

How to Personalizing your PeopleSoft Workspace

Overview

- Navigate Using the NavBar Navigator
- Set up user defaults
- Set up favorite screens
- Personalize the Content of the Homepage
- Personalize the Layout of the Homepage
- Customize pages and sections
- When all else fails...clear your cache, clear your cache, clear your cache. If that fails, clear your cache!!

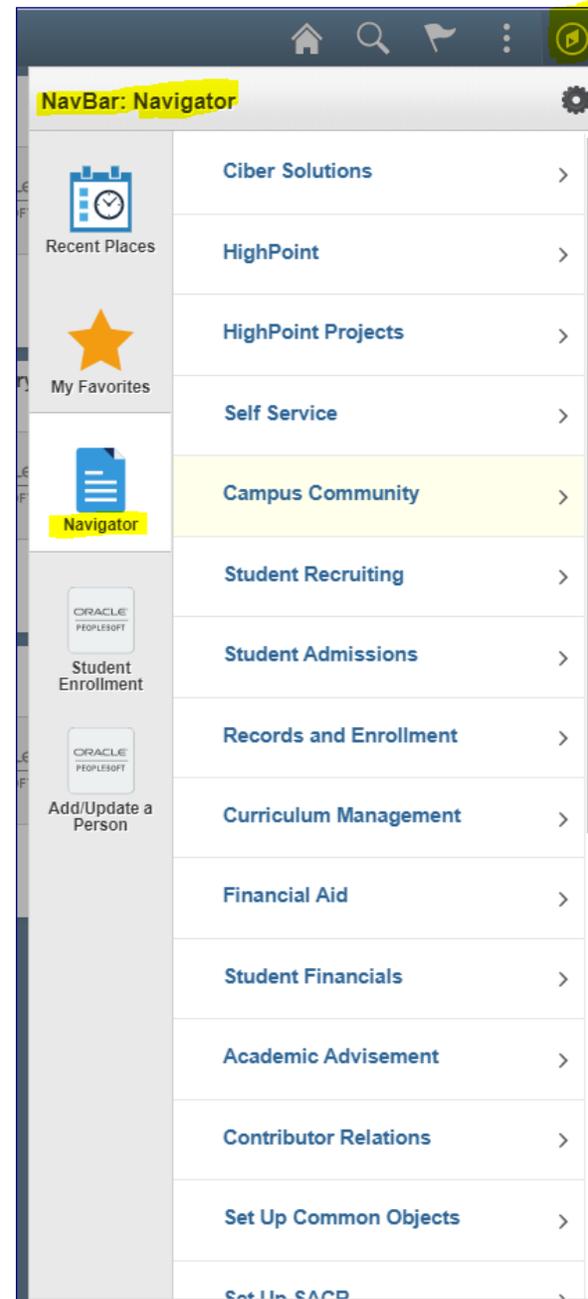
9.2 Basic Navigation

This 10-minute training explains:

- Locating the NavBar
- Exploring Navigator
- Saving a page link to the NavBar
- Adding and modifying favorites
- Creating your own home pages and personalizing it
- Changing the default of your home page
- Creating additional home pages that include page links (tiles) to frequently used ctcLink pages based on a particular task, like all the page links used for registering students
- Adding tiles (links) to your homepage(s)

