Overview

PeopleSoft Learning Solutions is the PS version currently in use at the University Of New Orleans.

Navigating Learning Solutions is similar to navigating many common websites. For some, this navigation will be intuitively familiar. For others, this web-based version of PeopleSoft will present unique challenges in finding and using information.

In this course, PeopleSoft Learning Solutions version 8 is referred to generically as Learning Solutions. Upon successful completion of this workshop, you will be able to navigate and understand the interface.

Upon successful completion of this course, you will:

- Understand terms related to PeopleSoft Learning Solutions
- Navigate Learning Solutions utilizing breadcrumbs, menus and header navigation
- Utilize various tips and tricks to enhance your experience

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**Terms**

**Figure 1**

**Breadcrumbs** (Figure 1) are small horizontal hyperlinks that are always present across the top of your page. The links show which pages, components, or menu navigation hyperlinks you used to get to the current page.

**Menus** (Figure 1) are navigation lists that contain menu headings and hyperlinks that you can click to retrieve pages from Learning Solutions.

The **navigation header** (Figure 1) is located under the top logo on the right side of the page. It remains constant, containing links to Home, Help, and Sign Out.
Navigating Learning Solutions

Signing into PeopleSoft is just like opening a secured page on a website on the internet.

First, go to the UNO home page and click the WebSTAR link. From there, choose the Faculty/Staff link on the webpage.

When the site opens, enter your User ID and password to access the secured area.

**Note:** Your User ID and password are the LAN credentials you use to access your UNO email and Blackboard.

The navigational structure consists of menu columns set up with lists of hyperlinks that enable you to navigate to the desired page.

The page action buttons just above the hyperlinks at the bottom of the page are another method for quick navigation. The **previous tab** button takes you to the previous page in the component. The **next tab** button takes you to the next page in the component.

The main column, also known as **Home**, contains a general list of the areas you can link to in that application. A **plus sign** before a listing indicates that there are more levels to view under that heading. A **minus sign** before a listing indicates that listing is expanded.

**Menu columns** are lists of **menu items**, or current menu items (Figure 1), and **menu bar items**, or previous menu items still available (Figure 1) that enable you to navigate to the desired component. Menus can only expand to three levels. If there are additional columns, the first column will collapse in order to make room for the next.

The final level of a heading will be underlined hyperlinks that, when clicked, will replace the menus with the page you select. You can click the back arrow, where the first column has collapsed, or follow the breadcrumbs to navigate quickly back to a particular level of the menu.

When you select a menu item from the second level, a new column listing appears with menu bar items. In order to display a component, you need to select a menu bar item. For most components, the basic choices are **Use**, **Setup**, **Process**, **Inquire**, and **Report**.

**Use:** Contains all the transactions you will perform in your database.

**Setup:** Contains all the base tables for your data from which transactions are built. Use these pages to update, add, or edit data in your tables.

**Process:** Contains pages that enable you to schedule or run process requests.

**Inquire:** The pages that you select from this heading will all be displayed as read-only. You will not be able to edit or update any of the data in these pages.

**Report:** Contains pages that enable you to produce reports or queries.
Using Internet Architecture Buttons

PeopleSoft Internet Architecture provides you with a multitude of buttons and links on your page to help you process transactions in your system. In general, if the action to be performed is navigation related, it will be shown as a link, which will bring you to another page. If the action is truly an action, such as Save or Process, it will be displayed as a button on your page. You only need to click the button or link to execute the command.

If a gray button appears on your page, that action is not then available to you. For example, when working on the last page in a component, you might see the following:

Buttons on the last page in a component

The **Next tab** button is gray because you are working on the last page of the component. Your only option is to select the **Previous tab** button.

Likewise, links often appear at the bottom of your page to indicate which of the component's pages you are on. You'll notice that the active page is not actually a link because it is not underlined. For example, if you are on the Compensation page of the Job Data component, the links at the bottom of the page will appear as follows:

Page links in a component

Most buttons and links in the system are self-explanatory. You'll find that performing transactions and navigating between pages and components will come easily. Nonetheless, we have included for your reference a few tables that detail the functioning of several PeopleSoft Internet Architecture buttons.

Search Page Buttons

The following search related buttons are located on Search Pages of all types.

