



PeopleSoft 9.0 Essentials

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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

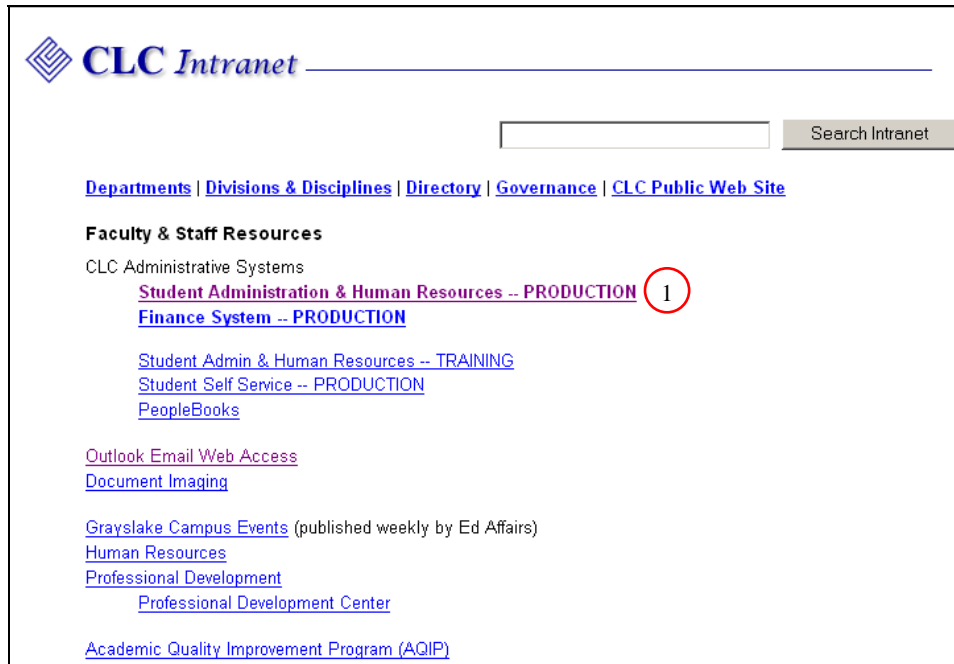
The screen snaps throughout this manual reflect the PeopleSoft 9.0 system as of 9/01/08. You may notice slight screen differences, between those in this manual and the “live” system, if the PeopleSoft system has changed after 9/01/08.

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**.



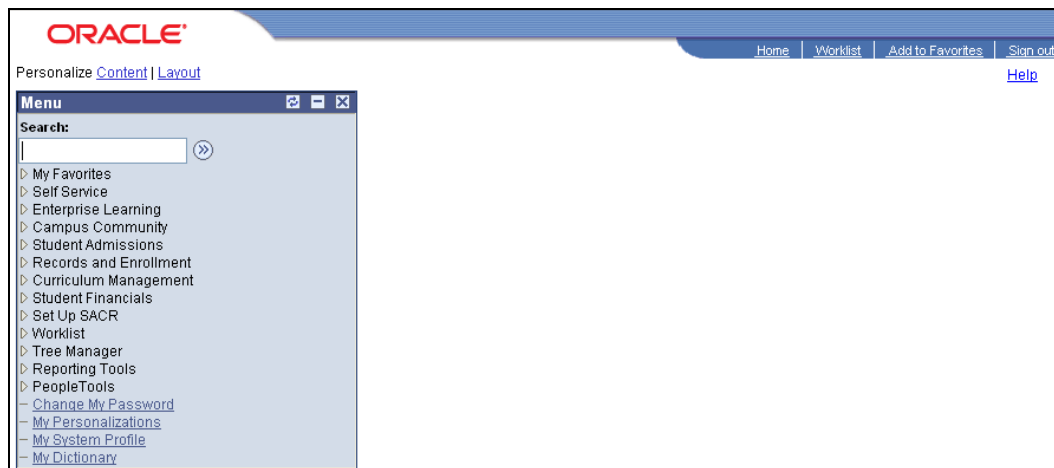
The sign in screen appears.



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:

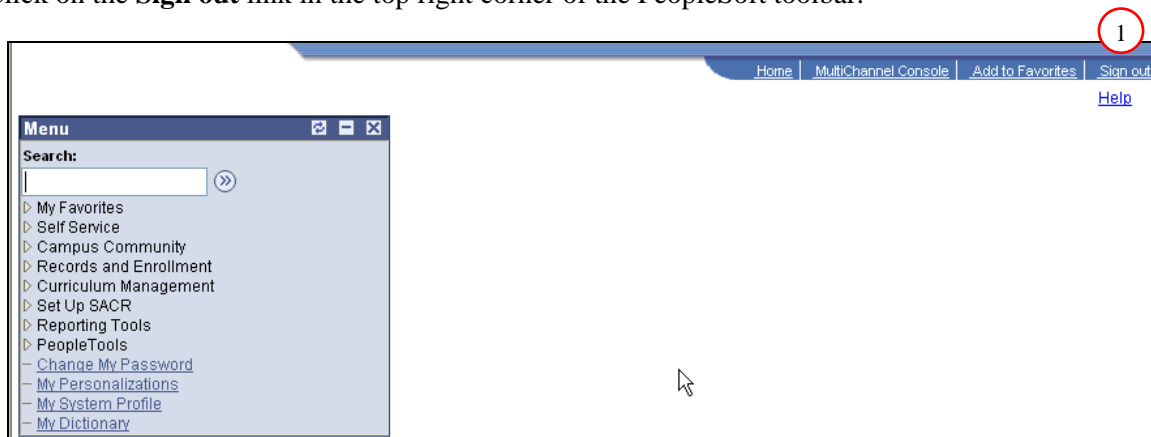


Logging Off Of PeopleSoft

When you finish using PeopleSoft or will be away from your 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.



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.

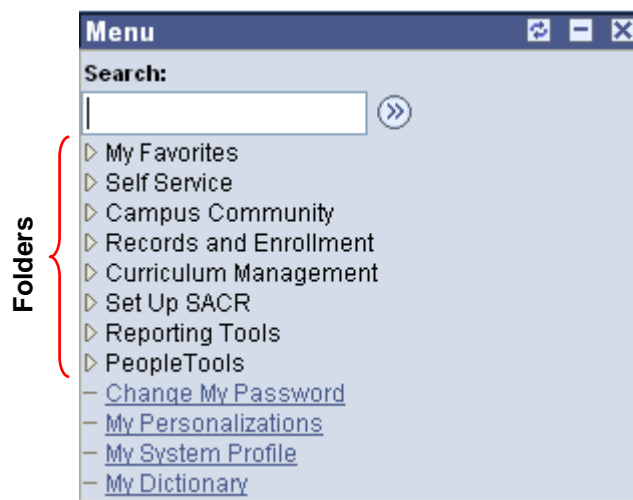
3. USING THE MENUS

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  button. To re-expand the menu pagelet, click the  button.

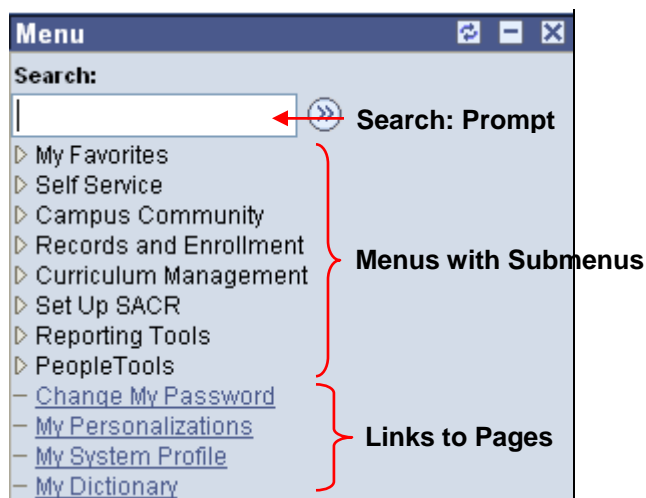


The **Ctrl (Control) Y** hot key combination will also collapse and expand the menu.

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, . 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, . If a Menu choice navigates you directly to a page, it will have a hyphen in front and be underlined in blue type suggesting that it is a hyperlink to a page.



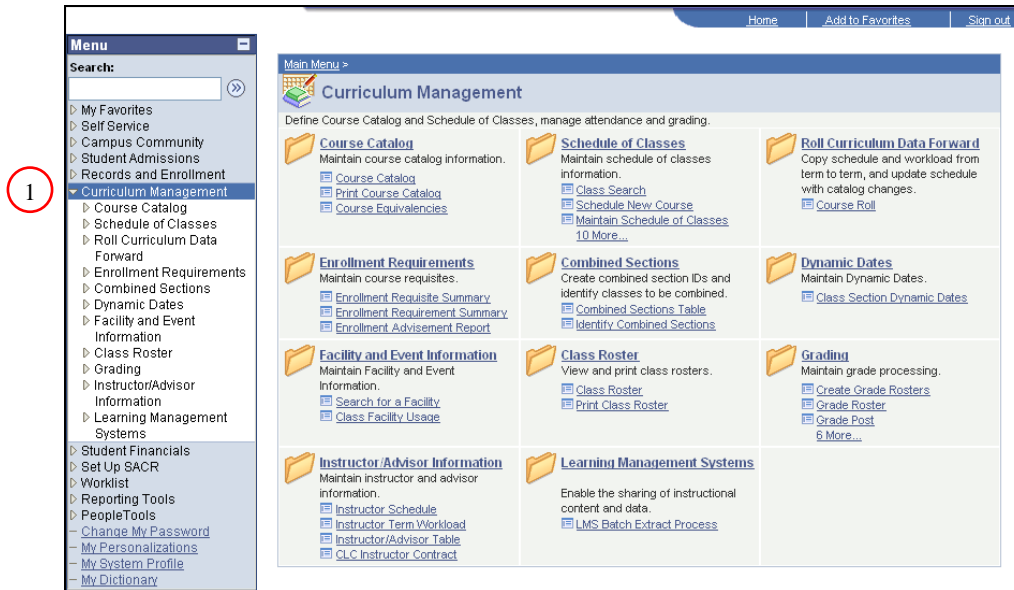
To select a **Menu** item, click your mouse on the desired selection. This will expand the associated Menu choice to its submenu. You may also click on any of the page links at the bottom of the Menu pagelet.

Using the Menu Pagelet (continued)

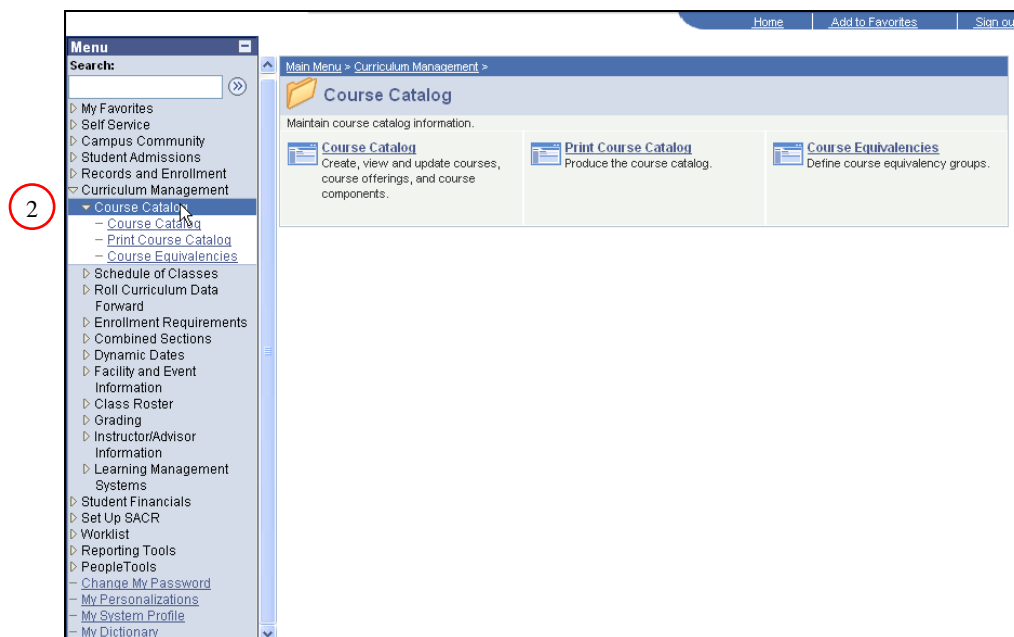
Opening a Page from the Navigation Menu

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.

