

# 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!!

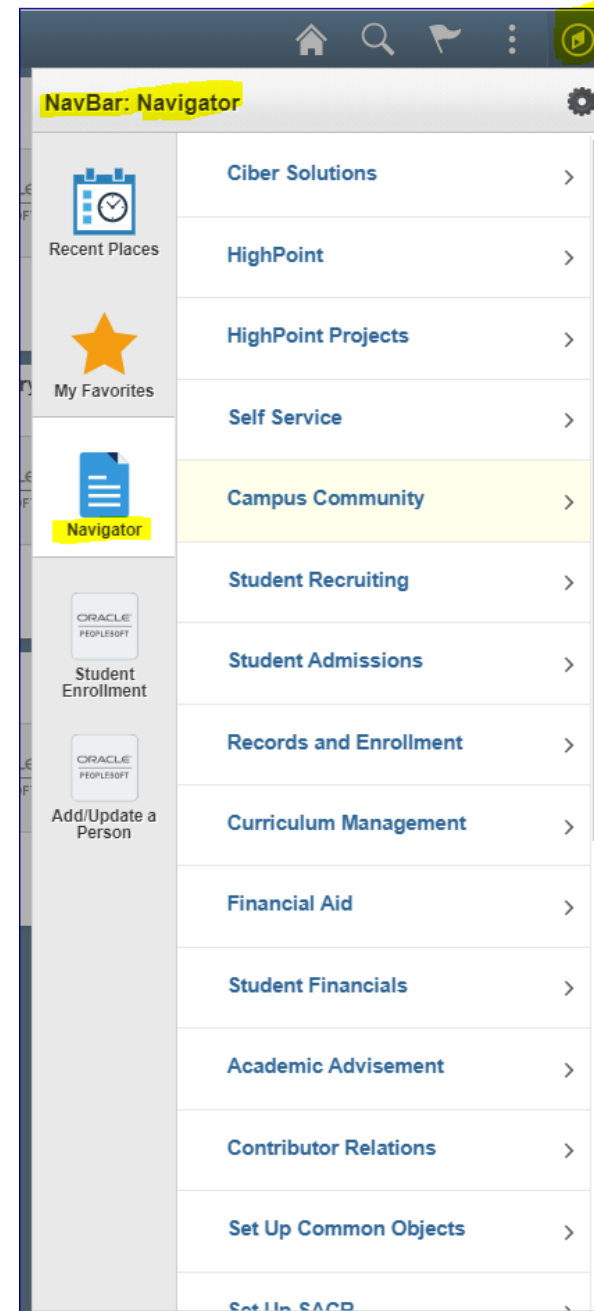
## 9.2 Basic Navigation

**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)

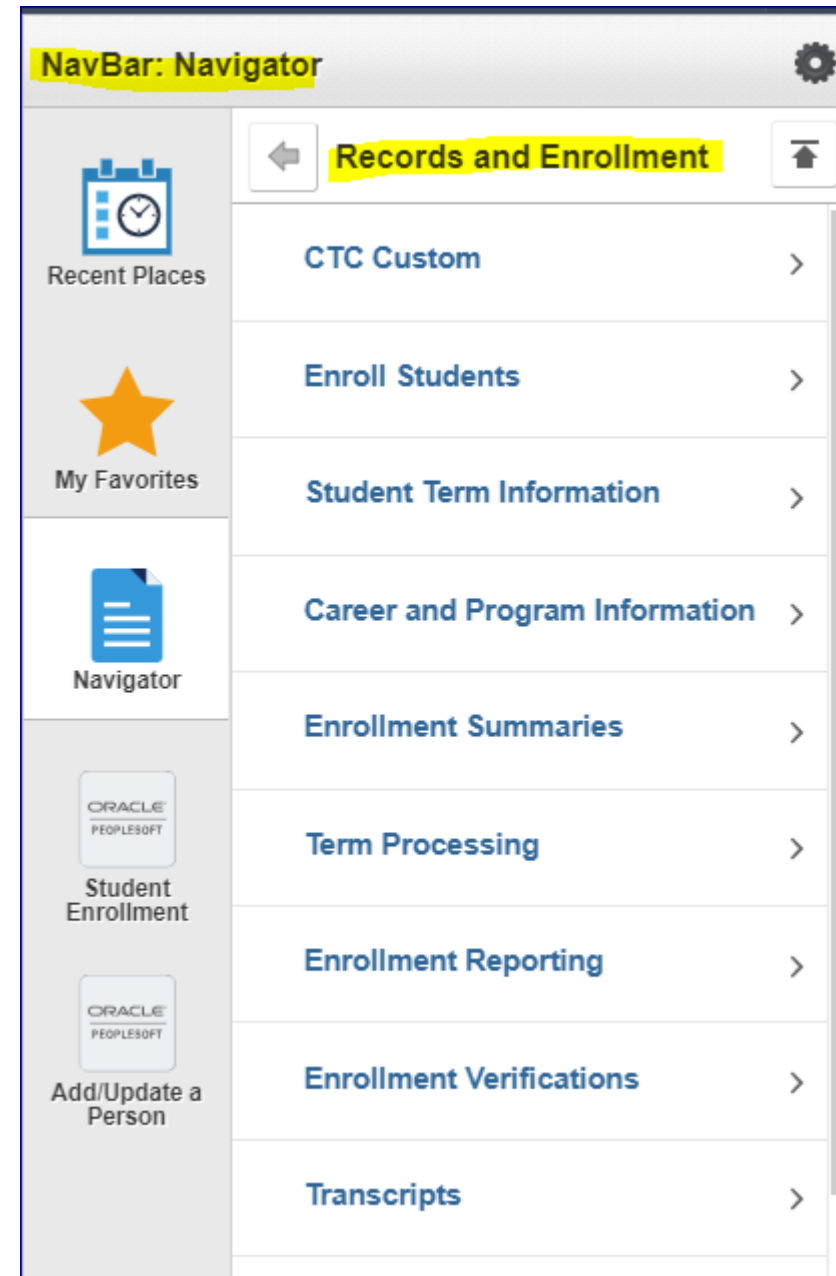
# Navigating PeopleSoft Using NavBar Navigator

