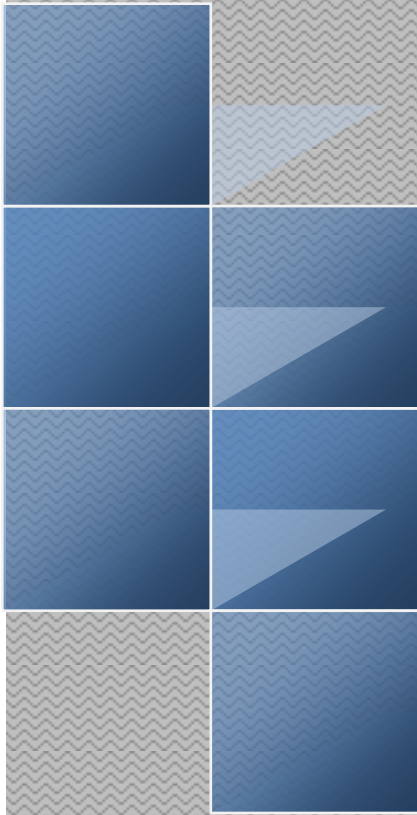




# The University of New Orleans

WebSTAR (PeopleSoft Learning Solutions v 9.0):

Basic Navigation Training Manual



# PeopleSoft 9.0 Basic Navigation Training

Welcome to the **Basic Navigation Training** module! This module contains the information and tools needed to navigate the new elements of Peoplesoft version 9.0.

**Goal**                    To have the skills and knowledge to navigate in PeopleSoft 9.0

**Participate**            at the end of this module, you will be able to.....  
**Objectives**

1. Navigate Peoplesoft 9.0
2. Understand key terms

**If you have any questions about this document please contact the Training group at 504-280-5645 or visit us at UCC-101Q.**

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## What is PeopleSoft? (WebSTAR)

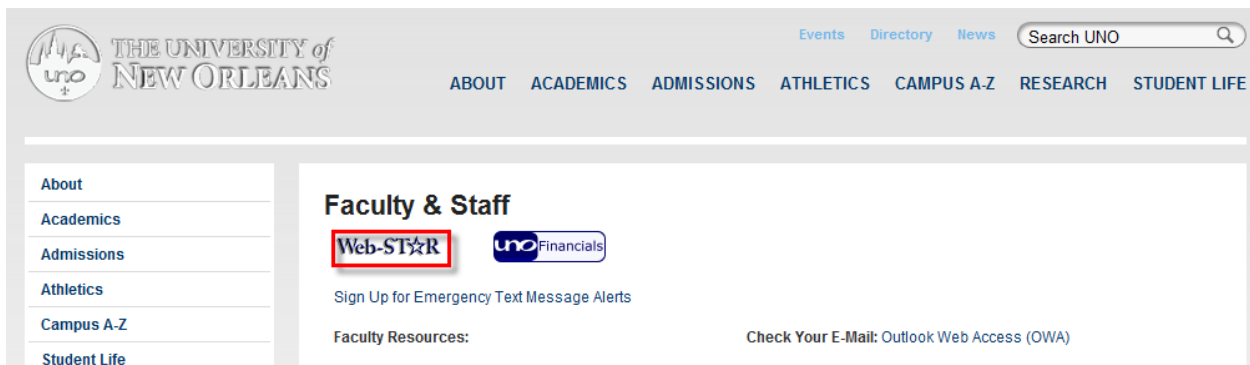
PeopleSoft is a web application used by the University of New Orleans to maintain view and update Student University Data and Human resource data. The content included is Admissions, Student Records, Course Information, Human Resource, Biographic and Student Financials data. To access PeopleSoft all you need is a browser on your PC or MAC. PeopleSoft is best used with Internet Explorer.

## Navigation to Web-STAR

<b>Step 1.</b>	Navigate to the UNO Home Page: <a href="http://www.uno.edu/">http://www.uno.edu/</a>
<b>Step 2.</b>	Select the <b>Faculty &amp; Staff</b> link.



<b>Step 3.</b>	Select the <b>Web-STAR</b> logo.
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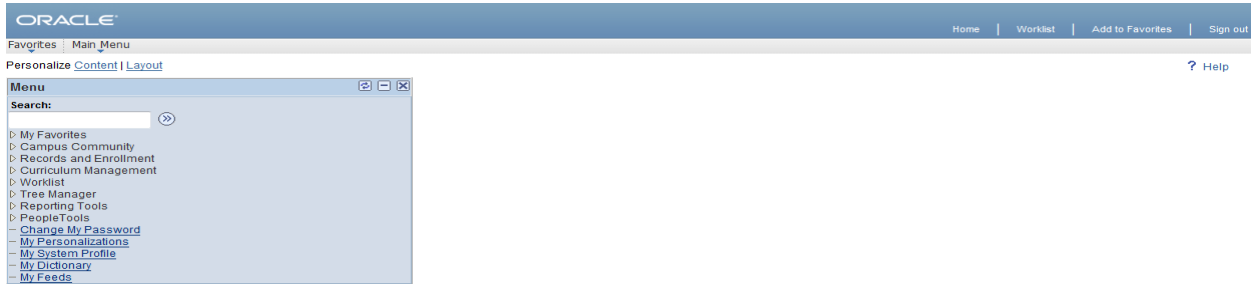
**Step 4.** Select the appropriate link based on your role at the University.



**Step 5.** Enter your UNO username and password. **Note:** Your user name is the as your email, computer or blackboard course username and password.



**Step 5.** Welcome to the Web-STAR Home Page. The home page is your starting point. On the left-hand side of the homepage is the menu. The items available in your menu are determined by your PeopleSoft Security. Menu items with triangles next to them can be expanded and collapsed.

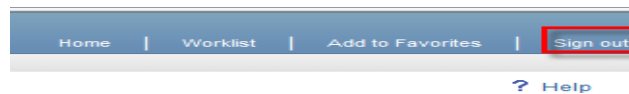


## Signing Out

To sign out click the Sign Out link on the navigational header that appears at the top of the page.