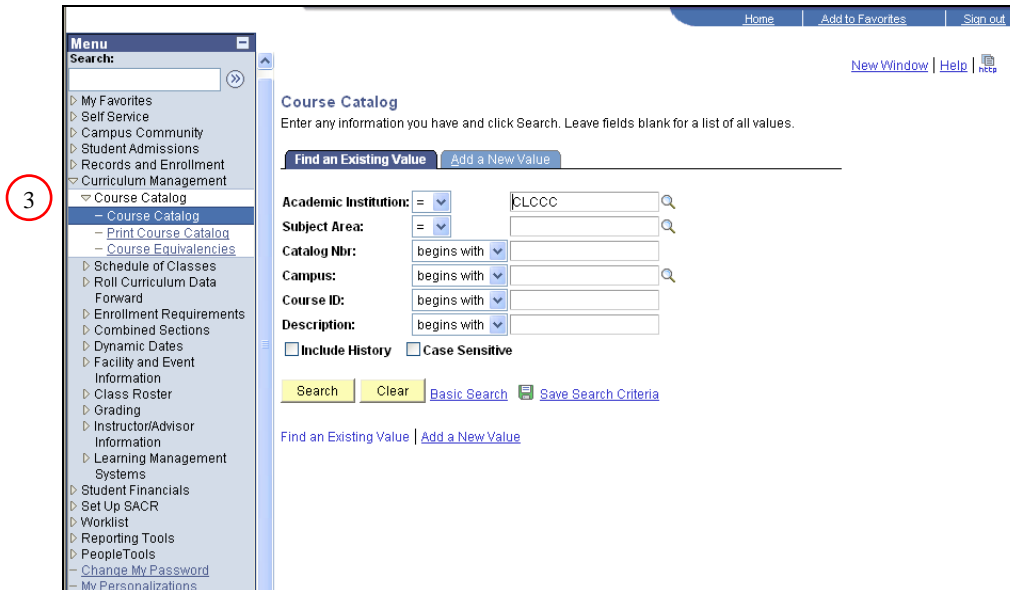


Opening a Page from the Navigation Menu (continued)

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

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

The Course Catalog search screen will display.



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.

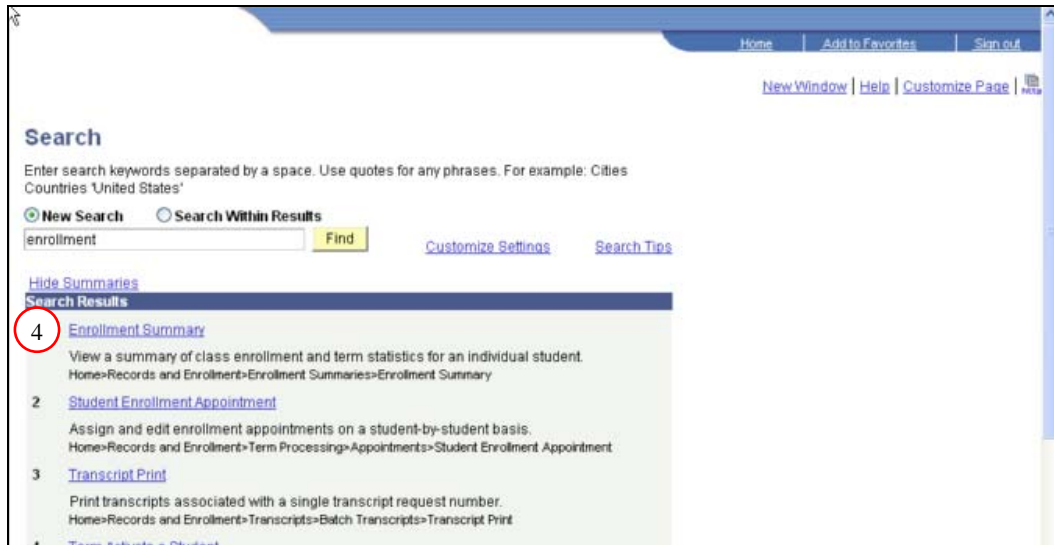


- Click in the **Search:** prompt at the top of the Menu pagelet.
- Type **enrollment**.
- Press **Enter**.

Using the Menu Search Function (continued)

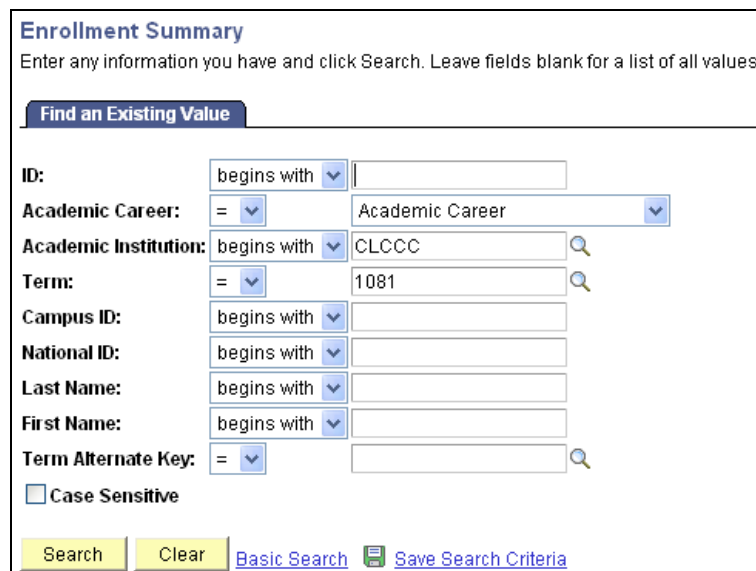
A search screen like the one below will display. A list of each menu item appears as a hyperlink along with a description of the menu. The path to the menu item also displays under the description.

4. Click on the **Enrollment Summary** hyperlink.



The screenshot shows the PeopleSoft Search interface. At the top, there are navigation links: Home, Add to Favorites, Sign out, New Window, Help, and Customize Page. Below the navigation bar is the 'Search' section with instructions: 'Enter search keywords separated by a space. Use quotes for any phrases. For example: Cities Countries United States'. There are two radio buttons: 'New Search' (selected) and 'Search Within Results'. A search box contains the text 'enrollment' and a 'Find' button. Below the search box are links for 'Customize Settings' and 'Search Tips'. A 'Hide Summaries' link is also present. The 'Search Results' section is highlighted, and the first result, '4 Enrollment Summary', is circled in red. The description for 'Enrollment Summary' is: 'View a summary of class enrollment and term statistics for an individual student. Home>Records and Enrollment>Enrollment Summaries>Enrollment Summary'. Other results include '2 Student Enrollment Appointment' and '3 Transcript Print'.

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



The screenshot shows the 'Enrollment Summary' search screen. At the top, there is a title 'Enrollment Summary' and a subtitle 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a section titled 'Find an Existing Value'. The search fields are: ID (begins with), Academic Career (=), Academic Institution (begins with), Term (=), Campus ID (begins with), National ID (begins with), Last Name (begins with), First Name (begins with), and Term Alternate Key (=). Each field has a dropdown menu for the search criteria and a text box for the search value. There are also search icons (magnifying glasses) next to the Academic Institution, Term, and Term Alternate Key fields. At the bottom, there is a 'Case Sensitive' checkbox and a 'Search' button. Below the 'Search' button are links for 'Clear', 'Basic Search', and 'Save Search Criteria'.

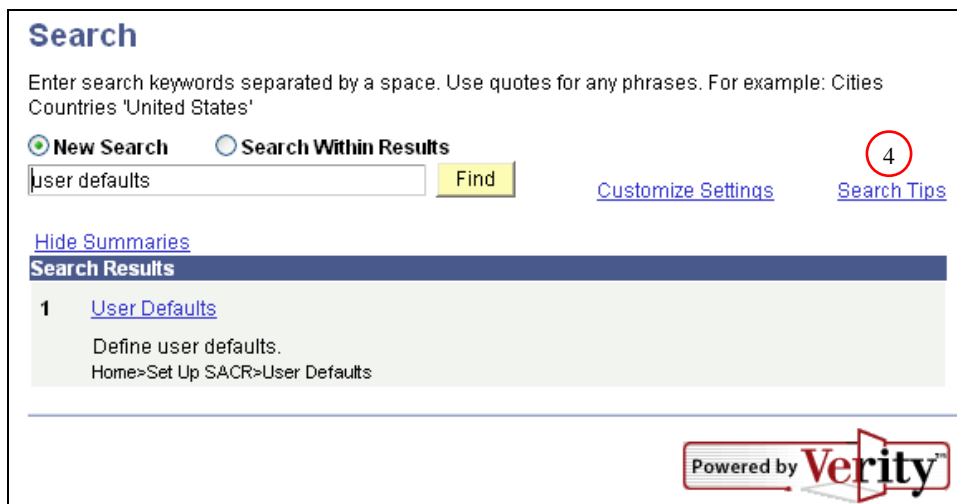
Using the Menu Search Function (continued)

Here is a second example using the Menu Search function.

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



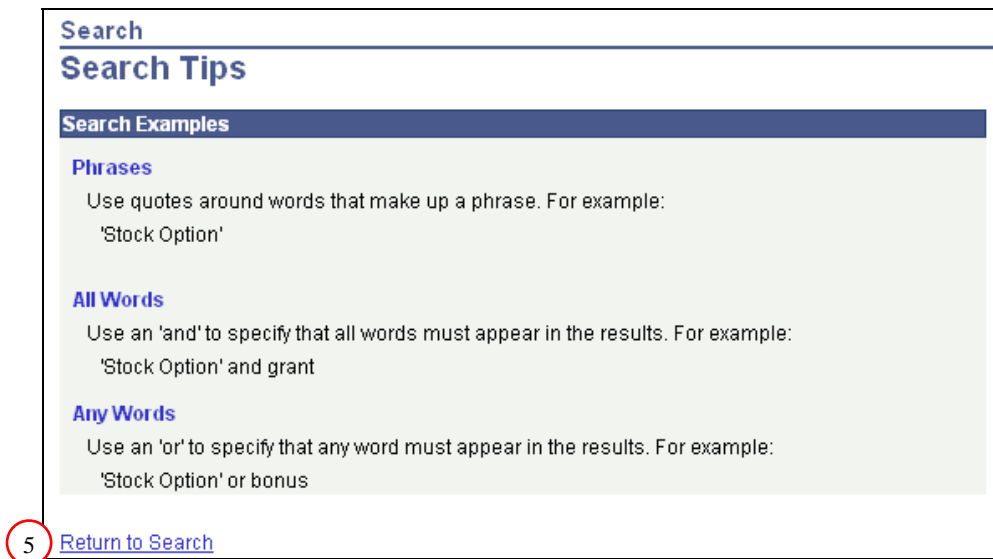
The Search screen will display, as seen below.