- 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' application interface, showing tabs 1 through 4. Each screenshot displays a form for User ID 101002145, Rissmann, Barbara J.

**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.

**Tab 2:** Shows fields for SetID (WA171), Aid Year, Business Unit (WA171), Application Center, Recruiting Center, Cashier's Office, Department, and Admit Type.

**Tab 3:** Shows fields for Academic Level, Application Method, Last School Attended, Graduation Date, Housing Interest, Financial Aid Interest, and External Acad Data Defaults.

**Tab 4:** Shows fields for SEVIS Default, 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. The top navigation bar is dark blue with the title 'Add/Update a Person' and icons for home, flag, and a menu of three vertical dots. Below the navigation bar, the page title 'Add/Update a Person' is highlighted in yellow. A search instruction reads: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this are two buttons: 'Find an Existing Value' (green) and 'Add a New Value' (white). The main content area is titled 'Search Criteria' and contains five search fields, each with a 'begins with' dropdown and a text input box: ID, Campus ID, National ID, Last Name, and First Name. On the right side, a sidebar menu is visible with the following options: 'Add To Homepage', 'Add To NavBar', 'Add To Favorites' (highlighted in yellow), 'My Preferences', and 'Sign Out'.

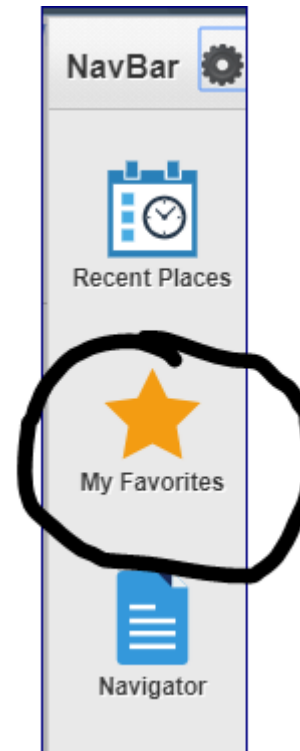
# Adding Favorites

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

Cancel

Personalize Homepage

Save

Add Homepage

Name: bjr's PROD Homepage

bjr's PROD Homepage

ctcLink Student Homepage

Facilities Homepage

ctcLink CS Staff Homepage

Advisor Homepage

ctcLink Advisor Homepage

Academic Plan Table

Assign Student Waiver

Class / Course Fees Rollover

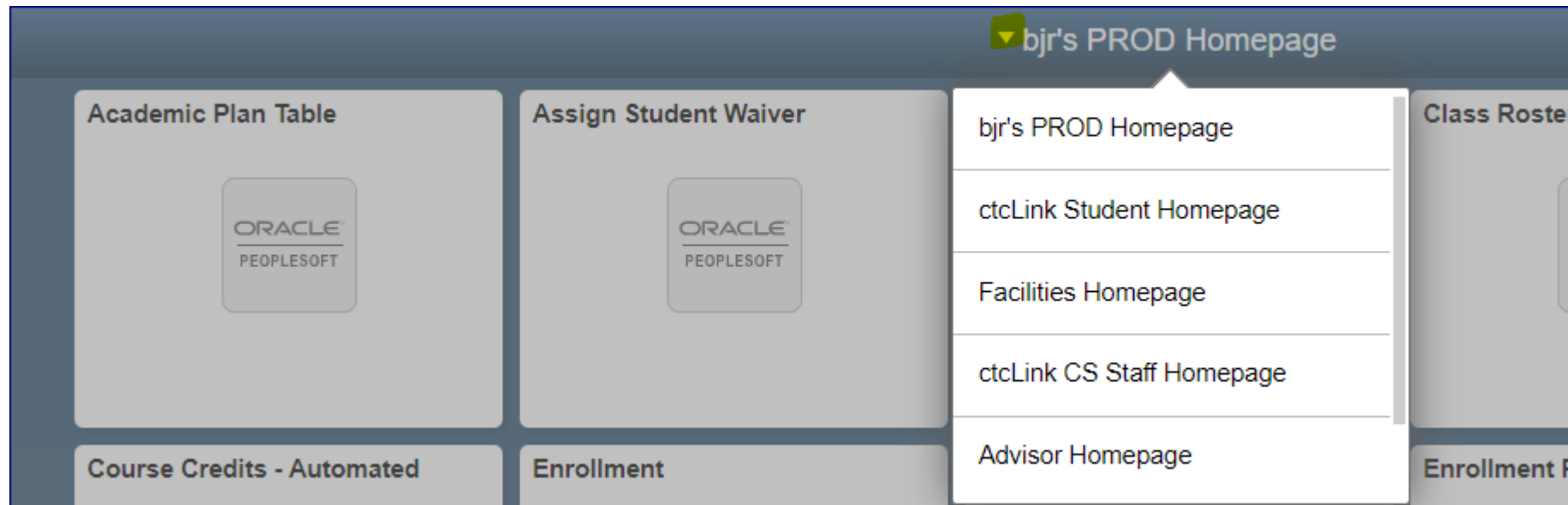
Class Roster

Course Catalog

Course Credits - Automated

Add Tile

- 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. The user is logged in as 'Woody Cowboy' with ID '201263737'. The 'External Organization' section shows 'External Org ID: 000140105' and 'Lake Washington Institute of T'. The 'External Course Defaults' section is expanded, showing the following settings:

Field	Value
Data Number	[Dropdown]
Data Source	Self-Reported Information
Acad Level	Unknown
Institution	WA171 Spokane CC
Course Type	Course
Unit Type	[Dropdown]
Grading Scheme	CrGrid
External Career	Undergraduate
Term Type	[Dropdown]
Begin Date	[Calendar]
End Date	[Calendar]
Course Level	[Dropdown]
Units Taken	[Input]
Grading Basis	TRN

An 'Apply Defaults' button is located to the right of the settings. The 'Personalize Page' link is highlighted in the top right corner.

