search for requisitions you have already created. Once you enter the search criteria and click the *Search* button, the results appear in the *Requisitions* section. Some of the search fields may already be populated based on your user preferences.

Another type of search page is displayed when you access *Create Requisitions*. On this page you enter a few pieces of information and click the *OK* button to go to a new page.

**Navigation**

- eProcurement
- Create Requisitions
Navigation from Within a Component

The breadcrumbs across the page have small arrows underneath each item. When you want to navigate elsewhere in the system, you can open the menu from any of the breadcrumbs to display a menu for new navigation.

Navigation

- eProcurement
- Manage Requisitions
- Manage Requisitions

![Image showing navigation menu]

The breadcrumbs across the page have small arrows underneath each item. When you want to navigate elsewhere in the system, you can open the menu from any of the breadcrumbs to display a menu for new navigation.

Navigation

- eProcurement
- Manage Requisitions
- Manage Requisitions

![Image showing navigation menu]
Retrieving Data

Use the search page to find existing values. This page appears when you select a component. Typically, you can enter many types of search criteria. The more fields that you enter, the more specific your search results will be.

There are two types of searches: Basic and Advanced. The basic search only displays one search field option. If that occurs, click the hyperlink for Advanced Search to enter values for multiple fields.

Click the Search button to see results. Scroll through the search box to find the value you want to view. Click that row of data to access it.

This example shows the search page for the Manage Requisitions component. Several values are already populated based on the user’s preferences. When the page is accessed, the results for those default values are displayed.

Navigation

- eProcurement
- Manage Requisitions
- Click Search

Use the search controls that are displayed on the page to help access information. These include:

- Look up icon access a Look Up page to find the appropriate value.
- Calendar icon displays a calendar from which you can select the appropriate date.
- Drop-down menus allow you to select from allowed values to match your criteria.
Look Up Page

The Look Up icon access a Look Up page to allow you to search and select the value for the search field. Click on the icon to display the Look Up page.

This example uses the Look Up page for the Requester field on the page.

Navigation

- eProcurement
- Manage
- Requisitions
- Click Look Up icon for Requestor field

TheLook Up Requester

The drop down list provides additional operators that can be used in a search. These include:

- **Begins with**
  - Looks for values that begin with the characters entered.

- **Contains**
  - Looks for values that contain the characters entered.

- **=**
  - Looks for an exact match for the characters entered.

- **Not =**
  - Looks for all values that do not match the characters entered.
<table>
<thead>
<tr>
<th>Operator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;</td>
<td>Looks for all values less than the characters entered.</td>
</tr>
<tr>
<td>&lt;=</td>
<td>Looks for all values less than or equal to the characters entered.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Looks for all characters greater than the characters entered.</td>
</tr>
<tr>
<td>&gt;=</td>
<td>Looks for all values greater than or equal to the characters entered.</td>
</tr>
</tbody>
</table>

**Between**

Opens up an additional field that searches for values between the entry in the first field and the entry in the second field.

**In**

Expands the field to accommodate multiple values to match. Values must be separated by commas.

**Wild Cards**

You can also use wild card values in your search. The available wildcards are:

- `% (percent symbol)` Matches one or multiple characters.
- `_ (underscore)` Matches only one value.
- `\ (backslash)` Indicates that the next character is not to be treated as a wild card.
Click the hyperlink for the value that matches the one you want to enter. The search page is displayed with the value you selected.
**Viewing Selected Records**

The component in the following screen shot contains the data from the record that you searched for. If the status is **Approved**, this data can be viewed but only updated by the authorized Approver. If the **Requisition Status** is **Open** the authorized Requester can make changes to the requisition.

**Navigation**

- eProcurement
- Manage Requisitions
- Requestor = BW_REQUISTER
- Click Search

**Viewing and Updating Data**

You can view or update the information contained within the selected record. There are several ways to navigate through the data.

Components may have tabs at the top or hyperlinks to move to other pages. You can click either of those to access the specific page. When you click one of these links, the new page also contains component links that will return to the original page.
Tools to view data are the Find and View All links. Use Find to search for specific line of data. Use View All to see all rows of data in a record.