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

Using the Menu Search Function (continued)

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



Search

Search Tips

Search Examples

Phrases
Use quotes around words that make up a phrase. For example:
'Stock Option'

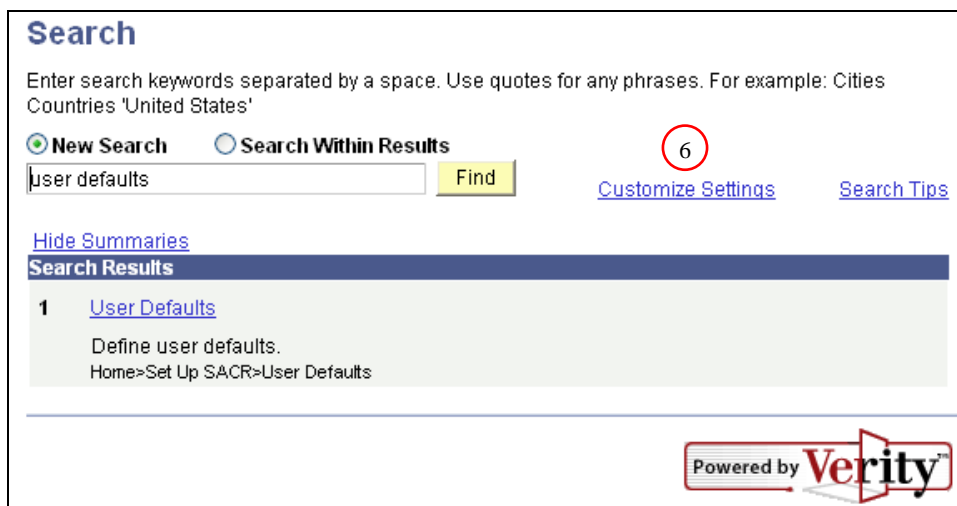
All Words
Use an 'and' to specify that all words must appear in the results. For example:
'Stock Option' and grant

Any Words
Use an 'or' to specify that any word must appear in the results. For example:
'Stock Option' or bonus

5 [Return to Search](#)

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

The Search screen will display again.



Search

Enter search keywords separated by a space. Use quotes for any phrases. For example: Cities
Countries 'United States'

☒ **New Search** ☐ **Search Within Results**

[Customize Settings](#) [Search Tips](#)

[Hide Summaries](#)

Search Results

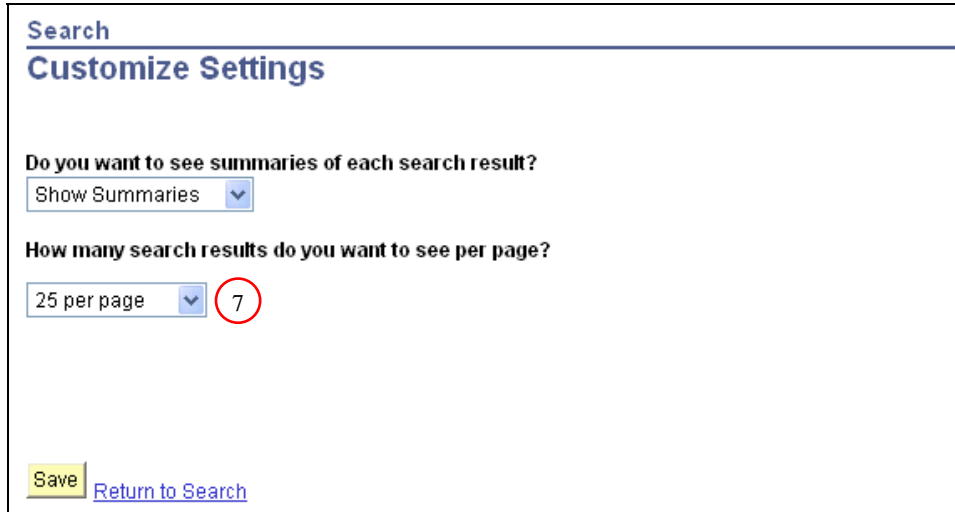
1 [User Defaults](#)
Define user defaults.
Home>Set Up SACR>User Defaults

Powered by **Verity**

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

Using the Menu Search Function (continued)

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 ▼ 7

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.



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?

10 per page ▼ 8


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.



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)

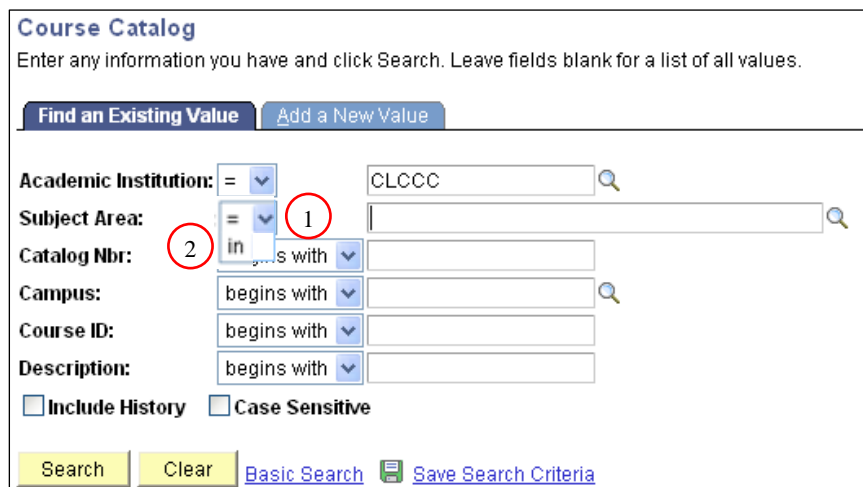
Operator	Description	Example
<	The less than operator should be used on fields containing numbers and will return values less than the specified value.	< 345
<=	The less than or equal to operator should be used on fields containing numbers and will return values lower than or equal to the specific value.	<= 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 to 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 *not* 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 you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value **Add a New Value**

Academic Institution: = CLCCC

Subject Area: = **1**

Catalog Nbr: **2** in

Campus: begins with

Course ID: begins with

Description: begins with

☐ Include History ☐ Case Sensitive


Search **Clear** [Basic Search](#) [Save Search Criteria](#)


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 Value **Add a New Value**

Academic Institution: = 

Subject Area: in  **3 & 4**


Catalog Nbr: begins with

Campus: begins with 

Course ID: begins with

Description: begins with

☐ Include History ☐ Case Sensitive

Search **Clear** [Basic Search](#)  [Save Search Criteria](#)


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 you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value **Add a New Value**

Academic Institution: = 

Subject Area: in 


Catalog Nbr: begins with

Campus: begins with 

Course ID: begins with

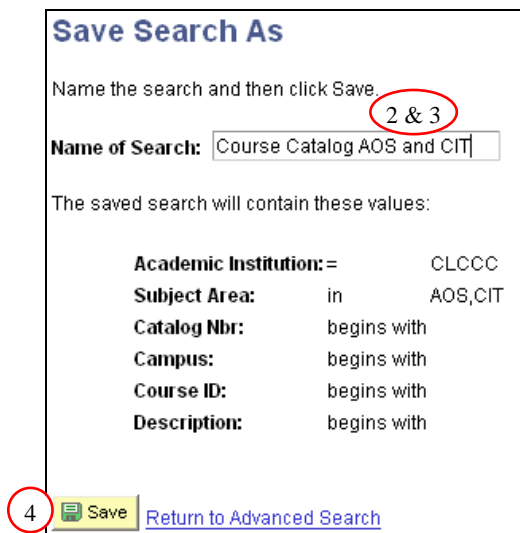
Description: begins with

☐ Include History ☐ Case Sensitive

Search **Clear** [Basic Search](#)  [Save Search Criteria](#) **1**

Saving Search Criteria (continued)

The Save Search As window appears.



Save Search As

Name the search and then click Save.

Name of Search: 2 & 3

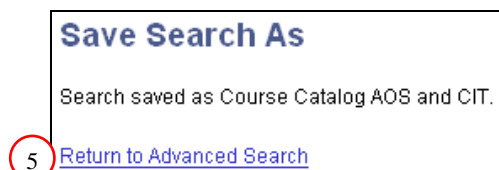
The saved search will contain these values:

Academic Institution:	=	CLCCC
Subject Area:	in	AOS,CIT
Catalog Nbr:	begins with	
Campus:	begins with	
Course ID:	begins with	
Description:	begins with	

4 [Return to Advanced 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.



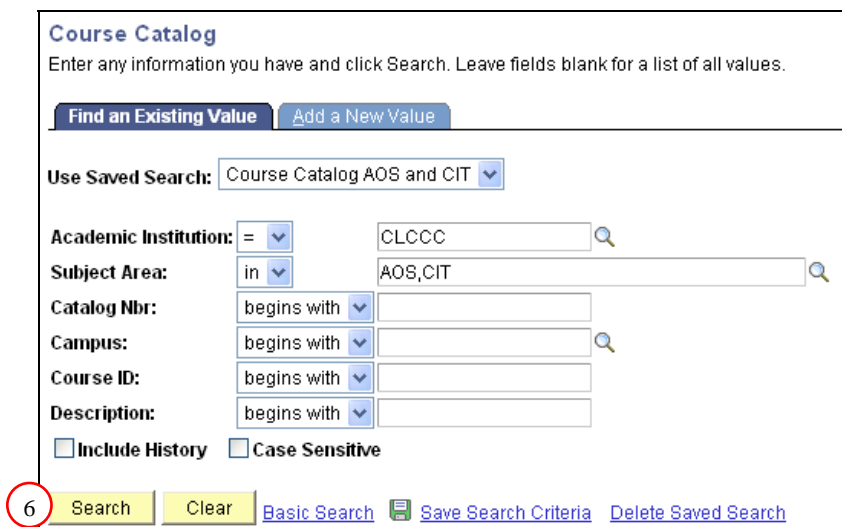
Save Search As

Search saved as Course Catalog AOS and CIT.

5 [Return to Advanced Search](#)

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 you have and click Search. Leave fields blank for a list of all values.

Use Saved Search: ▼

Academic Institution: = ▼ 🔍

Subject Area: in ▼ 🔍

Catalog Nbr: begins with ▼

Campus: begins with ▼ 🔍

Course ID: begins with ▼

Description: begins with ▼

☐ Include History ☐ Case Sensitive

6 [Basic Search](#) [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
CLCCC	AOS	111	CLC	000255	Business Communications 7
CLCCC	AOS	112	CLC	004748	Automated Office Technologies
CLCCC	AOS	112	CLC	004748	Computer Basics/Software Apps
CLCCC	AOS	113	CLC	005098	Comprehensive Word Processing
CLCCC	AOS	117	CLC	000261	Machine Transcription
CLCCC	AOS	118	CLC	000262	Adv Word Process/Desktop Pub
CLCCC	AOS	119	CLC	000263	Records Management
CLCCC	AOS	122	CLC	000265	Business Mathematics
CLCCC	AOS	128	CLC	000271	Intermediate Keyboarding
CLCCC	AOS	170	CLC	000276	Computer Keyboarding I
CLCCC	AOS	171	CLC	000277	Computer Keyboarding II
CLCCC	AOS	172	CLC	000278	Business English
CLCCC	AOS	175	CLC	005096	Keyboard Speed/Accuracy Bldg
CLCCC	AOS	178	CLC	000271	Intermediate Keyboarding
CLCCC	AOS	199	CLC	004079	Business Education Elective
CLCCC	AOS	214	CLC	005099	Admin Office Procedures
CLCCC	AOS	215	CLC	005097	Presentation Software
CLCCC	AOS	216	CLC	008317	Integrated Office Projects
CLCCC	AOS	223	CLC	000285	Advanced Keyboarding
CLCCC	AOS	225	CLC	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 Last

'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

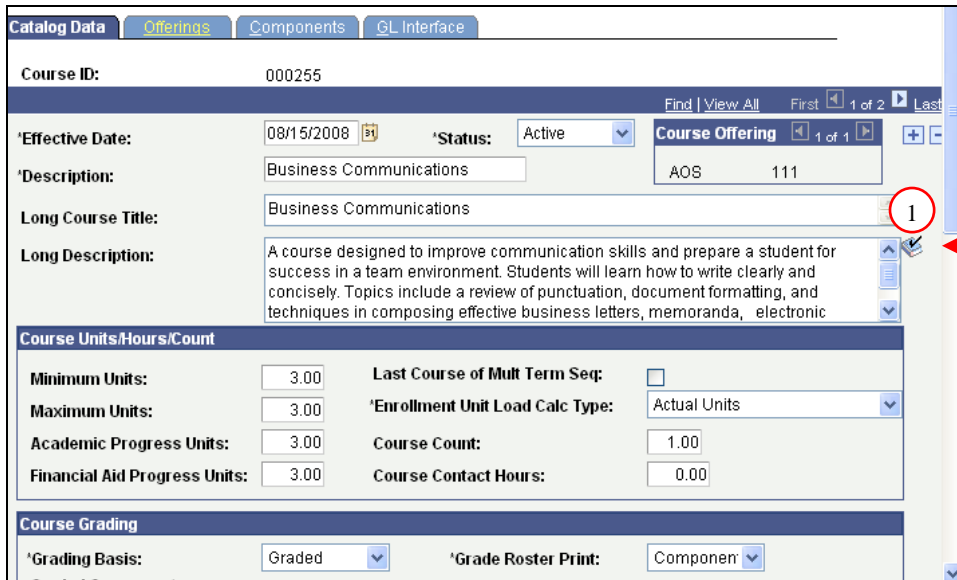
Course Grading

'Grading Basis: Graded 'Grade Roster Print: Component

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 *some* fields, particularly long limitless text fields, but *not* all fields. For example, the Spell Check icon is available for the Long Description field in the Course Catalog component.



