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!!

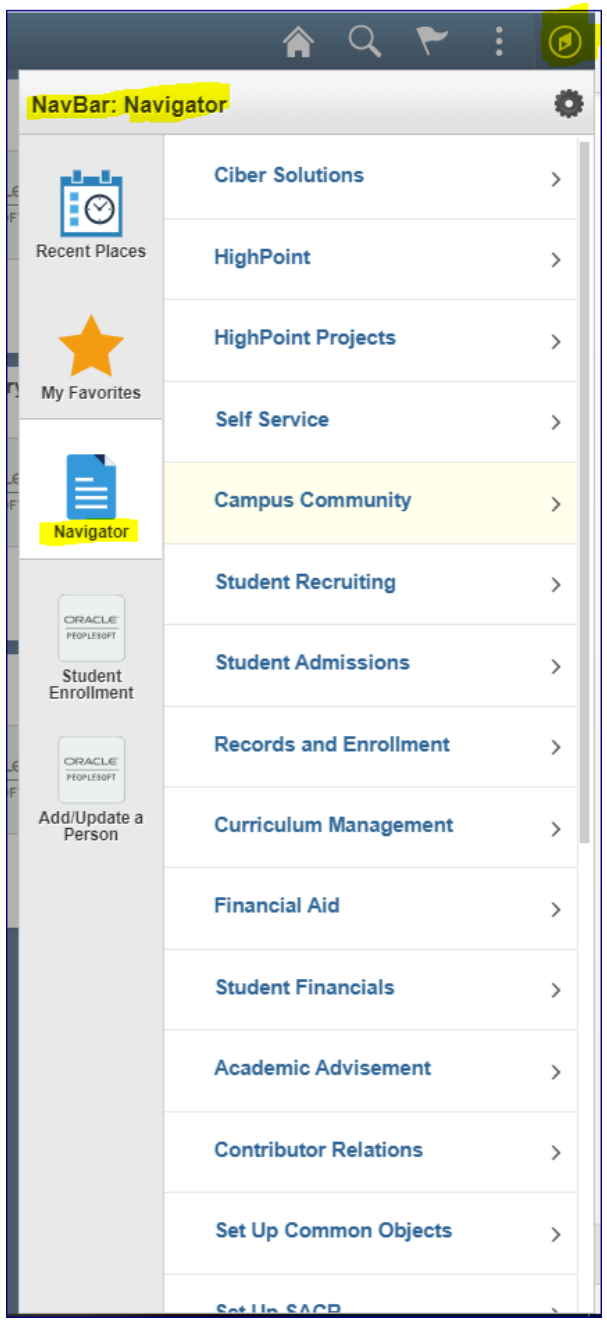
9.2 Basic Navigation

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 hompage(s)

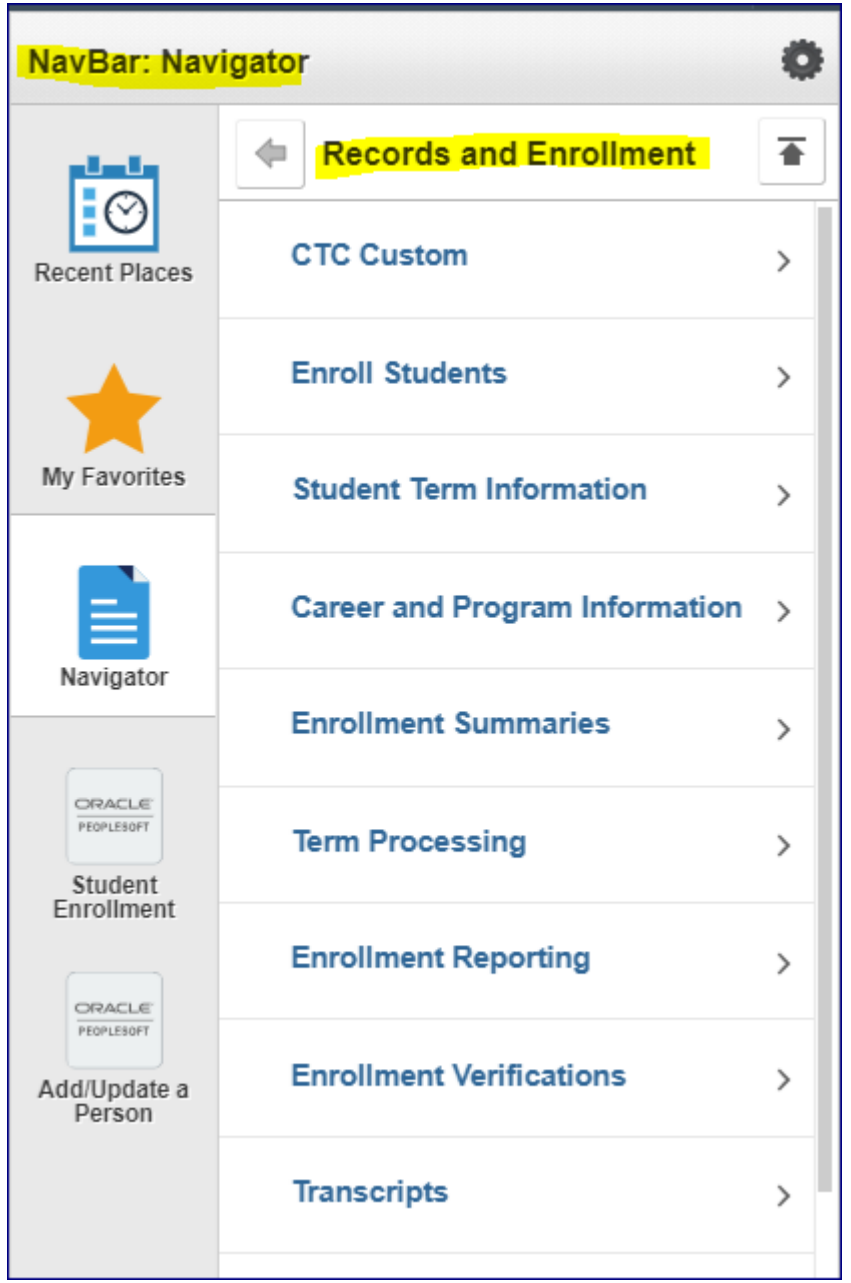
Navigating PeopleSoft Using NavBar Navigator