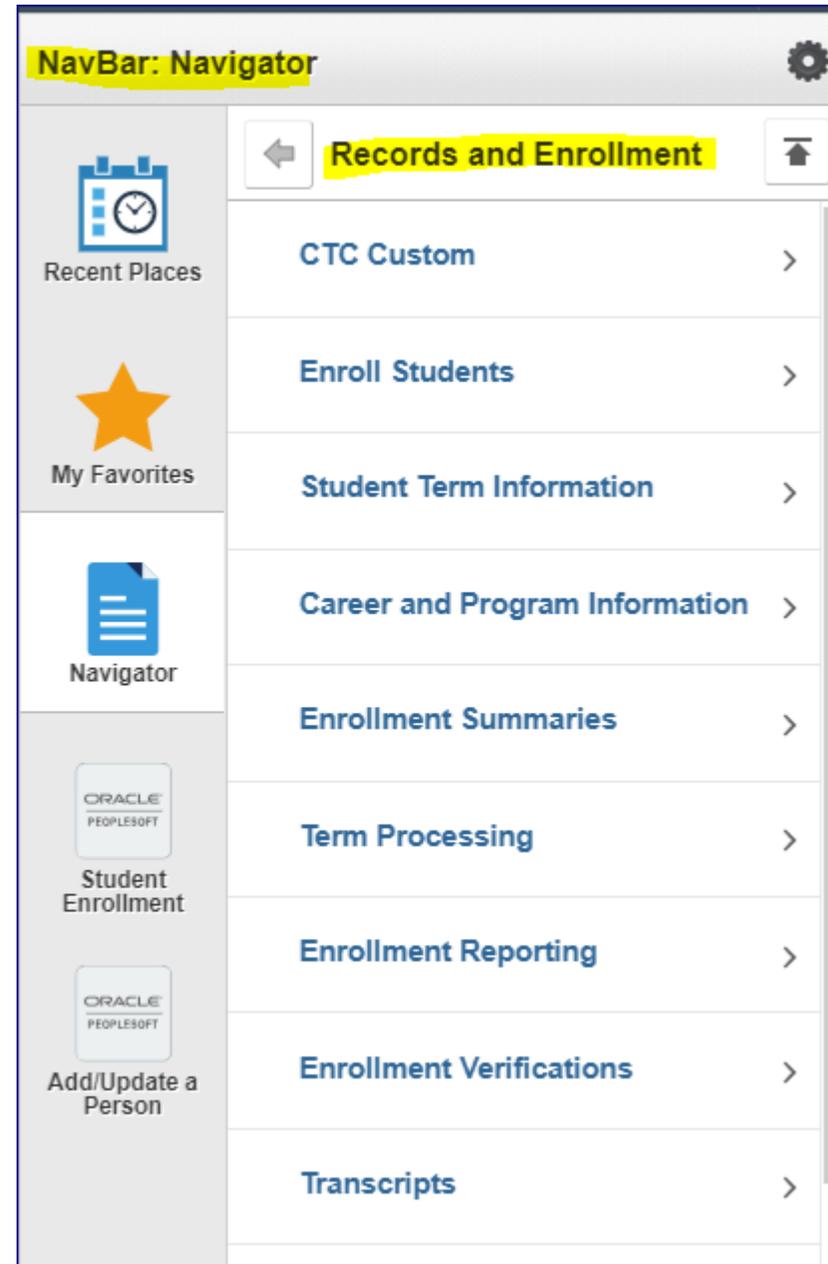
Navigating PeopleSoft Using NavBar Navigator

- The menu items displayed on the NavBar Navigator will display differently for end users depending upon security levels set.
- The menu will provide navigation to pages YOU have permission to work with
- The greater the level of security, the more populated your menu will be.



Navigating PeopleSoft Using Main Menu

- If you click on an item in the Navigator, a submenu of folders and documents will be displayed.
- In this example, the Records and Enrollment submenu is displayed.
- Scroll down by using the side bar on the right side of the NavBar.



Setting Up User Defaults

Note: Depending on Security, you may not have access Page Names.

Page Name	Definition Name	Navigation	Usage
User Defaults 1	OPR_DEF_TABLE_CS1	Set Up SACR > User Defaults > User Defaults 1	Set defaults for the Academic Institution field, Term field, Career field, Academic Program field, and other fields.
User Defaults 2	OPR_DEF_TABLE_CS2	Set Up SACR > User Defaults > User Defaults 2	Set defaults for the setID field, Aid Year field, Application Center field, Cashier's Office field, and other fields.
User Defaults 3	OPR_DEF_TABLE_CS5	Set Up SACR > User Defaults > User Defaults 3	Set defaults for admissions application data.
User Defaults 4	OPR_DEF_TABLE_CS4	Set Up SACR > User Defaults > User Defaults 4	Set defaults for printing transcripts, including transcript output destination and transcript type, SEVIS processing, and award-notification printing.
Enrollment Override Defaults	OPR_DEF_TABLE_CS3	Set Up SACR > User Defaults > Enrollment Override Defaults	Set default enrollment overrides for a specified user ID.
Communication Speed Keys	OPR_SPDKEY_FUNC	Set Up SACR > User Defaults > Communication Speed Keys	Set default values for communication keys for a particular user ID.
User 3C Groups Summary	OPR_GRP_3C_SUM	Set Up SACR > User Defaults > User 3C Groups Summary	Select the type of 3C group access by specifying inquiry or update access for data in 3C groups.

