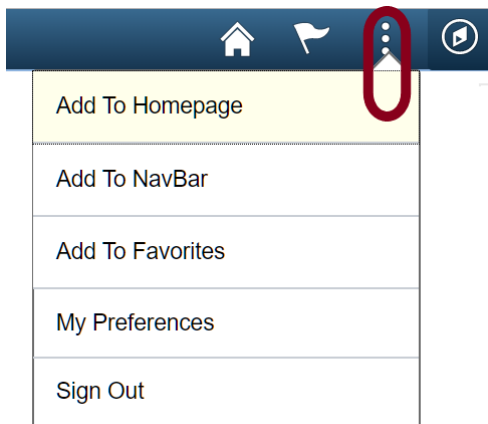


General

- Your Gateway always remains open on a separate tab. Don't try to arrow back, just go back to the tab.
- Watch this short [Video](#) on 9.2 Basic Navigation
- Clear your cache!

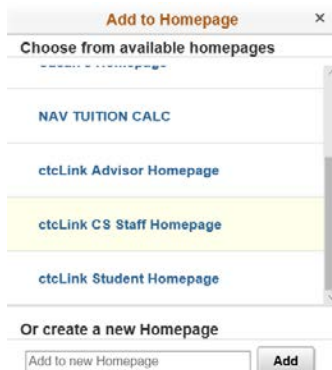
Add to Favorites



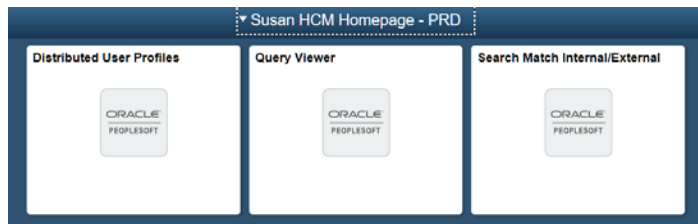
If you find you navigate to a page regularly, go ahead save it for easy access. You can save to 3 different places:

When saving a favorite make sure you save it before you have any data on the screen.

Homepage

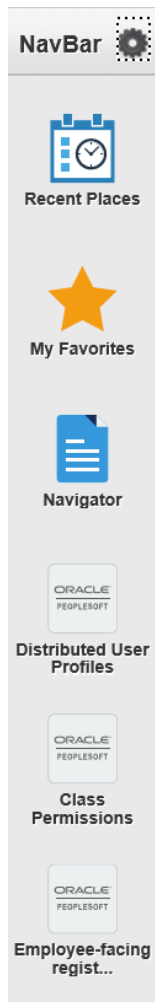


Homepage. These are the tiles you see when you enter a pillar (CS, HCM, FSCM). You can create a new homepage with all your favorites and then make it the default homepage, so that every time you enter a pillar using the top row navigation your favorites are right there. Or you can add to an existing Homepage.

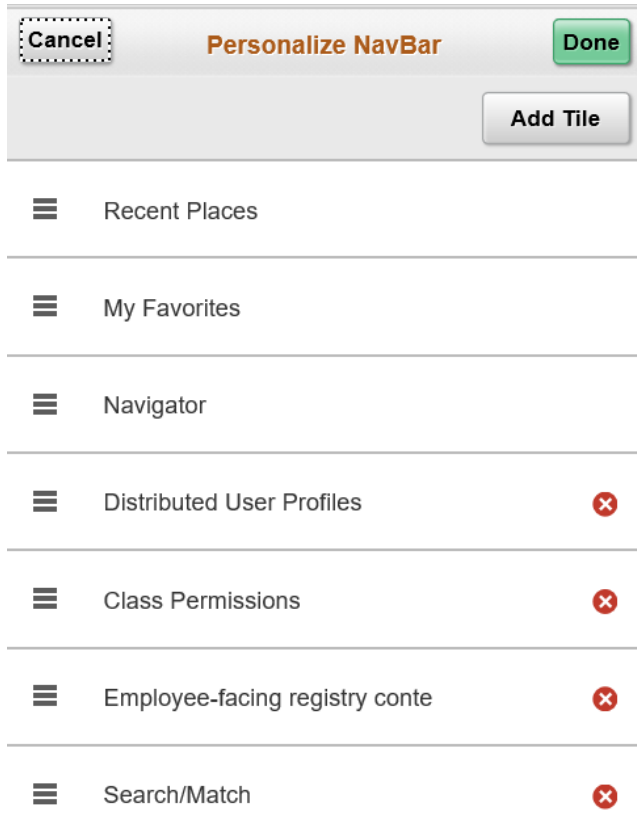


When you add a Homepage you can note what pillar you are in.

NavBar



This is your NavBar. Depending on the size of your screen and font size you only have room for two or three additional icons that you can see. If you add more you will need to scroll to see what is available.