- 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

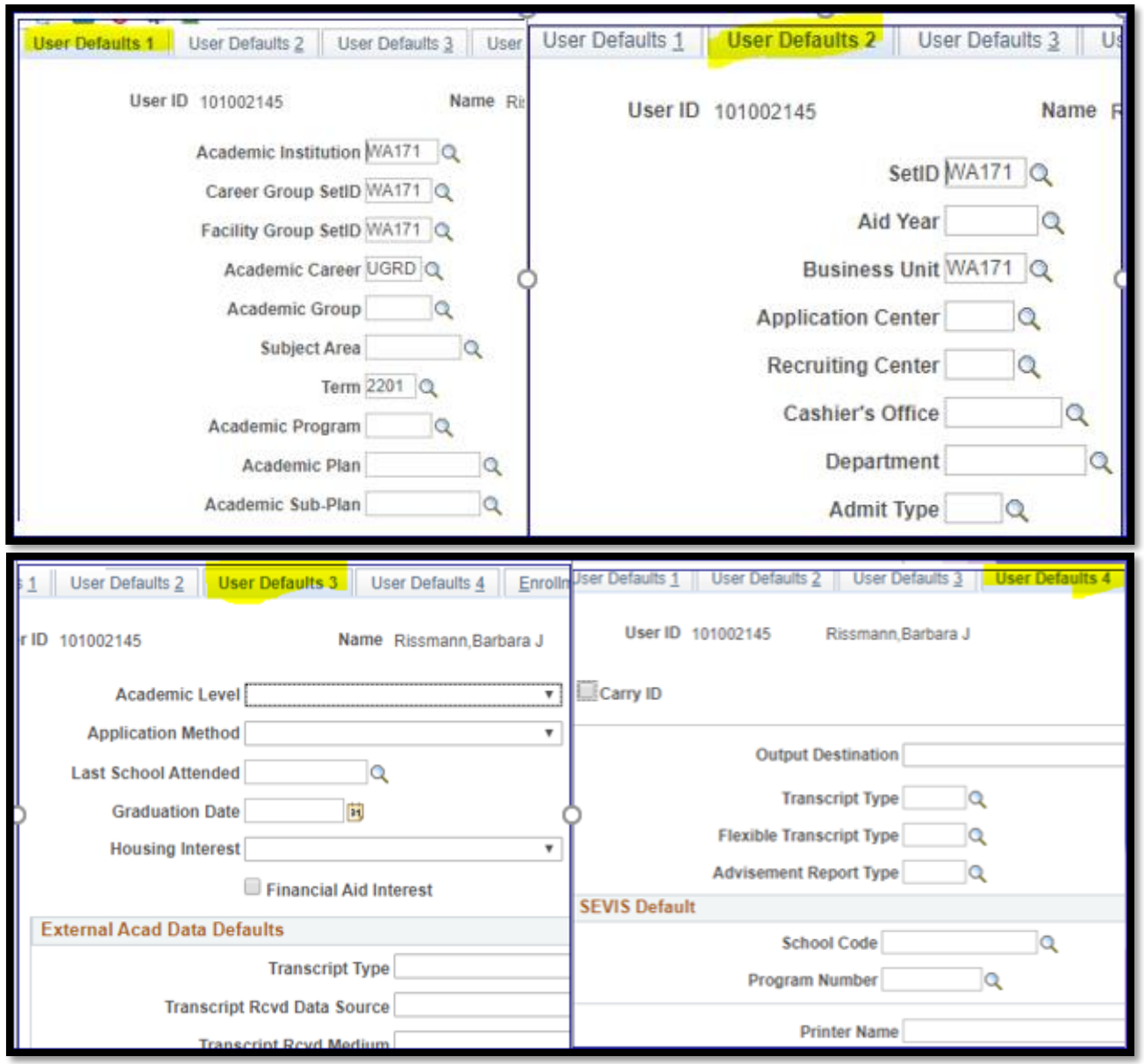
Note: Depending on Security, you may not have access Page Names.