User Defaults

Tabs 1 through 4

NavBar > Set Up SACR > User Defaults (9.2
NavBar uses the same path as 9.0
breadcrumbs)

- Tab 1 - Sets defaults for Academic Institution field, Term field, Career field, Academic Program field & others.
- Tab 2 - Sets defaults for the setID field, Aid Year field, Application Center field, Cashier's Office field & others.
- Tab 3 – Sets defaults for Admissions Application data
- Tab 4 - Set defaults for printing transcripts, including transcript output destination and transcript type, SEVIS processing, and award-notification printing.

The image displays four screenshots of the 'User Defaults' configuration interface for User ID 101002145, arranged in a 2x2 grid. Each screenshot shows a different tab of the configuration form.

- Top Left Screenshot (Tab 1):** Shows fields for Academic Institution (WA171), Career Group SetID (WA171), Facility Group SetID (WA171), Academic Career (UGRD), Academic Group, Subject Area, Term (2201), Academic Program, Academic Plan, and Academic Sub-Plan.
- Top Right Screenshot (Tab 2):** Shows fields for SetID (WA171), Aid Year, Business Unit (WA171), Application Center, Recruiting Center, Cashier's Office, Department, and Admit Type.
- Bottom Left Screenshot (Tab 3):** Shows fields for Academic Level, Application Method, Last School Attended, Graduation Date, Housing Interest, and Financial Aid Interest. It also includes a section for 'External Acad Data Defaults' with fields for Transcript Type, Transcript Rcvd Data Source, and Transcript Rcvd Medium.
- Bottom Right Screenshot (Tab 4):** Shows a 'SEVIS Default' section with fields for Output Destination, Transcript Type, Flexible Transcript Type, Advisement Report Type, School Code, Program Number, and Printer Name.

Adding Favorites

Navigation: NavBar

- You can add links to pages to a Favorites list to view the pages you use most in one place.
- Recently accessed pages are automatically added to the Recent Places Tile.

Adding Favorites

1. From the NavBar, navigate to the page you want to add.
2. In the upper right corner, select the 3 vertical dots, then click Add to Favorites.
3. In this example, Add/Update a Person will be added to your list of favorites

The screenshot displays the 'Add/Update a Person' web application interface. At the top, a dark blue header bar contains the page title 'Add/Update a Person' and navigation icons (home, flag, and a three-dot menu). Below the header, the main content area features a search section with the title 'Add/Update a Person' and the instruction 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Two buttons are present: 'Find an Existing Value' (highlighted in green) and 'Add a New Value'. Underneath, a 'Search Criteria' section is expanded, showing five search fields: 'ID', 'Campus ID', 'National ID', 'Last Name', and 'First Name'. Each field has a 'begins with' dropdown menu and an adjacent text input box. On the right side of the page, a vertical dropdown menu is open, listing options: 'Add To Homepage', 'Add To NavBar', 'Add To Favorites' (highlighted in yellow), 'My Preferences', and 'Sign Out'.

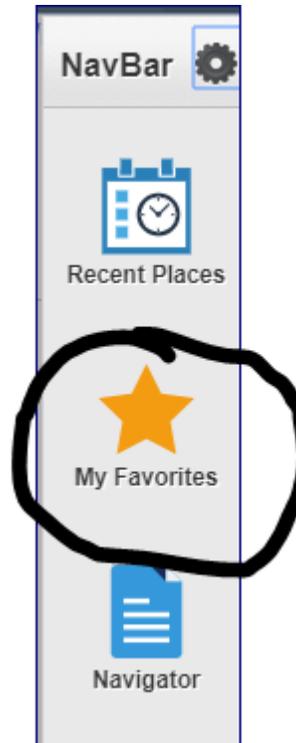
Adding Favorites

4. Enter a description or accept the default
5. Click OK when desired description is added
6. Favorites can be viewed by selecting the gold star on the NavBar.

