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## 1. INTRODUCTION

The College of Lake County has been using PeopleSoft software to manage the Human Resources and Student Administration processes of the college. The college has adopted a new version of the PeopleSoft system, PeopleSoft 9.0.

The new version of PeopleSoft includes all of the functionality of the previous PeopleSoft 8 system. Additionally, the PeopleSoft 9.0 system has some additional functionality, including bookmarking within the application, downloading data to Excel, and sending e-mails from within PeopleSoft.

This manual includes step-by-step instructions on how to use the new system and how the navigation has changed. The table of contents at the beginning of the document outlines each of the areas covered in this manual.

## **IMPORTANT NOTICE**

The screen snaps throughout this manual reflect the PeopleSoft 9.0 system as of 9/01/08. You may notice slight screen differences, between those in this manual and the "live" system, if the PeopleSoft system has changed after 9/01/08.



## 2. GETTING STARTED

### Accessing PeopleSoft

You will continue to access PeopleSoft from the link(s) provided on the CLC Intranet Home page, as indicated below. Both the Student Administration & Human Resources and Finance System will be using the PeopleSoft 9.0 version.

1. Click on the Student Administration & Human Resources – Production link.

CLC Intranet	
	Search Intranet
<u>Departments   Divisions &amp; Disciplines   Directory   Governance   CLC Public Web Sit</u>	<u>e</u>
Faculty & Staff Resources	
CLC Administrative Systems <u>Student Administration &amp; Human Resources PRODUCTION</u> <u>Finance System PRODUCTION</u>	
Student Admin & Human Resources TRAINING Student Self Service PRODUCTION PeopleBooks	
Outlook Email Web Access Document Imaging	
<u>Grayslake Campus Events</u> (published weekly by Ed Affairs) <u>Human Resources</u> <u>Professional Development</u> <u>Professional Development Center</u>	
Academic Quality Improvement Program (AQIP)	

The sign in screen appears.

College of Lake Co	User your CLC NETWORK ID & Password. User ID: Password: Sign In If you are unable to sign in, please
Human Resources & Student Administration	call Help Desk at Extension 2052.
All rights reserved.	System
© College of Lake County 2003.	

- 2. Enter your User ID and Password.
- 3. Click Sign In.



## Accessing PeopleSoft (continued)

The new PeopleSoft 9.0 Home page will display, as seen below:

ORACLE		Home	Worklist	Add to Favorites
rsonalize <u>Content</u>   <u>Layout</u>		<u>-rionie</u>		Add to Pavontes
lenu				
earch:				
$\otimes$				
My Favorites				
Self Service				
Enterprise Learning				
Campus Community				
Student Admissions				
Records and Enrollment				
> Curriculum Management				
> Student Financials				
Set Up SACR				
Worklist				
Tree Manager				
Reporting Tools PeopleTools				
- <u>Change My Password</u>				
• My Personalizations				
My System Profile				
- My Dictionary				

## Logging Off Of PeopleSoft

When you finish using PeopleSoft or will be away from you desk for 20 minutes or more, you should log off of PeopleSoft.

To log off of PeopleSoft:

1. Click on the **Sign out** link in the top right corner of the PeopleSoft toolbar.

		Home	MultiChannel Console	Add to Favorites
Menu				
Search:				
>>				
▷ My Favorites				
▷ Self Service				
> Campus Community				
> Records and Enrollment				
> Curriculum Management				
> Set Up SACR				
> Reporting Tools				
PeopleTools – Change My Password				
		N		
- <u>My Personalizations</u> - <u>My System Profile</u>		43		
- My Dictionary				

**Note:** You can sign out wherever "Sign Out" appears in the toolbar. There is no need to return to the Home page to sign out.



## 3. USING THE MENUS

### Menus

The PeopleSoft 9.0 system uses menus extensively as navigational tools. The menus look entirely different than previous PeopleSoft version menus.

### **Using Menus**

On the left side of the PeopleSoft 9.0 Home page the Menu pagelet is displayed. It contains a list of folders, which provide the primary method for moving through the system. This list contains the areas of the system to which you have access.



**Note:** The Menu pagelet displays all folders available to the current user. The folders available will vary based on the user's security permissions. Many of the high-level folders' names have changed.

For more details, download PeopleSoft Version 9.0 Essentials Cheat Sheet at the PDC web site.

For example, Build Community is now the Campus Community folder and Student Administration is now the Set Up SACR folder.

Additionally, the arrangement of folders has changed. The hierarchy and submenus have changed as well. When you first begin using PeopleSoft 9.0, you may have to do some exploring to determine the locations of the functional areas you need to use.

### **General Organization of Menus**

The table below provides some basic information on how things have changed in the menus:

PeopleSoft 8 Menus	PeopleSoft 9 Menus
🗄 🚞 Build Community	🗄 🛅 Campus Community
🗄 🛅 Manage Student Records	🗄 🚞 Records and Enrollment
🗄 🗀 Establish Courses	🗄 🗀 Curriculum Management

## Displaying and Hiding the Menu Pagelet

The menu pagelet can be displayed (expanded) or hidden (collapsed) at any time. To collapse the menu pagelet, click the  $\square$  button. To re-expand the menu pagelet, click the  $\square$  button.



## Using the Menu Pagelet

To use the Menu pagelet you may either select a folder (or menu item) in the list or use the search prompt at the top of the window to search for a particular folder.

Navigation to pages is accomplished through selections in the Menu. If a Menu selection has other choices

associated with it, you will see an arrow pointing sideways towards the selection,  $\mathbb{P}$ . This indicates that there are submenus associated with the menu item. If a Menu choice is open and the additional submenus

associated with it are visible, the arrow next to the Menu choice will point downwards, **Markov**. If a Menu choice navigates you directly to a page, it will have a hyphen in front and be <u>underlined in blue type</u> suggesting that it is a hyperlink to a page.



To select a **Menu** item, click your mouse on the desired selection. This will expand the associated Menu choice to its submenu. You may also click on any of the page links at the bottom of the Menu pagelet.

### Using the Menu Pagelet (continued)

#### Opening a Page from the Navigation Menu

1. Click on Curriculum Management in the Menu pagelet.

The Curriculum Management menu will expand and the submenus will now be available. The Main Menu pagelet will also be visible as seen to the right. You can access any of the submenu options: Course Catalog, Schedule of Classes, Enrollment Requirements, Combined Sections, Faculty and Event Information, Class Roster, Grading and Instructor/Advisor Information, by clicking on the menu item in either the Menu pagelet or the Main Menu pagelet.



2. Click on the Course Catalog menu item in the Menu pagelet.

(

					<u>Home</u>	Add to Favorites	<u>Sign out</u>
	Menu 🗖						
	Search:	^	Main Menu > Curriculum Management >				
2	Search: > My Favorites > Self Service > Campus Community > Student Admissions > Records and Enrollment → Course Catalon - Course C		Main Menu > Curriculum Management > Course Catalog Maintain course catalog information. Course Catalon Create, view and update courses, course offerings, and course components.	Print Course Catalog Produce the course catalog.		<u>Add to Favorites</u>	
	▷ Learning Management Systems ▷ Student Financials						
	▷ Set Up SACR ▷ Worklist						
	▷ Reporting Tools ▷ PeopleTools - Change My Password - My Personalizations - My System Profile						
	- My Dictionary	~					



## Opening a Page from the Navigation Menu (continued)

The page links, Course Catalog and Catalog Summary, will now be visible in both the Menu and Main Menu pagelets.