<table>
<thead>
<tr>
<th>Button</th>
<th>Name</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Search" /></td>
<td>Search</td>
<td>Processes the search once you have entered search criteria in the key fields above the Search button.</td>
</tr>
<tr>
<td><img src="image" alt="Clear" /></td>
<td>Clear data</td>
<td>Clears entered text from all fields on the page (without saving) so you can enter new criteria.</td>
</tr>
</tbody>
</table>
**Processing Buttons**
The following buttons are used for processing transactions.

<table>
<thead>
<tr>
<th>Button</th>
<th>Name</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Apply Button" /></td>
<td>Apply</td>
<td>Usually found on a page that you opened by clicking a prompt button. Enables you to apply the data input without returning you to the main page in case you want to perform additional searches.</td>
</tr>
<tr>
<td><img src="image" alt="Run Button" /></td>
<td>Run</td>
<td>Opens the Process Scheduler Request dialog box where you can set up your process control parameters for the current process.</td>
</tr>
<tr>
<td><img src="image" alt="OK Button" /></td>
<td>Okay</td>
<td>Accepts the data input made on an auxiliary page and returns you to the main page.</td>
</tr>
<tr>
<td><img src="image" alt="Cancel Button" /></td>
<td>Cancel</td>
<td>Clears the page and any data that you may have entered or changed without saving. When you click Cancel, the system doesn't warn you to save changes. Use Cancel if you entered data incorrectly and want to begin again.</td>
</tr>
</tbody>
</table>
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Learning Solutions 8.0
Latest Version: October 13, 2006

Toolbar Buttons
At the bottom of most pages you'll find the toolbar, which changes depending on the type of page you are in. The toolbar may include search list navigation buttons, page navigation buttons, and page action buttons. The toolbar changes depending on the type of page that's active. Therefore, not all buttons shown below will display on every page. Likewise, some buttons may be grayed out, indicating that that action is not available to you at that time.

<table>
<thead>
<tr>
<th>Button</th>
<th>Name</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="icon" alt="Save" /></td>
<td>Save</td>
<td>Sends the information you've entered on the page to the database. You'll generally save when you come to the end of a component. The Save command always updates the data for all pages in a group. Upon save, the system displays the &quot;Saved&quot; message in the upper right corner of the page.</td>
</tr>
<tr>
<td><img src="icon" alt="Return to Search" /></td>
<td>Return to Search Page</td>
<td>Returns you to the search page.</td>
</tr>
<tr>
<td><img src="icon" alt="Next in List" /></td>
<td>Next In List</td>
<td>Displays the data for the next data row in your search results grid. This button appears gray if you didn't select the data row from a search results grid, if there was only one row in the grid, or if the data displayed is the last row in the grid.</td>
</tr>
<tr>
<td><img src="icon" alt="Previous in List" /></td>
<td>Previous In List</td>
<td>Displays the data for the previous data row in your search results grid. This button appears gray if you didn't select the data row from the search results grid, if there was only one row in the grid, or if the data displayed is the last row in the grid.</td>
</tr>
<tr>
<td><img src="icon" alt="Next page in component" /></td>
<td>Next page in component</td>
<td>Displays the next page in the current component. If you are in the last page of the component, this button is gray.</td>
</tr>
<tr>
<td><img src="icon" alt="Previous page in component" /></td>
<td>Previous page in component</td>
<td>Displays the previous page in the current component. If you're in the first page of the component, this button is gray.</td>
</tr>
<tr>
<td><img src="icon" alt="Update/Display" /></td>
<td>Update/Display</td>
<td>Accesses existing rows of data on the database. If data is effective-dated, displays only current and future rows.</td>
</tr>
<tr>
<td><img src="icon" alt="Include History" /></td>
<td>Include History</td>
<td>Displays all rows of data: current, future, and history.</td>
</tr>
<tr>
<td><img src="icon" alt="Correction" /></td>
<td>Correction</td>
<td>Accesses existing rows of data in the database and displays all effective-dated rows. Allows you to update all rows, including history rows.</td>
</tr>
<tr>
<td><img src="icon" alt="Refresh" /></td>
<td>Refresh page</td>
<td>Appears for expert users only that are in Expert Entry mode. When clicked, validates the data entered in certain fields.</td>
</tr>
</tbody>
</table>
A **component** is a group of related pages that pertain to a specific task and contains folder tabs that provide access to a page. Components have replaced panel groups and can consist of one or several pages within the same window. As you finish one page, you click the **folder tab (Figure 2)** of the next page you want to open in the component. (You can also click the hyperlinks at the bottom of the page instead of the folder tabs to move between component pages.) (<ALT> + a shortcut key is a third option.)