You do have the option to click on the circle next to the NavBar to Personalize your NavBar. You can add tiles, or click on the red x in the circle to remove them. You can also drag and drop to reorder.

TIP:
If you have a sequence of processes to run, add them as favorites and names them starting with the step number.

My Favorites



The My Favorites star can be found on your NavBar. At the top you have a link to Edit Favorites, followed by all your favorites.

Edit Favorites

Click the Save button after editing or deleting favorites.

*Favorite	Sequence number	
Class Permissions	0	[-]
Class Roster	0	[-]
Distributed User Profiles	0	[-]
Instructor/Advisor Table	0	[-]
Issue Submissions -Early Alert	0	[-]
Query Viewer	0	[-]
Search/Match	0	[-]
Student Services Center	1	[-]
Add/Update a Person	2	[-]

Unlike the drag and drop functionality of personalizing your NavBar, you need to enter a

sequence number to reorder favorites.

SACR User Defaults

Navigation: NavBar → Navigation → Set Up SACR → User Defaults

Tab 1 - Sets defaults for Academic Institution field, Term field, Career field, Academic Program field & others.

User Defaults 1 | User Defaults 2 | User Defaults 3 | User Defaults 4 | Enrollment Override Defaults

User ID 101008381 Name Maxwell,Susan J.

Academic Institution	WA140	Clark College
Career Group SetID	WA140	Clark College
Facility Group SetID	WA140	Clark College
Academic Career	UGRD	Academic Career
Academic Group	BHS	Business & Health Sciences
Subject Area	DH	Dental Hygiene - DH
Term	2201	WINTER 2020
Academic Program		
Academic Plan		
Academic Sub-Plan		

WA140 – Clark College should be filled in for Academic Institution.

Anything in the red box can be set as a default: Academic Career, Academic Group; Subject Area: and Term.

If you work with a particular instructional unit you can default to that unit and not have to see the other units when this is a selection options.

If you do a lot of processing set your term to the current term. Remember to change when you need to move to a new term.

Tab 2 - Sets defaults for the setID field, Aid Year field, Application Center field, Cashier's Office field & others.

Defaults 1 | User Defaults 2 | User Defaults 3 | User Defaults 4 | Enrollment Override Defaults

User ID 10 Name Maxwell,Susan J.

SetID	WA140	Clark College
Aid Year	2020	2019-2020 Financial Aid Year
Business Unit	WA140	Clark College
Application Center		
Recruiting Center		
Cashier's Office		
Department		
Admit Type		
Campus	MAIN	Main Campus
Institution Set		

If you work with financial aid data you can default to the Aid Year you want.

Department allows you to default to one business Department – not advised at this point.

If you work with admissions and focus on one type of applicant you can default here.

TIP:

If you are doing a lot of data entry, organize your data by a field that you can default. Enter that group of data. Then come and set the default to the next group. The 30 seconds it takes to change a default can save a lot of time.

Tab 3 – Sets defaults for Admissions Application data

Defaults 1 | User Defaults 2 | **User Defaults 3** | User Defaults 4 | Enrollment Override Defaults

User ID 10 Name Maxwell,Susan J.

Academic Level

Application Method

Last School Attended

Graduation Date

Housing Interest

Financial Aid Interest

External Acad Data Defaults

Transcript Type

Transcript Rcvd Data Source

Transcript Rcvd Medium

Tab 4 - Set defaults for printing transcripts, including transcript output destination and transcript type, SEVIS processing, and award-notification printing.

User Defaults 1 | User Defaults 2 | User Defaults 3 | **User Defaults 4** | Enrollment Override Defaults

User ID 10 Maxwell,Susan J.

Carry ID

Output Destination

Transcript Type

Flexible Transcript Type

Advisement Report Type

SEVIS Default

School Code

Program Number

Printer Name [Explain](#)

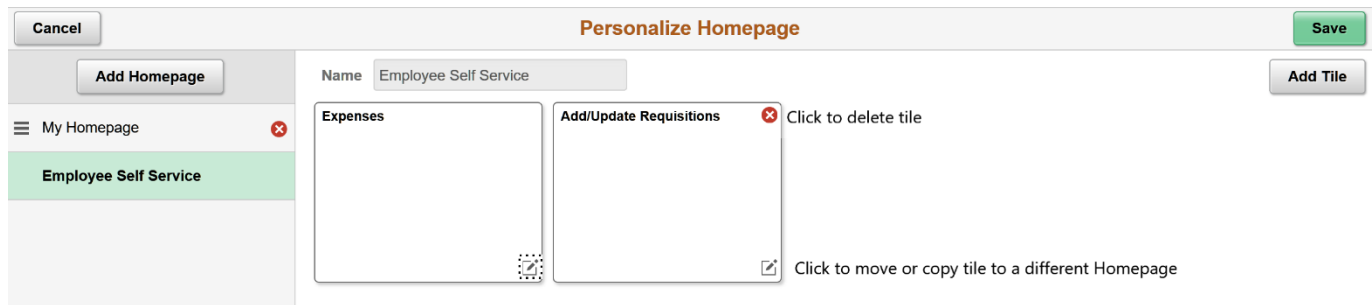
If you want to be able to look at multiple pages for a student and not have to continue to enter the ID on each screen check the Carry ID Box.

