

Walk through of the PeopleSoft Fee Tutorial - How to Navigate in Finance

Text version only

Navigating Overview

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- Lesson Overview
- Signing In to a PeopleSoft Application
- Recognizing Navigation Elements
- Lesson Review
- Lesson Quiz

Lesson Overview

Welcome to the world of PeopleSoft! This course covers basic PeopleSoft concepts, terminology, and navigation techniques for PeopleSoft 8.4 applications using a browser-based interface to view or manipulate data. The examples in this course use the PeopleSoft Financials and Supply Chain Management application and scenarios that are based in the United States.

Upon successful completion of this lesson, you will be able to:

- Sign in to a PeopleSoft application.
- Recognize navigation elements.

The estimated time to complete this entire lesson is 15 minutes.

Lesson Review

Welcome to the Lesson Review. This Lesson Review summarizes the important information presented in this lesson. After completing this Lesson Review, you may wish to review specific topics in the lesson or proceed to the Lesson Quiz.

This page includes a summary of the key points in this lesson. You may wish to review these points before proceeding to the Lesson Quiz.

- The Sign In page prompts you for your User ID and Password.
- PeopleSoft applications use left-hand navigation and a universal navigation header.

- To enter data in a PeopleSoft application, you first access a page or component.
- Components consist of several pages within the same window.
- There are several ways to navigate between pages in a component: selecting folder tabs, clicking links, or using access keys.
- You can sometimes navigate to related pages or components from a page.
- You can use the New Window link to open a new browser window, or child window.
- You must click the Save button in order for the system to commit your changes to the database.

Lesson Quiz

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Signing in to a PeopleSoft Application

Question 1

Which two pieces of information do you need to enter when signing in to a PeopleSoft application.

- Connection Type
- Database Name
- Password
- User ID

More than one answer is correct. Click the boxes to select the correct choices, then click **Enter**.

Recognizing Navigation Elements

The _____ is set up in a navigation hierarchy where you can access a series of folder drill-downs.

Question 2.

- User Preferences
- Menu Structure
- Universal Navigation Header
- Left-hand Navigation

Click the letter that represents the correct choice.

Recognizing Navigation Elements

Question 3.

Which of the following is NOT in the universal navigation header?

- Home
- Add to Favorites
- My Personalizations
- Worklist
- Search

Click the letter that represents the correct choice.

Recognizing Navigation Elements

Question 4.

PeopleSoft uses which of the following to navigate between pages in a component?

- Menus
- Access keys
- Hyperlinks
- Navigational headers
- Folder tabs

More than one answer is correct.

Recognizing Navigation Elements

In PeopleSoft, you can use folder tabs, hyperlinks, or access keys to navigate between pages in a component?

- True**
- False**

Navigating To and Within Pages

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- Lesson Overview
- Using the Navigation Hierarchy
- Navigating in Self-Service Pages
- Navigating Between Pages in a Component
- Lesson Review
- Lesson Quiz

Lesson Overview

PeopleSoft's browser-based interface provides an intuitive way of updating or viewing data in your database. This lesson will discuss using the navigation hierarchy to navigate to a page, describe how self-service pages work, and show several navigation methods that can be used to move between pages in a component.

Upon successful completion of this lesson, you will be able to:

- User the navigation hierarchy.
- Navigate in a self-service page.
- Navigate between pages in a component.

The estimated time to complete this entire lesson is 15 minutes.

Lesson Review

Welcome to the Lesson Review. This Lesson Review summarizes the important information presented in this lesson. After completing this Lesson Review, you may wish to review specific topics in the lesson or proceed to the Lesson Quiz.

This page includes a summary of the key points in this lesson. You may wish to review these points before proceeding to the Lesson Quiz.

- You use the left-hand navigation to expand and collapse levels of the navigation hierarchy.
- When you click an underlined link, a page or search page will display to the right of the navigation hierarchy.
- The left-hand navigation can be collapsed and expanded as needed.
- Self-service web applications provide you secure and convenient access to information.
- Self-service home pages provide easy access to related functions.

- Components consist of one or several pages within the same window. They are usually pages that are related and need to be completed together.
- You can navigate between pages in a component by selecting a folder tab, clicking a hyperlink, or using a shortcut key.

This page includes a summary of the key points in this lesson. You may wish to review these points before proceeding to the Lesson Quiz.

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Lesson Quiz

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Navigating To and Within Pages

Question 1.

Where would you click to access a page?

- Search field?
- L Customers
 - L Customer Information
 - Quick Customer Create
 - General Information
 - Dun & Bradstreet
- L Customers
 - Í Customer Information
 - Í Conversations
 - Í Review Customer Information

Click the letter that represents the correct choice.

Navigating To and Within Pages

Question 2.

Where would you click to collapse the left-hand navigation?

- | | |
|------|---|
| Menu | È |
|------|---|
- L Customer Information
- New Window

Click the letter that represents the correct choice.

Navigating in Self-Service Pages

Question 3.

Self-service page navigation is defined by roles in the organization.

True

False

Click True or False

Navigating To and Within Pages

Question 4.

You can click either the icon or the hyperlink to access a function in a self-service page.

True

False

Click True or False

Navigating To and Within Pages

Question 5.

Which of the following can be used to navigate between pages in a component?

Access keys

Left-hand navigation

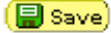
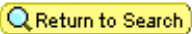
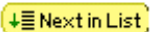

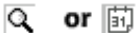








Hyperlinks

Navigation header

Folder tabs

More than one answer is correct. Click the boxes to select the correct choices, then click **Enter**.

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Hot Key	Button or Link	Action
Alt + 1	 Save	Save page
Alt + 2	 Return to Search	Return to the search page
Alt + 3	 Next in List	View the next row in the search list
Alt + 4	 Previous in List	View the previous row in the search list
Alt + 5	 or 	Opens the Look Up page or Calendar prompt
Alt + 6		Opens the pop-up window on a page
Alt + 7		Inserts rows in a grid or scroll area
Alt + 8		Deletes rows in a grid or scroll area
Alt + .		Next row in a grid or scroll area
Alt + ,		Previous row in a grid or scroll area
Alt + /		Find data in grid or scroll area
Alt + '		View all rows of data in grid or scroll area
Alt + \	Add a New Value Find an Existing Value	Toggles between options in a Search page