A **shortcut key (Figure 2)** is the underlined letter on each folder tab.

### Keyboard Shortcuts

Working in an internet browser-based environment can often be very mouse intensive. PeopleSoft offers many keyboard alternatives to using the mouse in the internet architecture. We call these shortcuts **Access Keys and Hot Keys**. Once you learn the keystroke combinations below, you'll find working in your PeopleSoft application is a quick and painless process.

#### Using Hot Keys

Hot keys perform an immediate action. When you press any of the key combinations below, the designated action occurs. You'll notice that several hot keys perform different functions depending on the page you are in, such as a transaction page or a search page.

<table>
<thead>
<tr>
<th>Hot Key</th>
<th>Button or Link</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alt+5</td>
<td><img src="link" alt="Lookup" /> <img src="link" alt="Calendar" /></td>
<td>Opens lookup page. Opens the calendar prompt.</td>
</tr>
<tr>
<td>Alt+6</td>
<td><img src="link" alt="Pop-up" /> <img src="link" alt="Related_Inc" /></td>
<td>Opens the pop-up window on a page.</td>
</tr>
<tr>
<td>Alt+7</td>
<td><img src="link" alt="Add" /></td>
<td>Inserts row in a grid or scroll area.</td>
</tr>
<tr>
<td>Alt+8</td>
<td><img src="link" alt="Delete" /></td>
<td>Deletes row in a grid or scroll area.</td>
</tr>
<tr>
<td>Alt+0</td>
<td><img src="link" alt="Refresh" /></td>
<td>When in Expert Entry mode, validates data entered in page.</td>
</tr>
<tr>
<td>Alt+.</td>
<td><img src="link" alt="Next" /></td>
<td>Next in grid, scroll, or search page results list.</td>
</tr>
</tbody>
</table>
Using Access Keys

Access keys move the focus of your cursor to a particular push button on your page. Pressing Enter executes the command—the equivalent of clicking the button with your left mouse button. The table below outlines the shortcuts you may use in place of clicking the equivalent action button with your mouse. After pressing the desired key combination from the list below, you must then press the Enter key to execute the action. For example, to save a page you would press Alt+1 followed by the Enter key. Note that some access keys have multiple actions assigned to them, and their usage depends on the currently active page.

<table>
<thead>
<tr>
<th>Access Key</th>
<th>Button</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alt+1</td>
<td><img src="Image" alt="Save" /></td>
<td>Save page in a transaction. Move to Search or Add button on a Search or Prompt page. Move to OK button on an auxiliary page.</td>
</tr>
<tr>
<td>Alt+2</td>
<td><img src="Image" alt="Return to Search" /></td>
<td>Return to search page from transaction page.</td>
</tr>
<tr>
<td>Alt+3</td>
<td><img src="Image" alt="Next in List" /></td>
<td>View next row in list when button is active.</td>
</tr>
<tr>
<td>Alt+4</td>
<td><img src="Image" alt="Previous in List" /></td>
<td>View previous row in list when button is active.</td>
</tr>
<tr>
<td>Alt+9</td>
<td><img src="Image" alt="Home&gt;" /></td>
<td>Toggles between menu items in the breadcrumbs</td>
</tr>
<tr>
<td>Alt+ \</td>
<td><img src="Image" alt="Update/Display" /></td>
<td>Toggles between action modes on the toolbar in a transaction page.</td>
</tr>
</tbody>
</table>
Folder Tab Access Keys

You can also use access keys for folder tabs to help you move between pages in a component. Identify these access keys by noting the letter in the folder tab name that is underlined. For example, in the Job Data component, (Figure 3) you can see that all the folder tabs contain access keys with which to open them. Open the Job Information page by pressing Alt+J to move your cursor to the page name in the folder tab, and then press Enter to open the page.
Menu Navigation Access Keys
Navigating between menus can be tiresome when you have to constantly revert to the mouse. By using a combination of the menu access keys (Alt+1, Alt+2, Alt+3 and Alt+4), the tab key, and the Enter key you can reduce your dependence on the mouse.  (Figure 4)

Alt+1, 2, 3 or 4
Moves focus across menu levels resting on the uppermost menu item for that column

Tab key
Moves focus to the next menu item in the current column or to the top of the next column if on the last menu item

Enter key
Opens the next menu level or the search page for the selected component

When menu navigation is the active window, you use the access keys to get to the next or previous menu level. For example, suppose you want to choose Capture Time and Labor from the second column above. You can simply press Alt+2 and then the tab key three times to transfer focus to that menu entry. You then press Enter to open the menu item. To view the Home menu again, press Alt+1+Enter. The collapsed menu section will expand.