Personalize Your Homepage

Click on the 3 dots to edit the homepage you currently have open.



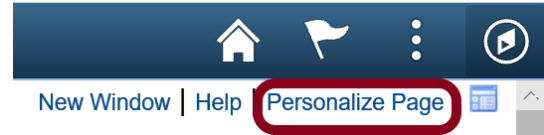
You can drag tiles in a different order, delete tiles, copy or move to a different Homepage.



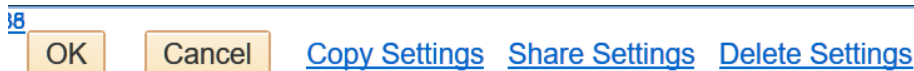
The order on the left sidebar is the order you will see Homepages. The top one is your default. Drag a Homepage's name to change the order.

Personalize a Page

When you are on a page that allows for personalization you will see the option in the right hand corner.



To personalize, go to the tab you want to have open first, and select view all if you want to change that. Then click on Personalize Page from the upper right hand corner of your screen. Check the first two options (or whatever options you want to change).



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 View All settings on this page.**
- Save tabbing order personalized below.**

For those who do a lot of data entry you can change the tabbing order on a page, or what field you go to when using the Tab key. You can skip fields you do not use, or change the order you like to enter data.

This image shows the default tabs changed from General to User Roles – because User Roles is the tab that I always use first. I also like to see all rows (which will show up to 100 at a time) instead of 10 rows.

← Susan's Homepage Distributed User Profiles

General ID **User Roles** Workflow Audit Links User ID Queries

User ID 10
Description Susan J. Maxwell

Dynamic Role Rule

Execute on Server Process Monitor Service Monitor

Test Rule(s) Refresh Execute Rule(s)

User Roles Personalize | Find | View 10 | **1-100 of 184** | Last

Role Name	Description	Dynamic
-----------	-------------	---------

Change the order of fields displayed

You can change the order of fields in a data grid. For example, this class permission data has a number of fields. Not all are necessary when granting the permission. The comment field at the end is very important.

Class Permission Data Personalize | Find | View 10 | 1-10 of 10 | Last

Seq #	Number	ID	Name	Issued	Issued By	Issued Date	Status	Permission Use Date	Expiration Date	Closed Class	Requisites Not Met	Consent Required	Career Restriction	Permission Time Period	Comments
-------	--------	----	------	--------	-----------	-------------	--------	---------------------	-----------------	--------------	--------------------	------------------	--------------------	------------------------	----------

When you see the multiple tabs and the “show all columns” button you can click on the Personalize link.

You will see the list of fields. You can reorder fields. Put those fields that you need to enter data into at the top,



in the order you want to enter the data, or view the data.

Grid Customization [Help](#)

Class Permission Data

Personalize Column Order

To order columns, highlight column name, then press the appropriate button.
Frozen columns display under every tab.

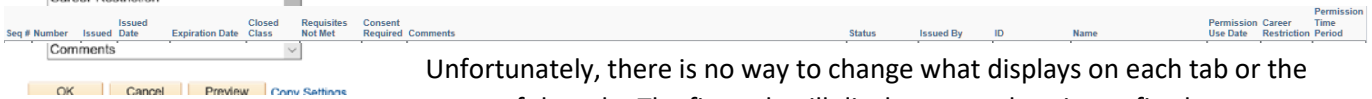
Column Order

- Tab General Info (frozen)
- Seq # (frozen)
- Number (frozen)
- ID (frozen)
- Name
- Issued
- Issued By
- Issued Date
- Status
- Permission Use Date
- Expiration Date
- Tab Permission
- Closed Class
- Requisites Not Met
- Consent Required
- Career Restriction

Hidden

Frozen

Example of reordered columns.



Unfortunately, there is no way to change what displays on each tab or the name of the tab. The first tab will display as much as it can fit, then move on

the second tab, etc.

Save a Search

Class Permissions

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

Search Criteria

Use Saved Search: **MACH Winter 2020**

Academic Institution = WA140

Term = 2201

Subject Area = MACH

Catalog Nbr begins with

Academic Career =

Campus begins with

Description begins with

Course ID begins with

Course Offering Nbr =

Academic Organization begins with

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#) [Delete Saved Search](#)

If you use the same search parameters each time you search in a particular page you can save that search criteria, name it, and then use the saved search when needed instead of filling in all the information each time.