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.



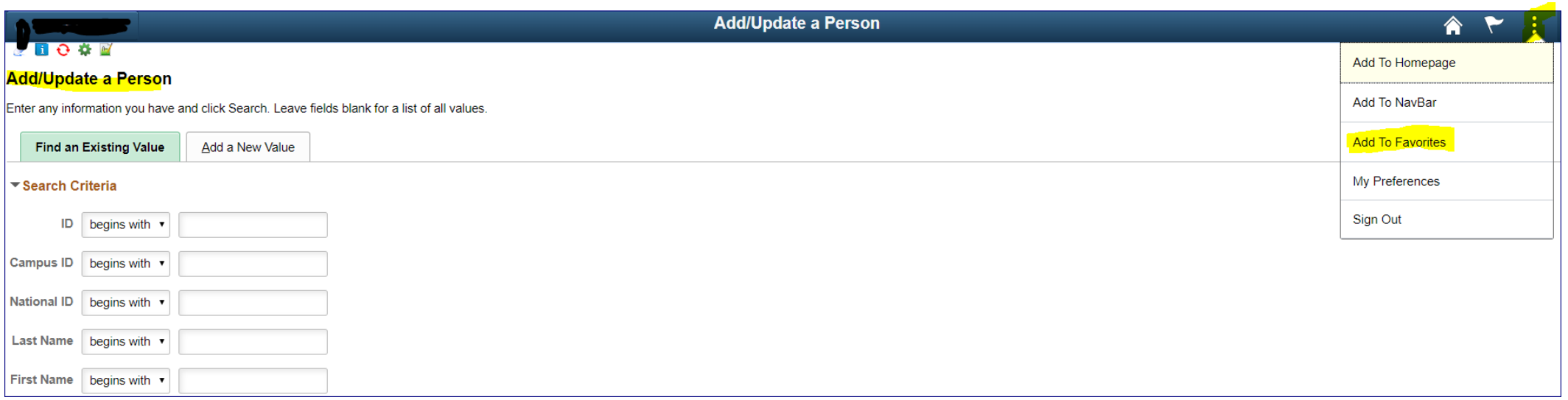
Adding Favorites

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.

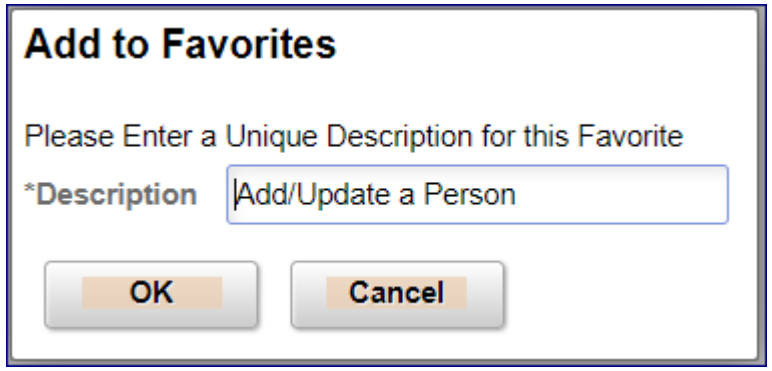
Adding Favorites

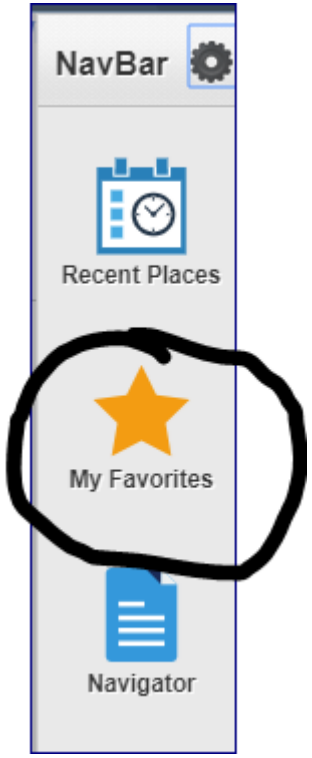
1. From the NavBar, navigate to the page you want to add.
2. In the upper right corner, select the 3 vertical dots, then click Add to Favorites.
3. In this example, Add/Update a Person will be added to your list of favorites



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.