A page is a screen with fields for inputting data.
Key fields (Figure 2) are the first level of fields on a page.

Figure 5

Page Action Buttons (Figure 5) are used for navigating, searching, processing, and page action functions.

Understanding Search Pages

There are two types of search pages: the basic search page and the advanced search page. When you select a page to navigate to, the system will often display an advanced search page, such as the Personal Data page shown below. The advanced search page generally offers several keys by which you may search for your record. It allows you to narrow down your search by entering in more than one type of criteria. The Personal Data advanced search page below contains seven fields starting with the EmplID (employee ID) field.

Advanced Search

If the search page offers a basic search option, it will appear as a link next to the search action buttons. In general, a basic search page offers just one or two fields by which you may perform your search. However, you may designate which key field you would like to search by from the Search By drop-down list box.
Entering Search Criteria

You can enter a full value or a partial value for any key field. Based on what you enter in the dialog box, the system uses the search record to present you with a list of possible matches or, if there is only one match, the page you requested. Often, however, you don't have all the information you need. For example, if you are searching for John Smith, you may find that there is more than one in your company. By entering his full name (without a space) and clicking the Search button, the system may display several John Smiths in the Search Results grid. In our example below, there are only two. You may be able to determine which employee is the correct one based on the additional information displayed in the Search Results grid. To access the employees data, click any of the underlined hyperlinks in the Search Results grid.

**Note.** The Search Results for the advanced search will contain a link for each column entry, while the basic search page results will only display the first column as a link.

After you've finished entering in the personal data information for John Smith, let's say you need to enter some leave of absence dates for a different employee, but you're not sure how to spell the employee's last name. You do know, however, that his employee ID begins with a Z. To locate the correct record you would type **Z** as the search criterion in the **EmpID** field (note that this field is not case-sensitive). The system retrieves a list of all employee IDs that begin with **Z** and displays the valid values in the Search Results grid below the search buttons.

The search function can retrieve up to 300 entries from the database, displaying a number of results at a time in the Search Results list. Use your browser's scroll bar to view all listings on the current page. If the list is subdivided, click the right-pointing arrow above the grid or press Alt+. to view the next set of listings.

If your search retrieves more than the maximum 300 listings, as our example below does, the Search Results will indicate this. You should then attempt to narrow your search in another way if you are not able to retrieve the data you need on the first attempt.
From the list, you see the employee you were looking for: employee ID **Z1000** for **Charles Albion**. A single click on any column in that row retrieves the **Absence Data** page, with the latest absence information for that employee. Here you may enter his approaching leave of absence. When you access a page, notice that the key fields are the uppermost display-only fields on the page, most often just below the page tabs. In the **Absence Data** page above, **Name**, **Employee ID**, and **Empl Rcd#** are the key fields. The data fields in which you will enter data pertaining to the absence of the employee are below the key fields in the **Absence Data** scroll area.

**Using Wildcards**

PeopleSoft applications support three wildcard features when searching for data. These wildcards can be helpful in finding the exact information you want to process. The following are the supported standard wildcard features.

- **% (percent sign)** Match one or more characters.
- **_ (underscore)** Match any single character.
- **\ (back slash)** Escape character—don’t treat the next character as a wildcard.

For example, you can type a number string of possible employee IDs along with the % sign, such as Z%000, and the system returns a list of those employees whose IDs match that criterion.
Saving Data on Pages

![Image of unsaved data dialog box]

When you make changes to a page, you have to manually save the page by using the Page Action Buttons at the bottom of the page. If you attempt to navigate to a new page without saving your changes, you will get a dialog box (Figure 6) prompting you to cancel changes or return to your page and save. Click <OK> to return to your page then select <SAVE> from your Page Action Buttons. If you wish to discard your changes, select <Cancel> on the dialog box to navigate to the next page without saving.

Using Multiple Windows

![Image of New Window hyperlink]

At the top of all pages you may notice the New Window hyperlink. Clicking this link will open a new browser window, or child window, showing the menu navigation to your current position at level 3. From this point you can open a new transaction to view or enter new data. You may open any number of child windows as necessary.