Add to Favorites

Please Enter a Unique Description for this Favorite

*Description

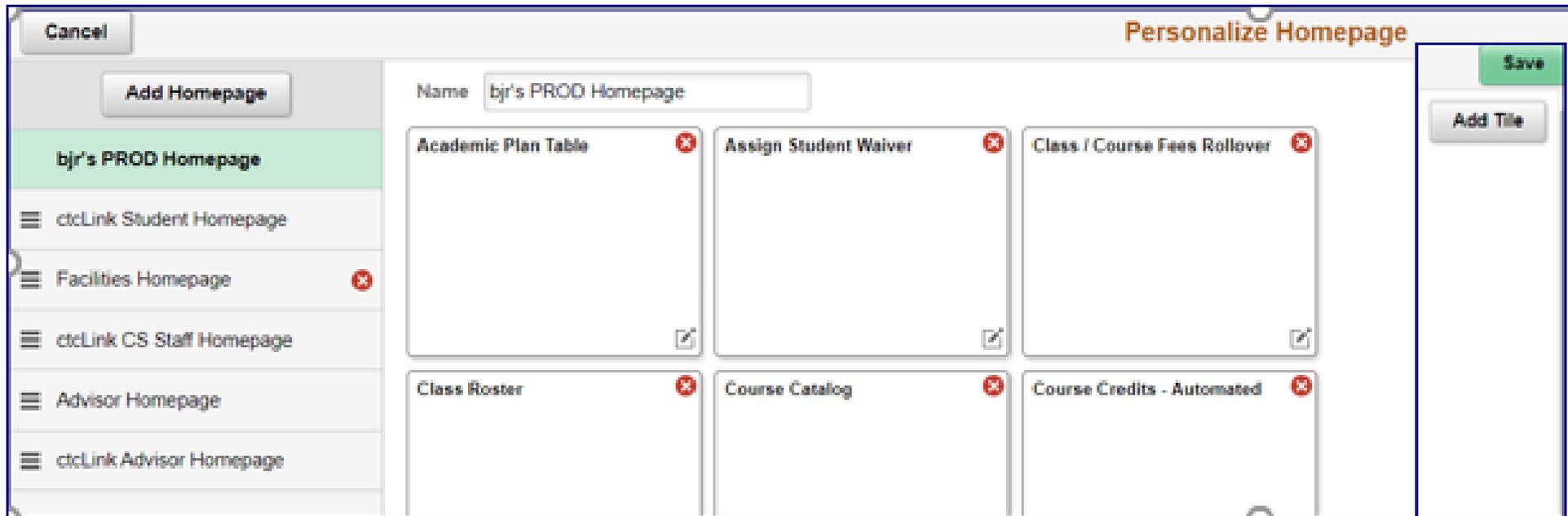


Personalize the Content of the Homepage

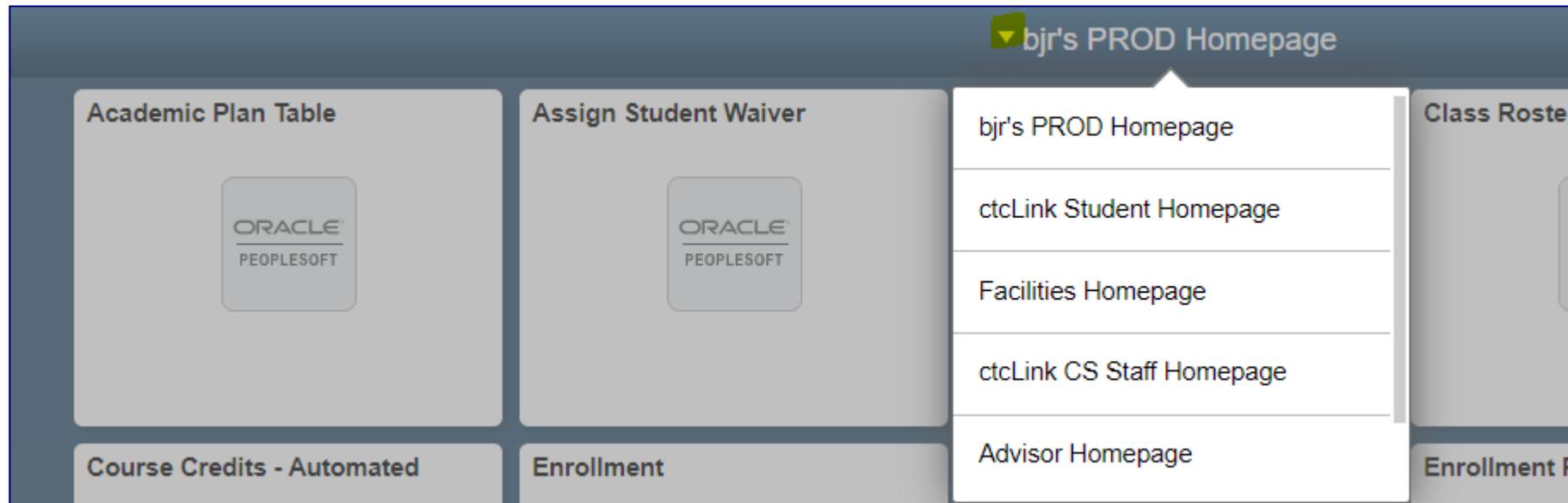
- It is difficult to tell Production and Test environments apart
- All testing environments mirror production and can only be identified by the URL, unless personalized
- In the upper right corner, select the 3 vertical dots, then click Personalize Homepage.