< bjr's PROD Homepage

External Education



OK

Cancel

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

## Page Personalization

Personalized Settings are in effect.

☒ 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.

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

- 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

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

### Page Personalization

Personalized Settings are in effect.

☐ 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.

To define new tabbing order, select Clear Tabbing Order, then click items to include in desired sequence.  
 This new Tab order setting may be overridden by the people code command SetCursorpos().  
 To rearrange tabbing order, select Remove from order, Move up in order, or Move down in order, then click appropriate items to rearrange.

☐ Disable Autocomplete for the entire page.  
☐ Disable Autocomplete for the entire component.

To configure Autocomplete for the entire page or component, select the above appropriate checkboxes.

To enable or disable Autocomplete for a specific field, select the Autocomplete toggle icon next to the field. When Autocomplete is disabled, the toggle icon will be grayed out or not shown.

[Clear Tabbing Order](#) [Restore Default](#)

Rearrange tab order action

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

# 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

[External Education](#) [Courses and Degrees](#)

Woody Cowboy 201263737

School Information

Find | View 1 First 1 of 1 Last

## After Clearing Tabbing Order

[External Education](#) [Courses and Degrees](#)

Woody Cowboy 201263737

School Information

Find | View 1 First 1 of 1 Last



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 ID: 000140105 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 6

To Date:

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 Search

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  31

End Date  31

**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

Grid Customization

Enrollment List

Personalize Column and Sort Order

To order columns or add fields to sort order, highlight column name, then press the appropriate button.  
Frozen columns display under every tab.

Column Order	Sort Order
Tab Fields 1-7	
User ID	
ID	
Term	
Class Nbr	
Subject Area	
Catalog Nbr	
Academic Career	
Tab Fields 8-11	
Enrollment Request ID	
Last Update DateTime	
Enrollment Request Source	
Enrollment Req Detail Sequence	
Tab Fields 12-19	
Enrollment Request Action	
Enrollment Action Reason	
Enrollment Action Date	
Units Taken	

Hidden

Frozen

Descending

OK Cancel Preview Copy Settings