3. Click on the **Course Catalog** link in the Main Menu pagelet.

The Course Catalog search screen will display.

							<u>Home</u>	Add to Favorites	<u>Sign out</u>
	Menu 🗖								
	Search:	~						New Window	Luon I 🖻
	())							INCOV VVIII UUV	Help http
	My Favorites		Course Catalog						
	▷ Self Service		· · · · ·	ou have and cliv	k Search. Leave fields b	Jonk for a li	ict of all values		
	Campus Community		Enter any mormation y	ou nave and chi	K Search, Leave lielus k		ist of all values.		
	Student Admissions		Find an Existing Val	ue 🛛 Add a Ne	w Value				
	Records and Enrollment Curriculum Management				wyuldo				
(3)	✓ Course Catalog		8 I I		6LCCC				
$\mathbf{S}$	- Course Catalog		Academic Institution:		prece	Q			
_	- Print Course Catalog		Subject Area:			Q			
	- Course Equivalencies		Catalog Nbr:	begins with 🔽					
	Schedule of Classes		Campus:	begins with 🗸		Q			
	Roll Curriculum Data Forward			-	1				
	Enrollment Requirements		Course ID:	begins with 🔽					
	Combined Sections		Description:	begins with 🔽					
	Dynamic Dates		Include History	Case Sensitiv	'e				
	Facility and Event								
	Information Class Roster		Search Clear	Bacin Room	n 🖶 Save Search Crite	rio			
	D Grading			Dasit Searci		<u>ina</u>			
	Instructor/Advisor								
	Information		Find an Existing Value	Add a New Va	ue				
	Learning Management								
	Systems ▷ Student Financials								
	> Set Up SACR								
	▷ Worklist								
	Reporting Tools								
	PeopleTools – Change My Password								
	- <u>Change my Password</u> - My Personalizations								

#### Using the Menu Search Function

There is a Search prompt at the top of the Menu pagelet. If you are not sure where to find information in PeopleSoft 9.0, simply type in a keyword and then press **Enter**. We will search for student enrollment information using the search prompt.



- 1. Click in the Search: prompt at the top of the Menu pagelet.
- 2. Type enrollment.
- 3. Press Enter.



A search screen like the one below will display. A list of each menu item appears as a hyperlink along with a description of the menu. The path to the menu item also displays under the description.

4. Click on the Enrollment Summary hyperlink.



The Enrollment Summary search screen appears, as seen below. You can then enter your search fields to view enrollment data for a specific person.

Enrollment Summ	ary		
Enter any information y	ou have and clic	k Search. Leave fields bla	nk for a list of all values.
Find an Existing Val	ue		
		1	1
ID:	begins with 🚩		
Academic Career:	= 🗸	Academic Career	*
Academic Institution:	begins with 🔽	CLCCC	Q
Term:	= 🗸	1081	Q
Campus ID:	begins with 🔽		]
National ID:	begins with 🔽		]
Last Name:	begins with 🔽		]
First Name:	begins with 🔽		]
Term Alternate Key:	= 🗸		Q
Case Sensitive			
Search Clear	Basic Search	🗐 Save Search Criteria	1



Here is a second example using the Menu Search function.

- 1. Click in the **Search:** prompt again.
- 2. Type user defaults.
- 3. Press Enter.



The Search screen will display, as seen below.

Sea	arch				
	search keyw tries 'United	1 / 1	ice. Use quotes 1	or any phrases. For exampl	e: Cities
	w Search	🔘 Search Within Res			(4)
user	defaults		Find	<u>Customize Settings</u>	Search Tips
	<u>Summaries</u> ch Results				
1	<u>User Defau</u>	<u>ults</u>			
	Define use Home>Set U	r defaults. p SACR≻User Defaults			
				Powered by	Veritv

4. Click on the **Search Tips** hyperlink.

A list of suggestions for using the Search: prompt will display.

Searcl	1 Examples
Phras	ses
Use	quotes around words that make up a phrase. For example:
'St	ock Option'
	ords
Use	an 'and' to specify that all words must appear in the results. For example:
'St	ock Option' and grant
Any V	Vords
Use	an 'or' to specify that any word must appear in the results. For example:
'St	ock Option' or bonus

## 5. Click on the **Return to Search** hyperlink.

The Search screen will display again.

Search			
Enter search key Countries 'United	vords separated by a space. Use quotes States'	for any phrases. For examp	le: Cities
💿 New Search	🔘 Search Within Results	6	
user defaults	Find	Customize Settings	Search Tips
<u>Hide Summaries</u> Search Results 1 <u>User Defa</u>			
	er defaults.		
Home>Set l	Jp SACR>User Defaults		
		Powered by	Verity

6. Click on the **Customize Settings** hyperlink.



You can customize your search results by hiding summaries and changing the number of search results you would like to see on a page.

Search
Customize Settings
Do you want to see summaries of each search result?
Show Summaries 🐱
How many search results do you want to see per page?
25 per page 🔽 💙
Save Return to Search

- 7. Click the **down arrow** to the right of 25 per page.
- 8. Select 10 per page.
- 9. Click the Save button.

	Home Add to Favorites Sian out
	New Window   Help   Customize Page
Search	
Customize Settings	
Do you want to see summaries of each search result? Show Summaries	
snow summanes	
How many search results do you want to see per page?	
10 per page 💌 😣	
9	
Save Return to Search	

Now when you use the search prompt, your search result lists will display in groups of 10.



## 4. CONDUCTING SEARCHES

### **Using Search Operators**

You are now on the Course Catalog search screen. In this screen you will see six search fields as well as specific operators associated with the fields.

	Course Catalog Enter any information Find an Existing Va Academic Institution:		k for a list of all values.			
	Subject Area: Catalog Nbr:		م			
Operators —	Campus:	begins with 🗸	Search Fields			
	Course ID:	begins with 🗸				
	Description:	begins with 💌	J			
	Include History Case Sensitive					
	Search Clear	Basic Search 🚦 Save Search Criteria				
	Find an Existing Value	Add a New Value				

The default operator will display for each field. For example, "begins with" is the default operator for Catalog Number (Nbr). The default will work best in most situations. You can change the operator by simply clicking the down arrow to the right, and selecting a different option. For example, clicking the down arrow to the right of the equal sign (=) brings up a set of two options, = or in; or clicking the down arrow to the right of "begins with" brings up a list of ten options. The table below provides a list of operators along with a description of the operator.