Personalize Homepage

- Add or rearrange tiles by moving the links under Add Homepage
- Add, remove or personalize tiles



- Enter the desired text in the “Name” box
- The text will appear in the drop-down of the Home Page
- Change the name of any of your homepages to indicate the environment “PROD” or “TEST” or “PCD”
- Remember that when the Test Environment (PCD) is refreshed, it will be necessary for you to re-enter “TEST” or “PCD”, since all test environment screens will be a duplicate of PROD



Personalize Pages-change default view

- Navigate to the page you wish to personalize
- Choose the preferred default settings
 - Select Courses and Degrees Tab
 - Select View All
- Select the Personalize Page Link in the upper right corner

The screenshot shows a web application interface for 'External Education'. The 'Courses and Degrees' tab is selected and highlighted in yellow. The user is logged in as 'Woody Cowboy' with ID '201263737'. The page title is 'External Organization' and it shows '1 of 1' records. A 'Personalize Page' link is visible in the top right corner. The main content area displays 'External Org ID 000140105' and 'Lake Washington Institute of T'. Below this is a section for 'External Course Defaults' with an 'Apply Defaults' button. The form contains the following fields:

Data Number	External Career	Undergraduate	
Data Source	Self-Reported Information	Term Type	
Acad Level	Unknown	Begin Date	
Institution	WA171 Spokane CC	End Date	
Course Type	Course	Course Level	
Unit Type		Units Taken	
Grading Scheme	CrGrid	Grading Basis	TRN Transfer

bjr's PROD Homepage External Education

OK Cancel [Copy Settings](#) [Share Settings](#) [Delete Settings](#)

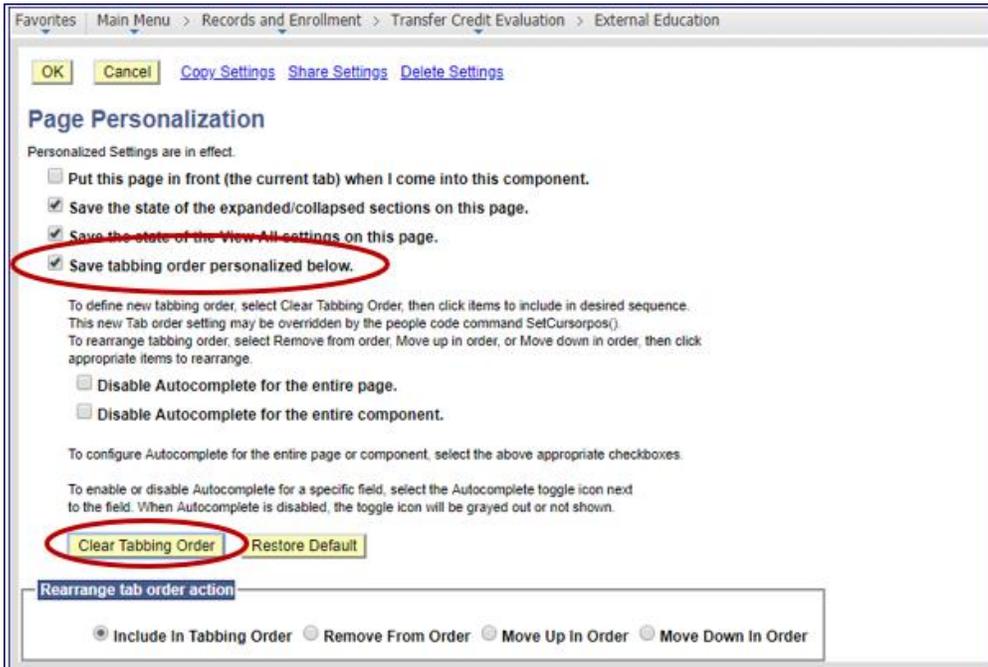
Page Personalization

Personalized Settings are in effect.

NOTE: Different personalization options are available, depending upon the page/section selected

- Put this page in front (the current tab) when I come into this component.
- Save the state of the expanded/collapsed sections on this page.
- Save the state of the View All settings on this page.
- Save tabbing order personalized below.

