

**NORTH DAKOTA
UNIVERSITY SYSTEM**

ConnectND Higher Education

PeopleSoft Tips

PeopleSoft Tips

Definitions:

With the new system comes new terminology. Here is a short list of PeopleSoft words and definitions so we can all start “talking PeopleSoft.”

Account: On a Purchase Order or Voucher, an Account serves the same function as a TCC. Accounts are now 6 digits in length instead of 3.

Program: Serves the same function in PeopleSoft as Projects did in UCICS.

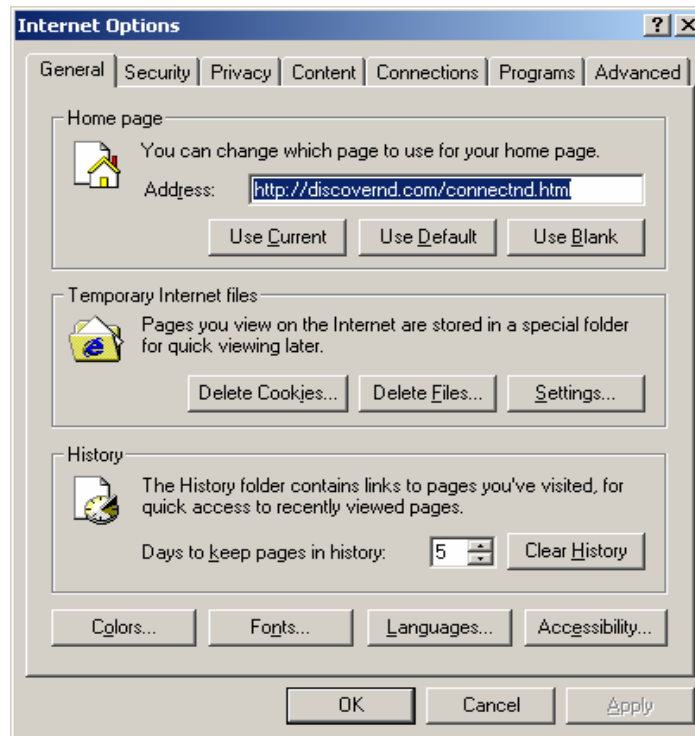
Voucher: Replaces the term RFP (Request for Payment).

Tips

There are some general tips that will help with processing transactions in PeopleSoft.

Clear Cache: It is a good idea to clear your cache files about once every week. Cache can be the cause of some strange warning messages, and security issues. To clear cache:

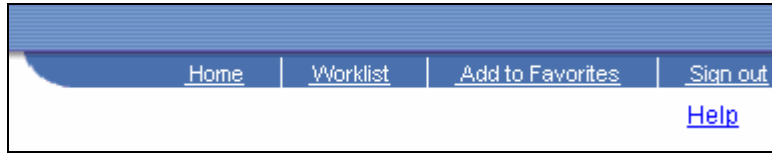
- Open your web browser. Click on Tools, Internet Options...
- The Internet Options page will appear.



- Click on the **Delete Cookies...** button.
- Click on the **Delete Files...** button.
- Click **OK**.
- Your cache files are now clear.

Add to Favorites

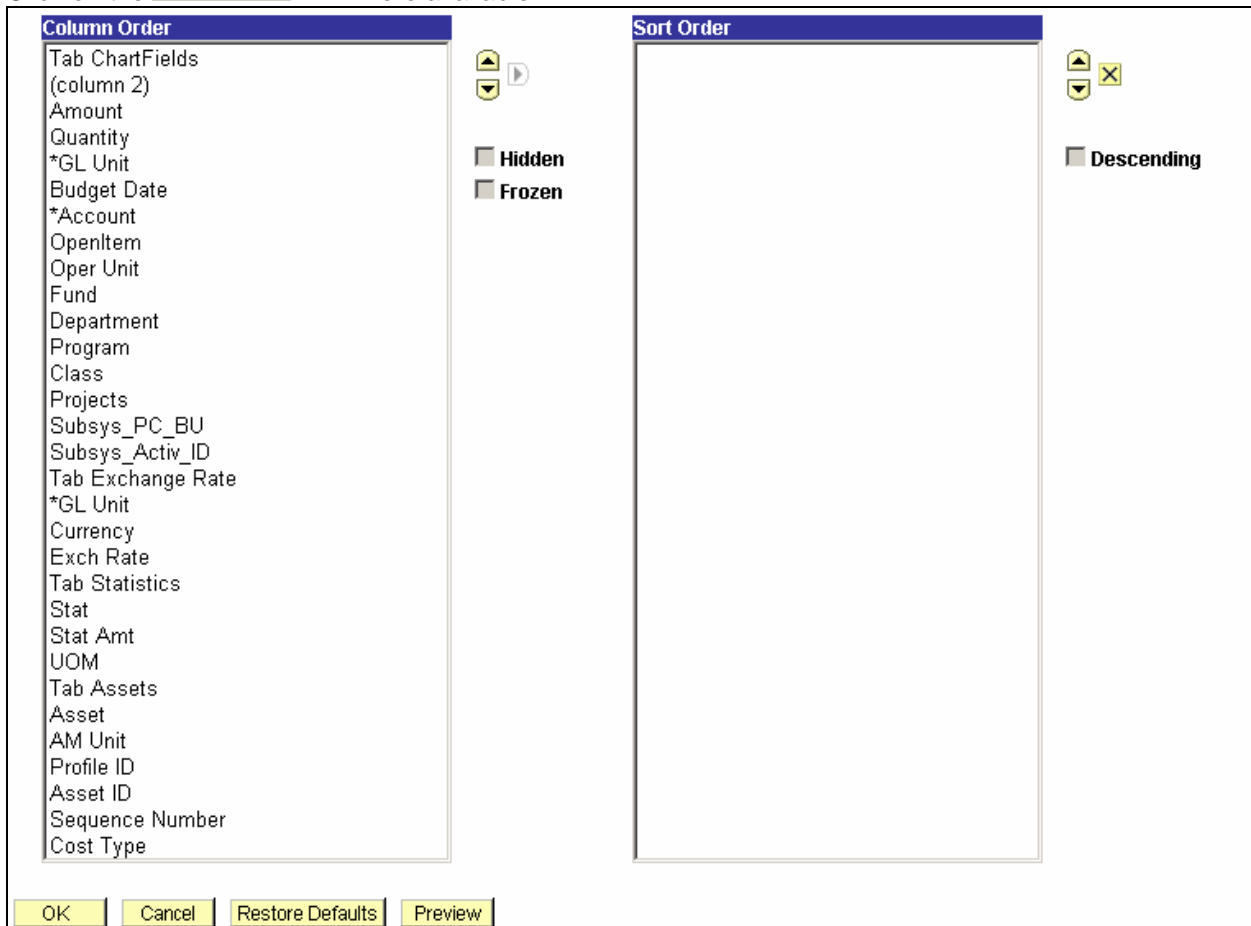
Favorites are located on the top of your menu in PeopleSoft. To add a page to your favorites, navigate to the page you wish to add, then click on the [Add to Favorites](#) link located at the top right of your PeopleSoft web page. The favorite will be stored in the My Favorites folder at the top of the left hand navigation or menus.