Operator	Description	Example
in	Allows you to enter two or more values for a field. The values must be comma-delimited.	In CIT,AOS, would locate all courses with a subject area of CIT or AOS.
begins with	Allows you to enter the first one, two, three, etc. values for a field.	Begins with 12, would locate all values beginning with the numbers 1 and 2 in succession.
contains	Allows you to enter any part of a field.	Contains a, would locate any values having the letter "a" anywhere in the value.
=	Must enter an exact match for a field.	= C IT
not =	Allows you to enter a value to be eliminated from the list of possible values.	Not = CIT

## Using Search Operators (continued)

Operator	Description	Example
<	The less than operator should be used on fields containing numbers and will return values less than the specified value.	< 345
<=	The less than or equal to operator should be used on fields containing numbers and will return values lower than or equal to the specific value.	<= 655
>	The greater than operator should be used on fields containing numbers and will return values greater than the specified value.	>543
>=	The greater than or equal to operator should be used on fields containing numbers and will return values higher than or equal of the specified value.	>=321
between	The between operator should be used on fields containing numbers and will allow you to specify a starting number and ending number. The result will include both numbers specified along with any between the specified values.	Between 36 and 45, would locate all values equal to 36 and 45 as well as all values in between.

The Academic Institution prompt defaults to CLCCC, \*which is the only valid entry for this field.

- 1. Click on the **down arrow**, to the right of the Subject Area: prompt.
- 2. Select in.

\***Note**: Defaults, like CLCCC, are set by the user in Operator Defaults. If <u>not</u> set, the user has more repetitive input to do each day. (See Setting User Defaults section in PS 9.0 *Basics User Manual.*)

The "in" operator allows you to select a list of valid values rather than a single value.

Course Catalog						
Enter any information	Enter any information you have and click Search. Leave fields blank for a list of all values.					
Find an Existing Va	lue 👔 <u>A</u> dd a New	Value				
Academic Institution:	= 🗸	CLCCC	٩			
Subject Area:	= (1)		Q			
Catalog Nbr: 2	ins with 🔽		]			
Campus:	begins with 🔽		Q			
Course ID:	begins with 🔽		]			
Description:	begins with 🔽		]			
Include History	Case Sensitive					
	-					
Search Clear	Basic Search	🚦 Save Search Criteria	<u>a</u>			



### Using Search Operators (continued)

- 3. Click in the Subject Area: prompt.
- 4. Type **CIT,AOS**

Course Catalog						
Enter any information you have and click Search. Leave fields blank for a list of all values.						
Find an Existing Val	ue 👔 <u>A</u> dd a Nei	w Value				
Academic Institution:	= 🛩	CLCCC	Q			
Subject Area:	in 🗸	CIT,AOS	3 & 4			
Catalog Nbr:	begins with 🔽					
Campus:	begins with 🐱		Q			
Course ID:	begins with 💌					
Description:	begins with 💌					
Include History	Case Sensitiv	e				
Search Clear	Basic Search	🔋 🖶 <u>Save Search Criteri</u>	a			

Using the "in" operator, you can conduct searches involving more than one value for a field. In this case we are searching for all Computer Information Technology and Administrative Office Systems classes. When using the "in" operator, you must use only valid entries for the field and must delimit the value with commas.

#### **Saving Search Criteria**

1. Click the Save Search Criteria hyperlink.

Course Catalog				
Enter any information y	ou have and clic	k Search. Leave fields bla	ank for a list of all values.	
Find an Existing Val	ue 🔰 Add a Ne	w Value		
Academic Institution:	= 🗸	CLCCC		
Academic institution:	= 💌		Q	
Subject Area:	in 🛩	CIT,AOS		Q
Catalog Nbr:	begins with 🗸			
Campus:	begins with 🚩		Q	
Course ID:	begins with 🔽			
Description:	begins with 🔽			
Include History	Case Sensitiv	ve 👝		
		(1)		
Search Clear	Basic Search	n 📕 <u>Save Search Criteri</u>	a	



## Saving Search Criteria (continued)

The Save Search As window appears.

Sav	Save Search As			
Name	the search	and then		2 & 3
Name	of Search:	Course		
The sa	aved search	will conta	iin these va	lues:
	Academ	ic Institut	ion: =	CLCCC
	Subject	Area:	in	AOS,CIT
	Catalog	Nbr:	begins	with
	Campus	:	begins	with
	Course I	D:	begins	with
	Descript	tion:	begins	with
$\neg$				
4 🔒 🕄 🖁	we Return	to Advanc	ed Search	

- 2. Click in the Name of Search: prompt.
- 3. Type Course Catalog AOS and CIT.
- 4. Click the **Save** button.

The Save Search As window displays.



5. Click the **Return to Advanced Search** hyperlink.

At the top of the Course Catalog window will be a Use Saved Search: prompt. Your saved search, Course Catalog AOS and CIT, will be in the prompt for reuse whenever you enter the Course Catalog component.

Course Catalog Enter any information y	ou have and click	< Search. Leave fields bla	nk for a list of all values.
Find an Existing Val	ue Add a Nev	v Value	
Use Saved Search:	ourse Catalog A	OS and CIT 💌	
Academic Institution:	= 🗸	CLCCC	٩
Subject Area:	in 🔽	AOS,CIT	Q
Catalog Nbr:	begins with 🔽		
Campus:	begins with 🔽		Q
Course ID:	begins with 🐱		
Description:	begins with 🔽		]
Include History	Case Sensitive	•	
4			
6 Search Clear	Basic Search	📳 Save Search Criteria	Delete Saved Search

6. Press **Enter** or click the **Search** button.

## Saving Search Criteria (continued)

A search result list will display, as seen below.

Search Results					
View All					First ┥ 1-76 of 76 🕞 Last
Academic Institution	Subject Area	Catalog Nbr	Campus	Course ID	Description
<u>CLCCC</u>	AOS	<u>111</u>	<u>CLC</u>	000255	Business Communications (7)
<u>CLCCC</u>	<u>A08</u>	<u>112</u>	<u>CLC</u>	004748	Automated Office Technologies
<u>CLCCC</u>	AOS	<u>112</u>	<u>CLC</u>	004748	ComputerBasics/Software Apps
<u>CLCCC</u>	<u>A08</u>	<u>113</u>	<u>CLC</u>	005098	Comprehensive Word Processing
<u>CLCCC</u>	<u>A08</u>	<u>117</u>	<u>CLC</u>	000261	Machine Transcription
CLCCC	AOS	<u>118</u>	<u>CLC</u>	000262	Adv Word Process/Desktop Pub
<u>CLCCC</u>	<u>A08</u>	<u>119</u>	<u>CLC</u>	000263	Records Management
CLCCC	AOS	<u>122</u>	<u>CLC</u>	000265	Business Mathematics
<u>CLCCC</u>	AOS	<u>128</u>	<u>CLC</u>	000271	Intermediate Keyboarding
<u>CLCCC</u>	<u>A08</u>	<u>170</u>	<u>CLC</u>	000276	Computer Keyboarding I
CLCCC	AOS	<u>171</u>	<u>CLC</u>	000277	Computer Keyboarding II
CLCCC	<u>A08</u>	172	<u>CLC</u>	000278	Business English
<u>CLCCC</u>	AOS	<u>175</u>	<u>CLC</u>	005096	Keyboard Speed/Accuracy Bldg
CLCCC	AOS	<u>178</u>	<u>CLC</u>	000271	Intermediate Keyboarding
<u>CLCCC</u>	<u>A08</u>	<u>199</u>	<u>CLC</u>	004079	Business Education Elective
CLCCC	AOS	214	<u>CLC</u>	005099	Admin Office Procedures
<u>CLCCC</u>	AOS	215	<u>CLC</u>	005097	Presentation Software
<u>CLCCC</u>	<u>A08</u>	<u>216</u>	<u>CLC</u>	008317	Integrated Office Projects
<u>CLCCC</u>	AOS	223	<u>CLC</u>	000285	Advanced Keyboarding
<u>CLCCC</u>	<u>A08</u>	225	<u>CLC</u>	000287	Practicum in Secretarial Sci

7. Click on the first course description listed in the Search Results.

The course will now display.