Multiple person records

If you are working with a long list of people on a PeopleSoft component, rather than searching every time, you can use the “IN” condition to fetch all the records at one time. Then you can go down the list or use the next record.

Person Profiles

Enter any information you have and click Search. Leave fields blank for a list of all values.

▼ Search Criteria

Empl ID in

Profile Type begins with

Name begins with

Last Name begins with

Alternate Character Name begins with

Include History Correct History Case Sensitive

Search Results

View All First 1-3 of 3 Last

Empl ID	Profile Type	Name	Last Name	Alternate Character Name
02868	PERSON			(blank)
09138	PERSON			(blank)
09842	PERSON			(blank)

Search Match

Always SEARCH before you create a new person record. Always use

Search Match. Duplicate students must be sent to SBCTC and is a manual, time consuming process.

Navigation: Main Menu → Campus Community → Personal Information(student)→ Search/Match

Navigation: Main Menu > Workforce Administration > Personal Information > Search Match Internal/External

In the Search Type field, select Person

In the Search Parameter field, select PSCS_TRADITIONAL

Then Save Search Criteria, and name your search.

Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Personal Information ▾ > Search Match Internal/External

Search/Match Integrated

Enter any information you have and click Search. Leave fields blank for a list of all values.

▼ Search Criteria

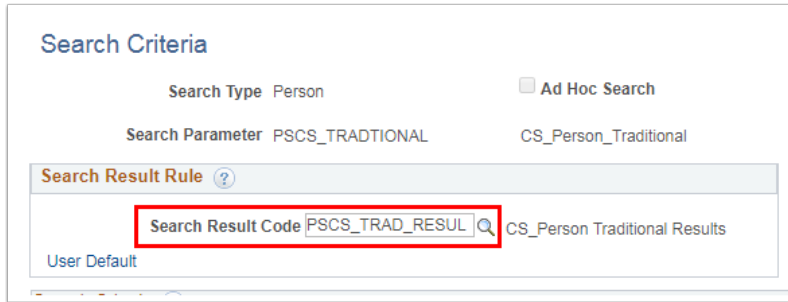
Search Type: =

Search Parameter: begins with

Ad Hoc Search

Description: begins with

In the **Search Result Code** field click on User Default, then use the lookup icon and select PSCS_TRAD_RESUL. Click on “Return to advanced search” and this will save this information as the default.



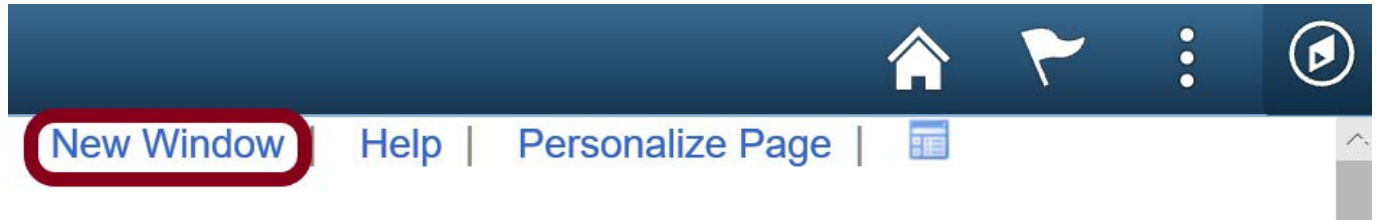
The screenshot shows a web form titled "Search Criteria". It includes several fields: "Search Type" set to "Person", "Search Parameter" with values "PSCS_TRADITIONAL" and "CS_Person_Traditional", and a "Search Result Rule" section. Within this section, the "Search Result Code" field contains the text "PSCS_TRAD_RESUL" and is highlighted with a red rectangular box. Below this field, there is a "User Default" label.

Now save to favorites – in whichever ways you want (homepage, navbar, favorites).

You can search on as few as 3 characters

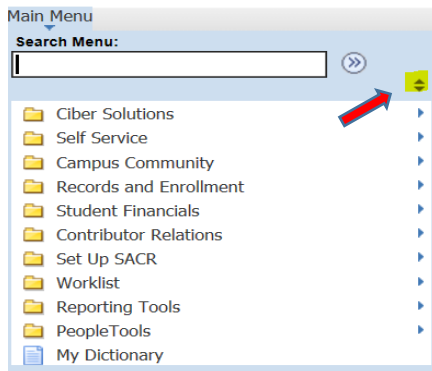
Multiple Windows

You can open a second instance of PeopleSoft in a different browser, or you can open a second window.



Alphabetizing

To alphabetize a list use the up/down arrows. This will ONLY work if you are using classic pages.



Non PeopleSoft Tips

Outlook

Create a contact group for a group of people you regularly have to email.

Change a display name in My Contacts (double click, change display as). Useful when you have two people with the same name like Christy Campbell.