

NAVIGATING IN THE SYSTEM

AUTHORIZED REQUESTERS AND AUTHORIZED APPROVERS

CHAPTER 2



Bowie State University
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NAVIGATING IN THE SYSTEM

Overview

Being able to navigate in Peoplesoft is essential. After signing on to PeopleSoft, the system displays a homepage with menu navigation and a universal navigation header. The browser-based *navigation* is designed to allow you to access your pages using the menu pagelet with navigation pages or by using drop-down menus. There is also a search feature on the menu that you can use to find your page.

The folder drilldown structure is the primary means of getting around your PeopleSoft application. This structure collapses and expands based on your selections. The main level, also known as *Home* is a blank page allowing you to access previously used pages from *Favorites* or to open the *Main Menu*.

You also have access to two bookmarks that allow you to make changes based on your own preferences: *Change My Password* and *My System Profile*. You can reset your own password.

Objectives

By the end of this chapter, you will be able to:

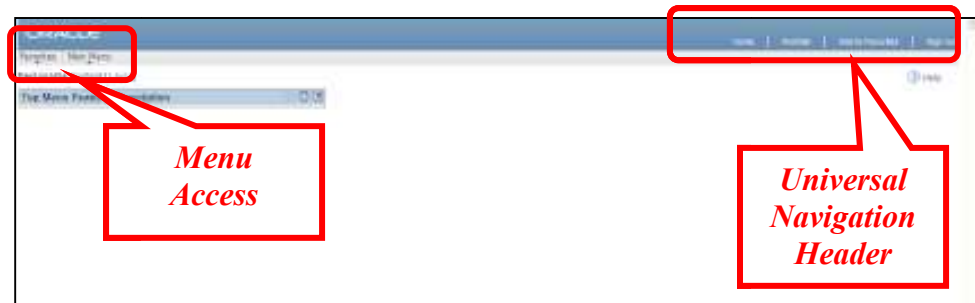
- Navigate in Peoplesoft.
- Access a page or component.
- Use a link to access related pages.
- Open pages.
- Save pages.

Navigation

The PeopleSoft application is internet browser-based. Point to the component that you want to access and a small hand appears. The hand means that the item is linked, and you can click it to open a new menu or access a component.

Home Page

After signing in you will see the *Home* page. It consists of the Navigation bar and the access to the menus.

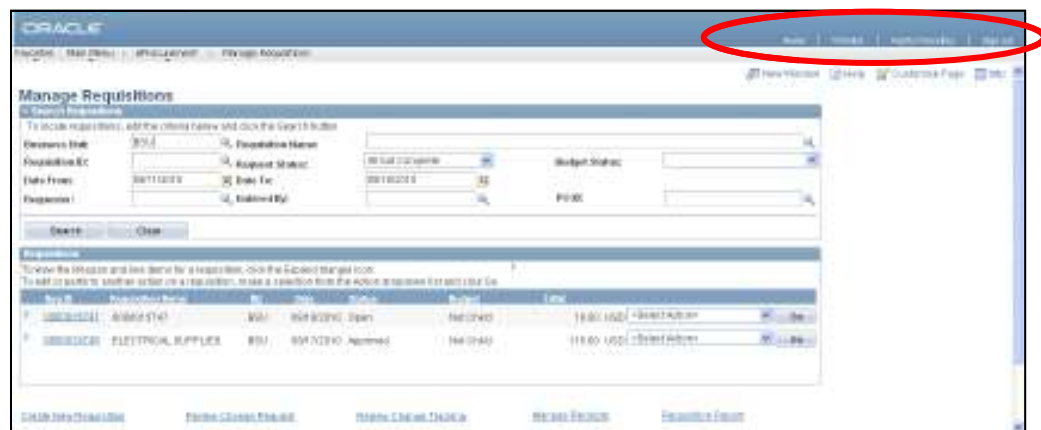


Universal Navigation Header

The Universal Navigation Header includes hyperlinks to *Home*, *Worklist*, *Add to Favorites*, and *Sign Out*. You can access these commands from page.

Navigation

- eProcurement
- Manage Requisitions



The Universal Navigation Header hyperlinks are:

<i>Home</i>	Click to close the current component and return to the default homepage.
<i>Worklist</i>	Click to access your workflow list, if you have access.
<i>Add to Favorites</i>	Click to add this page to your favorites list. Favorites are similar to standard browser bookmarks for frequently used folders and pages. Once a favorite is added, it is maintained in the My Favorites folder in the main menu pagelet. Favorites are specific to your workstation, not user ID.
<i>Sign Out</i>	Click to terminate a user session.