**Note:** Before you sign out of any transaction page, you must save any changes before signing out. For security purposes, the system will automatically log you out after a period of twenty minutes of inactivity. Prior to your session timeout, the system will provide a warning that your browser session is about to expire. You can continue your session by clicking on the OK button in the warning message.

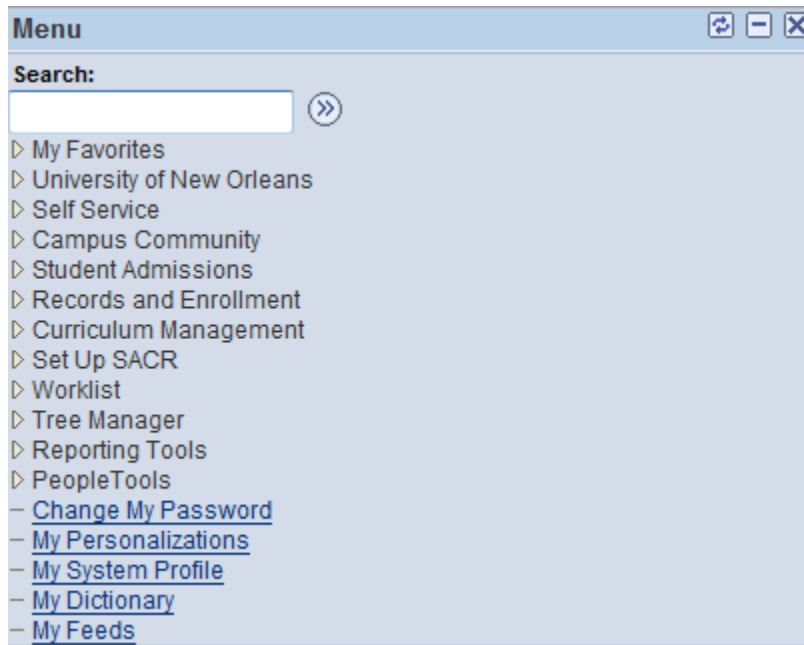
**Step 1.** Select the [Sign Out](#) link on the navigational header.



## Navigating in WebSTAR

### Using Menu Pagelet

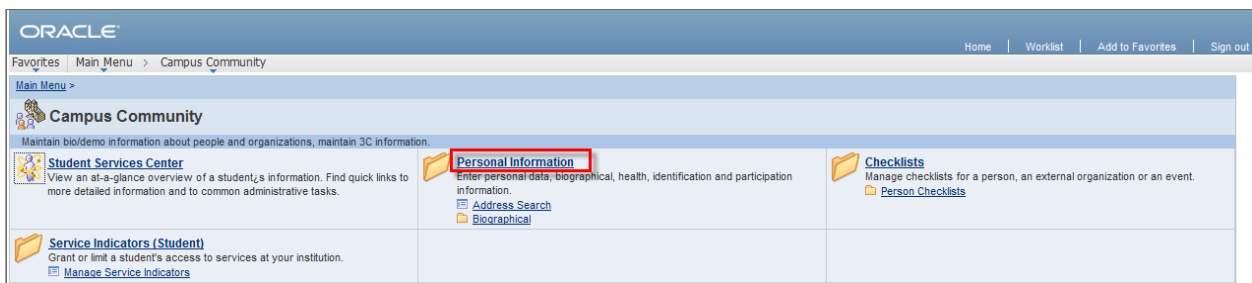
The menu pagelet navigation is on the left side of the page and is an intuitive way of updating or viewing data in Web-STAR (PeopleSoft). The menu is located on the left side of your screen and consists of a hierarchy of folders and content references. Expanding and collapsing these folders, and selecting content references from within them, is one of the primary ways of navigating within PeopleSoft applications.



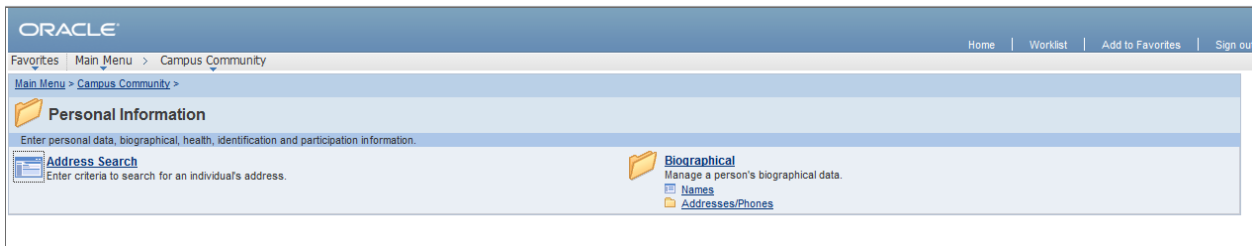
## Using Navigation Pages

The menu is a navigation hierarchy. When you click on a menu option at the highest level, the next level is expanded and highlighted.

<p><b>Step 1.</b></p>	<p>Click the <b>Campus Community</b> link. When you open a menu level, a navigation page is also displayed. PeopleSoft provides navigation pages as alternatives to the menu pagelet. The navigation pages provide task-driven pages that group processes into sections, with a brief explanation of what each section is about, and one or more links to either folders or page groups. Notice also that the header shows the navigation path, with links you can click if you want to return to a higher level.</p>
<p><b>Step 2.</b></p>	<p>Click the <b>Personal Information</b> link.</p>



	<p>Icons at each section level identify whether a link will open a new folder, or a page. The Address Search section displays a link to a page group. Other sections show folder icons. In these sections, the links that are contained in the folder are also displayed. Up to four links are displayed. If there are more than four, you can click the <b>nMore..</b> link to view the additional links.</p>
<p><b>Step 3.</b></p>	<p>Click the <b>Biographical</b> link and select the desired link under the Biographical folder.</p>



