PS200 – PeopleSoft 9.2
Basic Navigation
Basic Navigation

• The PeopleSoft 9.2 Basic Navigation course provides the training necessary to get you started in the upgraded PeopleSoft 9.2 Finance system.

• This course is intended to give you a frame of reference for basic navigation skills when the system is in place. We realize your time is valuable and we have kept that in mind when creating this course.

• You will pick up additional navigation tips and tricks during your role-based end user training courses.
Course Objectives

At the end of this course, you should be able to:

• Familiarize yourself with the EIS Home page and Main Menu
• Use components, pages and perform data entry
• Work with Favorites
• Personalize tables and export to a spreadsheet
• Search for Chartfield Data
• Use Wildcards and Partial Values
• Add an Effective Dated Row
Terms and Definitions

- Please review the new terms and definitions contained within the PeopleSoft 9.2 Basic Navigation training.

<table>
<thead>
<tr>
<th>New Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breadcrumb</td>
<td>A functional display of the navigational path to the page you are currently viewing.</td>
</tr>
<tr>
<td>Component</td>
<td>A collection of related pages.</td>
</tr>
<tr>
<td>Workflow</td>
<td>Automated routing of a transaction to one or more individuals for review and approval</td>
</tr>
<tr>
<td>Worklist</td>
<td>Automated prioritized lists of work items that a person (or group of people) has been tasked to do.</td>
</tr>
</tbody>
</table>
EIS (Enterprise Information System) is the primary administrative information system for the University of North Texas System (UNTS). EIS is a suite of integrated application software based on the Oracle-PeopleSoft (PS) product line. The enterprise-wide system provides support to multiple campuses. EIS replaced the legacy mainframe system and is expected to support the institution for the foreseeable future. The EIS, along with the RDS data warehouse and several ancillary reporting tools, improves end-user access to integrated data for analysis that supports operational and strategic decision-making needs.

EIS primarily manages core business processes for the following areas:
- Payroll
- Purchasing
- Budgeting
- Student Administration
- Accounting
- Other student and administrative areas
EIS is divided into the following distinct environments:

- **Campus Solutions (CS)**
  - Lead module for Student Administration including Admissions, Student Records, Student Finance, and Financial Aid/Scholarships

- **Human Resources (HCM)**
  - Lead module for Human Resources and Payroll

- **Financials (FS)**
  - Lead module for Finance and Budgets

- **Portal (PA)**
  - Web-based entry point for students, faculty, and staff to access self-service features and information about UNTS activities and services
  - Serves as a report distribution platform for significant reports, such as, Budgets, to institutional administrative offices
  - Presents a unified appearance across the entire UNTS user community
EIS Facts

Who uses EIS?
Anyone that has a relationship with UNTS has the potential to be an EIS user. Prospective students, current students, alumni, faculty, staff and persons gifting to the institution that may not be alumni.

What is myUNT?
myUNT is a University of North Texas System portal that provides a central web location that UNT, UNTHSC, and UNT Dallas community members may access the EIS system and other available online services using a single sign on. The portal serves as a launching point to various functions of the system.

What is the difference between EIS portal and the EIS administrative interfaces?
The EIS administrative interfaces provide access for administrative users to access and use features relating to either the Financials (FS), Human Resource (HCM), or Campus Solutions (CS) environments.
Selecting a Browser

- There are some browser restrictions to take into consideration when working in the PeopleSoft 9.2.

**Web Browsers & Settings**

Enterprise Information System (EIS) currently supports the following Web browsers and versions:
- Google Chrome 24
- Firefox 17
- Internet Explorer 11, 10, 9, and 8
- Safari 6

**Note:** Internet Explorer’s Compatibility Mode is unsupported in EIS. Turn off this feature in Internet Explorer under Tools > Compatibility Mode Settings.

To use the Enterprise Information System, set your Web browser to allow JavaScript, accept cookies, and turn off popup blocking.

Some documents inside EIS are in PDF format and require the free [Adobe Reader](https://get.adobe.com/reader/) software to open.
EIS Navigation

- Do **not** navigate EIS using your Internet Browser buttons.
- Use the EIS navigation buttons and links provided to navigate in the EIS system.
- Using your Internet Browser **Back** button can prematurely exit you from your transaction page and take you directly back to the **EIS Home** page.
- **Important!** For security purposes it is important that you use the **Sign out** button when you are finished with your EIS session rather than simply closing the browser window. Other users could potentially access your cached **EIS Home** page from another portal if you do not sign out properly.
EIS System Login Instructions

**Step 1**

Go to your *myUNT* web page at [https://my.unt.edu](https://my.unt.edu).
EIS System Login Instructions (cont.)

Step 2

Type in your Enterprise User ID (EUID) and password.

Note: If you are having trouble with your EUID or your password, click the appropriate link below the logging button for help.

Step 3.

Click the button to go to your myUNT Home Page.
EIS System Login Instructions (cont.)

**Step 4**

Click on the EIS Financials button located on the lower left-hand side of your myUNT Home Page screen.
EIS Home Page

Top of Main and Favorites Menus

Navigation Header

Top Menu Features Description that can be turned off from the Content link
Navigation Header Links

- The navigation header will remain at the top of your window as you navigate through EIS pages.