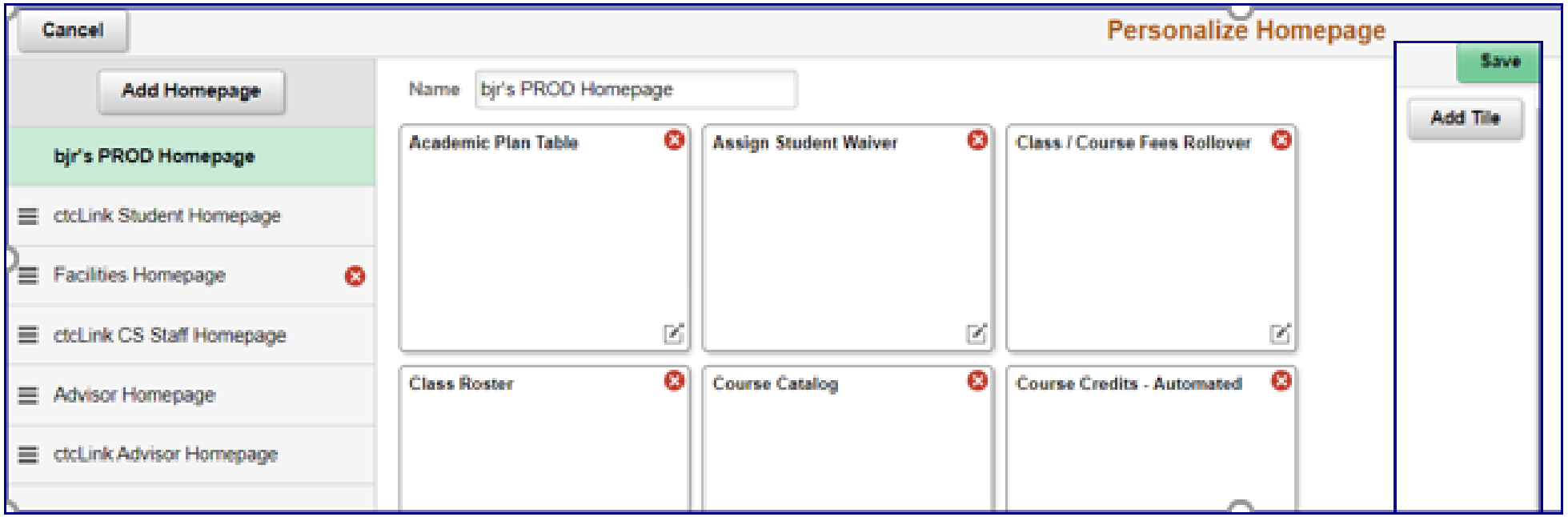


Personalize the Content of the Homepage

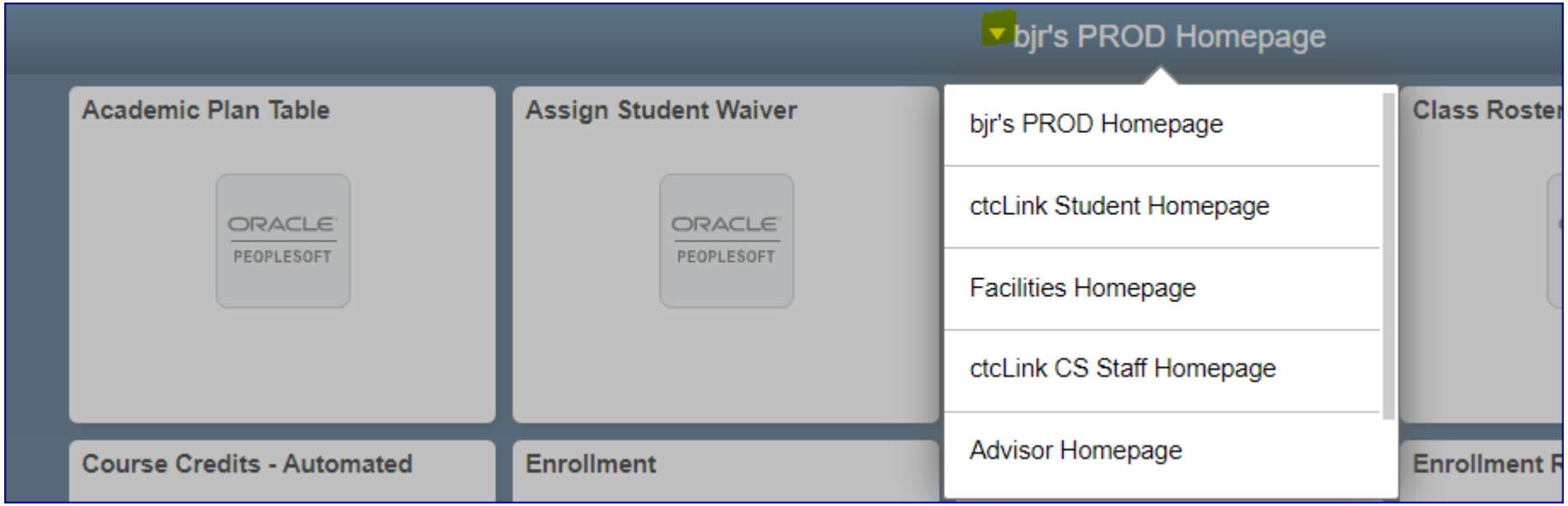
- It is difficult to tell Production and Test environments apart
- All testing environments mirror production and can only be identified by the URL, unless personalized
- In the upper right corner, select the 3 vertical dots, then click Personalize Homepage.