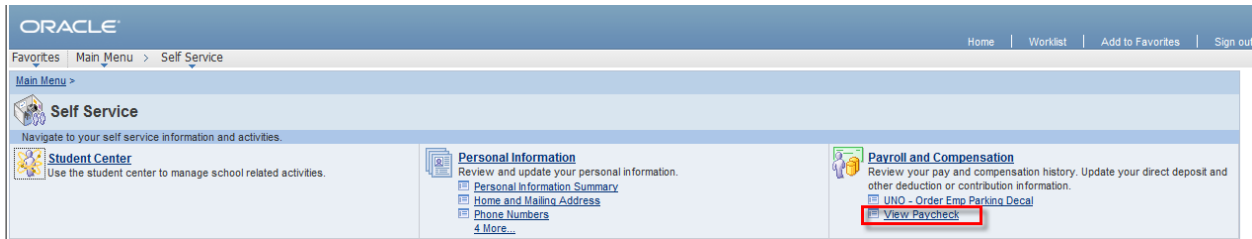


## Using Favorites

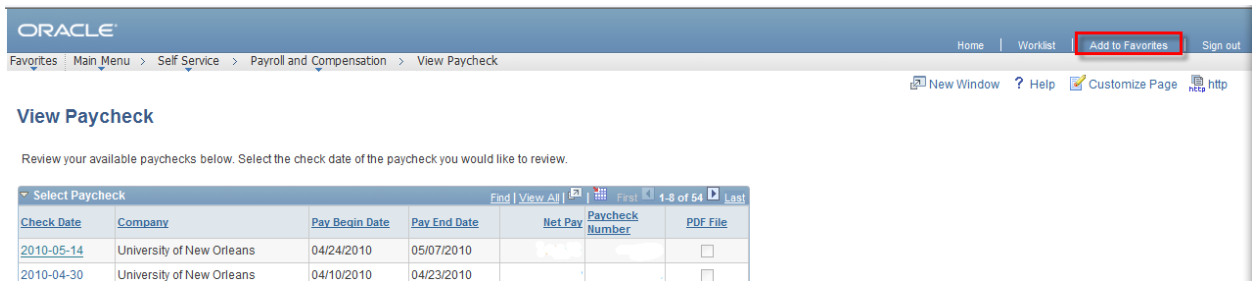
One of the new features of PeopleSoft 9.0 is the ability to add pages that you use frequently to a Favorites menu in PeopleSoft. The favorites list is your own list of bookmarks. Once you add a favorite, it appears under the favorites menu. You can return to the page by clicking the link for the page that you want to view.

### Add Favorites

**Step 1.** Navigate to **Self Service, Payroll and Compensation, View Paycheck .**

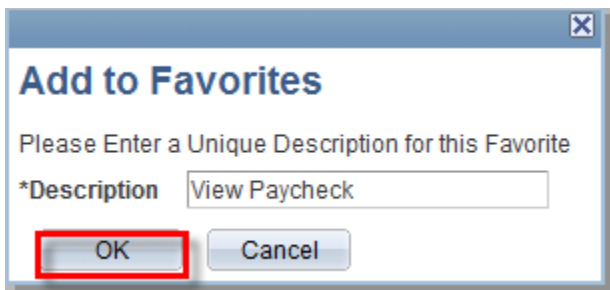


**Step 2.** When you are on the **View Paycheck** page. Select the **Add to Favorites** link on the navigational header.



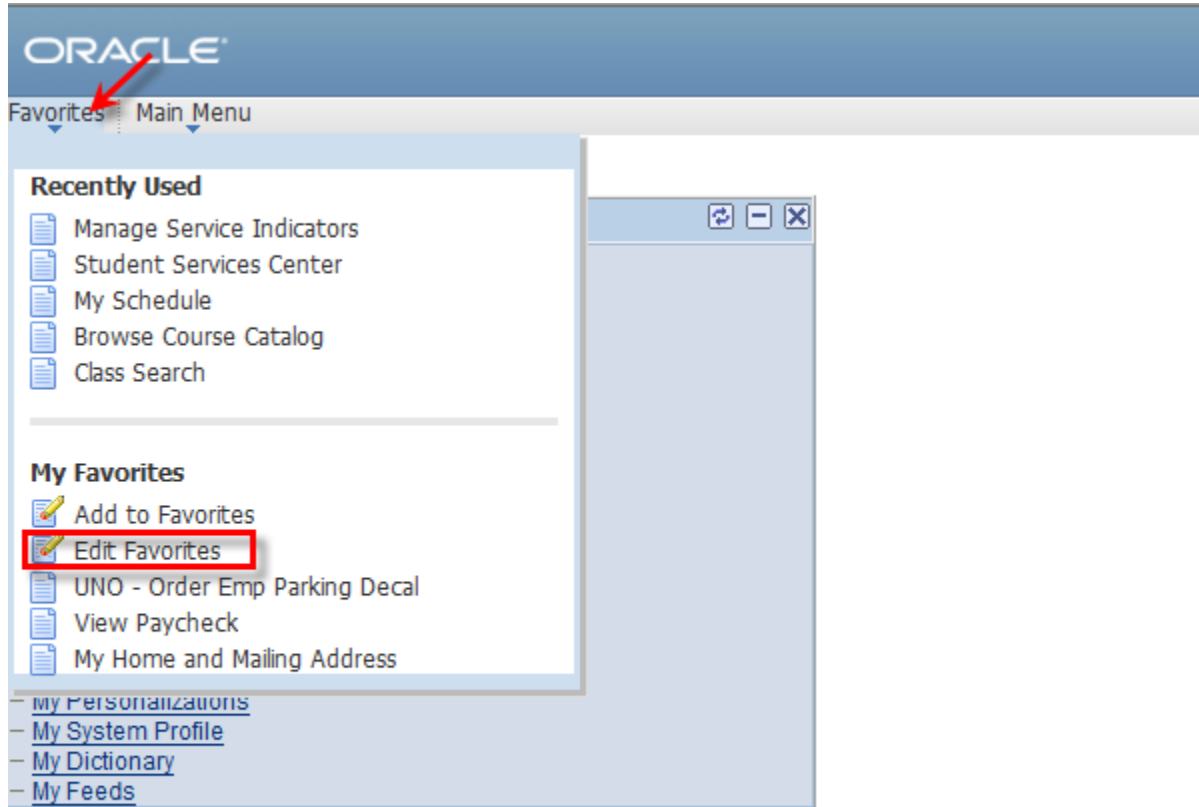
**Step 3.** The description of the page will auto populate. If necessary, the description can be modified.