The screenshot shows the PeopleSoft Course Catalog component with the 'Catalog Data' tab selected. The 'Long Description' field is highlighted, and a small icon (a checkmark inside a circle) is visible to its right. A red circle with the number '1' is drawn around this icon, and a red arrow points to it with the label 'Spell Check Icon'.

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

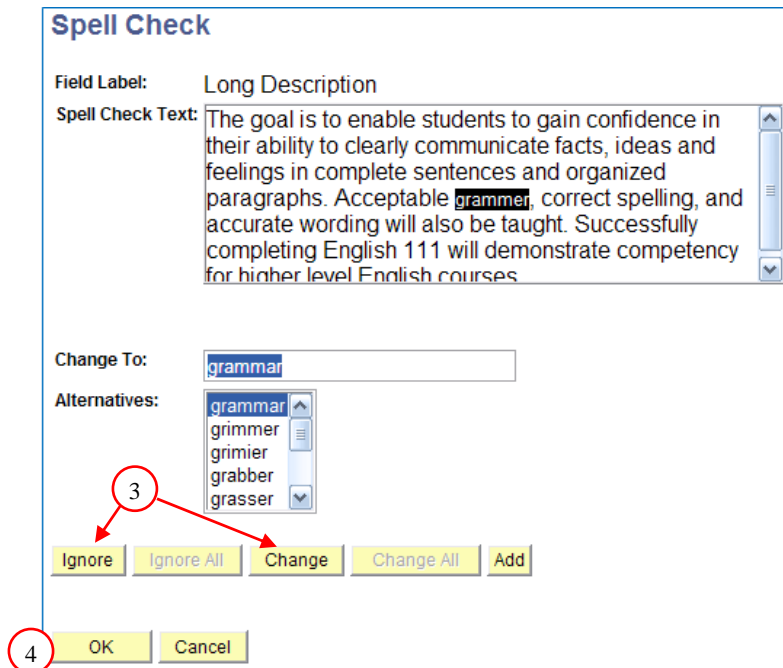
The following window will appear, if there are *no spelling errors*. This is a very handy tool when you are entering or editing data in PeopleSoft.



2. Click **OK**.

Using Spell Checking (continued)


- 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).
- Click **OK**.

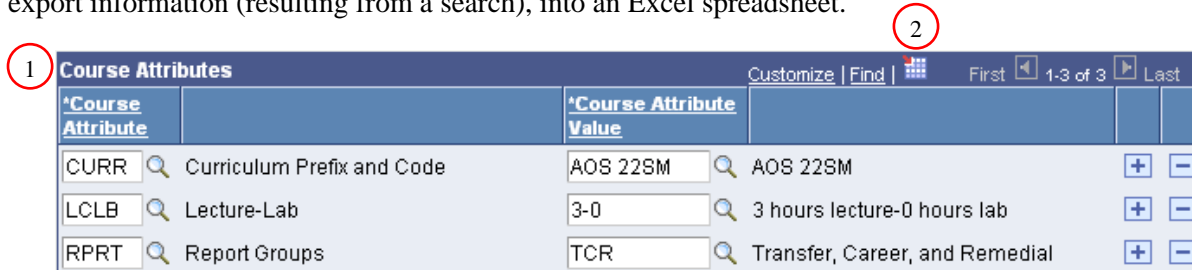


Using Download Into Excel Function

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

- 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.

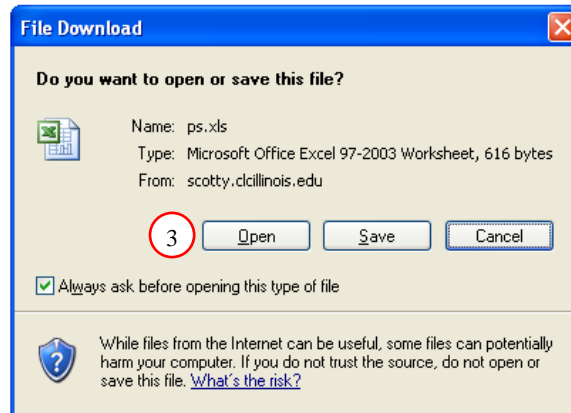


- In Internet Explorer, hold down your **Ctrl** key and then press the **download** icon .

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.


Course Catalog search screen

1


2

Find an Existing Value **Add a New Value**

Academic Institution: = 

Subject Area: = 


Catalog Nbr: begins with

Campus: begins with 

Course ID: begins with

Description: begins with

☐ Include History ☐ Case Sensitive

Search **Clear** [Basic Search](#)  [Save Search Criteria](#)

2. Click on the **Add a New Value** tab.

A new screen will appear.

Course Catalog

Find an Existing Value **Add a New Value**

Course ID:

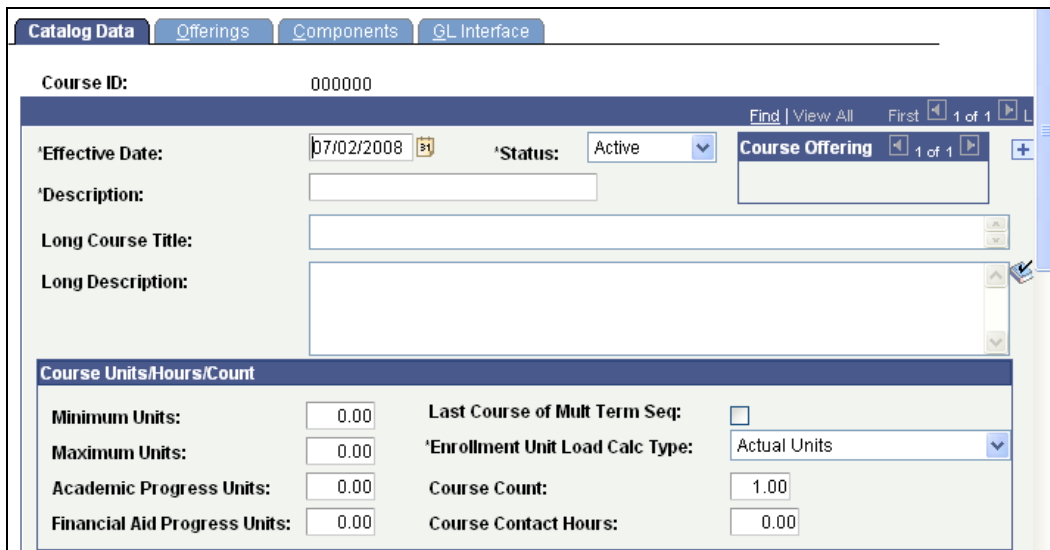
3 **Add**

[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.

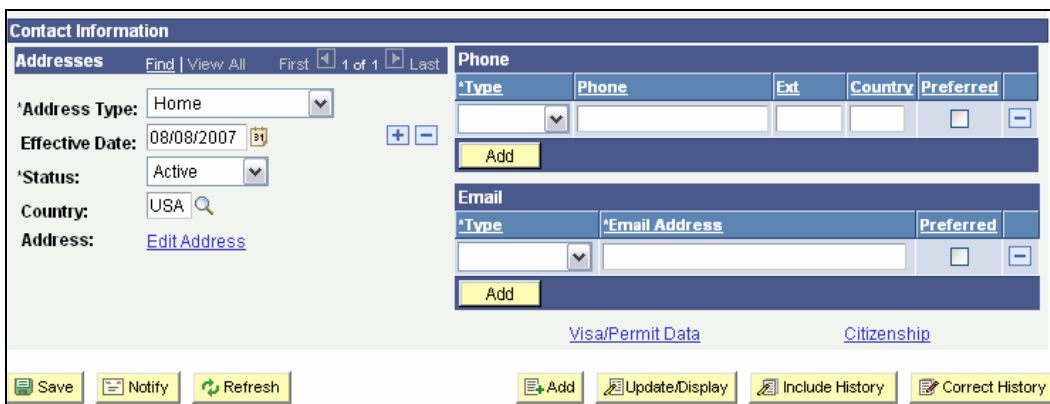


Note: You would want to run Spell Check on any new fields in which you've entered data that have .

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.



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.

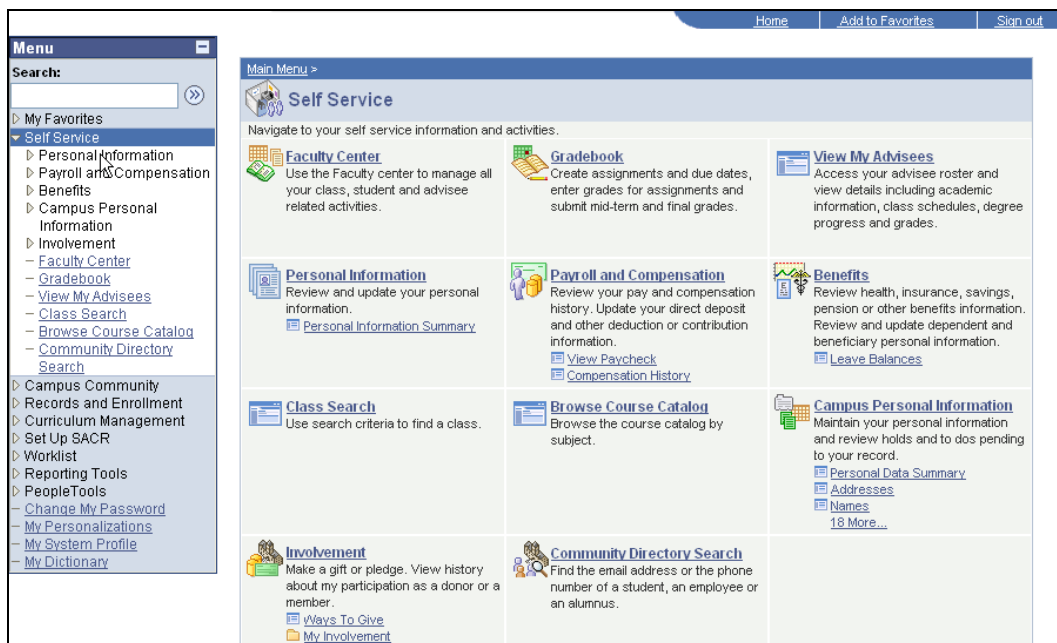
6. USING SELF SERVICE

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

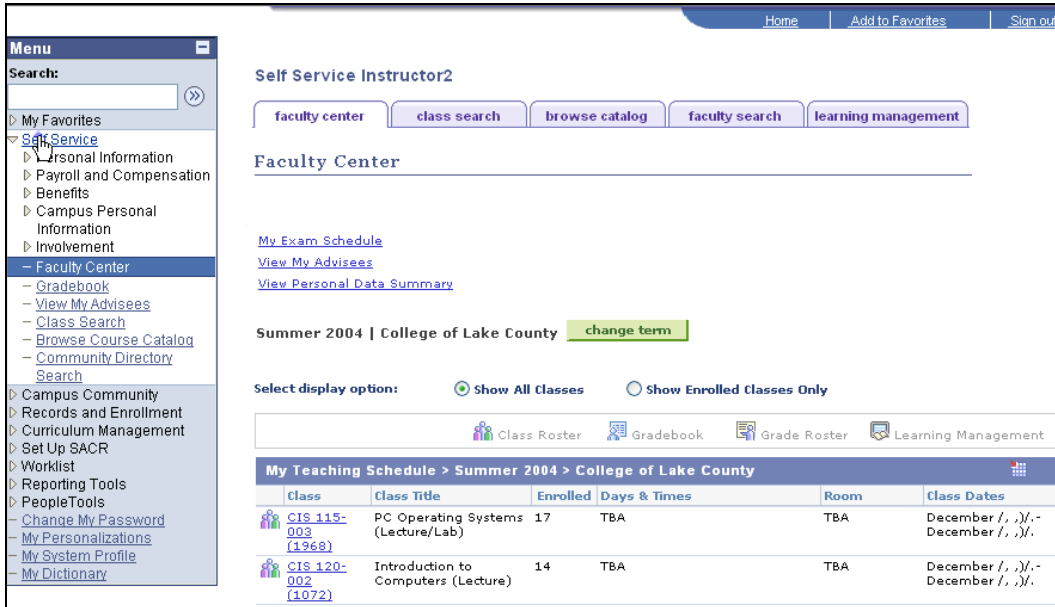
1. Personal Information
2. Payroll and Compensation
3. Benefits
4. Campus Personal Information
5. Involvement