Catalog Data Offerings	Components GL Interface			
Course ID:	000255			
	Find   View All First 🛃 1 of 2	▶ <sub>Last</sub> =		
'Effective Date:	08/15/2008 🛐 *Status: Active 👻 Course Offering 🕙 1 of 1 🕨	+-		
*Description:	Business Communications AOS 111			
Long Course Title:	Business Communications			
Long Description:	A course designed to improve communication skills and prepare a student for success in a team environment. Students will learn how to write clearly and concisely. Topics include a review of punctuation, document formatting, and techniques in composing effective business letters, memoranda, electronic			
Course Units/Hours/Count				
Minimum Units:	3.00 Last Course of Mult Term Seq:			
Maximum Units:	3.00 *Enrollment Unit Load Calc Type: Actual Units	·		
Academic Progress Units:	3.00 Course Count: 1.00			
Financial Aid Progress Units:	3.00 Course Contact Hours: 0.00			
Course Grading				
*Grading Basis:	Graded V Grade Roster Print: Componen V			

-



## 5. NEW FUNCTIONALITY

## **Using Spell Checking**

A course will display and the Catalog Data tab will be active. You will see a new icon for spell checking. It can be found on the right side of <u>some</u> fields, particularly long limitless text fields, but <u>not</u> all fields. For example, the Spell Check icon is available for the Long Description field in the Course Catalog component.

Catalog Data <u>Offerings</u> <u>C</u>	∑omponents	erface						
Course ID:	000255							
				<u>Find   View All</u>	First 🖪 1 of	2 🕨 Last		
*Effective Date:	08/15/2008 🛐	*Status: Active	*	Course Offerin	lg . ◀ 1 of 1 🕨	÷E		
*Description:	Business Communic	ations		AOS	111			
Long Course Title:	Business Communic	ations				(1)		
Long Description:	A course designed to success in a team er concisely. Topics incl techniques in compo	nvironment. Student lude a review of pun	s will learn ictuation, di	how to write clea ocument formatti	arly and ng, and			Spell Check Ico
Course Units/Hours/Count								
Minimum Units:	3.00 Last C	ourse of Mult Term	Seq:					
Maximum Units:	3.00 *Enrolli	nent Unit Load Cal	: Type:	Actual Units		~		
Academic Progress Units:	3.00 Course	e Count:		1.00				
Financial Aid Progress Units:	3.00 Course	e Contact Hours:		0.00				
Course Grading								
*Grading Basis:	Graded 💌	*Grade Roster I	Print:	Componen 🔽			e.	

1. Click on the **Spell Check** icon to the right of the Long Description field.

The following window will appear, if there are *no spelling errors*. This is a very handy tool when you are entering or editing data in PeopleSoft.



2. Click OK.



## Using Spell Checking (continued)

- 3. If there are any misspellings, in the text field being checked, choose Ignore (to ignore the spell check warning) or Change (to correct the error).
- 4. Click OK.

Spell Chec	k	
Field Label:	Long Description	
Spell Check Text:	The goal is to enable students to gain confidence in their ability to clearly communicate facts, ideas and feelings in complete sentences and organized paragraphs. Acceptable grammer, correct spelling, and accurate wording will also be taught. Successfully completing English 111 will demonstrate competency for higher level English courses	
Change To:	grammar	
Alternatives:	grammar A grimmer grimier grabber grasser M	
Ignore Ignore	All Change Change All Add	
4 ОК Са	ncel	

### **Using Download Into Excel Function**

There is a new function in PeopleSoft 9.0 that allows you to download data from PeopleSoft into another program, such as Excel.

1. Scroll down in the Course Catalog window to the **Course Attributes** area.

In the Course Attributes title bar, you will see the download icon, . This function is available for some groups in PeopleSoft. For example, the download icon is available for both Course Attributes and Course Topics in the Course Catalog component of PeopleSoft 9.0. Grids also have this icon and you can use it to export information (resulting from a search), into an Excel spreadsheet.

$\sim$							
(1)	Course Attri	butes			Customize   Find   🚟 🛛 First 🖪 1-3 of 3	🕑 La	ast
	<u>*Course</u> <u>Attribute</u>		<u>*Course Attribu</u> <u>Value</u>				
	CURR 🔍	Curriculum Prefix and Code	AOS 22SM	Q	AOS 22SM	+	
	LCLB 🔍	Lecture-Lab	3-0	Q	3 hours lecture-0 hours lab	+	
	RPRT 🔍	Report Groups	TCR	Q	Transfer, Career, and Remedial	+	

2. In Internet Explorer, hold down your **Ctrl** key and then press the **download** icon

**Note:** If the download function does not work, you will need to turn it on using the My Personalizations link in the main menu. Refer to pages 40 and 41 for help with this.



## Using Download Into Excel Function (continued)

The File Download window displays as seen below.



3. Click the **Open** button.

The Security Alert window may display.

4. Click the **Yes** button.



The information will appear in a new Excel spreadsheet.



## **Using Grid Tabs**

Grid Tabs are located at the top of a search screen. The shaded (or darker) tab is always the active one. By default, the "Find an Existing Value" tab will be active. The "Add a New Value" tab is the inactive one.

1. Return to the **Course Catalog search screen**.

	Find an Existing Val	ue <u>A</u> dd a Nev	) v Value				
	Academic Institution:		¢LCCC	Q			
	Subject Area:	= 🕶	AOS	Q			
	Catalog Nbr:	begins with 💌	111				
Course Catalog search screen	Campus:	begins with 🔽	CLC	Q			
	Course ID:	begins with 🔽	000255				
	Description:	begins with 🔽					
	Include History Case Sensitive						
		-					
	Search Clear	Basic Search	🚦 <u>Save Search Criteria</u>				

2. Click on the Add a New Value tab.

A new screen will appear.

	Course Catalog
	Eind an Existing Value Add a New Value
	Course ID: 000000
3	Add
	Find an Existing Value Add a New Value

3. Click the **Add** button.

## Using Grid Tabs (continued)

The Course Catalog data entry screen will appear. If you wanted to add a new course to the catalog, you would fill in the necessary prompts and then click the **Save** button, at the bottom of the page to save your work.

Catalog Data Offerings C	components GL Interface
Course ID:	000000
	<u>Find</u>   View All First 🗹 1 of 1 🕨 L
*Effective Date:	D7/02/2008 🛐 'Status: Active 🗸 Course Offering 🕘 1 of 1 🕨 ∓
*Description:	
Long Course Title:	
Long Description:	<u>~</u> #-
	82
Course Units/Hours/Count	
Minimum Units:	0.00 Last Course of Mult Term Seq:
Maximum Units:	0.00 *Enrollment Unit Load Calc Type: Actual Units
Academic Progress Units:	0.00 Course Count: 1.00
Financial Aid Progress Units:	0.00 Course Contact Hours: 0.00

**Note:** You would want to run Spell Check on any new fields in which you've entered data that have **\***.

#### **Using Notify Button**

The Notify button appears on many pages throughout PeopleSoft 9.0. It takes you directly to an e-mail page, thus making it easier to communicate with staff, faculty, or a student about any action just performed on that PeopleSoft page.