Customize


You can customize your entry screens for more user-friendly entry. When you customize entry pages, it only changes the pages accessed when using your user ID. Each user must customize his or her own pages.

Click on the [Customize](#) link where available.




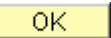

Some fields are not being used by the NDUS system. To hide fields, click on the field, and then select **“Hidden”**.

You can also change the order of the entry fields. Select one of the fields you want to sort, and click on the  move up and  move down buttons to create the order you want.

Click on  to see your changes.










Click on  to change everything back to the original default settings.

Click on  to go back to the original page without recording any of your changes.

Click on  to select all of your changes. The changes will be permanently saved when you click  on the entry page. The next time you access this page, your screen will contain your customizations.

Hot Keys

You can generally tab to and activate **entry fields, lookups, dropdowns, buttons** and **checkboxes** without using the mouse.

1. **Entry Fields** (Ex: **Vendor:** ): Tab to entry field and key in the correct value.
2. **Lookups** (Ex: , ): Tab to the lookup and hit ENTER. This brings you to the lookup screen
3. **Drop-Downs** (Ex: ): Tab to the lookup to highlight it. Type the first letter of the value you wish to select. Keep typing the first letter until your value appears. Use the  arrow to go back to the previous value. When you have the correct value in the drop-down, tab away from the drop-down box.
4. **Buttons** (Ex: , , , ): tab to the button and hit ENTER to activate the button's action.
5. **Checkboxes** (Ex. **Separate Payment**): tab to the selection. Hit the SPACE BAR to select the checkbox.

For more entry options, you can use Hot Keys instead of using the mouse. Hot keys are listed in the table below.

- | | |
|--------------|---|
| ALT+1 | Saves page in a transaction.
Moves to the Search or Add button on a Search or Look Up page.
Moves to the OK button on a secondary page. |
| ALT+2 | Returns to the search page from the transaction page. |
| ALT+3 | View next row in list when button is active. |
| ALT+4 | View previous row in list when button is active. |

- ALT+5** Opens Look Up page.
 Opens the calendar prompt.
- ALT+6** Opens the pop-up window on a page.
- ALT+7** Inserts one or more rows in a grid or scroll area.
- ALT+8** Deletes row in a grid or scroll area.
- ALT+0** When in Expert Entry mode, activates the Refresh button, which validates the data entered on the page.
- ALT+ .** View next set of rows in grid or scroll area.
- ALT+ ,** View previous set of rows in grid or scroll area.
- ALT+ /** Finds data in grid or scroll area.
- ALT+ ‘** View all rows of data in grid, scroll area, or search page results list.
- ALT+ ** Toggles between Add a New Value and Find an Existing Value in a Search page.
- CTRL+ J** Displays system information.
- CTRL+ K** When in a search page or transaction page, opens a page with a list of keyboard navigation shortcuts using hot keys and access keys.
- CTRL+ Y** Toggles menu between collapse and expand.
- CTRL+ TAB** Toggles focus through the frame set.
- ENTER** Activates the OK button, where appropriate.
 On a Search page, activates the Search button.
 On a Look Up page, activates Look Up button.
- ESC** Activates the Cancel button, where appropriate.