Navigating in PeopleTools 8.55

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Home Page

When users log into PeopleSoft, not the Dashboard, the home page has changed. By default, you will only see a tile for "Classic Home".



There are several new icons at the top right hand side of the page:



1.

Home - This icon will take you back to your My Homepage from wherever you are.

2. **Notifications** – (Not currently being used) Since delivered notifications are not currently using the delivered notifications, you should not see anything here.

- 3. Actions List ("Hamburger" icon) You will see different options depending on where you are in the system.
 - From the My Homepage screen you will see the following options:
 - Personalize Homepage Allows you to remove tiles
 - **Help** Will be PeopleBooks.
 - Sign out Signs you out of PeopleSoft.
 - When you go to a page in the PeopleSoft system, you will see the following options:
 Add to Homepage Will add the page to My Homepage:

ORACLE	▼ My Homepage	🕥 = 🌱 🏫
Classic Home	Search/Match ORACLE PEOPLESOFT	
		c
• Add to Nav B	ar – Will add the page to the Nav	Bar menu:
ORACLE	▼ My Homepage	ê ₹ ≡ @
Classic Home	Search/Match	NavBar 🕻
	PEOPLESOFT	
		Recent Place
		Recent Place
		Recent Place My Favorites Navigator

• Add to Favorites – Will add the page to your My Favorites:

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• My Favorites – If you have set any Favorites, they will be shown here. Same Favorites as in your Classic Menu.

ORACLE	▼ My Homepage	♠ ₹ ≡ Ø
Classic Home	NavBar:	My Favorites 🔅
		Edit Favorites
	Recent Pla	ses Search/Match
		25
	Navigato	
		70
		не
	•	

Navigator – This is the suggested way to navigate through PeopleSoft.



Note: The Navigator will start where you were when you last used the Navigator, which may not be the page you are on currently if you got there via a Favorite, a tile on your My Homepage or Nav Bar.



Navigating in PeopleSoft

There are a few different ways of navigating to pages within PeopleSoft:

- 1. Classic Home (Not Recommended)
- 2. Navigator (Recommended)
- 3. Page added to My Favorites
- 4. Tiles added to your My Homepage
- 5. Tiles added to your Nav Bar

Classic Home (Not Recommended)

1. Click the Classic Home tile on My Homepage or the Nav Bar to display the left navigation <u>almost</u> as it has been.

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				Personalize Content Layo	ut ?	Hel
Menu	0 0 -					
Search:						
())						
My Favorites						
Campus Student Administration						
NBS Application						
NeSIS Student Administration						
Online Admission Application						
Self Service						
Campus Community						
Student Recruiting						
Student Admissions						
Records and Enrollment						
Curriculum Management						
Financial Aid						
Student Financials						
Academic Advisement						
Contributor Relations						
SA Integration Pack						
Set Up Common Objects						
Set Up SACR						
Enterprise Components						
Worklist						
Tree Manager						
Reporting Tools						
PeopleTools						
Ouerv Viewer		_				

2. When you navigate to a page in PeopleSoft, you will no longer see the "breadcrumbs" at the top of the page like you did previously.

< Home	Add/Update Person	🕥 = 🧚 🏫
		New Window Help
Add/Update Person		
Enter any information you have and click Search. Leave field	s blank for a list of all values.	
Find an Existing Value		
Search Criteria		
ID begins with ↓] Academic Career = √ National ID begins with ↓ Campus ID begins with ↓ Last Name begins with ↓ First Name begins with ↓ □ Include History □ Correct History □ Case Sensith	 	
Search Clear Basic Search 🔯 Save Search	Criteria	
Find an Existing Value Add a New Value		

- 3. The source button will take you back to the entire Classic Menu, but if you click **New** Window to open another window, the Home button will not be displayed.
- 4. You can navigate to a different page by clicking the 🙆 Nav Bar and selecting 트 Navigator.

Navigator (Recommended)

1. Click the 🙆 Nav Bar and select 🧮 Navigator.

ORACLE	▼ My Homepage		= 🤧 🏠	۲
Classic Home		NavBar: Nav	igator	0
			Personal Information (S	
		Recent Places	Biographical (Student)	>
		*	Identification (Student)	>
		My Favorites	Participation Data (Student)	>
		Navigator	Biodemo Processes (Student)	>
			Health Information (Student)	>
		Classic Home	Search/Match	
			Search/Match Integrated	
	•		Address Search	~

2. Navigate through the levels as you would in the Classic Home menu.



3. Use the **Back arrow** to go back up one level in the menu and the **Back to Main Menu** button to collapse all levels of the menu.