For example, if you've changed a student's primary e-mail address (per their request), you can then confirm the change in the e-mail by using the Notify button at the bottom of the Contact Information page. There isn't any need to transfer to CLC's e-mail system to accomplish this notification.

Contact Informa	rtion						
Addresses	<u>Find</u>   View All	First 🖪 1 of	1 🕑 Last	Phone			
	Home	~		<u>*Type</u>	Phone	Ext C	ountry Preferred
*Address Type:				~			
Effective Date:	08/08/2007 🛐	ļ	+ -	Add			
*Status:	Active 🗸						
Country:	USA 🔍			Email			
Address:	Edit Address			<u>*Type</u>	<u>*Email Address</u>		Preferred
Address.	LuitAddress				<b>v</b>		
				Add			
				1	/isa/Permit Data	<u>Ci</u>	tizenship
📑 Save	lotify 🗘 Refre	sh		E+ Add	Update/Display	🔏 Include Hist	ory Correct History

**Note**: PeopleSoft 9.0's e-mail function is intended for use when communicating specifically about PeopleSoft–related information / actions. Otherwise, continue to use CLC's e-mail system.



## 6. USING SELF SERVICE

The Self Service area in PeopleSoft 9.0 contains the following areas:

- 1. Personal Information
- 2. Payroll and Compensation
- 3. Benefits
- 4. Campus Personal Information
- 5. Involvement

Self Service can be accessed using the main menu and can be used by staff to look up specific information including:

- Home and mailing addresses
- Phone numbers
- E-mail addresses
- Emergency contacts
- Marital status
- Name changes
- Paycheck
- Direct deposit
- Compensation history
- W-4 tax information
- W-2 reissue request
- Faculty event tracking



## USING SELF SERVICE (continued)

					<u>Home</u>	Add to	<u>Sign out</u>
Menu 🗖							
Search:	Self Service Ir	structor2					
()) ())							
▷ My Favorites	faculty center	class search	browse	catalog fa	culty search	learning m	anagement
▶ ∠rsonal Information	Faculty Cen	ter					
▶ Payroll and Compensation							
▷ Benefits ▷ Campus Personal							
Information							
▶ Involvement	<u>My Exam Schedu</u>	_					
- Faculty Center	<u>View My Advisees</u>						
– <u>Gradebook</u>	<u>View Personal Da</u>	ta Summary					
- <u>View My Advisees</u>							
<ul> <li>Class Search</li> <li>Browse Course Catalog</li> </ul>	Summer 2004	College of Lake Cou	inty cl	nange term			
- Community Directory							
Search							
▷ Campus Community	Select display opt	ion: 💿 Show Al	Classes	🔘 Show Eni	olled Classes O	nly	
Records and Enrollment				_			
D Curriculum Management		👬 Clas:	s Roster	🖉 Gradebook	🕞 Grade P	Roster 😽	Learning Management
▷ Set Up SACR ▷ Worklist							<u>*::</u>
Reporting Tools		ichedule > Summer 2		_	County		
▷ PeopleTools	Class	Class Title	Enrolled	Days & Times		Room	Class Dates
- Change My Password		PC Operating Systems	17	тва		TBA	December /,  ,)/ December /,  ,)/.
- My Personalizations	(1968)	(Lecture/Lab)					December ( , , )( .
<ul> <li>My System Profile</li> <li>My Dictionary</li> </ul>		Introduction to	14	тва		тва	December / , ,)/
	002 (1072)	Computers (Lecture)					December / , ,)/.
	(1072)						

As you can see, in the screen above, Self Service also enables you to go directly to specific PeopleSoft pages, such as Faculty Center (on the right of the screen above).

On the Faculty Center page, you can View Advisees and get a list of all classes being taught by term.

You can also click on the tabs across the top and access:

- Class Search
- Browse Catalog
- Faculty Search
- Learning Management



## 7. PRINTING

Once you have found needed information in PeopleSoft 9.0, you can easily print out the results. We will search for a specific class roster and print it out.

### Printing Option #1 – File > Print

1. Click on **Curriculum Management** in the Menu pagelet.



2. Click on Class Roster (to view or to print).

Academic Institution:	begins with 💌	CLCCC
Term:	begins with 💌	1081
Subject Area:	begins with 💌	AOS 3 Q
Catalog Nbr:	begins with 💌	112
Class Nbr:	- 🖌	
Class Section:	begins with 💌	
Session:	- 🖌	~
Course ID:	begins with 💌	
Course Offering Nbr:	= 🗸	

- 3. Fill in the **Search fields** as seen above.
- 4. Click the **Search** button or press **Enter**.



## Printing Option #1 – File > Print (continued)

The class roster will display.

Cla	ass R	oster												
AOS	s 112-0	01 Auto	mated Office Tech	nnologies										
Led	ture (543	33)					Class Detail							
Spri	ng 2008	Regular Academic	Session   College of	Lake County   Ac	ademic									
<b>T</b>	Meeting I	nformation												
		Days & Times				eeting Dates		Mid Term Dat			ite to Withdra ifund & No Gr		te to Withdraw ade	Last Day to Complete an Incomplete
004	4748	TuTh 9:30AM - 10:45AM	T217 - Grayslake Campus	Lauren LoPre		1/22/2008 - 5/15/2008	Lecture/Lab	03/19/2008	02	2/07/2	2008	04/09/2	008	09/14/2008
nr	olled Stu	idents	Ie		<u>Grade</u> Basis	Program and Pla	10	Level	Status Note	2	Srade Input	<u>Cu</u> Units Taken	stomize   Find   Drop Date	First 🕙 1-24 of 24 🕑 Last
Enr			Is			Program and Pla	m	Level			Grade Input			
1	031239	5 Adams,Hele	n M 84	7/244-5682	Graded	Administrative C Administrative A		Freshman				3.00		Administrative Office Systems
2	046224	9 Bautista,Mar	itza L		Graded	Medical Assistin Assisting	ig - Medical	Freshman				3.00		Medical Assisting
3	044955	0 Boose,Dush	anna M		Graded	Associate Trans Associate in Sci	fer Degree - ence	Freshman	Withdra	wn V	N		03/04/2008	Associate Transfer Degree
4	040979	2 Goldberg,An	neMarie 84	7/726-2428	Graded	General Studies Studies	- General	Freshman				3.00		General Studies
5	049451	1 Goldmann,J	ana		Graded	English as a Se Language - Eng Second Lang-Bi	lish as a	Freshman				3.00		English as a Second Language
6	027198	3 Hillebrand,K	athleen A 84	7/265-7037	Graded	Health Informati Medical Office S	on Technology - pecialist	Freshman				3.00		Health Information Technology
7	049131	2 Horton,Sand	ra D 84	7/838-0892	Graded	Nursing - Regis	tered Nursing	Freshman				3.00		Nursing
8	045764	6 Kogan,Mathe	ew Lee 84	7/520-7325	Graded	Administrative C General Office/A Assistant Cert		Freshman				3.00		Administrative Office Systems
						Administrative C	ffice Systems -							

5. Select **File** from the main menu in Microsoft Internet Explorer.



6. Select Print.



## Printing Option #1 - File > Print (continued)

The Print window displays.