**Step 4.** Click **OK**. Once the favorite is added you are automatically returned to the page that you were on before you selected Add to Favorites.

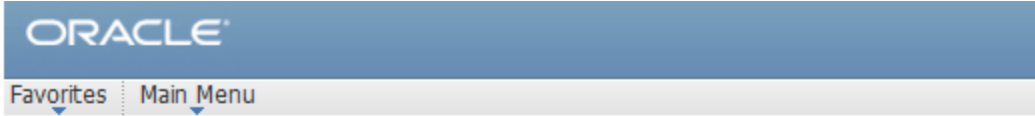


## Remove Favorites

<b>Step 1.</b>	Click the <b>My Favorites</b> link.
<b>Step 2.</b>	Select <b>Edit Favorites</b> .



<b>Step 3.</b>	At this point, you can change the name of any favorites, change the sequence they appear in, or delete one altogether. To change the name type over the displayed name.
<b>Step 4.</b>	To change the sequence, type the desired number over the displayed numbers.
<b>Step 5.</b>	After you submit changes click <b>Save</b> .



## Edit Favorites

Click the Save button after editing or deleting favorites.

Favorites <span>Customize   Find   [Icon]   [Icon] First 1-3 of 3 Last</span>		
*Favorite	Sequence number	
UNO - Order Emp Parking Decal	1	Delete
View Paycheck	2	Delete
My Home and Mailing Address	3	Delete

## Using Search Criteria

Flexible search criteria allow you to specify how you want PeopleSoft to match the criteria you enter to the values in the field. For example, you can specify that the criteria you enter should appear at the beginning of the field value, or that it must match exactly.

Default operators are provided for each search key. Notice on the displayed search page that the defaults are = or **begins with**. This means that the system searches for records in which the field value equals (matches exactly) your criteria or, in the second case, begins with your criteria. **Note:** that if you choose **between**, a second field will open for the end value of the range.

Displayed below is a list of all the operators that are available when conducting a search.

Operator	Field Use
<b>Begins with</b>	Character fields.
<b>contains</b>	Character fields.
=	All field types.
<b>Not=</b>	All field types.
<	All field types.
<=	All field types.
>	All field types.
>=	All field types.
<b>between</b>	All field types.
<b>in</b>	All field types.

In this example, you are searching for a course in the English department. You know the course name begins with English, but you aren't sure of the exact name. If the course description began with the word English, you could use the "begins with" operator and enter the word **English** in the field next to the operator. This would return all descriptions that begin with the word English. But if you're not sure that the course title begins with the word English, you need to use the "contains" operator. Using an operator for more than one field helps to make your search even more specific. The **Search Results** list displays all the English courses with the word **English** in the description.

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

Find an Existing Value

Maximum number of rows to return (up to 300):

Academic Institution: =

Term: =

Subject Area: =

Catalog Nbr: begins with

Academic Career: =

Campus: begins with

Description: contains

Course ID: begins with

Course Offering Nbr: =

Case Sensitive

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

**Search Results**

View All First 1-12 of 12 Last

Academic Institution	Term	Subject Area	Catalog Nbr	Academic Career	Campus	Description	Course ID	Course Offering Nbr
UNOLA	0980	ENGL	4715	Undergrad	MAIN	18th Century English Novel	001363	1
UNOLA	0980	ENGL	4715G	Graduate	MAIN	18th Century English Novel	001363	2
UNOLA	0980	ENGL	150	Undergrad	MAIN	Developmental English	001265	1
UNOLA	0980	ENGL	1156	Undergrad	MAIN	English Composition	004796	1
UNOLA	0980	ENGL	1157	Undergrad	MAIN	English Composition	001278	1
UNOLA	0980	ENGL	1158	Undergrad	MAIN	English Composition	001279	1
UNOLA	0980	ENGL	1159	Undergrad	MAIN	English Composition Honors	001280	1
UNOLA	0980	ENGL	4398	Undergrad	MAIN	Internship in English	001352	1
UNOLA	0980	ENGL	4398G	Graduate	MAIN	Internship in English	001352	2
UNOLA	0980	ENGL	6398	Graduate	MAIN	Internship in English	001394	1
UNOLA	0980	ENGL	6280	Graduate	MAIN	Intro Grad Studies in English	001312	1
UNOLA	0980	ENGL	3394	Undergrad	MAIN	Seminar in English	001320	1

## Working with grids

On some pages, some of the fields are repeated in order to enter multiple rows of data. For this purpose, PeopleSoft uses **grids**. With grids, you have the ability to add, edit, and view multiple occurrences (rows) of data for a group of fields on one page.

The **Class Roster** page contains a grid area. Instead of using a traditional scroll bar to scroll through the rows of data in a grid, PeopleSoft uses navigation buttons and hyperlinks.

Most often, you will find these buttons and hyperlinks in the **navigation header** for each area, with the exception of the **Insert Row** and **Delete Row** buttons. The **First** link takes you to the first row of data. Use the **Previous Row** arrow to navigate to the previous row of data. Use the **Previous Row** arrow to navigate to the previous row of data. The number system for the rows shows the number of rows you are currently viewing. Use the **Next Row** arrow to navigate to the next row of data.

Grids look similar to a spreadsheet with **column headings**, **rows**, and **cells**. The cells are equivalent to fields. Fields within a grid may be represented as edit boxes, drop-down list boxes, check boxes, and radio or prompt buttons.