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)



Class	Class Title	Enrolled	Days & Times	Room	Class Dates
CIS 115-003 (1968)	PC Operating Systems (Lecture/Lab)	17	TBA	TBA	December /, ,/ - December /, ,/
CIS 120-002 (1072)	Introduction to Computers (Lecture)	14	TBA	TBA	December /, ,/ - December /, ,/

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:

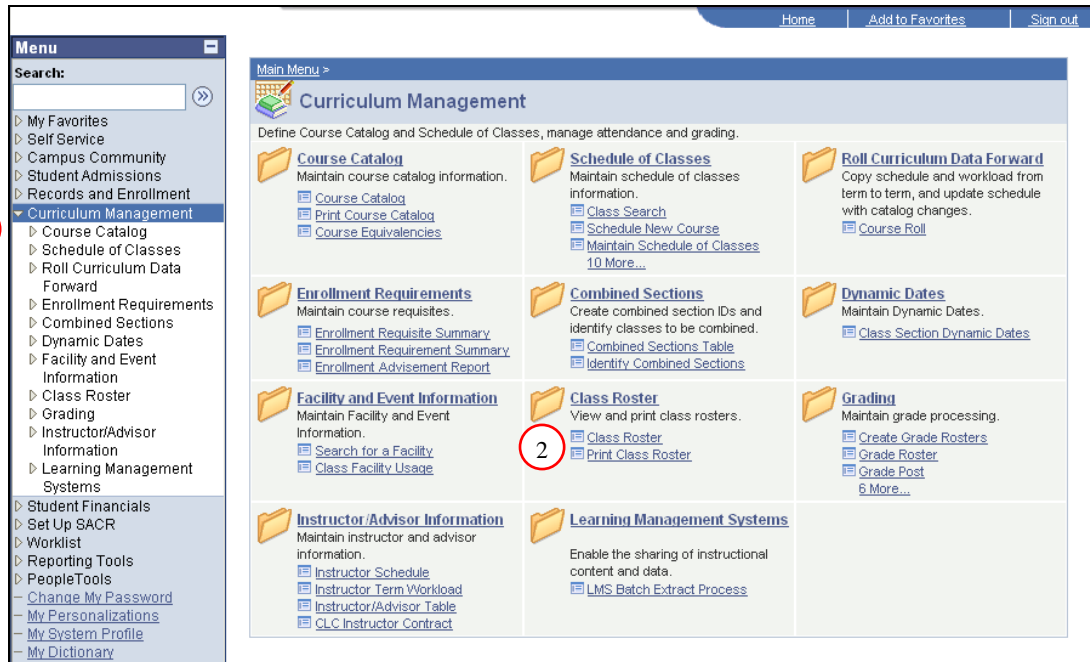
- Class Search
- Browse Catalog
- Faculty Search
- Learning Management

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.

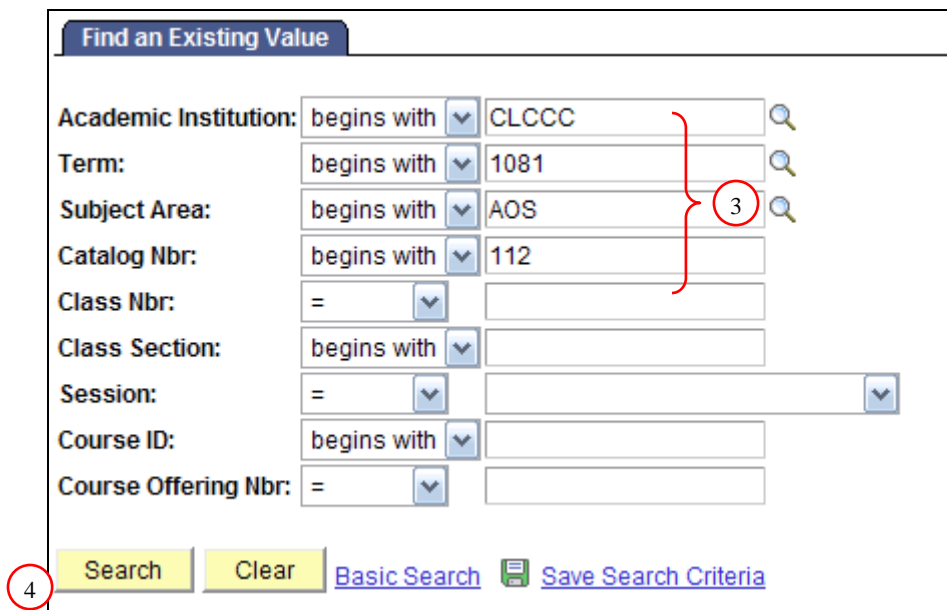
Printing Option #1 – File > Print

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



The screenshot shows the PeopleSoft 9.0 Main Menu. On the left, the 'Menu' sidebar has 'Curriculum Management' selected and circled with a red '1'. The main content area is titled 'Curriculum Management' and contains several sections: 'Course Catalog', 'Schedule of Classes', 'Roll Curriculum Data Forward', 'Enrollment Requirements', 'Combined Sections', 'Dynamic Dates', 'Facility and Event Information', 'Class Roster', 'Grading', 'Instructor/Advisor Information', and 'Learning Management Systems'. The 'Class Roster' option is circled with a red '2'.

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



The screenshot shows the 'Find an Existing Value' search form. The search criteria are filled in: Academic Institution (begins with CLCCC), Term (begins with 1081), Subject Area (begins with AOS), and Catalog Nbr (begins with 112). A red bracket groups these four fields, with a red '3' next to it. The 'Search' button is circled with a red '4'.

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.

Class Roster

AOS 112 - 001Automated Office Technologies

Lecture (5433)

Class Detail

Spring 2008 | Regular Academic Session | College of Lake County | Academic

Meeting Information

Course ID	Days & Times	Room	Instructor	Meeting Dates	Topic	Mid Term Date	Last Date to Withdraw with Refund & No Grade	Last Date to Withdraw with Grade	Last Day to Complete an Incomplete
004740	TuTh 9:30AM - 10:45AM	T217 - Grayslake Campus	Lauren LoPresti	01/22/2008 - 05/15/2008	Lecture/Lab	03/19/2008	02/07/2008	04/09/2008	09/14/2008

*Enrollment Status:

Enrolled

Enrollment Capacity: 24Enrolled: 24

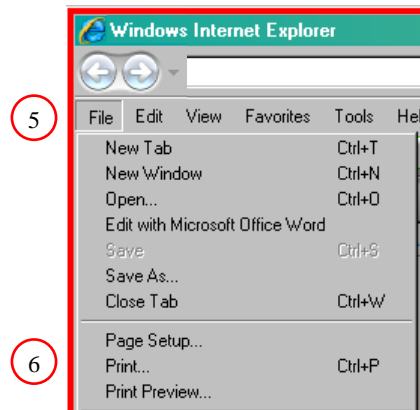
Enrolled Students

Customize | Find

First 1-24 of 24 | Last

ID	Name	Telephone	Grade Basis	Program and Plan	Level	Status Note	Grade Input	Units Taken	Drop Date	Primary Academic Program
1 0312395	Adams, Helen M	847/244-0682	Graded	Administrative Office Systems - Administrative Assistant Cert	Freshman			3.00		Administrative Office Systems
2 0462249	Bautista, Maritza L		Graded	Medical Assisting - Medical Assisting	Freshman			3.00		Medical Assisting
3 0449550	Boose, Dushanna M		Graded	Associate Transfer Degree - Associate in Science	Freshman	Withdrawn W			03/04/2008	Associate Transfer Degree
4 0409792	Goldberg, AnneMarie	847/726-2428	Graded	General Studies - General Studies	Freshman			3.00		General Studies
5 0494511	Goldmann, Jana		Graded	English as a Second Language - English as a Second Lang-Begin	Freshman			3.00		English as a Second Language
6 0271983	Hillebrand, Kathleen A	847/265-7037	Graded	Health Information Technology - Medical Office Specialist	Freshman			3.00		Health Information Technology
7 0491312	Horton, Sandra D	847/636-0992	Graded	Nursing - Registered Nursing	Freshman			3.00		Nursing
8 0457646	Kogan, Mathew Lee	847/520-7325	Graded	Administrative Office Systems - General Office/Administrative Assistant Cert	Freshman			3.00		Administrative Office Systems
				Administrative Office Systems -						

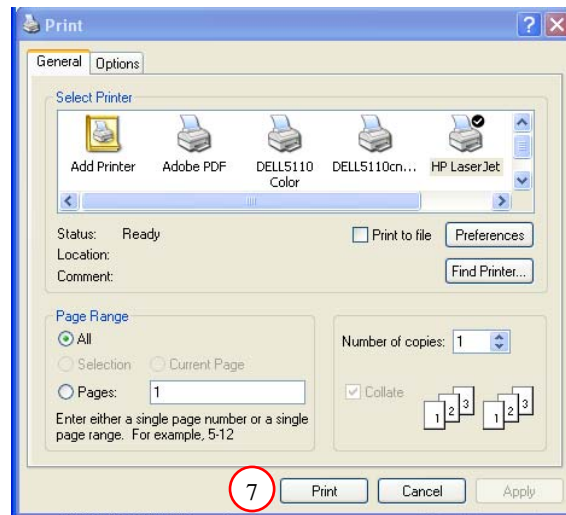
5. Select **File** from the main menu in Microsoft Internet Explorer.



6. Select **Print**.

Printing Option #1 – File > Print (continued)

The Print window displays.









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**.

Enrolled Students								Customize
	Photo	ID	Name	Grade Basis	Units	Primary Academic Program	Program and Plan	Level
1		0505150	Bell, Patricia Ann	Graded	3.00	CARER	Career Degree or Certificate - Administrative Assistant	Sophomore
2		0007304	Bone, Alva J	Graded	3.00	CARER	Career Degree or Certificate - Administrative Assistant	Sophomore
3		0450617	Brito, Trycia B	Graded	3.00	CARER	Career Degree or Certificate - Business Management/Superviso	Sophomore
4		0516233	Evans, Lula Marie	Graded	3.00	CARER	Career Degree or Certificate - Administrative Assistant Cert	Freshman
5		0502232	Hernandez, Deisy	Graded	3.00	TRANS	Associate Transfer Degree - Associate in Arts	Sophomore
6		0525739	Madura, Cheryl Sue	Graded	3.00	CARER	Career Degree or Certificate - Administrative Assistant Cert	Freshman

2

PRINTER FRIENDLY VERSION

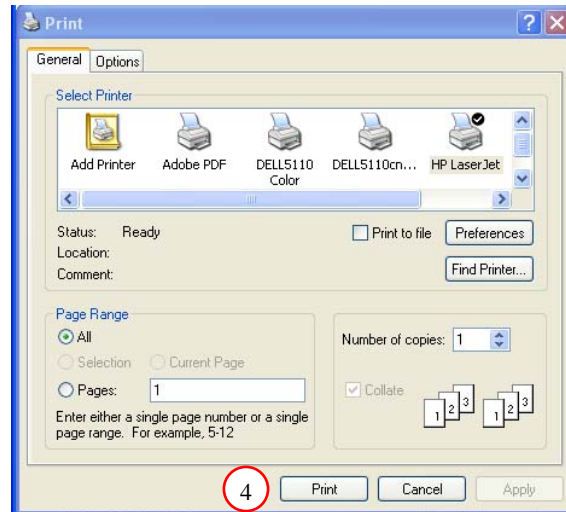
1

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.

