Getting Comfortable with PeopleSoft Navigation

The purpose of this guide is to explain the general layout of the PeopleSoft pages and provide explanations of commonly used navigational buttons and links.

Before you begin . . .
After completing this guide, you will be able to:
• Access PeopleSoft
• Recognize navigational elements
• Use common buttons or icons
• Sign out of PeopleSoft

How do I sign in to PeopleSoft?
1. Sign in to the NUPortal at nuportal.northwestern.edu
2. Click the Staff tab, Finance and Budget tab, and then click the Login to PeopleSoft link from the left navigation pane.

Who has access?
All users who can access PeopleSoft directly

Additional Resources
Visit the Project Café training website for additional resources http://cafe.northwestern.edu/training/.

Where to get help?
For assistance, contact NUIT Support Center at 847-491-HELP (4357) or e-mail consultant@northwestern.edu.
Step 2: Recognizing commonly used navigation elements

The PeopleSoft Home page appears.

1. Menu Panel
The menu panel contains menus, folders, and pages. Click next to a menu item to see more options.

   - Search – Type in the name of a page you want to find in the Search box and then click or press Enter to see the results.

2. Quick Menu
This header appears at the top of every PeopleSoft page. Click a link (underlined word) to do these common tasks:

   - Home – Return to the Home page.
   - Add to Favorites – Add commonly used folders or pages to your My Favorites list at the top of the menu panel.
   - Sign out – Sign out of your secure session.
Step 3: Navigating through menus, folders, and pages

Use the menu panel to open menus, folders, and pages. In the example below, the General Ledger menu is selected from the menu panel. The General Ledger menu is expanded, showing the folders beneath it. These folders also appear as icons on the right side of the screen. Pages are stored in each folder. Pages are useful for completing tasks.
Using breadcrumbs to find your way . . .

In this example, the user selected the General Ledger menu from the menu panel. Then they selected the Journals folder. This is an example of the navigation clues that appear on the Journals page.

These are called breadcrumbs. Breadcrumbs show you where you are in the program.

This is the page title. When you select a menu or folder its name appears here.
**Step 4: Explore your options with page tabs and links**

Page tabs and links provide additional options. Tabs appear near the top of the page and links appear near the bottom of the page. The page tabs and links provide the same options. This example shows the tabs and links on the Create/Update Journal Entries page.

![Create/Update Journal Entries page](Image)

- **Business Unit:** NWUNV
- **Journal ID:** NEXT
- **Journal Date:** 05/05/2008

Click on the page tabs to access more options.

Click on the page links to access more options.
## Step 5: Using common page features

Many pages use drop-down menus and icons to make additional options available. Use these tools to help you enter information.

<table>
<thead>
<tr>
<th>Menu</th>
<th>Journal Entry</th>
<th>Create/Update Journal Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Header
- **Unit:** NAJNV
- **Journal ID:** NEXT
- **Date:** 05/05/2008
- **Long Description:**

**Menu Options:**
- **Ledger Group:** ACTUALS
- **Ledger:**
- **Source:**
- **Reference Number:**
- **SJE Type:**
- **Journal Class:**
- **Transaction Code:** GENERAL

**Additional Features:**
- **Currency Defaults:** USD / OPENINT
- **Reversal:** Do Not Generate Reversal
- **Auto Generate Lines:**
- **Save Journal Incomplete Status:**

**Tools:**
- **Search:** Click the magnifying glass to see what options are available.

**Drop-down Menus:**
- Click the arrow to see all menu options.

**Icons:**
- **Add**
- **Update/Display**
Step 6: Setting up My Favorites

You can save pages or folders that you use frequently by adding them to the My Favorites menu. This will allow you to quickly open these items.

1. Click Add to Favorites.
Step 6b: Name and access your *My Favorites*

**Add to Favorites**

Please Enter a Unique Description for this Favorite

*Description: Create/Update Journal Entries*

[OK] [Cancel]

1. Click OK.

A description defaults. You can use this, or add one of your own.

2. A link to the Create/Update Journal Entries page has been added here.
Step 7: Understanding commonly used buttons

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="" alt="Save" /></td>
<td>Click the <strong>Save</strong> button each time when you are finished entering information on a page. <strong>You will lose your information if you leave the page without clicking the Save button!</strong></td>
</tr>
<tr>
<td><img src="" alt="Clear" /></td>
<td>Click the <strong>Clear</strong> button to clear all information entered on a page.</td>
</tr>
<tr>
<td><img src="" alt="Cancel" /></td>
<td>Click the <strong>Cancel</strong> button to cancel an action.</td>
</tr>
<tr>
<td><img src="" alt="Delete" /></td>
<td>Click the <strong>Delete</strong> button to delete a row or item.</td>
</tr>
</tbody>
</table>

Step 8: Signing out of PeopleSoft

Click the **Sign out** link to securely exit PeopleSoft.

Click **Sign out** from the Quick Menu to exit PeopleSoft.