The screenshot shows the 'UNO Class Roster' page. At the top right, there are links for 'New Window' and 'Help'. Below the page title, course information is displayed: Course ID: 000026 Management Accounting, University of New Orleans; Catalog: ACCT 2130, 2010 Fall; Class Nbr: 10025 Section: 003 Lecture, Regular Academic Session. A 'Roster Type' section has 'Enrollment Status' set to 'Enrolled'. Below this, it shows 'Total Students: 31' and a 'Detail' link. The main grid has a navigation header with 'Customize', 'Find', 'First', '1-31 of 31', and 'Last' buttons. The grid columns are: Name, Enrolled/Withdrawn, Academic Level - Term Start, Student ID, Short Desc, Hours, Prim Prog, Academic Plan, and Academic Sub-Plan. The first four rows of data are visible, all showing 'Enrolled' status and 'Junior' level.

## Using the Customize Link to Personalize Grids

For most grids, including some analytic grids, you can use the Customize link to change the order of the columns, the sort order, which columns are frozen, and which columns are hidden. You can also share your grid customizations with other users or copy other users' settings. You control these settings on the Personalize Column and Sort Order page, which you open by clicking the Customize link in the grid's navigation header. Any personalizations that you make to a grid remain in place until you change them.

## Changing the Column Ordering

**Step 1.** Select the **Customize** link on the grid.

The screenshot shows a web application interface for an 'Enrollment List'. At the top, there is a 'Customize' button highlighted with a red box. Below it are tabs for 'Fields 1-7', 'Fields 8-11', 'Fields 12-19', 'Fields 20-25', 'Fields 26-30', 'Fields 31-35', and 'Fields 36-40'. The main table has the following columns: User ID, ID, Term, Class Nbr, Subject Area, Catalog Nbr, and Academic Career. The data rows are as follows:

	User ID	ID	Term	Class Nbr	Subject Area	Catalog Nbr	Academic Career
1	E2056607	2220991	0980	11933	PHYS	1031	UGRD
2	E2056607	2220991	0980	11941	PHYS	1033	UGRD
3	E2056607	2220991	0980	11941	PHYS	1033	UGRD
4	E2056607	2220991	0980	11941	PHYS	1033	UGRD
5	E2056607	2220991	0980	11933	PHYS	1031	UGRD
6	E2056607	2220991	0980	11936	PHYS	1031	UGRD
7	E2056607	2220991	0980	11941	PHYS	1033	UGRD
8	E2056607	2220991	0980	10680	ENGL	1157	UGRD
9	E2069204	2220991	0980	11942	PHYS	1034	UGRD

- Step 2.** Under the **Column Order**, select the column that you want to move.
- Step 3.** To change the sequence, or add fields to sort order, highlight column name, then press the appropriate button.
- Step 4.** Click **OK** to save your changes and return to the transaction page.

### Personalize Column and Sort Order

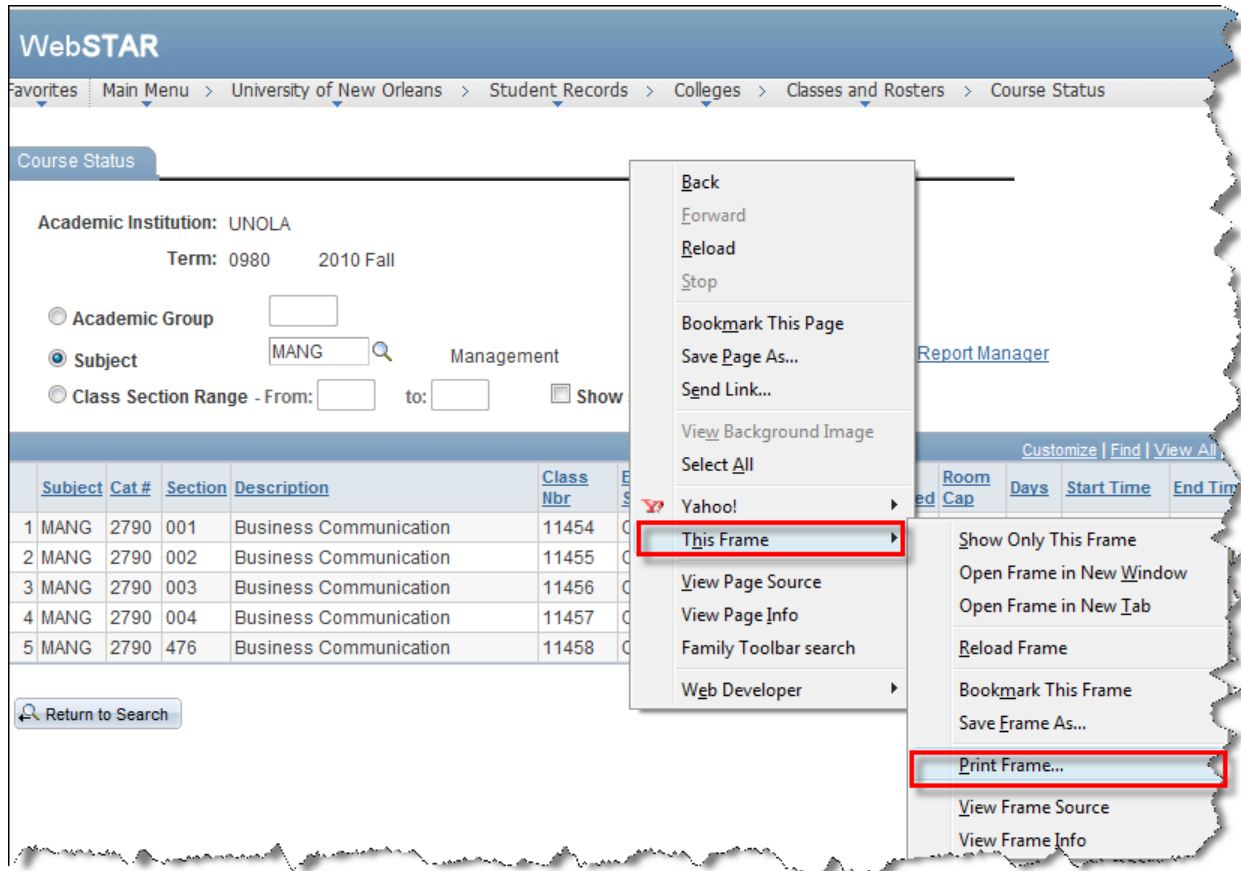
To order columns or add fields to sort order, highlight column name, then press the appropriate button.  
 Frozen columns display under every tab.