Personalize Homepage

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

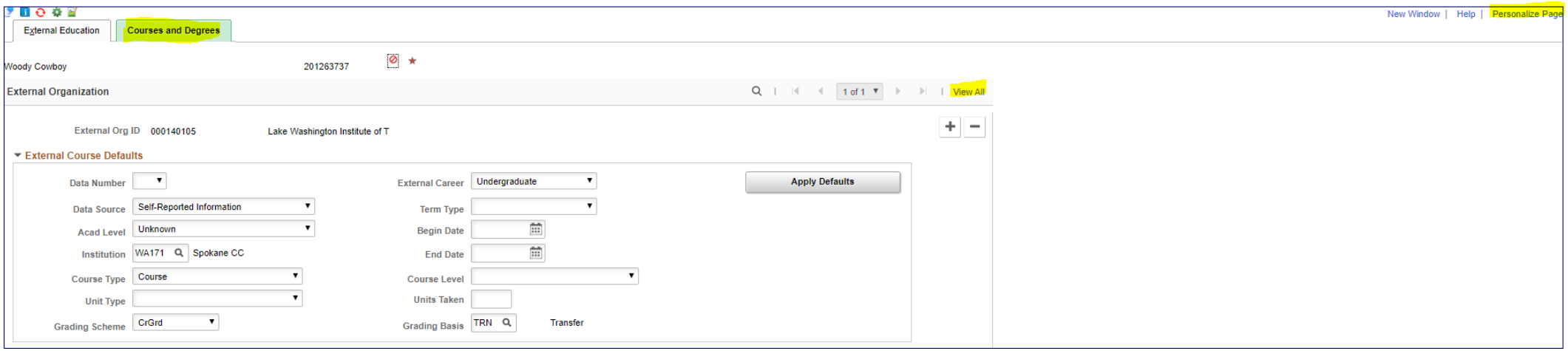


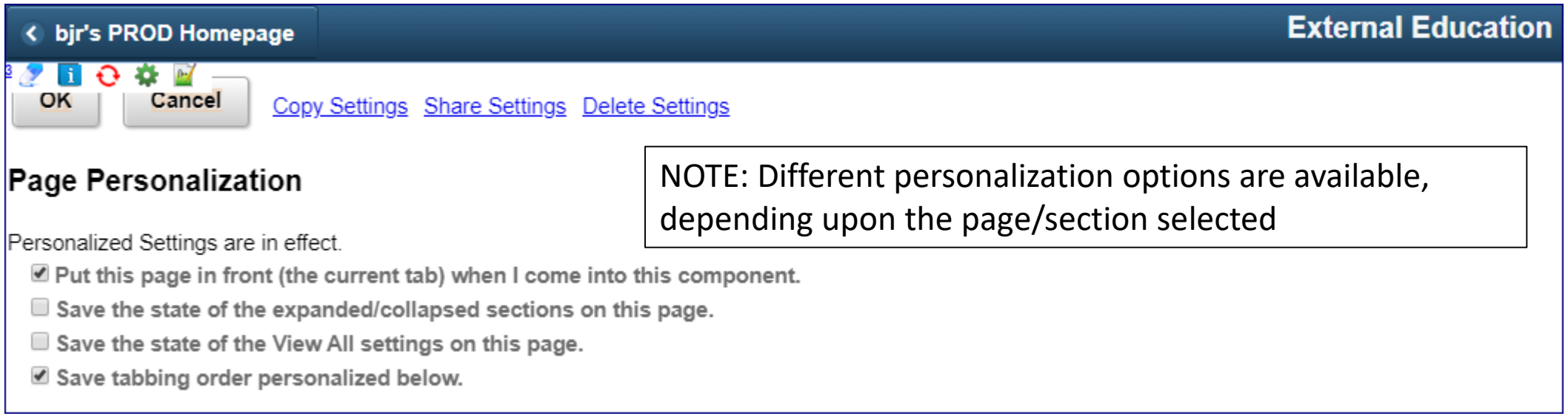
- Enter the desired text in the “Name” box
- The text will appear in the drop-down of the Home Page
- Change the name of any of your homepages to indicate the environment “PROD” or “TEST” or “PCD”
- Remember that when the Test Environment (PCD) is refreshed, it will be necessary for you to re-enter “TEST”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



Personalize Pages-change default view

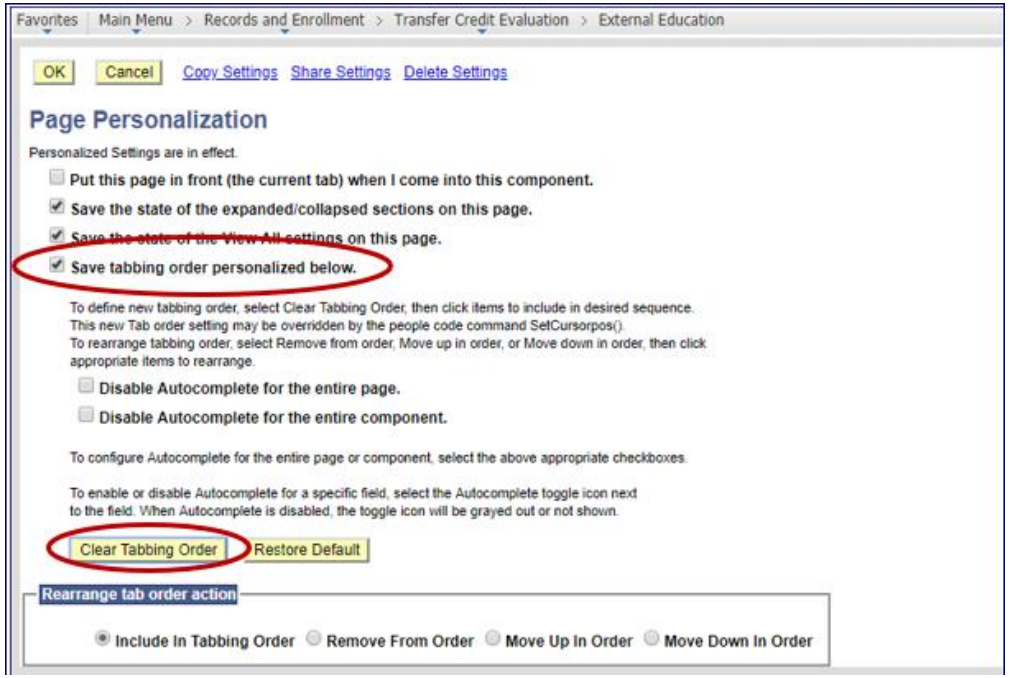
- Navigate to the page you wish to personalize
- Choose the preferred default settings
  - Select Courses and Degrees Tab
  - Select View All
- Select the Personalize Page Link in the upper right corner