	1			
Select Printer		(11)	-	
9				
Add Printer	Adobe PDF	DELL5110 Color	DELL5110cn	HP LaserJet
<				>
Status: Rea Location: Comment: Page Range	auy		Print to fil	e Preferences
<ul> <li>All</li> </ul>			Number of cop	ies: 1 😂
O Selection	Current Page	e		
O Pages:	1		Collate	
Enter either a s	ingle page numbe or example, 5-12	er or a single		

7. Click the **Print** button to send the roster to the printer.

**Note:** Any printed output from PeopleSoft pages will be displayed as a .pdf file in the reports manager. It is no longer necessary to go to a 'Reports Drive' to get output.

#### Printing Option #2 – Printer Friendly Version

- 1. While the class roster is displayed, scroll to the bottom of the roster.
- 2. Click on **Printer Friendly Version**.

	Photo	ID	Name	Grade Basis	Units	Primary Academic Program	Program and Plan	Level
1	<u>e</u> r	0505150	<u>Bell,Patricia Ann</u>	Graded	3.00	CARER	Career Degree or Certificate - Administrative Assistant	Sophomore
2	<u>ê</u> q	0007304	<u>Bone,Alva J</u>	Graded	з.оо	CARER	Career Degree or Certificate - Administrative Assistant	Sophomore
3	<u>8</u> 9	0450617	<u>Brito,Trycia B</u>	Graded	3.00	CARER	Career Degree or Certificate - Business Management/Supervisio	Sophomore
4	<u>r</u>	0516233	<u>Evans,Lula Marie</u>	Graded	3.00	CARER	Career Degree or Certificate - Administrative Assistant Cert	Freshman
5	<u>r</u>	0502232	Hernandez,Deisy	Graded	3.00	TRANS	Associate Transfer Degree - Associate in Arts	Sophomore
6	<u>ê</u> q	0525739	<u>Madura,Cheryl</u> Sue	Graded	3.00	CARER	Career Degree or Certificate - Administrative Assistant Cert	Freshman

The printer friendly version of the roster appears on the screen.

3. Click **CTRL+P**.



## Printing Option #2 – Printer Friendly Version (continued)

The print window appears.

실 Print	? 🛛
General Options	
Select Printer	
Add Printer Adobe PDF DELL5110 Color	DELL5110cn HP LaserJet
<	>
Status: Ready Location: Comment:	Print to file Preferences
Page Range	(
⊙ All	Number of copies: 1 🗢
O Selection O Current Page	
O Pages: 1	✓ Collate
Enter either a single page number or a single page range. For example, 5-12	
4 P	int Cancel Apply

4. Click **Print** to print the roster.

## Printing Option #3 – Right Click (for information that fits completely on a screen)

1. **Right** click anywhere on the roster page.

A dialogue box appears.

	<b>Back</b> Forward
	Save Background As Set as Background Copy Background Set as Desktop Item
	Select All Paste
	Create Shortcut Add to Favorites View Source
_	Encoding >
(2)	Print
$\smile$	Refresh
	Append to existing PDF

#### 2. Select **Print**.

The print window appears.

3. Click **Print** to print the roster.



## Printing Option #4 – Right Click (for information that is larger than a screen)

1. **Right** click anywhere on the roster page.

The dialogue box appears

2. Select **Print Preview**.

AOS 112-1	001 Aut	omated Office Tec	hnologies						Back Forward		
	Regular Academic	Session   College o	f Lake County   Acac	lemic		Class Deta	1		Bookmark this page IM this page to Friend Email this page to Friend		
<ul> <li>Meeting</li> <li>Course ID</li> </ul>	Information Days & Times	Room	Instructor	Meeting	Dates	Topic	Mid Term Date	La	Save Background As Set as Background Copy Background	te to Withdraw ade	Last Day to Complete an Incomplete
004748	TuTh 9:30AM - 10:45AM	T217 - Grayslake Campus	Lauren LoPres	ti 01/22/20 05/15/20		Lecture/Lab	03/19/2008	02	Select All Paste	1008	09/14/2008
Enrollment									Create Shortcut Add to Favorites View Source		
	Capacity: 24	Enrolled:	24						Encoding		
Enrolled St	Name	I	elephone <u>G</u> B	rade asis Progr	am and I	<u>Plan</u>	Level	2	Print Print Preview Refresh	stomize   Find	First 🕙 1-24 of 24 🕨 Li

(3)

- 3 On the Print Preview window, select **Only the selected frame** and **Shrink to Fit**.
- 4 Click **Print**.

🖉 Print Preview	la de la constante de la const	
	1 Page View 💟 Only the selected frame 💟 Shrink To Fit 💌	
	+ +	+ +
	Class Roster	Page 1 of 1
	*	- Times   wigi   Score in Fage   - Bi
	Clear Mouter	A THE BUILT HARDING AN ADD. CALL
	ADS 12 01 Advantian Office Servicing to	
	Richard Michael and Antonia and Antonia and Antonia	
	** March galdwood far. Name of the state of	NAME AND ADDRESS OF A DESCRIPTION OF
	The same and the same	annual to
	and \$400. 2 <sup>mb</sup> and bear heart heart heart heart	
	Finite State	
	Referritority 31 Refer. 3	
	Ruler Exercit	Jana Em Elerian
	Andre Donal. a para artene transmission and artene art	NOT THE PART OF A CONTINUE OF MARK
	Back District.         Mail         Control of the second s	in a constraint of the Lipse
	Factor Status	na na na manana na manana na manana Ina manana na 10 ma 1 pan Danina 1 Ananing
	Number         State         State <t< td=""><td>an an care your an your an your and your and the provided of the State In Antonia with a D Anna State Mantan I Care and T</td></t<>	an an care your an your an your and your and the provided of the State In Antonia with a D Anna State Mantan I Care and T
	Number         State         State <t< td=""><td>an an ann an an an an an an an an an an</td></t<>	an an ann an
	Nucleon Strategy         Sector St	na na serie a na serie na serie la mana da 2 fina 1 julio Interna i ficancing IED INTER I financia finanza da per Carrier I filaria Persona i Banaria la mp
	Nucleon Strategy         Sector St	In the set of a second
	Match Mission         Match Mi	non an International Annual Annual Statistics Hains Landing 2010 2014 Annual Tombo Based Hains Based Hains Based Hains
	Match Mission         Match Mi	an example and the second seco
	Notice Strategy         Section Strategy<	an o a fair a suitanti a tana an ang
	$ \begin{array}{ c c c c c } \hline \begin{tabular}{ c c c c c } \hline \begin{tabular}{ c c c c c c c c c c c c c c c c c c c$	In sector 2 and 2
	Note that the set of	In control of the second secon
	$ \begin{array}{ c c c c c c c c c c c c c c c c c c c$	In the set of se



## Printing Option #4 - Right Click (continued)

The print window appears.