The screenshot shows a dialog box with two main sections: 'Column Order' and 'Sort Order'.  
 - **Column Order:** A list of fields including 'Tab Fields 1-7', 'User ID', 'ID', 'Term', 'Class Nbr', 'Subject Area', 'Catalog Nbr' (highlighted in red), 'Academic Career', 'Tab Fields 8-11', 'Enrollment Request ID', 'Last Update DateTime', 'Enrollment Request Source', and 'Enrollment Req Detail Sequence'. To the right of this list are 'Hidden' and 'Frozen' checkboxes, both unchecked. Above the list are 'Move Up' and 'Move Down' buttons. A red arrow points to the 'Move Up' button.  
 - **Sort Order:** An empty list. To its right are 'Move Up' and 'Move Down' buttons, and a 'Descending' checkbox which is unchecked.

## Printing Active Screens in PeopleSoft Version 9 (Mozilla Fire Fox)

### Print Frame

<b>Step 1.</b>	Right-click in the desired frame.
<b>Step 2.</b>	Select <b>This Frame</b> .
<b>Step 3.</b>	Select <b>Print Frame</b> .

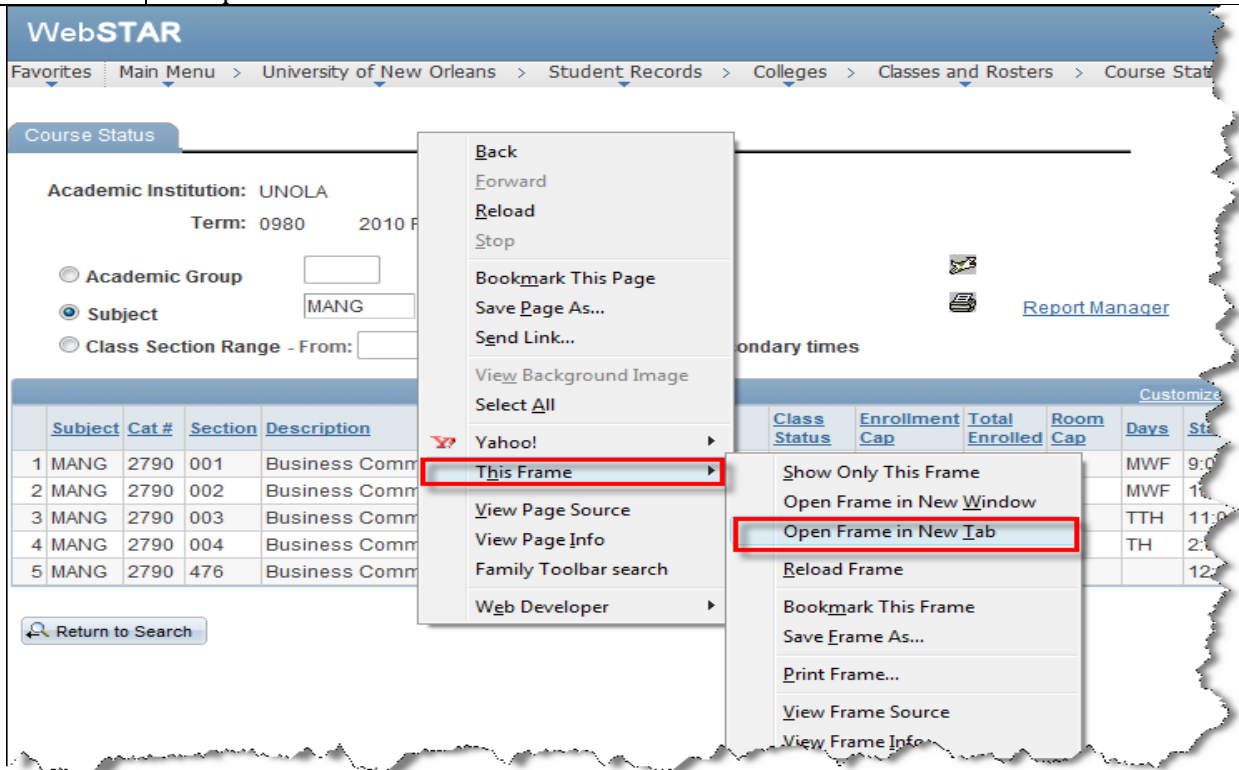


<b>Step 4.</b>	The data portion of the screen should print
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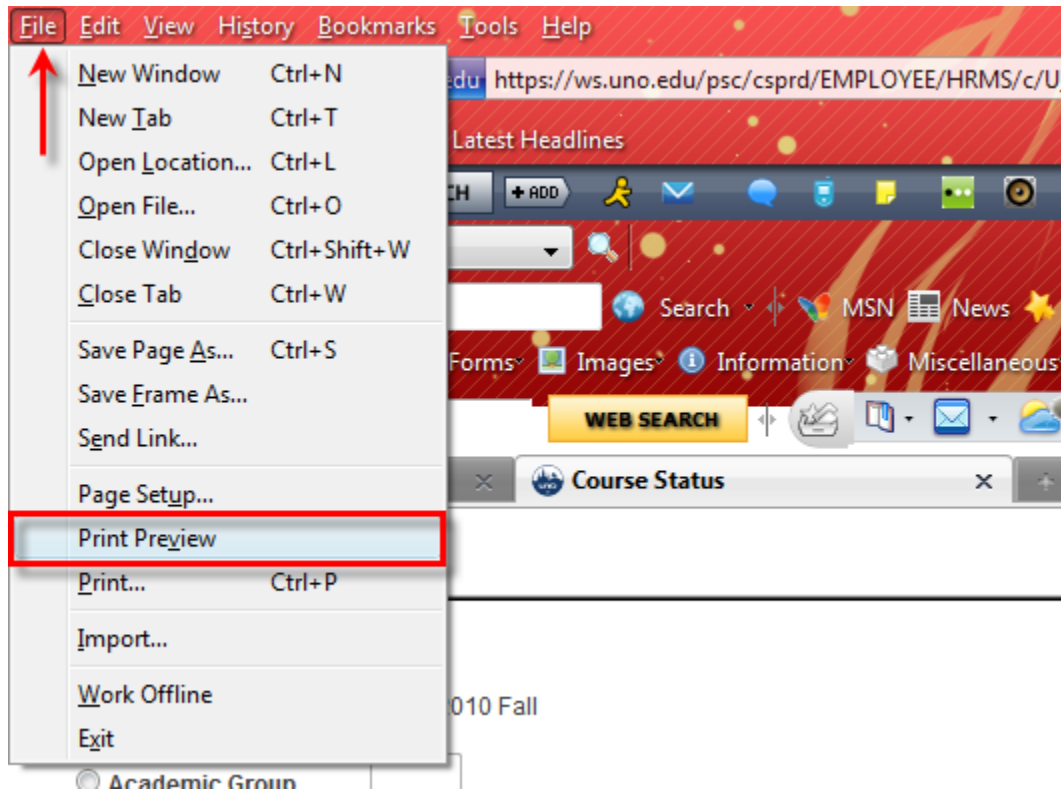


## Open and Print Frame in New Tab

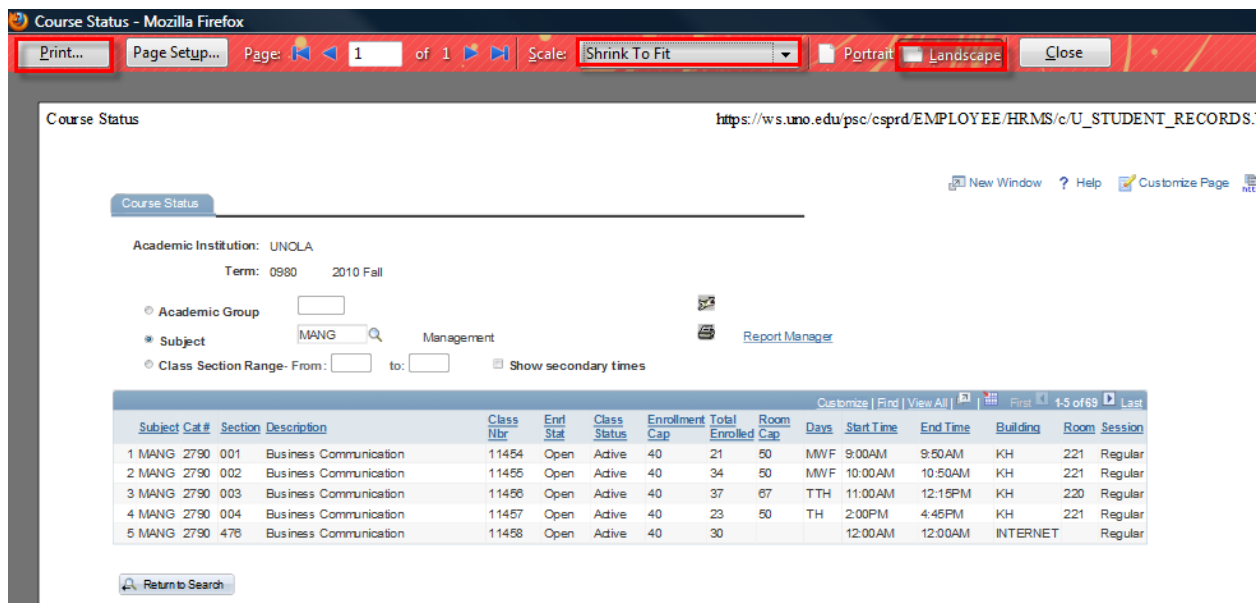
<b>Step 1.</b>	Right-click in the desired frame.
<b>Step 2.</b>	Select <b>Open Frame in New Tab</b> . This will create a new browser tab containing the data portion of the screen.



**Step 3.** Use the normal **File > Print Preview** or **Print** dialog.



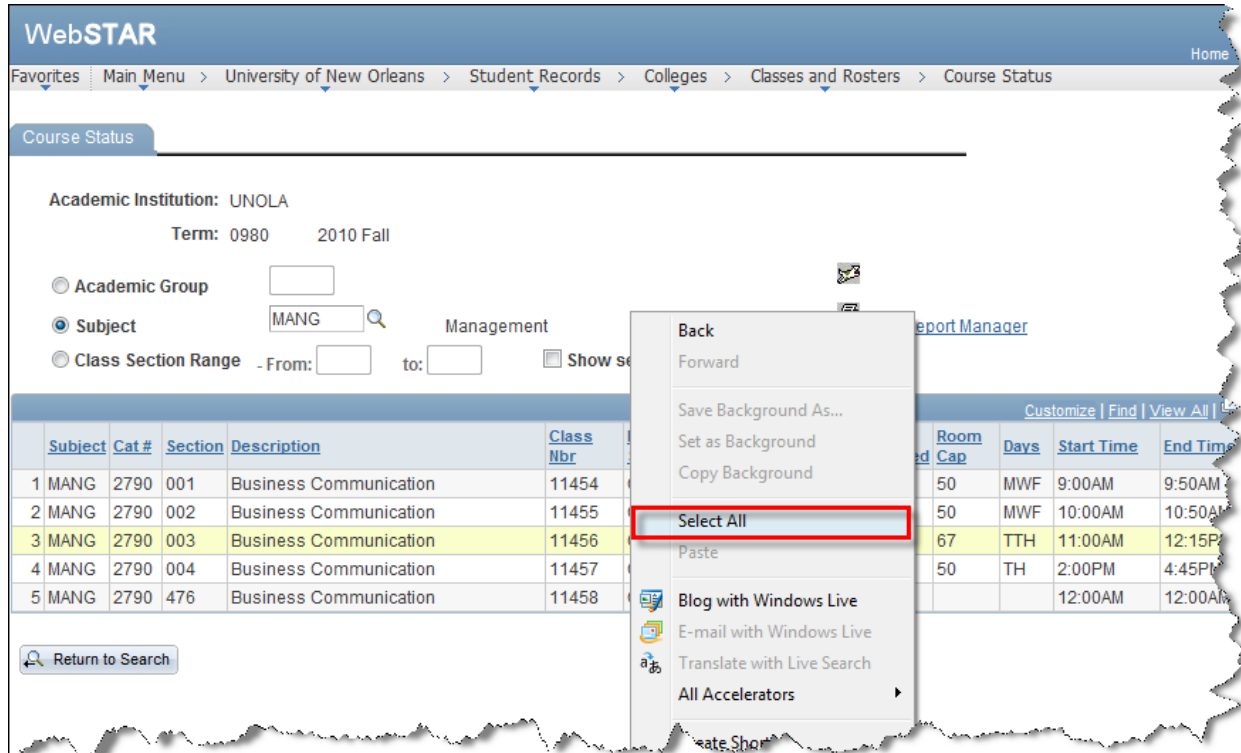
**Step 4.** In the Print Preview window, select **Landscape** mode.  
**Step 5.** Select **Shrink to Fit**.  
**Step 6.** Select **Print** button.