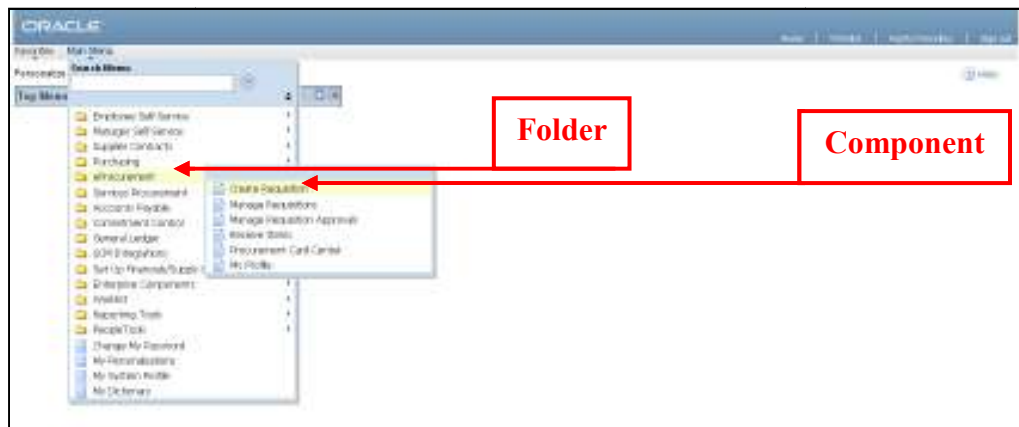
Drop-down Menu Navigation

Click on the Main Menu link at the top of the page, to open the menu. Hover the pointer over each folder in the navigation and a new menu opens. When you reach the component, click on the component to access the search page.

In the example below, you see the navigation that enables you to view or create a purchase requisition.

Navigation

- eProcurement
- Manage Requisitions



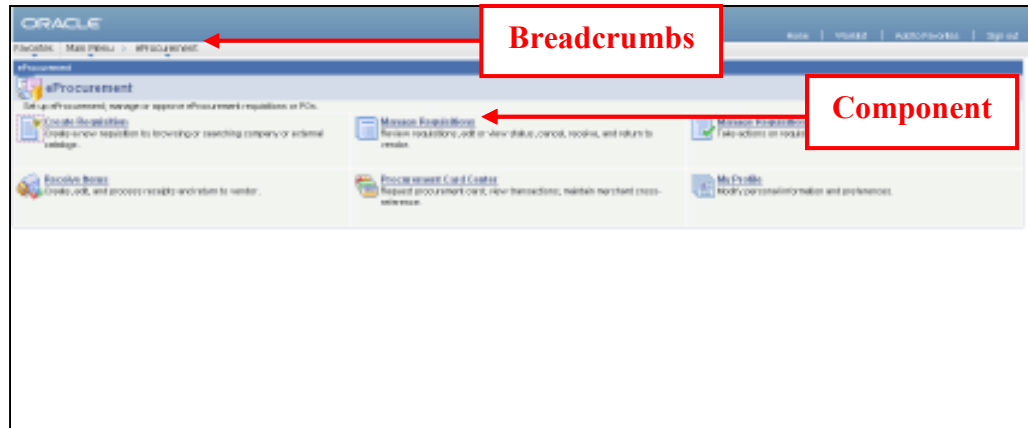
A *Search* field appears at the top of the Main Menu. Enter the name of the page you want to access and click . All content references that are in the portal registry will appear and you can click on the hyperlink of the one you need.

Menu Pages Navigation

Click on the Main Menu link at the top of the page, to open the menu. Click on a folder to display the menu page for that folder .

Navigation

- eProcurement
- Manage Requisitions



Breadcrumbs appear across the top of the page to show the current navigation. Other folder and components appear on the menu page. Access the one you want by clicking on the hyperlink for that object.

Favorites – Recently Used

Each time you access a component in the PeopleSoft application, it is added to a Recently Used list on the *Favorites* menu. This list contains the last five pages that you accessed. To go back to a page used previously in your online session, open the *Favorites* menu and click on the hyperlink for the component that you want to access.