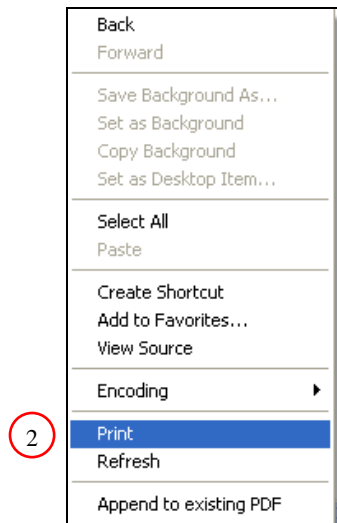


4. Click **Print** to print the roster.

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.



2. Select **Print**.

The print window appears.

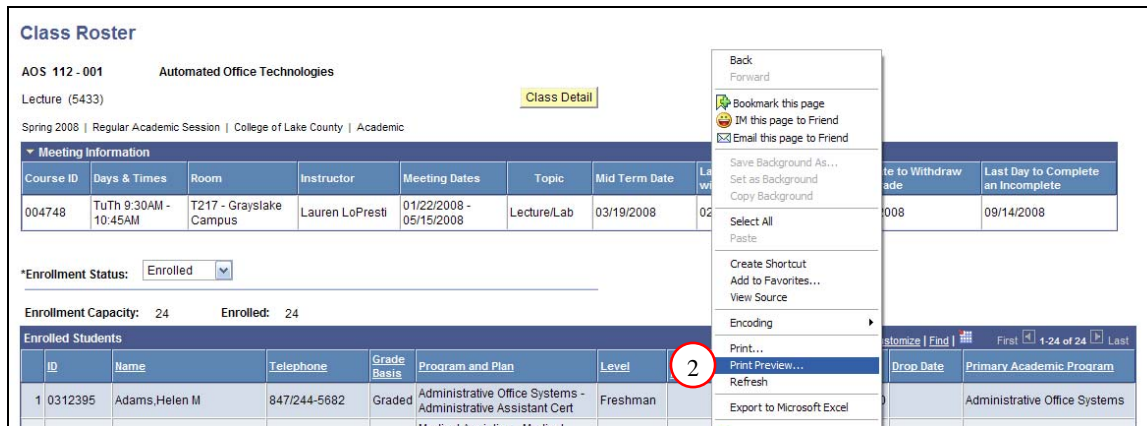
3. Click **Print** to print the roster.

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**.



Class Roster

AOS 112 - 001 Automated Office Technologies

Lecture (5433)

Spring 2008 | Regular Academic Session | College of Lake County | Academic

Meeting Information

Course ID	Days & Times	Room	Instructor	Meeting Dates	Topic	Mid Term Date	Last Day to Withdraw	Last Day to Complete an Incomplete
004748	TuTh 9:30AM - 10:45AM	T217 - Grayslake Campus	Lauren LoPresti	01/22/2008 - 05/15/2008	Lecture/Lab	03/19/2008	008	09/14/2008

*Enrollment Status:

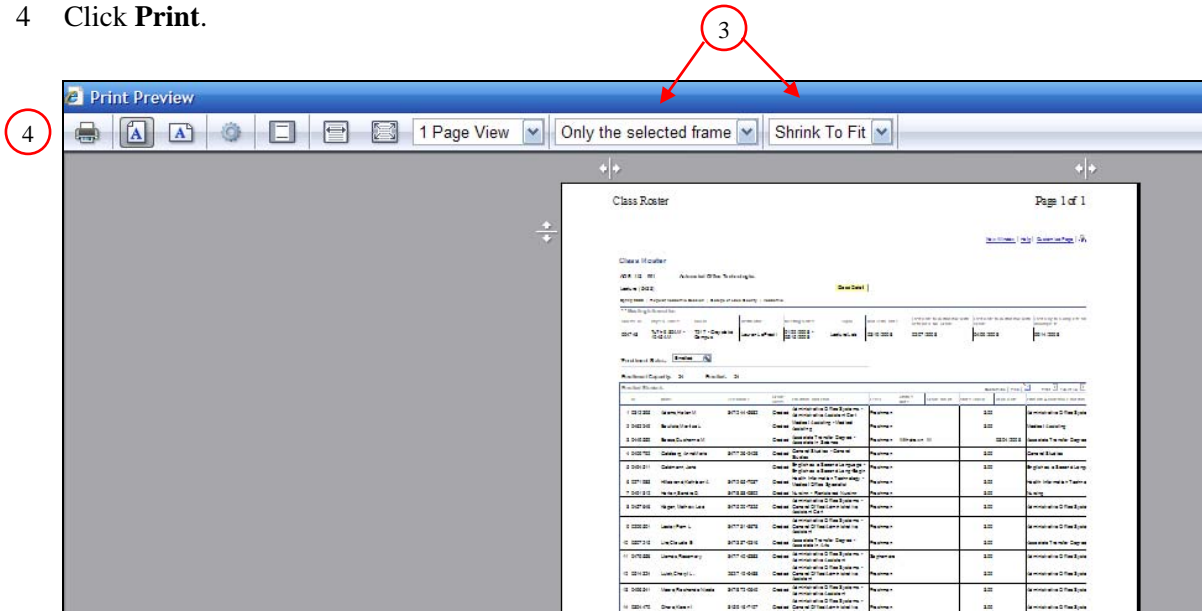
Enrollment Capacity: 24 Enrolled: 24

Enrolled Students

ID	Name	Telephone	Grade Basis	Program and Plan	Level
1 0312395	Adams, Helen M	847/244-5682	Graded	Administrative Office Systems - Administrative Assistant Cert	Freshman

Context menu options: Back, Forward, Bookmark this page, IM this page to Friend, Email this page to Friend, Save Background As..., Set as Background, Copy Background, Select All, Paste, Create Shortcut, Add to Favorites..., View Source, Encoding, Print..., **Print Preview...**, Refresh, Export to Microsoft Excel.

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



Print Preview

1 Page View | Only the selected frame | Shrink To Fit

Class Roster

Page 1 of 1

Class Information

AOS 112 - 001 Automated Office Technologies

Lecture (5433)

Spring 2008 | Regular Academic Session | College of Lake County | Academic

Meeting Information

Course ID	Days & Times	Room	Instructor	Meeting Dates	Topic	Mid Term Date	Last Day to Withdraw	Last Day to Complete an Incomplete
004748	TuTh 9:30AM - 10:45AM	T217 - Grayslake Campus	Lauren LoPresti	01/22/2008 - 05/15/2008	Lecture/Lab	03/19/2008	008	09/14/2008

*Enrollment Status:

Enrollment Capacity: 24 Enrolled: 24

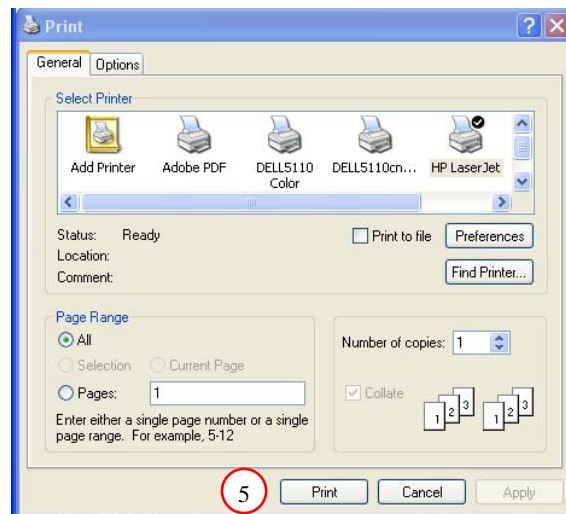
Enrolled Students

ID	Name	Telephone	Grade Basis	Program and Plan	Level
1 0312395	Adams, Helen M	847/244-5682	Graded	Administrative Office Systems - Administrative Assistant Cert	Freshman

Print button circled with a red '4'.

Printing Option #4 – Right Click (continued)

The print window appears.



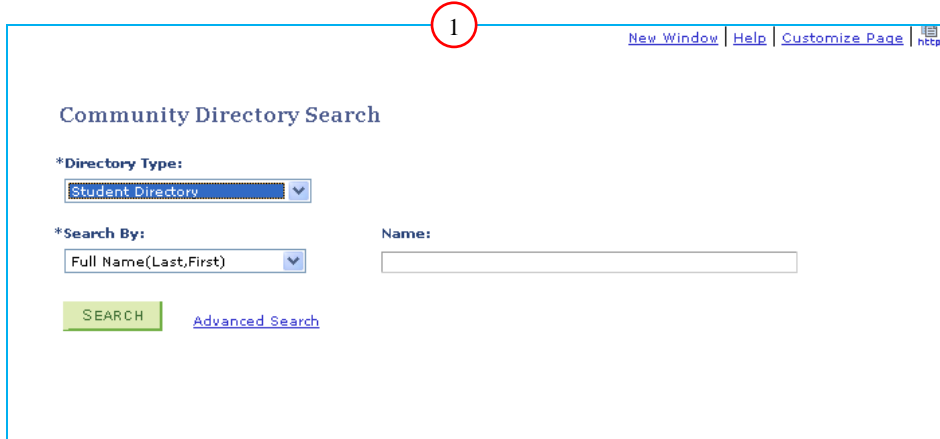
5 Click **Print** to print roster.

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.



Community Directory Search

*Directory Type:

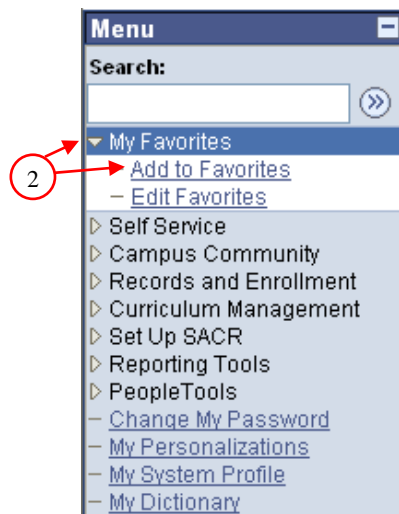
*Search By:

Name:

[Advanced Search](#)

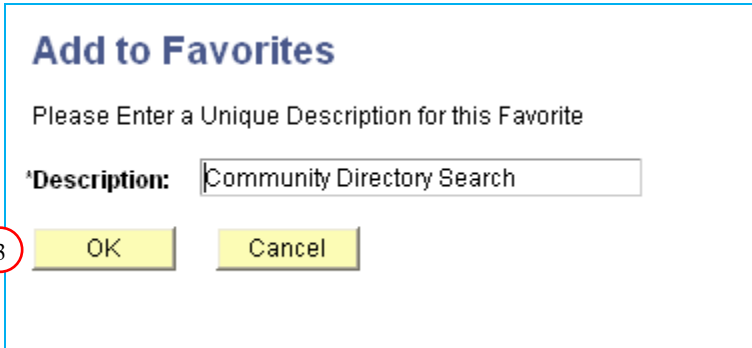
[New Window](#) | [Help](#) | [Customize Page](#) | [http](#)

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 Favorites

Please Enter a Unique Description for this Favorite

Description:

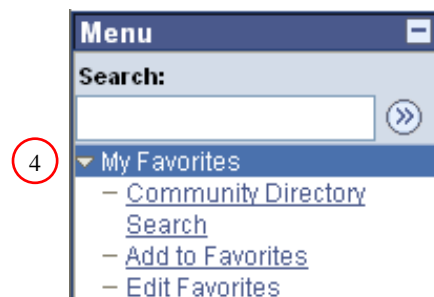
3

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.