My Favorites

To add an item to My Favorites:

1. After navigating to a page, click the **Actions List ("Hamburger")** icon and then choose **Add To Favorites**.

â	۴	₹	۲
Add To Homepage			Help
Add To NavBar			
Add To Favorites			
Sign out			

To navigate to an item in My Favorites:

1. Click the	Nav Bar and choose	🔶 My Favori	ites.	
	7 🏫			
NavBar: My	Favorites	0		
\odot	🗹 Edit Favorites			
Recent Places	Search/Match			
My Favorites				
2. Choose an i	tem in the list.			
To delete or e	edit a Favorite:			
1. Click the	Nay Bar and choose		ites	
2. Click E	dit Favorites at the t	op of the mer	nu.	
My Homepage	de the t	Edit Favorites		🔿 🏲 🗏 🕢
Edit Favorites				New Window Help Personalize Page
Click the Save button after edi	ting or deleting favorites.			
Favorites Personalize	Find 🔄 🔢 First 🕚 1-2 of 2 🕑 Last			
Add/Update a Person	0 -			
Search/Match	0 -			
Save Notify				

- 3. Click the minus sign beside an entry to delete it.
- 4. Click **Save** to save your changes.

Tiles Added to My Homepage

To add a tile to your My Homepage:

- 1. Navigate to a page in PeopleSoft.
- 2. Click the Actions List ("Hamburger") icon and then choose Add To Homepage.

â 🐔 🛒	٢
Add To Homepage	Help
Add To NavBar	
Add To Favorites	
Sign out	

3. If necessary, choose the Homepage where you want to add the tile.

< My Homepage	User Checkout	â 🐔 🛒	Ø
User Checkout		Add To Homepage	Help
Enter any information you have and click Search. Leave fields blank	Add to Homepage ×	Add To NavBar	
Find an Existing Value	Choose from available homepages	Add To Eavorites	
Search Criteria	My Homepage	Add for avoines	
Search by: NoSIS Lloar begins with		Sign out	
Search Advanced Search			
	Or create a new Homepage		
	Add to new Homenage		
tps://cststnu.nebraska.edu/psc/cststnu/EMPLOYEE/HRMS/s/WEBLI	B_PTNUI.PT_BUTTON_PINstnu/EMPLOYEE/HRMS/c/NBA_CS_UT0011.NB/	A_USER_CHECKOUT.GBL&lp=SA.EMPLOYEE.DEFAULT	LP

4. Click **OK**.

5. Now if you click (Home) to return to your My Homepage, you will see a tile for the page you just added.

ORACLE	▼ My Homepage	🕥 = 🌱 🏫
Classic Home	Checkout User Profile	
	ORACLE	
		C

To navigate to an item on My Homepage:

1. If necessary, click (Home).

2. Click the tile.

To Delete or Rearrange Tiles on My Homepage.

- 1. If necessary, click (Home).
- 2. Click the Actions List ("Hamburger") icon and choose Personalize Homepage.

ancel	Perso	onalize Homepage		Save
Add Homepage	Name My Homepage			Add Tile
My Homepage	Classic Home	Checkout User Profile	Search/Match	8
	Add/Update a Person	Report Manager	Query Manager	8

- 4. To change the order of the tiles, click and drag the tiles where you want and let go.
- 5. Once you are completed, click Save

Tiles Added to the Nav Bar

To add a tile to the Nav Bar:

1. Navigate to a page in PeopleSoft.

2. Click the Actions List ("Hamburger") icon and then choose Add To NavBar.

Query Manager Enter any information you have and click Search, Lawe fields blank for a list of all values.								Add To Homepage		
								Add To NavBar Add To Favorites		
Search Adversaria Saarch										
									Sign out	
My Favorite Queries						Pers	onalize	Find 💷	🔣 First 🛞 1-2 of 2	East
Juery Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Remove
NBASR_IC_FIND_STU		Public		Edit	HTML	Excel	XML	Schedule	Lookup References	
BA_SR89_STUDENT_ELK	2	Public		Edit	HTML	Excel	XML	Schedule	Lookup References	-
Clear Favorites Lis	t	Public		Edit	HTML	Excer	AML	Schedule	Lookup Kelerences	

3. Click **OK**.

4. Now if you click the **Nav Bar**, you will see a tile with the page you just added at the bottom of the list.



To navigate to an item in your Nav Bar.

- 1. Click 🕑 Nav Bar.
- 2. Click on the tile.

To Delete or Rearrange tiles on your Nav Bar.



- 3. To delete a tile, click the red 😣 beside it.

ORACLE	▼ My Homepage	A 🚩 🗏 🕼	Ð
Classic Home		Cancel Personalize NavBar Don	•
		Add Tile	
		Recent Places	
		My Favorites	
		Navigator	
		■ Classic Home	
		Query Manager	•
	•		

- 4. To rearrange the order of items in the list, click and drag the items to where you want them to go.
- 5. When you are done, click

New Windows

No Home button on new window

Lose session after clicking Home button in a new window

New Window – use Navigator, Favorites or NavBar, Recent

Tips & Tricks for 8.55