Navigation

- Favorites
- Recently Used



Component Search Page

Use components to open up the pages where you perform specific actions such as data entry or running processes. The screen capture below shows the search page which is displayed when you access the *Manage Requisitions* page.

Navigation

- eProcurement
- Manage Requisitions

The ***Search Requisitions*** section contains fields for you to search for requisitions you have already created. Once you enter the search criteria and click the **Search** button, the results appear in the ***Requisitions*** section. Some of the search fields may already be populated based on your user preferences.

Another type of search page is displayed when you access *Create Requisitions*. On this page you enter a few pieces of information and click the **OK** button to go to a new page.

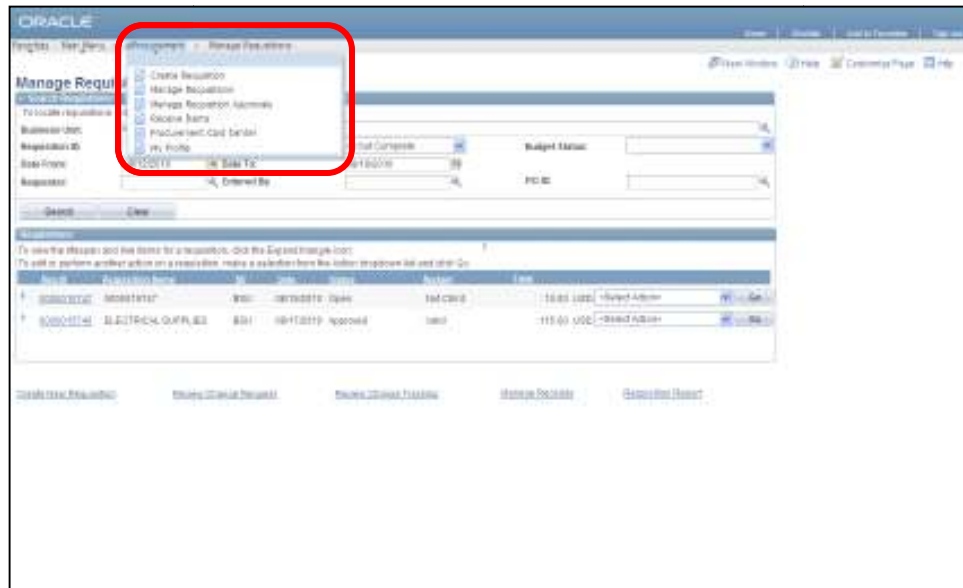
Navigation

- eProcurement
- Create Requisitions

The breadcrumbs across the page have small arrows underneath each item. When you want to navigate elsewhere in the system, you can open the menu from any of the breadcrumbs to display a menu for new navigation.

Navigation

- eProcurement
- Manage Requisitions
- Manage Requisitions



Retrieving Data

Use the search page to find existing values. This page appears when you select a component. Typically, you can enter many types of search criteria. The more fields that you enter, the more specific your search results will be.

There are two types of searches: Basic and Advanced. The basic search only displays one search field option. If that occurs, click the hyperlink for *Advanced Search* to enter values for multiple fields.

Click the **Search** button to see results. Scroll through the search box to find the value you want to view. Click that row of data to access it.

This example shows the search page for the *Manage Requisitions* component. Several values are already populated based on the user's preferences. When the page is accessed, the results for those default values are displayed.

Navigation

- eProcurement
- Manage Requisitions
- Click Search

Use the search controls that are displayed on the page to help access information. These include:



Look up icon access a Look Up page to find the appropriate value.



Calendar icon displays a calendar from which you can select the appropriate date.



Drop-down menus allow you to select from allowed values to match your criteria.

Look Up Page

The Look Up icon access a Look Up page to allow you to search and select the value for the search field. Click on the icon to display the Look Up page.

This example uses the Look Up page for the Requester field on the page.

Navigation

- eProcurement
- Manage Requisitions
- Click **Look Up** icon for *Requestor field*

Look Up

Look Up Requester

Requester: begins with ▼

Look Up Clear Cancel [Basic Lookup](#)

Search Results

Only the first 300 results of a possible 315 can be displayed. Enter more search key information and search again to reduce the number of search results.