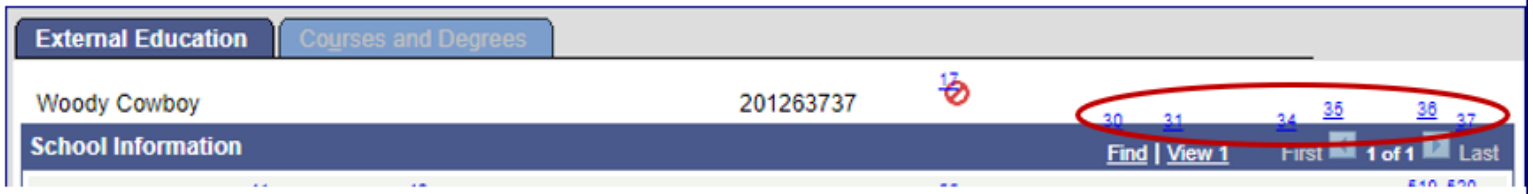
- First checkbox controls the active default tab - Courses and Degrees Tab
- Second checkbox controls whether sections are expanded or collapsed by default
- Third checkbox controls whether this page opens showing one or multiple pages expanded
- Select OK to save
- The page will default based on changes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

Personalize Pages Change Tabbing Order

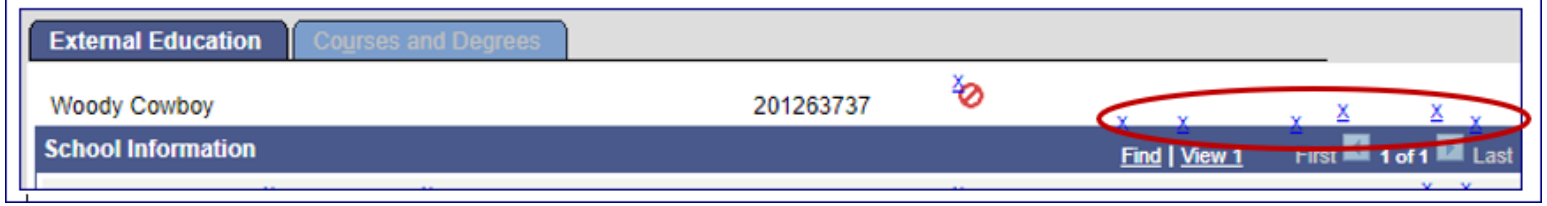


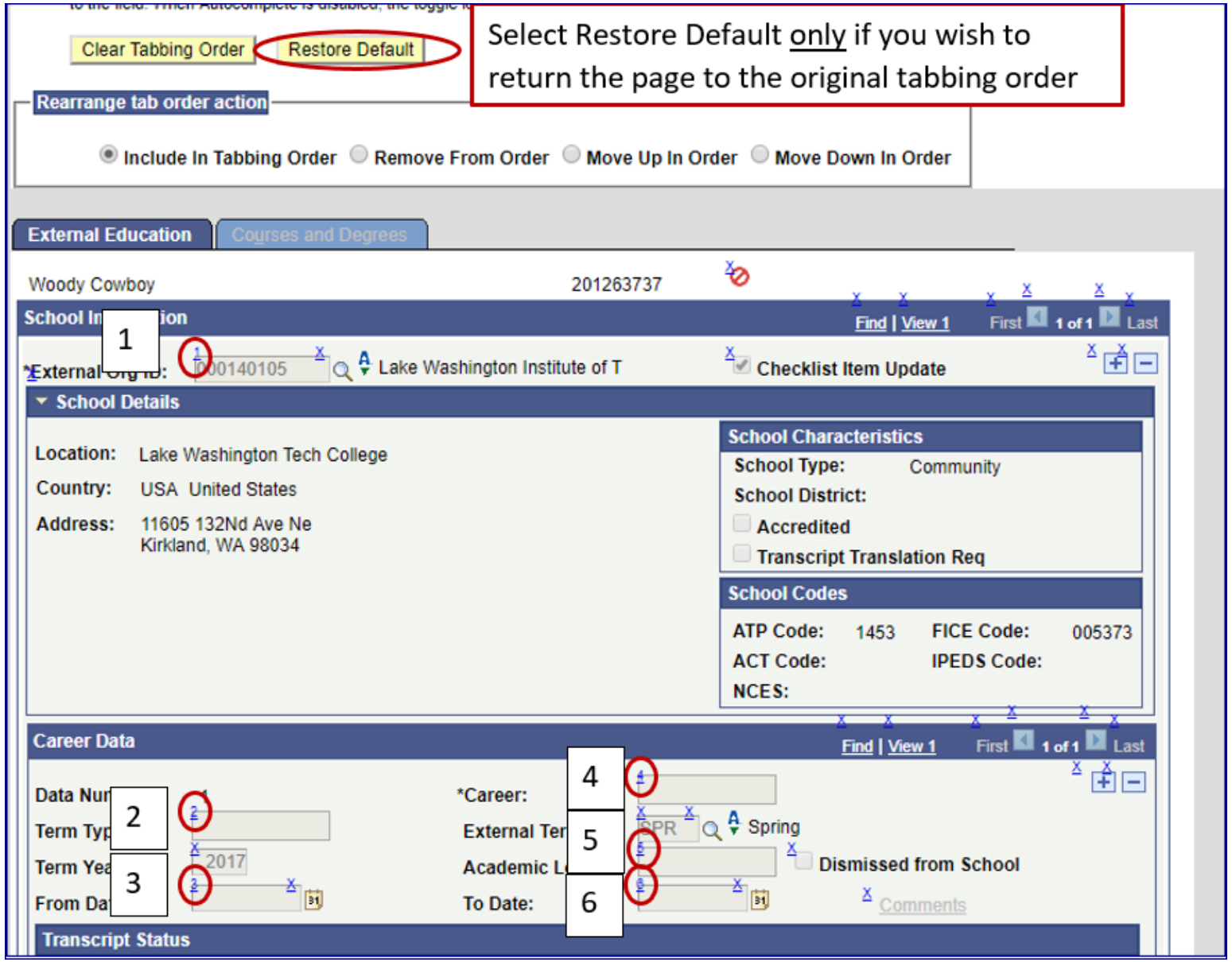
- Navigate to a page to change the tabbing order of fields
- Select Clear Tabbing Order
- All tab labels change from default tabbing order to “x”