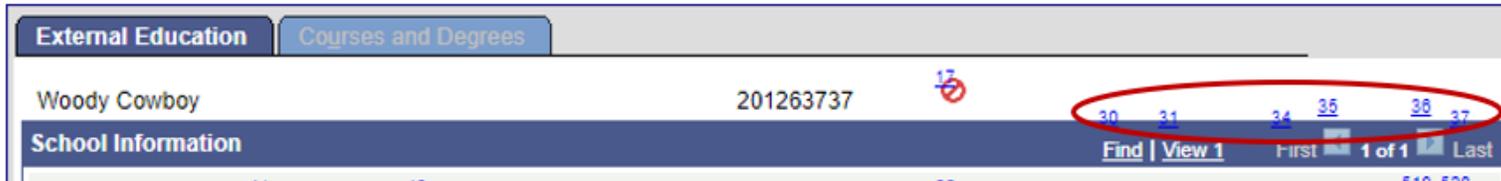
- First checkbox controls the active default tab - Courses and Degrees Tab
- Second checkbox controls whether sections are expanded or collapsed by default
- Third checkbox controls whether this page opens showing one or multiple pages expanded
- Select OK to save
- The page will default based on changes when opened in the future



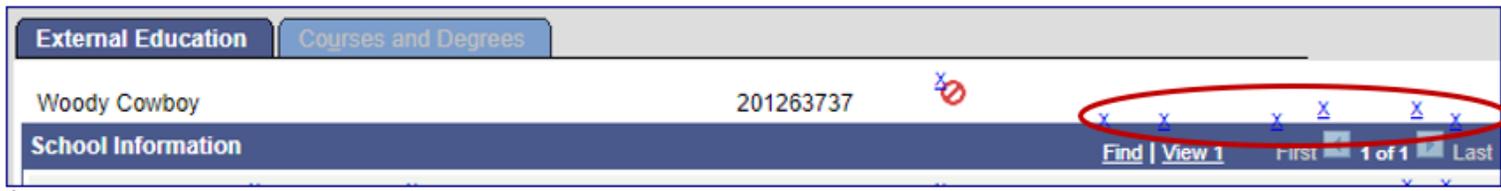
Personalize Pages Change Tabbing Order

- Navigate to a page to change the tabbing order of fields
- Select Clear Tabbing Order
- All tab labels change from default tabbing order to “x”

Before Clearing Tabbing Order



After Clearing Tabbing Order



to the field. When Autocomplete is disabled, the toggle is

Clear Tabbing Order Restore Default

Select Restore Default only if you wish to return the page to the original tabbing order

Rearrange tab order action

Include In Tabbing Order
 Remove From Order
 Move Up In Order
 Move Down In Order

External Education Courses and Degrees

Woody Cowboy 201263737

School Information Find | View 1 First 1 of 1 Last

1 External Org: 00140105 Lake Washington Institute of T Checklist Item Update

School Details

Location: Lake Washington Tech College

Country: USA United States

Address: 11605 132Nd Ave Ne Kirkland, WA 98034

School Characteristics

School Type: Community

School District:

Accredited

Transcript Translation Req

School Codes

ATP Code: 1453 FICE Code: 005373

ACT Code: IPEDS Code:

NCES:

Career Data Find | View 1 First 1 of 1 Last

Data Num 2

Term Type 3

Term Year 2017

From Date

*Career: 4

External Ter 5

Academic L

To Date: 6

Dismissed from School

Comments

Transcript Status

Personalize Pages

Change Tabbing Order

- Click the “x” next to each field in the order you would like the fields to be selected by tabbing
- As each “x” is clicked, the tabbing order of the fields is created incrementally with each click
- Six tabs have been selected
- When the page is opened, the cursor will tab in the order clicked
- To return page to original tabbing order, select “Restore Default”

Personalize Section Column and Sort Order

Enrollment Request Search

Academic Institution WA171 Spokane CC

Academic Career

Term

Enrollment Request ID

Enrollment Request Source

Enrollment Request Action

Enrollment Action Reason

User ID

ID

Class Nbr

Refresh Previous Search Result

Enrollment Action Range

From Date

End Date

Last Update Range

From DateTime

Thru DateTime

Enrollment List [Personalize](#) Find | First 1 of 1 Last

Fields 1-7	Fields 8-11	Fields 12-19	Fields 20-25	Fields 26-30	Fields 31-35	Fields 36-40	
User ID	ID	Term	Class Nbr	Subject Area	Catalog Nbr	Academic Career	
1							

- Navigate to the section of the page you wish to personalize
- Select the Personalize Link

- To order columns or add fields to sort order, highlight column name, then press the appropriate button
- Frozen columns display under every tab, hidden columns do not display
- Select Preview to see results