## Printing Active Screens in PeopleSoft Version 9 (Internet Explorer)

### Print Frame

<b>Step 1.</b>	Right-click inside the desired frame.
<b>Step 2.</b>	Choose <b>Select All</b> .



**Step 2.** Right-click a highlighted area and select **Print Preview**.

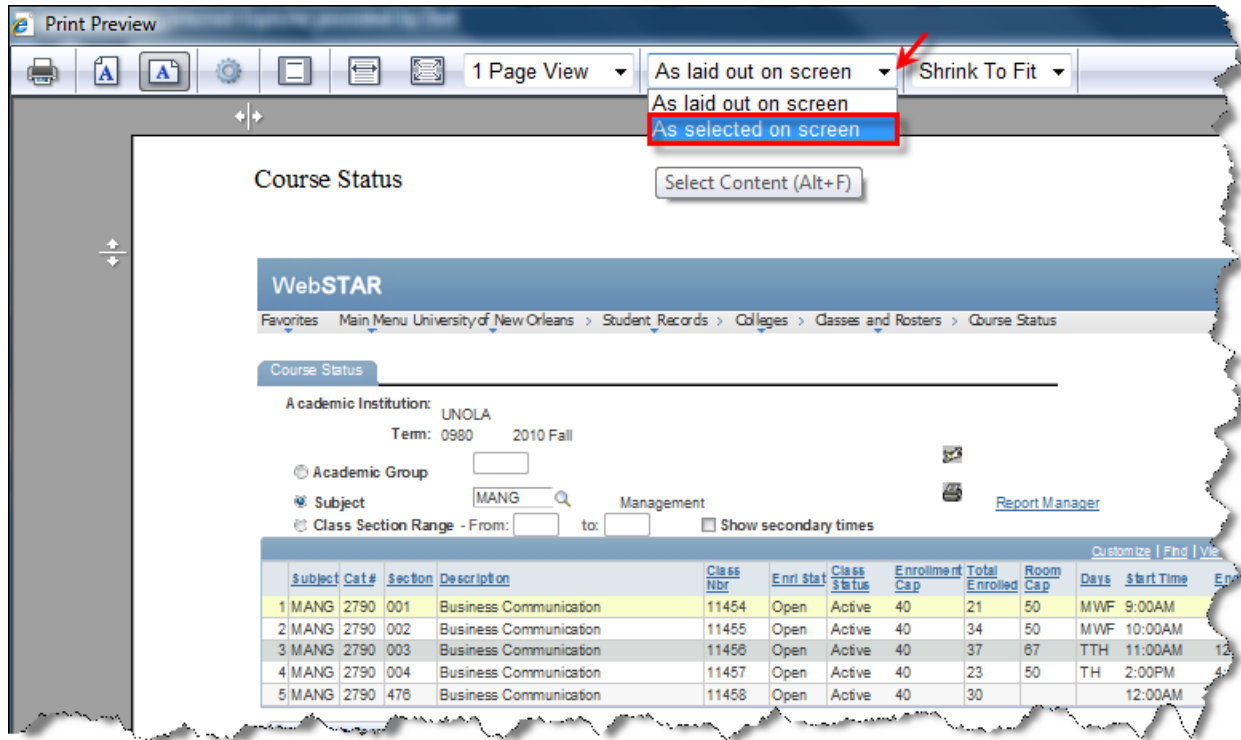
The screenshot shows the WebSTAR interface for 'Course Status' at UNOLA, Term 0980 (2010 Fall). The subject is 'MANG' (Management). A table lists five class sections. A right-click context menu is open over the table, with 'Print Preview...' highlighted in red.


	Subject	Cat #	Section	Description	Class Nbr	Enrl Stat	Class Status	Enrollment Cap	Total Enro
1	MANG	2790	001	Business Communication	11454	Open	Active	40	21
2	MANG	2790	002	Business Commu				40	34
3	MANG	2790	003	Business Commu				40	37
4	MANG	2790	004	Business Commu				40	23
5	MANG	2790	476	Business Commu				40	30

**Step 3.** In the Print Preview window, select **Landscape** mode.

The screenshot shows the 'Print Preview' window. The page setup toolbar at the top indicates 'Landscape (Alt+L)' is selected. The main content area displays the 'Course Status' page from the previous screenshot, rendered in a landscape orientation.

**Step 4.** Under the **As laid out on the screen** drop-down, select **As selected on the screen**.



**Step 5.** Choose **Shrink To Fit** or **80%** shows all of the desired fields.  
**Step 6.** Select the  button.