Before Clearing Tabbing Order



After Clearing Tabbing Order

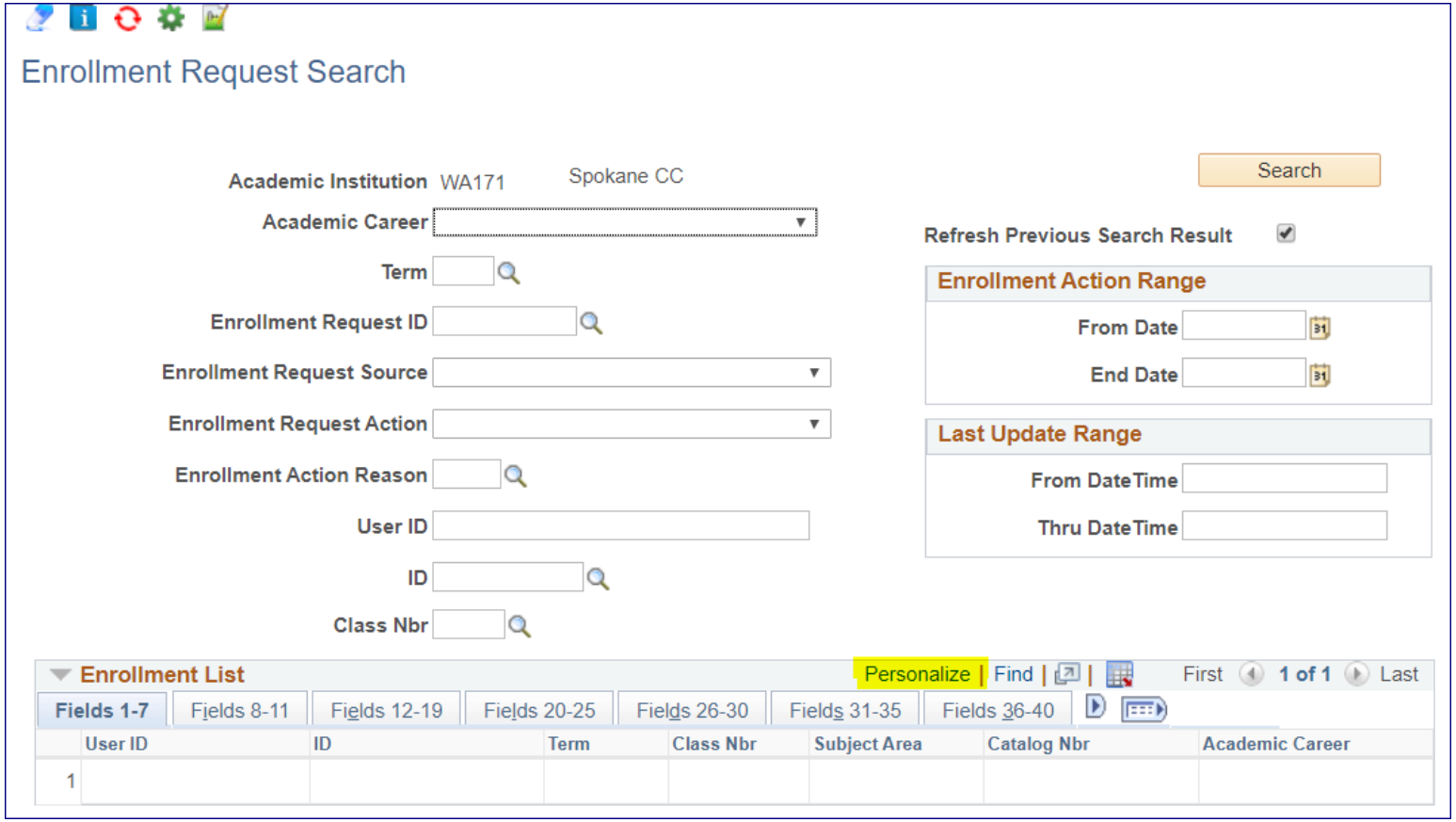


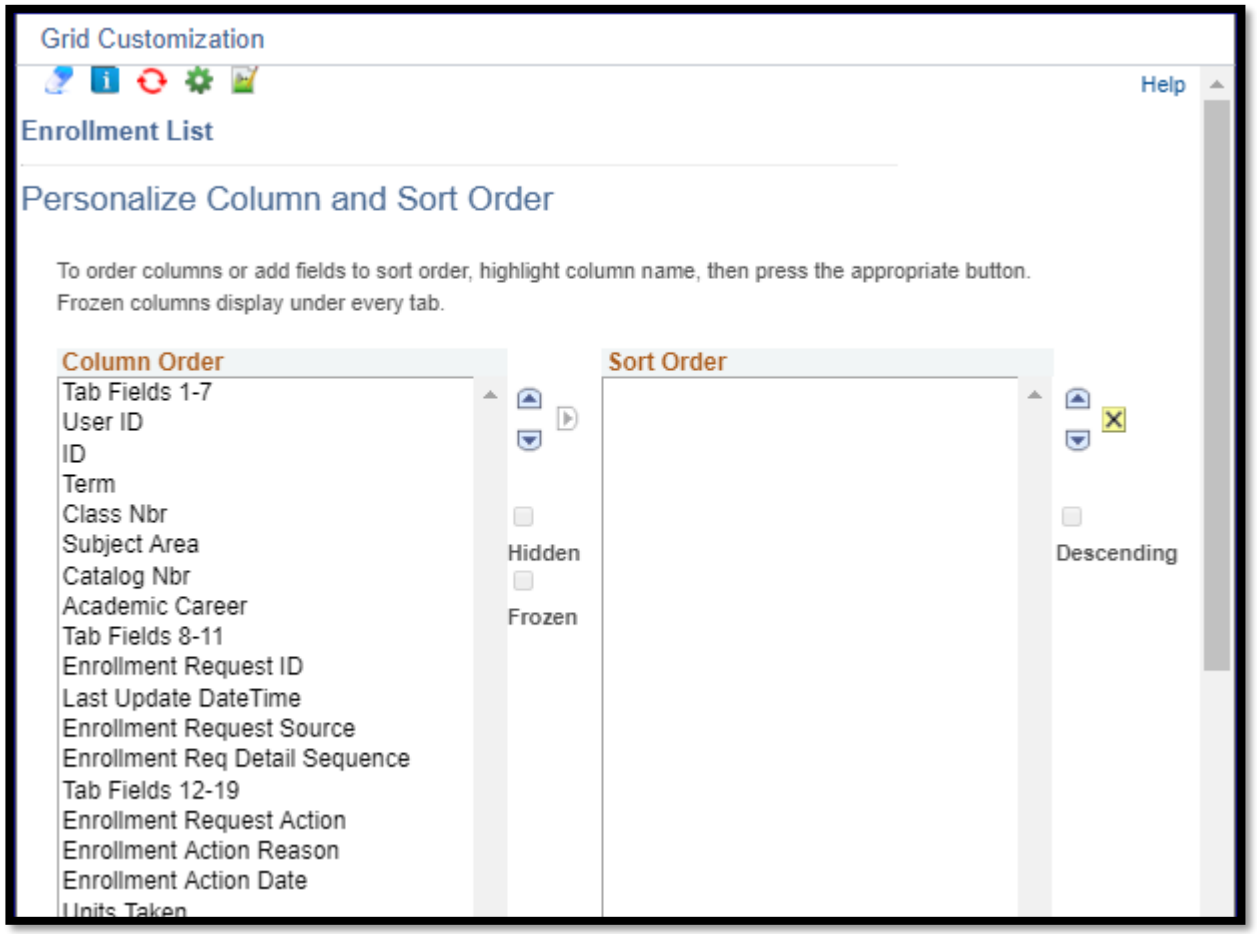


Personalize Pages
Change Tabbing Order

- 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



- 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