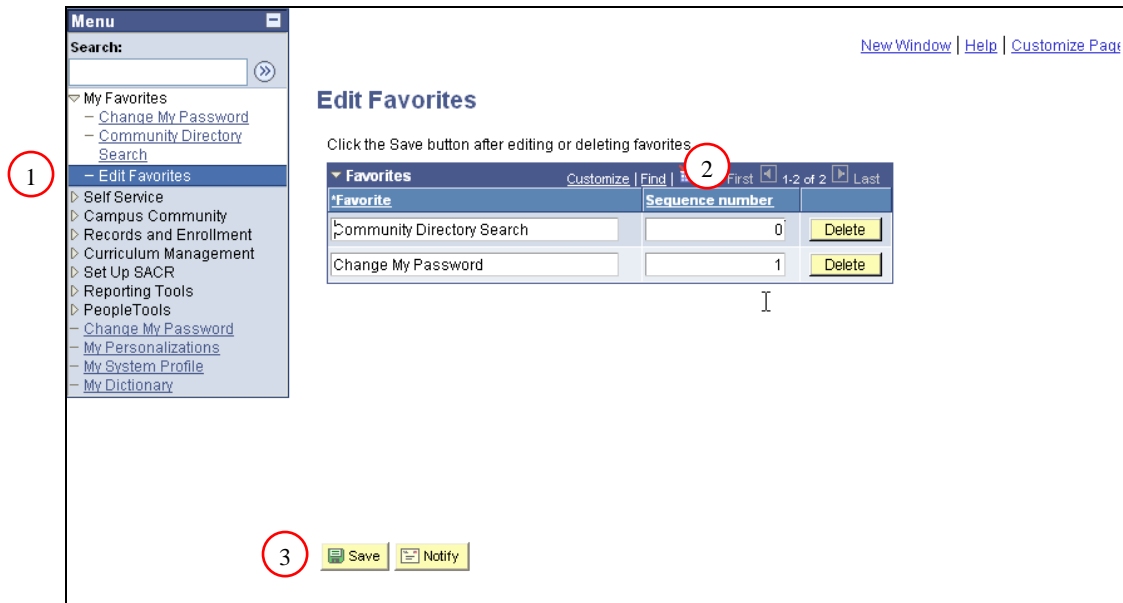
Sequencing and Editing Favorites

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:

- My Favorites
 - Change My Password
 - Community Directory Search
 - Edit Favorites**
 - Self Service
 - Campus Community
 - Records and Enrollment
 - Curriculum Management
 - Set Up SACR
 - Reporting Tools
 - PeopleTools
 - Change My Password
 - 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	Sequence number	Delete
Community Directory Search	0	Delete
Change My Password	1	Delete

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.

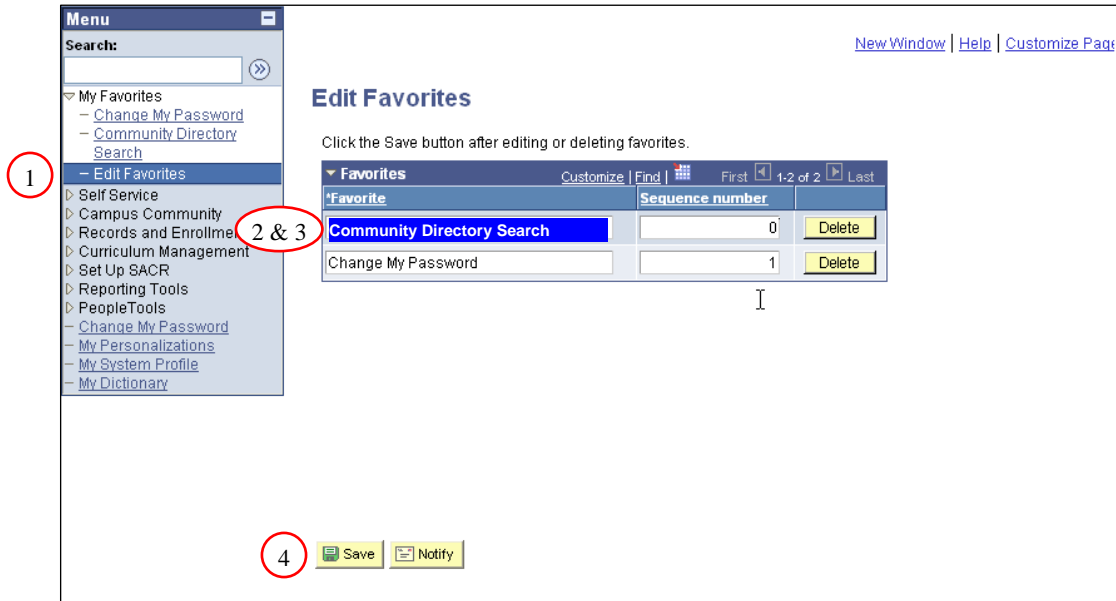
3. Click **Save** to save the new sequence.

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:

- My Favorites
 - Change My Password
 - Community Directory Search
 - Edit Favorites**
 - Self Service
 - Campus Community
 - Records and Enrollment
 - Curriculum Management
 - Set Up SACR
 - Reporting Tools
 - PeopleTools
 - Change My Password
 - 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	Sequence number	
Community Directory Search	0	Delete
Change My Password	1	Delete

Save Notify

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.



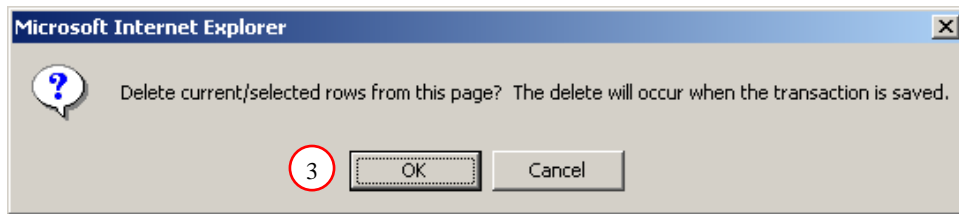
*Favorite	Sequence number
Course Catalog	0

2

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

OK Cancel

3. Click **OK**.

The Course Catalog Favorite **page** is deleted from the list.

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

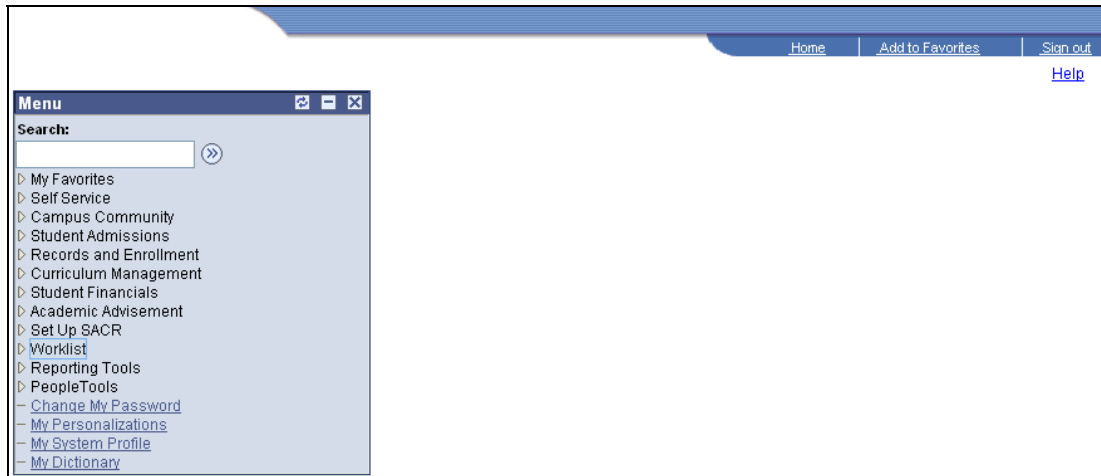
9. USING 19th 41st HOUR

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.

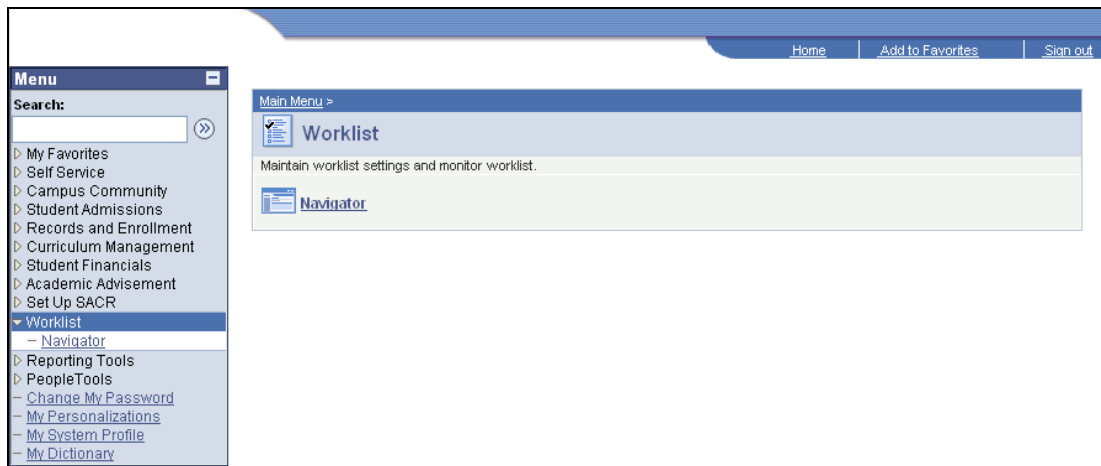
To access 19th 41st Hour do the following:

1. Click on **Worklist**.



Worklist Main Menu displays.

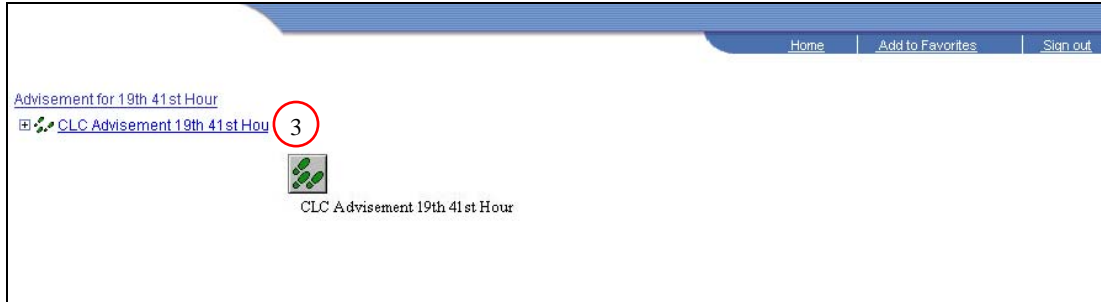
2. Click on **Navigator**.