Remember that each window times out individually. Keep only the windows open that you are currently using, closing all unnecessary windows along the way. By limiting the number of open windows, you reduce any errors you may experience.
Printing in Learning Solutions

Printing in Learning Solutions is very different from printing in other applications or previous version of PeopleSoft. Learning Solutions has implemented the Report Manager to fulfill printing requests.

To retrieve your reports, navigate to:

Home > PeopleTools > Report Manager > Inquire > Report List

Don’t forget that you can bookmark this page to quickly return each time you need to print a report.

The report manager lists all available reports from the last 24 hours. In order to view and print your report, look for the Report Description. You can select the View hyperlink to see the details and gain access to your report.

Once you have opened the Report/Log Viewer page, you can select your file to print. Most reports are generated in either pdf or csv format. Adobe Acrobat Reader is required to view pdf formatted files. Microsoft Excel is required to view csv formatted files.
Tips and Tricks
There are tips and tricks you can deploy that will make Learning Solutions easier to use. By using these methods, you can help head off any potential problems before they arise.

Logging In
User ID’s and passwords are case sensitive. Be sure you use all capital letters for your User ID and the correct combination of upper and lowercase letters for your password.

![Figure 9](browser_buttons.png)

Browser Buttons
Do not use your browser’s Forward and Back buttons (Figure 9) to navigate between pages. Your browser uses information stored in a temporary file called a cache. Using your browser’s navigation buttons can result in the display of incorrect information. Use the breadcrumbs instead.

Popup Blockers
Popup blockers are internet tools that prevent web pages from generating new browser windows without your permission. PeopleSoft Learning Solutions generates new windows for a variety of processes. Popup blockers will interfere with the normal functioning of your Learning Solutions environment. Disable popup blockers while working in Learning Solutions.

Logging Out
Use the Sign Out (Sign Out) button on the navigation header to exit Learning Solutions. Signing out in this way will make sure that you are properly logged off the system and helps maintain system security.

Maximizing Working Space
You can press the `<F11>` key to maximize the browser window to give yourself more space to work in Learning Solutions. You can return your browser to normal by pressing `<F11>` again.

Required Fields
Asterisks (*) denote required fields. Failure to complete these fields will result in an error message.

Quick Search Pages
To quickly search a page for specific piece of information, you can use your browser’s search feature. Access the search feature by selecting

    Edit -> Find (on this page)

Enter the information you wish to find in the Search Dialog Box.
New Window

There are certain rules of thumb to keep in mind when using PeopleSoft’s New Window feature:

1. **Before opening a new window,** save any changes made in the current window. If the session times out while you are working in a new window, you may lose any unsaved changes.

2. **After a certain length of inactivity** (specified by a system administrator, default time is 20 minutes) in one of your child windows, your new window session will timeout or expire. This does not invalidate your other, current windows but simply means this expired window is no longer useable. Any unsaved changes will be lost. Close this window using the browser’s **File, Close** feature or the **(Close Window)** button. Do not use the **Return to PeopleSoft 8.00.01 Sign In** link on the expired page. Doing so will invalidate the entire session in all open windows.

3. Do not use your browser’s **File, New > Window** feature. Doing so merely copies the current HTML from the parent window, rather than opening a new PeopleSoft maintained window session.

**Note.** Users entering or viewing data in two different languages should do so using a separate instance of their browser program and sign in under the same user ID and password.

**Figure 10**

Window Timeouts

To maintain security in Learning Solutions, periods of inactivity will result in a ‘timeout’ message (**Figure 10**). This message means that the browser’s window had no activity for a period of time. You will be prompted to sign again to resume your work. If you are working in more than one browser window, you may be required to sign in each time another window ‘times out’. Keep extra windows to a minimum, and close windows you are not currently using.
Having a Problem?

One of the best features of PeopleSoft Learning Solutions is that common problems do not require a call to the Help Desk. Using the same techniques you would use for resolving problems for any web page, you can solve most problems quickly. Complete the checklist below before calling the Help Desk, and you will be one step ahead.

- Use <Stop> on your browser’s toolbar to end any page processing.
- Delete the page cache to clear any temporary versions of your page by using your browser’s menu to navigate to

**Tools > Internet Options > Delete Temporary Files**

- Reload page using Learning Solutions breadcrumbs and menus.

If you are still having a problem, repeat Steps 1-2 above, then:

- Close all browser windows, including those that have nothing to do with Learning Solutions.
- Relaunch browser.
- Reload page using Learning Solutions breadcrumbs and menus.

If you are still having a problem, contact the Help Desk at 280-HELP (4357).