OVERVIEW

Today’s demonstration introduces PeopleSoft’s login procedure and navigational capabilities. After viewing the demonstration and reviewing this document, you will understand:

- PeopleSoft Product Lines and Database Instances
- PeopleSoft Security
  - How to sign in to PeopleSoft
- PeopleSoft’s Graphical User Interface (GUI) / Internet Architecture (PIA)
  - PeopleSoft Menus and Navigation
  - Search Pages and Lists

PEOPLESOFT PRODUCT LINES DATABASE INSTANCES

To implement the PeopleSoft system, the ufBridges team will configure, load and possibly customize the system. We need “copies” of the system, called instances, in order to organize our work. PeopleSoft is a web-based environment so each instance is a complete system that you can access from the web via a distinct URL (i.e. web address). Each instance contains all the modules of the product line (like Finance and Human Resources).

PEOPLESOFT SECURITY

When a user attempts to sign on to PeopleSoft, they enter a **User ID** and a **password** on the PeopleSoft Signon page. If the ID and password are valid, PeopleSoft connects the user to the application and the system retrieves the appropriate user profile. Please note, PeopleSoft is case-sensitive so it distinguishes upper and lower case letters (i.e. gator is not the same as Gator or gatoR). Should you ever have trouble logging in, just check the case of your User ID and/or password.

If the user attempts to signon during an invalid **signon time**, as defined in their security profile, PeopleSoft does not allow them to sign on. After a user signs on, they can stay connected as long as their signon time allows and as long as their browser does not sit idle for longer than their **time-out interval**.
USER PROFILES

All PeopleSoft users have a unique ID and user profile. Since each user requires access to certain parts of the system based on their job, PeopleSoft assigns roles to these user profiles. These roles let PeopleSoft know what each user can access whenever they log in.

The only way a user can access a PeopleSoft page is through a menu. PeopleSoft Security controls what menu and corresponding actions are available to each user.
PROCEDURE – LOG IN TO PEOPLESOFT

1. Open your web browser (e.g. Internet Explorer)
2. In the Address bar, enter your desired URL
   a. http://xxyy.erp.ufl.edu/ where xx is the Product Line and yyy is the instance
   b. http://my.ufl.edu/ once we are in production (i.e. after July 1, 2004)
3. On the ensuing sign-on screen, enter your User ID (case sensitive)
4. Enter your Password (case sensitive)
5. Click the Sign In button
PEOPLESOFT INTERNET ARCHITECTURE (PIA)

PIA GRAPHICAL USER INTERFACE (GUI)

A graphical user interface is simply what you (i.e. the user) see (i.e. graphical) on your computer monitor to use or interact (i.e. interface) with the system (i.e. PeopleSoft). As a web-based application, PeopleSoft should look and feel very similar to many other pages on the Internet.

PeopleSoft’s user interface stems from the PeopleSoft Internet Architecture (PIA), which is a fancy way to say PeopleSoft functions as web-based applications that you access via a web browser. The PIA uses left hand navigation with folder dropdowns and a universal navigation header that includes the following navigational tools: Home, Worklist, Add to Favorites, and Search. The Help link takes you to context-specific reference in PeopleBooks. In other words, PeopleSoft takes you to the specific help file relating to the page you are own.

NAVIGATION ELEMENTS

PeopleSoft applications are made up of a navigational structure, components (groups of pages), and pages. Using these elements, you can enter new data or change, delete, and modify the existing data in your application. Working with the PIA is similar to browsing web pages and it is a simple, intuitive way of working with your database.
This header area remains static as you navigate through the pages.

- **Home** returns you to your homepage, which is the same page after you first log in to PeopleSoft.
- **Worklist** provides summary information about all items on your personal Worklist. This page also provides links enabling you to view additional details about the work, to perform the indicated work, and to reassign work items.
- **Add to Favorites** allows you to create your own list of bookmarks to folders and content references under the My Favorites folder in the left hand navigation.
- **Sign out** logs you out of PeopleSoft
- **Search** allows you to search for any registered content references.

**LEFT HAND NAVIGATION**
This type of PeopleSoft navigation uses folder drilldowns that begins with a top level that represents the first level of organization. This structure collapses and expands based on your selections. Ultimately, you will select a link that takes you to a component or page. PeopleSoft supplies a brief description whenever you place your cursor over a link for a few moments.

- **Click Accounts Receivable**
- **Click Pending Items**
- **Click Online Items**
COMPONENTS AND PAGES

A component is simply a group of related pages that pertain to a specific task. Components, which you access from the left hand navigation, contain tabs with each containing a related page. A page appears in the browser window as an individual display and data-entry screen. To display a page or component, you will generally enter the keys so that the system can retrieve the correct row of data. Keys are the display-only fields that uniquely identify your data.
A search record is the list of defined search keys that help you locate data. The search keys are the fields PeopleSoft prompts you on a search page. Most transaction pages or components have search records associated with them. If you select other pages that have a common search record, such as pages within a component or an associated link, PeopleSoft will not prompt you to enter search criteria again. PeopleSoft will prompt for new search keys only when you select a new page outside of the component with a different search record.

There are two types of search pages: the basic search page and the advanced search page. When you select a page, the system often displays an advanced search page, on the Find an Existing Value tab. You may also click the Add a New Value tab to add a new row of data into the table.

If the search page offers a basic search option, it appears as a Basic Search link next to the search action buttons. You can also save the specifics of your search using Save Search Criteria. Click this link to give the search a name, review the included values, and save your search. Later on, the Use Saved Search dropdown list will appear so that you can select a previously saved search. Once you save a search, that specific search record is available for use in other search pages that use the same search record. You can also delete any saved searched on the Delete Saved Searches page.
ENTERING SEARCH CRITERIA
When entering search criteria, you can enter a full or partial value for any key field. Based on what you enter, the system uses the search record to present a list of possible matches or, if there is only one match, the page you requested.

Operators allow you to search on limited amounts of information, such as the first letters for a customer, company, or state name. PeopleSoft provides the following operators: begins with, contains, =, not=, <, <=, >, >=, between, and in.

LISTS
When PeopleSoft presents you with a list, you will notice a few common elements. On the right-hand side, several navigational controls surround information about the number of items in the list with a format of x-y of z, where x-y is the range of items on the current page and z is the total number of items on all pages. First takes you to the first page of the list, and Last takes you to the last page of the list. The arrows take you to the next or previous page.

Customize takes you to a page where you can change the columns that you view in the list as well as the sort order. Find allows you to enter some basic information to filter the data in a list so you only see the data that interests you. The Download icon moves the data from PeopleSoft to a Microsoft Excel spreadsheet that you can save to your workstation or a shared folder.
From any page or component, you can click the **Help** link and PeopleSoft will launch PeopleBooks AND take you to the specific section containing pertinent information about the page or component you required help. This is what we call context-based referencing.