USING 19th 41st HOUR (continued)

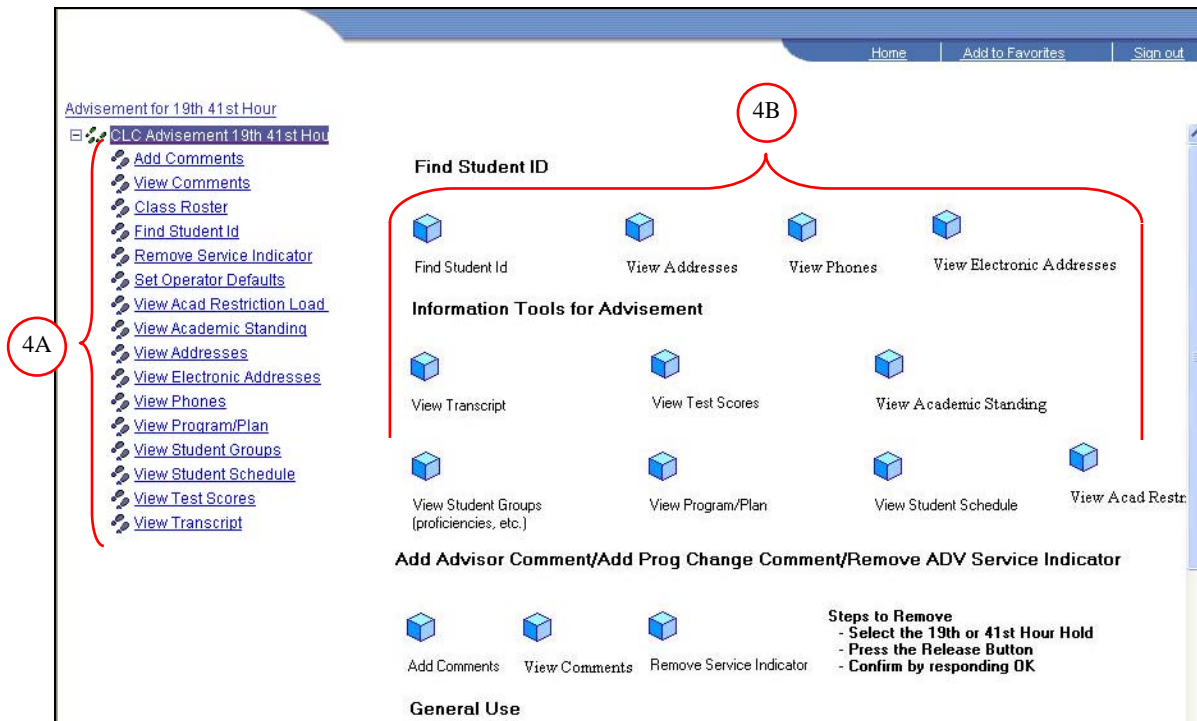
Advisement for 19th 41st Hour displays.

- Click **CLC Advisement 19th 41st Hour**.



CLC Advisement 19th 41st Hour footprints display.

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

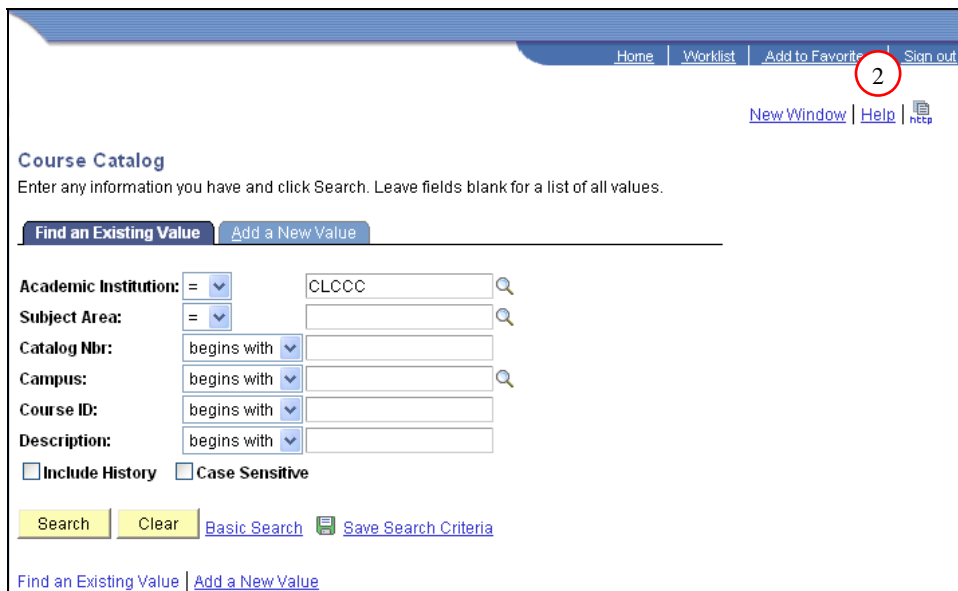


10. USING HELP

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**.

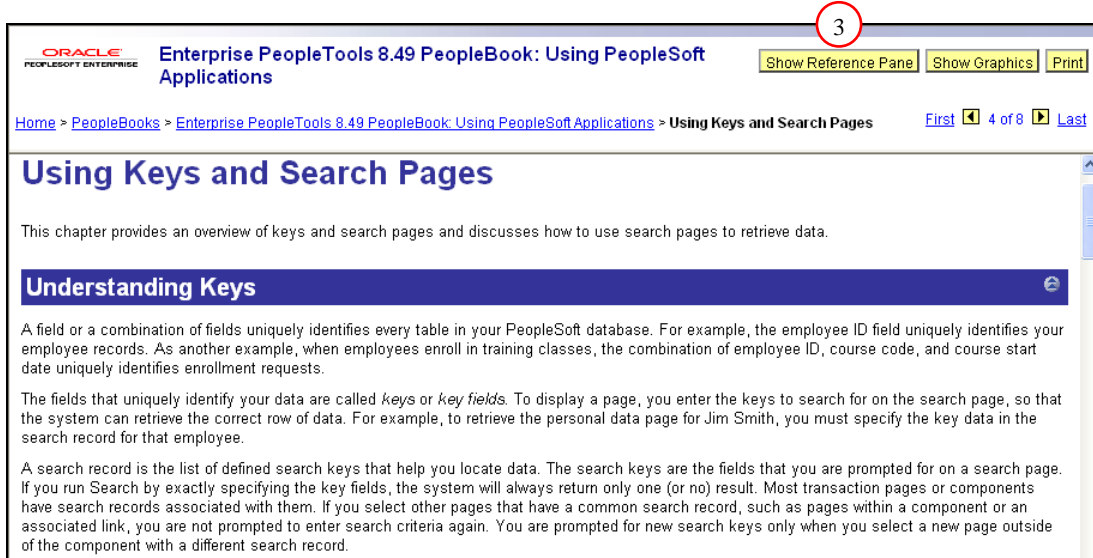
The Course Catalog search window displays.



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.

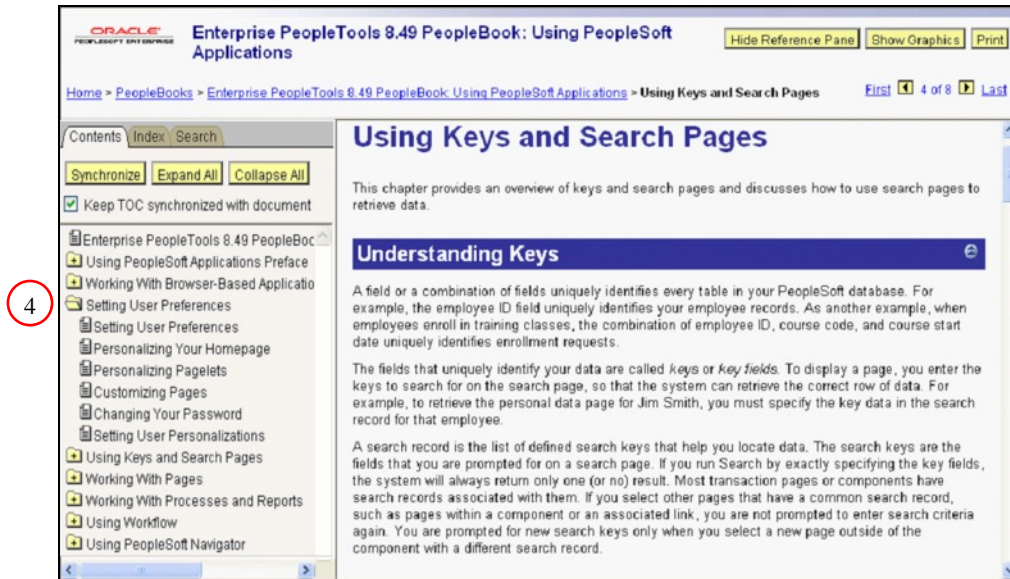
The PeopleSoft help window will display.

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



USING HELP (continued)

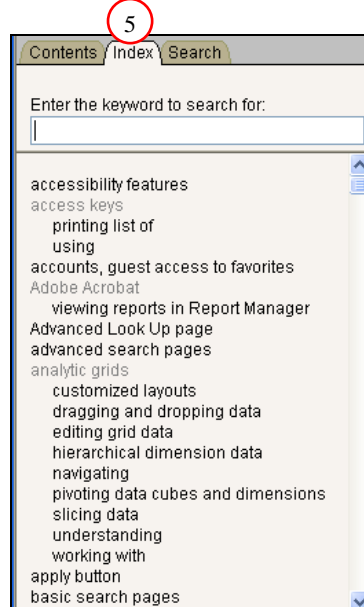
The Reference pane displays. This is a table of contents, which can be used to look up specific help topics.



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 not 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

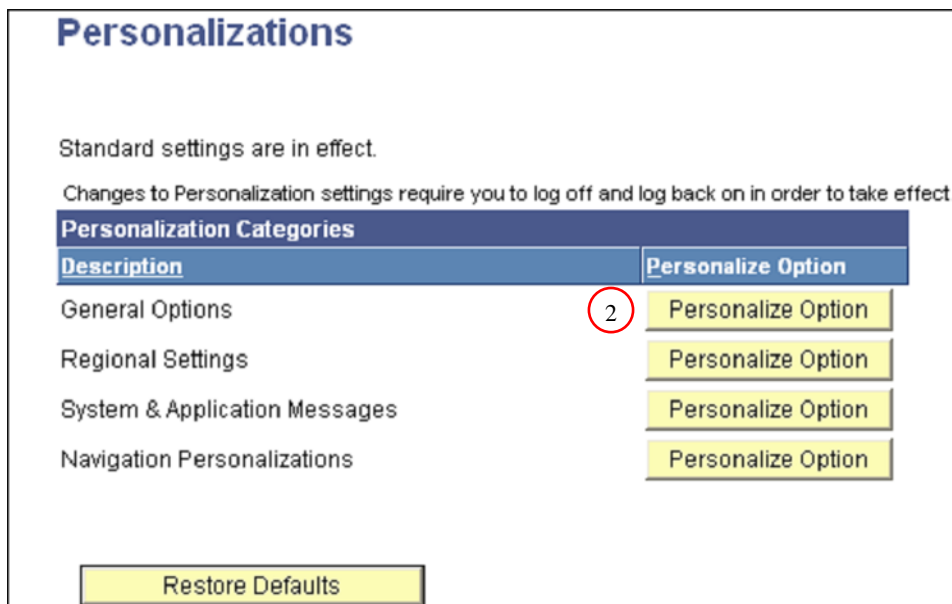
PeopleSoft 9.0 provides a section where you can create Personalization preferences. The My Personalizations link can be found near the bottom of the Menu pagelet.

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



2. Click on **General Options Personalize Option** button.

Using My Personalizations (continued)

The following screen will appear.

Option Category: General Options

Personalization Option	Default Value	Override Value	
Accessibility Features	Accessibility features off	<input type="text"/>	Explain
Excel 97 grid download	No	No 3	Explain
Time page held in cache	900	<input type="text"/>	Explain
Multi Language Entry	No	<input type="text"/>	Explain
Spell Check Dictionary	Use session language	<input type="text"/>	Explain

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

Option Category: General Options

Personalization Option	Default Value	Override Value	
Accessibility Features	Accessibility features off	<input type="text"/>	Explain
Excel 97 grid download	No	Yes 4	Explain
Time page held in cache	900	<input type="text"/>	Explain
Multi Language Entry	No	<input type="text"/>	Explain
Spell Check Dictionary	Use session language	<input type="text"/>	Explain


5

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

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

The following window will appear.

Save Confirm

 Your Personalizations have been saved.

6

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 Explain 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 OK so that the system records your changes. If you do not want your changes recorded click Cancel . 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.

Option Category: General Options

Personalizations			Find	First	1-5 of 5	Last
Personalization Option	Default Value	Override Value				
Accessibility Features	Accessibility features off	<input type="text" value=""/>			Explain	
Excel 97 grid download	No	<input type="text" value="No"/>			Explain	
Time page held in cache	900	<input type="text" value=""/>			Explain	
Multi Language Entry	No	<input type="text" value=""/>			Explain	
Spell Check Dictionary	Use session language	<input type="text" value=""/>			Explain	