🖢 Print	? >
General Options	
Select Printer	
Add Printer Adobe PDF DELL5110 Color	DELL5110cn HP Laser Jet
<	<u> </u>
Status: Ready Location: Comment:	Print to file Preferences Find Printer
Page Range	
Selection Current Page	Number of copies: 1
O Pages: 1	
Enter either a single page number or a single page range. For example, 5-12	
5	rint Cancel Apply

5 Click **Print** to print roster.

-



## 8. USING FAVORITES

### Adding Favorites

Once you start working in PeopleSoft 9.0, you will be able to set up Favorites. This is different from previous versions of PeopleSoft which relied on the Favorites tool inside the Microsoft Internet Explorer browser to manage Favorites. Now your Favorites will not be deleted after every PeopleSoft system update.

1. Navigate to the page you want to add as a Favorite. In this case, let's suppose it's the Community Directory Search page.

	$\smile$	<u>new</u>	<u>, window</u> 1	Help   C	ustomize P.	aye j
Community Directory Se	earch					
*Directory Type:						
Student Directory 🛛 😽						
Student Directory						
*Search By:	Name:				7	
	Name:					
*Search By:						
*Search By: Full Name(Last,First)					]	
*Search By: Full Name(Last,First)						

2. On the Menu Pagelet, click **My Favorites** then **Add to Favorites**.





## Adding Favorites (continued)

The following window appears. The Description field contains the default name of the favorite. You can edit the description as needed. In this case, we will keep Community Directory Search as the Favorite name.

	Add to Fa	vorites	
	Please Enter a	Unique Description for this Favorite	
	*Description:	Community Directory Search	
3	ок	Cancel	

3. Click the **OK** button.

The Page is added to the My Favorites menu item.

4. Click on **My Favorites** in the Menu pagelet (to update the changes).

You will now see Community Directory Search as your Favorite.



### **Sequencing and Editing Favorites**

You can order your list of favorites in whatever sequence works best for you. The default is alphabetical order by menu page name. And the default sequence number is zero.

To change the order, using Sequence Numbers, do the following:

1. Select Edit Favorites under My Favorites in the Menu pagelet.

The Edit Favorites page appears.

	Menu  Search: (>)	New Window   Help   Customize Page
1	My Favorites     Change My Password     Community Directory     Search     Edit Favorites     Campus Community     Campus Community     Carcolum Management     Set Up SACR     Reporting Tools     PeopleTools     Change My Password     My Personalizations     My Personalizations     My System Profile     My Dictionary	Edit Favorites Click the Save button after editing or deleting favorites Favorites Customize Find First 1.2 of 2 Last Favorite Community Directory Search Change My Password I Letter
	3	Save Notify

2. Enter a different sequence number for each of the menus to be rearranged in your list of favorites.

**Note:** Keep in mind that a favorite with a sequence number of one (1) will appear first in the list, then two (2), and so on.

3. Click **Save** to save the new sequence.

## Sequencing and Editing Favorites (continued)

To change the order, using menu titles, do the following:

1. Select Edit Favorites under My Favorites in the Menu pagelet.

The Edit Favorites page appears.

	Menu 🗖		
	Search:	New Window Help Customiz	<u>e Paq</u> e
	(>>		
	✓ My Favorites	Edit Favorites	
	<ul> <li><u>Change My Password</u></li> <li><u>Community Directory</u></li> </ul>		
$\frown$	Search	Click the Save button after editing or deleting favorites.	
(1)	– Edit Favorites	<b>Favorites</b> Customize   Find   🚟 First 🗹 1-2 of 2 🕩 Last	
$\smile$	▷ Self Service ▷ Campus Community	<u> <u>*Favorite</u> <u>Sequence number</u> </u>	
	Records and Enrollme 2 &	2 3 Community Directory Search 0 Delete	
	D Curriculum Management	Change My Password 1 Delete	
	▷ Set Up SACR ▷ Reporting Tools		
	▷ PeopleTools	I	
	- Change My Password		
	<ul> <li><u>My Personalizations</u></li> <li><u>My System Profile</u></li> </ul>		
	- My Dictionary		
	$\mathcal{C}$		
	4		

- 2. Highlight the menu name listed in the Favorites column that you want to change.
- 3. Type in the new menu title you want to give it.
- 4. Click **Save** to set the new menu name.



## **Deleting Favorites**

Let's delete the Course Catalog Favorite.

1. Select Edit Favorites under My Favorites in the Menu pagelet.

The Edit Favorites window displays.

Edit Favorites		
Click the Save button after (	editing or deleting favorites.	
▼ Favorites	<u>Customize</u>   <u>Find</u>   📶 First 🗹 1 of 1	▶ Last
*Favorite	Sequence number	2
Course Catalog	0	Delete

2. Click the **Delete** button next to Course Catalog.

The follow warning message will display.

Microsoft	Internet Explorer
?	Delete current/selected rows from this page? The delete will occur when the transaction is saved.
	3 Cancel

### 3. Click OK.

The Course Catalog Favorite page is deleted from the list.

4. Click **Save** for your changes to take effect.



### 9. USING 19th 41st HOUR

Users of PeopleSoft 8 can access Advisement for 19th 41st Hour in PeopleSoft 9.0 in the Worklist folder.

However, you can set up your footprint pages as Favorites, to reach them directly from the Home page. Unlike PeopleSoft 8, your Favorites are internalized in PeopleSoft 9.0. That means, you won't lose your Favorites in the future when the system is updated.

To access 19th 41st Hour do the following:

1. Click on **Worklist**.

>>>
vorites
ervice
us Community
nt Admissions
ds and Enrollment
ulum Management
nt Financials
mic Advisement
st
ting Tools
eTools
ae My Password
rsonalizations
stem Profile
tionary

Worklist Main Menu displays.

2. Click on Navigator.

		Home	Add to Favorites	Sign ou
Menu 🗖				
Search:  Description My Favorites Search: Description Search: Description Student Admissions Descords and Enrollment Destudent Financials Description Student Financials Description Descr	Main Menu > Worklist Maintain worklist settings and monitor worklist. Mavigator			



## USING 19th 41st HOUR (continued)

Advisement for 19th 41st Hour displays.

3. Click CLC Advisement 19th 41st Hour.

	<u>Home</u>	Add to Favorites	<u>Sign out</u>
Advisement for 19th 41st Hour			
E S. CLC Advisement 19th 41st Hou 3			
20			
CLC Advisement 19th 41 st Hour			

CLC Advisement 19th 41st Hour footprints display.

4. Choose the one you want from the list on the left (A) OR from the icons on the right (B).

Advisement for 19th 41st Hour		(4B)	Home Add to Favo	r <u>ites Sign o</u> u
CLC Advisement 19th 41st Hou Add Comments View Comments	Find Student ID	$\overline{\mathbf{X}}$	_	
Class Roster Class Roster Find Student Id Remove Service Indicator Set Operator Defaults View Acad Restriction Load View Academic Standing View Addresses View Hectronic Addresses View Program/Plan View Student Groups View Student Schedule	Find Student Id Information Tools for View Transcript		ew Phones View Electronic View Academic Standin	
View Test Scores	View Student Groups (proficiencies, etc.)	View Program/Plan	View Student Schedule	View Acad Res
	Add Advisor Comment	VAdd Prog Change Comr	nent/Remove ADV Service	Indicator
	Add Comments View Cont	uments Remove Service Indicato	Steps to Remove - Select the 19th or 41st Ho - Press the Release Button - Confirm by responding OK	
	General Use			



### 10. USING HELP

Within the PeopleSoft 9.0 application, you can find documentation to help you. To see an example of a Help link, you will need to navigate to a search page.