<table>
<thead>
<tr>
<th>Header Link</th>
<th>What It Does</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>Click to return to the EIS Home page (all menus collapsed).</td>
</tr>
<tr>
<td>New Window</td>
<td>The New Window link allows you to open another session of PeopleSoft without logging into the system again. This is helpful when you need to navigate to a new page, but you don’t want lose any unsaved data on the page you are currently using.</td>
</tr>
<tr>
<td>Worklist</td>
<td>Click to view and process items from any worklist.</td>
</tr>
<tr>
<td>Add to Favorites</td>
<td>Click to add the current page to your favorites list for easy accessibility.</td>
</tr>
<tr>
<td>Sign out</td>
<td>Click to sign out of EIS.</td>
</tr>
<tr>
<td>Help</td>
<td>Opens the online PeopleBooks help for the EIS page that you are currently viewing.</td>
</tr>
</tbody>
</table>
EIS Main Menu

The Main Menu is best described as a *cascading* menu.

- As you select menu items, sub-menus dynamically display.
- Sub-menus often contain submenus of their own.
The menu items listed on your EIS Main Menu will vary depending on the security access you have been granted access to in the EIS system.

- The greater your level of security, the more populated your menu.
- You will be able to navigate to each of the pages you have been granted security access to.
Exercises

- Familiarizing Yourself with the EIS Home Page and Main Menu
  - Perform this UPK exercise by clicking the Try It! image. When you have completed the exercise you will return to this course.

- Using Component, Pages and Performing Data Entry
  - Perform this UPK exercise by clicking the Try It! image. When you have completed the exercise you will return to this course.
Sorting Column Headings

**Initial Column View**

- Click the Column Header the 1st time to view column data column in an ascending order.

**Ascending Column View**

- Click the Column Header a 2nd time to view column data in a descending order.

**Descending Column View**

- Click the Column Header a 3rd time to return to the initial column view.
Common Navigation Buttons

- Listed in the table below are some of the common navigation buttons found in EIS.

<table>
<thead>
<tr>
<th>Button</th>
<th>Button Name</th>
<th>What It Does</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Refresh" /></td>
<td>Refresh page</td>
<td>Forces a trip to the server, validating any data that has been entered and processing any deferred PeopleCode changes.</td>
</tr>
<tr>
<td><img src="image" alt="Return to Search" /></td>
<td>Return to Search</td>
<td>Located at the bottom of most pages, used to return to search page.</td>
</tr>
<tr>
<td><img src="image" alt="Save" /></td>
<td>Save</td>
<td>Sends the information that you have entered on the page to the database. You generally save when you come to the end of a component. The Save button updates the data for all pages in a component.</td>
</tr>
<tr>
<td><img src="image" alt="Look up" /></td>
<td>Look up</td>
<td>To look up the valid values for a particular field, click the field’s Lookup button. PeopleSoft will automatically show all available choices for the field.</td>
</tr>
</tbody>
</table>
Types of Data Entry Fields

• Edit Box - associated with database fields that have formatting attributes assigned to them.

• Table Related Edit Boxes – defined by a template. Tables can be “Personalized” by users and once completed, downloaded to a spreadsheet.
Exercises

Working with Favorites
- Perform this UPK exercise by clicking the Try It! image. When you have completed the exercise you will return to this course.

Personalizing Tables and Exporting to a Spreadsheet
- Perform this UPK exercise by clicking the Try It! image. When you have completed the exercise you will return to this course.
Basic Lookup vs. Advanced Lookup

**Basic Lookup**
- Allows only one search field
- Provides a link to Advanced Lookup

**Advanced Lookup**
- Allows multiple search fields
- Provides a link to the Basic Lookup
Operators and Wildcards

**Operators** - allow the user to narrow the criteria to search by a variety of different search options. Changing the “Operator” from the default “begins with” allows the user to adjust their search option results.

*Example:* Selecting the “Operator” titled “contains” will allow you to search an item that contains a certain word, such as, college to search for certain information that obtains the word college.

**Wildcards** – used in the beginning, middle, or end of a search term. In PeopleSoft 9.2 the percent sign (%) is used as the Wildcard to search for data.

*Example:* % with the partial value of 588 can be entered in a search field as %588 to search an Employee ID that contains the numbers 588.
Exercises

Searching for Chartfield Data
– Perform this UPK exercise by clicking the Try It! image. When you have completed the exercise you will return to this course.

Using Wildcards and Partial Values
– Perform this UPK exercise by clicking the Try It! image. When you have completed the exercise you will return to this course.
Effective Dated Rows

Effective dating allows you to maintain historical data. It also allows you to enter data that won't be in effect until some future time.

EIS categorizes effective-dated rows into three types:

- **Current row**: The data row with the effective date closest to, but not greater than, the system date.
  
  *Important Note*: Only one row can be designated as the current row.

- **History row**: Data rows with an effective date earlier than the current row.

- **Future row**: Data rows with an effective date later than the system date.
Exercise

Adding an Effective Dated Row

- Perform this UPK exercise by clicking the Try It! image. When you have completed the exercise you will return to this course.
Course Summary

Upon completion of this course, you should now be able to:

• Familiarize yourself with the EIS Home page and Main Menu
• Use components, pages and perform data entry
• Work with Favorites
• Personalize tables and export to a spreadsheet
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