View 100 First 1-300 of 300 Last

Requester	Name
AALLEN	NO LONGER WITH BSU
ABARNES	Barnes, Antoinette
ACAMPBELL	Campbell, Anisha
ACREEK	Creek, Arlene
AFEVRIER	Fevrier, Anselma
AHILLIAR	Hilliard, Ann
AISAAC	Isaac, Angela
ALESIE	Leslie, Annie Ruth REGENCY
ALEWIS	Lewis, Anne REGENCY
ANFI SON	Nelson, Anthony

The drop down list provides additional operators that can be used in a search. These include:

Begins with

Looks for values that begin with the characters entered.

Contains

Looks for values that contain the characters entered.

=

Looks for an exact match for the characters entered.

Not =

Looks for all values that do not match the characters entered.

<	Looks for all values less than the characters entered.
<=	Looks for all values less than or equal to the characters entered.
>	Looks for all characters greater than the characters entered.
>=	Looks for all values greater than or equal to the characters entered.
<i>Between</i>	Opens up an additional field that searches for values between the entry in the first field and the entry in the second field.
<i>In</i>	Expands the field to accommodate multiple values to match. Values must be separated by commas.

Wild Cards

You can also use wild card values in your search. The available wildcards are:

<i>% (percent symbol)</i>	Matches one or multiple characters.
<i>_ (underscore)</i>	Matches only one value.
<i>\ (backslash)</i>	Indicates that the next character is not to be treated as a wild card.

Navigation

- eProcurement
- Manage Requisitions
- Requestor: “begins with” **BW**
- Click **Look Up**
- Click the hyperlink that is returned

Click the hyperlink for the value that matches the one you want to enter. The search page is displayed with the value you selected.

Navigation

- eProcurement
- Manage Requisitions
- Requestor = **BW_REQUESTER**
- Click **Search**

Viewing Selected Records

The component in the following screen shot contains the data from the record that you searched for. If the status is “**Approved**”, this data can be viewed but only updated by the authorized Approver. If the **Requisition Status** is “**Open**” the authorized Requester can make changes to the requisition.

Navigation

- eProcurement
- Manage Requisitions
- Requestor = *BW_REQU-STER*
- Click **Search**
- Click hyperlink in search results

Requisition Line	Requisition ID	Item	Unit	Status	Total
ELECTRONIC SUPPLIES	000001749	093	00172019	Approved	118.00
Pre Requisitioned Balance: 118.00 / 100%					

Line	Item	Description	Quantity	Status	Request Date	Unit Price	Price	Status	Total
1	ELECTRONIC SUPPLIES	093	1	Approved	11/11/2019	118.00	118.00	Approved	118.00
2	ELECTRONIC SUPPLIES	093	1	Approved	11/11/2019	118.00	118.00	Approved	118.00

Viewing and Updating Data

You can view or update the information contained within the selected record. There are several ways to navigate through the data.

Components may have tabs at the top or hyperlinks to move to other pages. You can click either of those to access the specific page. When you click one of these links, the new page also contains component links that will return to the original page.

ORACLE

[Home](#)
[Logout](#)
[Load My Favorites](#)
[Help](#)

[Contracts](#)
[New Items](#)
[eProcurement](#)
[e Vendor Registrations](#)

[Open Windows](#)
[Print](#)
[Export to Excel](#)
[Export to PDF](#)

Requisition Details

Requisition Number	Requisition ID	Item	Date	Status	Total
ELECTRONIC SUPPLIES	000007740	000	08/11/2019	Approved	178.00
Pre-Expenditure Balance	216.00	1000			

Item	Item Description	Amount Status	Quantity	Unit	Price	Status	Total
1	ELECTRONIC SUPPLIES	Available	11	4.0000 \$/ea	22.0000 USD	Approved	95.00
2	ELECTRONIC SUPPLIES	Available	11	1.9000 \$/ea	20.9000 USD	Approved	22.00

[View All Items Requisition](#)
[View All Items Requisition](#)

Links

Tools to view data are the Find and View All links. Use Find to search for specific line of data. Use View All to see all rows of data in a record.

Unit: BSU Req ID: 0000000046

Line: 1 [Office supplies](#)

Sel	Sched	Ship To	Due Date	Req Qty	Price	Amount	Status
1		BSU_RECV	06/04/2003	5.0000	11.5000	57.50	Active

Req Qty: 5.0000 Each Amount: 57.50 Dollar

[Distribution](#) [Shipment Detail](#) Drop Shipment

[Ship To Address](#) [One Time Address](#)

[Save](#) [Return to Search](#) [Print](#) [Refresh](#)