1. From the Menu pagelet, click on Curriculum Management, Course Catalog, and Course Catalog.

The Course Catalog search window displays.

				Home Vvorklist	
					2
					New Window   Help   🖳
Course Catalog					
•	you have and clic	k Search. Leave fields bla	nk for a list of all	Ivalues.	
Find an Existing Va	lue 📔 <u>A</u> dd a Nev	w Value			
Academic Institution:	= 🗸	CLCCC	Q		
Subject Area:	= •		Q		
Catalog Nbr:	begins with 🗸				
Campus:	begins with 🗸		Q		
Course ID:	begins with 🗸				
Description:	begins with 🗸		]		
Include History	Case Sensitiv	e	]		
		-			
Search Clear	Basic Search	🚦 Save Search Criteria	1		
Find an Existing Value	Add a New Val	ue			

2. Click on the **Help** link in the upper right corner of the window, for context sensitive help. In other words, help with a field in this window.

The PeopleSoft help window will display.

3. Click the Show Reference Pane button in the upper right corner of the window.

		(3)
PEOPLESOFT ENTERPRISE	Enterprise PeopleTools 8.49 PeopleBook: Using PeopleSoft Applications	Show Reference Pane Show Graphics Prin
Home > PeopleBooks	> Enterprise PeopleTools 8.49 PeopleBook: Using PeopleSoft Applications > Using	Keys and Search Pages First 🖪 4 of 8 🕨 Las
Using Ke	eys and Search Pages	
This chapter provides	es an overview of keys and search pages and discusses how to use search page:	es to retrieve data.
Understandi	ing Keys	0
employee records. A	tion of fields uniquely identifies every table in your PeopleSoft database. For exa As another example, when employees enroll in training classes, the combination fies enrollment requests.	
	uely identify your data are called <i>keys</i> or <i>key fields</i> . To display a page, you enter ieve the correct row of data. For example, to retrieve the personal data page for J at employee.	
If you run Search by have search records associated link, you	he list of defined search keys that help you locate data. The search keys are the Y exactly specifying the key fields, the system will always return only one (or no) s associated with them. If you select other pages that have a common search rec J are not prompted to enter search criteria again. You are prompted for new searc ith a different search record.	) result. Most transaction pages or components cord, such as pages within a component or an

-



## USING HELP (continued)

The Reference pane displays. This is a table of contents, which can be used to look up specific help topics.



4. Click on Setting User Preferences.

The Setting User Preferences folder expands. You could continue drilling down in the table of contents until you find a topic of interest or use Index.

5. Click on the **Index** tab at the top of the window.



An alphabetical index of keywords (or topics) appears. You can scroll through the list or simply type a keyword into the Search prompt. The window will automatically scroll down to the area of interest.



## USING HELP (continued)

**Note:** PeopleBooks Help may <u>not</u> take you to the exact reference because of the CLC customization of PeopleSoft 9.0.

You'll receive the message "No content available" and then be returned to a more general high-level help page instead.



## **11. PERSONALIZATIONS**

### **Using My Personalizations**

PeopleSoft 9.0 provides a section where you can create Personalization preferences. The My Personalizations link can be found near the bottom of the Menu pagelet.

1. Click on My Personalizations in the Menu pagelet.



There are four areas that you can personalize:

- General Options
- Regional Settings
- System & Application Messages
- Navigation Personalizations

Personalizations			
Standard settings are in effect.			
Changes to Personalization settings require you	to log off and l	og back on in order to take e	effect.
Personalization Categories			
<u>Description</u>		Personalize Option	
General Options	2	Personalize Option	
Regional Settings		Personalize Option	
System & Application Messages		Personalize Option	
Navigation Personalizations		Personalize Option	
Restore Defaults			

2. Click on General Options Personalize Option button.



## Using My Personalizations (continued)

The following screen will appear.

Option Category: General Options					
Personalizations			<u>Find</u>	First 🖪 1-5 of 5	5 🕑 Last
Personalization Option	Default Value	Override Value			
Accessibility Features	Accessibility features off			~	<u>Explain</u>
Excel 97 grid download	No	No		3 ~	<u>Explain</u>
Time page held in cache	900	Yes			<u>Explain</u>
Multi Language Entry	No			~	<u>Explain</u>
Spell Check Dictionary	Use session language			*	<u>Explain</u>
Restore Category Defaults					
OK Cancel					

- 3. Click the **down arrow** to the right of "No" in the Excel 97 grid download row.
- 4. Select Yes.

ersonalizations			<u>Find</u>	First 🖪 1-5 of 5	5 🕑 Last
Personalization Option	Default Value	Override Value			
Accessibility Features	Accessibility features off			*	<u>Explain</u>
Excel 97 grid download	No (4)	Yes		~	<u>Explain</u>
Time page held in cache	900				<u>Explain</u>
Multi Language Entry	No			*	<u>Explain</u>
Spell Check Dictionary	Use session language			*	<u>Explain</u>
Restore Category Defaults					

We have now turned on, or activated, the download function in PeopleSoft.

5. Click **OK** to save this setting.

The following window will appear.



#### 6. Click Return.

You will return to the Personalizations main window.

## Using My Personalizations (continued)

The table below provides information regarding the various column headings in the My Personalizations area.

Column Heading	Description
Option Category	Shows the description of the category of personalizations. This helps you to make sure that you have the correct category open.
Personalization Option	This column lists all of the personalization options available for you to modify. The text that appears in the list is a brief description of the option. For more information on the option, click the <b>Explain</b> link.
Default Value	Refers to the initial settings that your administrator has specified for the option. If you do not modify the default value, the option assumes the value provided by the system administrator.
Override Value	Enter any custom value you want to assign to the personalization option. To "override" a default setting means to "use in place of" the default setting.
Explain	Click this link to view more information on what the personalization option provides. See the following section for more information on the Explanation page.
Restore Category Defaults	Returns all modified options to the default values. This button applies only to the current category, as in the category you have open.
OK/Cancel	After you have made any modifications, click <b>OK</b> so that the system records your changes. If you do not want your changes recorded click <b>Cancel</b> . If you have not made any changes and just viewed the options, you can use either button to return to the Personalizations page.

To learn more about the options for personalization, you should read the Explain link, in each row, adjacent to each of the Personalization Options.

С	ption Category: General Options					
	Personalizations			<u>Find</u>	First 🖪 1-5 of s	5 🕑 Last
	Personalization Option	Default Value	Override Value			
	Accessibility Features	Accessibility features off			*	<u>Explain</u>
	Excel 97 grid download	No	No		~	<u>Explain</u>
	Time page held in cache	900				<u>Explain</u>
	Multi Language Entry	No			~	<u>Explain</u>
	Spell Check Dictionary	Use session language			~	<u>Explain</u>
	Restore Category Defaults					
	OK Cancel					