PeopleSoft Terminology and Navigation

Training Guide
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## CAMPUS SOLUTIONS MODULES

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The objective of this training is to present a high-level overview of PeopleSoft and provide exposure to the “look and feel” of the PeopleSoft Campus Solutions system. It will give end users an opportunity to learn the basics and understand the terminology.

After completing this course, attendees should be able to:

- Review Campus Solutions module terminology
- Understand how to log in to Campus Solutions
- Have a better understanding of basic Campus Solutions terminology and navigation
- Understand effective dating
- Understand how to update or modify data
- Be able to set up User Defaults and Favorites
- Use the help feature
Campus Solutions Modules

Campus Solutions is a tool specifically designed for activities related to higher education. Campus Solutions is made up of the following modules. Each module contains many business processes. Below is a list of each module with a brief description:

**Campus Community** – contains the information about individuals and organizations that is common to all modules.

**Admissions** – processes applicants, admits them to the institution and matriculates them to make them students.

**Records and Enrollment** – the course catalog and schedule of classes are created and maintained within Student Records. Additionally pre-requisites, permissions and enrollment data are managed.

**Student Financials** – tuition and other fee calculation. Financial aid disbursements are done using Student Financials.

**Academic Advisement** – creates graduation requirements and evaluates students’ courses to determine if they are ready to graduate. Degree progress reports can be run at any time during a student’s career.
Chapter 1: Campus Solutions Introduction and Log In

Introduction
End users will be granted security access to log into the Campus Solutions (CS) system.

Each person will be given a unique User ID and password.

Objectives
♦ Log in and out of the system using a User Id and Password

Business Process
The process starts with navigating to the CS system with a User Id and password
Procedure 1  This section outlines those pages and fields that must be completed in order to sign into the new Albert/PeopleSoft system

Navigate to the NYU HOME login page

Signing on to the New Albert

You must have been granted security access by attending training sessions to gain access to the new system.

Step 1: Select NYUHome Login

Step 2: Log in using your current NETID and Password
Step 3: Select the Work tab
Step 4: Select Admin Login

Step 5: Select the SIS Link

You are now logged into production SIS Next Gen
Step 6  Change your personal Password by clicking on Change My Password link

** Once you are granted access to the CS system you are able to use this page to change your password.

Step 7  Sign out of system by clicking on the Sign out link
Chapter 2: Navigation and Terminology

Introduction

The New Albert is a web based application, navigation though the system is the same as using any other web based program. Using your mouse and clicking on icons will lead you through the system. Security will control what each end user will be able to view, or change.

The navigation structure offers a “Portal-like” environment. The New Albert menu is made up of a hierarchy of folders and content references. By clicking on the content references, you will be lead to components/pages where you will perform your tasks. Using the Tab key allows end users to move from field to field quickly. There are other tips for quick navigation at the end of this guide.

Objectives

♦ Log into system view and navigate system

Business Process Information

The process starts with logging in to system. Security will drive what an end user is able to see and change or update. Each end user will have a unique User ID and Password.
Procedure 1

This section describes the basic navigation structure and terminology of CS.

Start Procedure

Step 1
Log on to system using User ID and Password

Step 2
On the left side menu Click on Campus Community

Folders are represented by the following icon:

Content references are identified by this icon:

Step 3
Click on Home
The **Menu** columns are links you use to navigate to the desired component or page. These columns collapse and expand based on your selections.

<table>
<thead>
<tr>
<th>Menu Columns</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1</strong></td>
<td>The left column, called the Menu pagelet contains a list of the areas you can access. The menu displayed is determined by your security access role.</td>
</tr>
<tr>
<td><strong>2</strong></td>
<td>When you select a link from the Menu pagelet, the area expands to display sub-categories within that area.</td>
</tr>
<tr>
<td><strong>3</strong></td>
<td>A set of related navigation folders will also appear providing another way to navigate instead of using the Menu links. Inside each folder are additional links that navigate you directly to the pages you want.</td>
</tr>
<tr>
<td><strong>4</strong></td>
<td>Page links are displayed as hyperlinks meaning that you can click the underlined words to open the selected page.</td>
</tr>
</tbody>
</table>

**Step 4**  
Click on the **Campus Community** link
Components consist of several pages within the same window that pertain to a specific category. Components are accessed from the menu. Select the desired menu items from the Home menu until the final column becomes a list of underlined links. These links, when clicked with your mouse, will eventually either bring you to a single page or open the first of several pages in a component.

**Components**

**Step 5** Hover over the **Personal Information (Student) folder**

General information nested within this folder will be presented

**Step 6** Click on the **Personal Information (Student) folder**

Personal security access will drive what is visible to end users
Step 7  Click on the **Biographical (Student)** folder

Note the **breadcrumbs** at the top of the page identify the navigation path you took.

**Main Menu** > **Campus Community** > **Personal Information (Student)** > **Biographical (Student)**

Step 8  Click on **Home**

**Procedure Complete**

**Practice Scenarios**

Refer to the Procedure section above to practice processing

**Step 1**  Log on to system

**Step 2**  Click on Menus

**Step 3**  Click on Home
Chapter 3: Basic and Advance Search Methods

Introduction

There are two types of search pages: Basic and Advanced. Basic Search allows you to search using only one field, such as last name. Advanced Search allows you to search using a combination of fields such as first and last name, and student ID.

Objectives

♦ Understand how basic and advanced searches are performed.

Business Process Information

The process starts with an end user navigating to a component and attempting to search the system for data.

Procedure 1

This section outlines those pages and fields that must be completed in order to use the basic or advanced Search tools. It is required that at least one value be given to the system in order to perform a search.

Start Procedure

Step 1 Log on to system

Step 2 Navigate to the course catalog search page and view the Advanced Search page (which is the default)
A page is the individual display and data-entry screen for each part of PeopleSoft. Pages are the primary way for you to view and alter PeopleSoft data. You'll use pages to view, enter, and update data. Each page display also provides features in the form of buttons or links to help you navigate through the system.

Page tabs identify the page you are viewing and allow you to navigate through a component. The white page tab indicates the page that is being displayed.

In addition to clicking page tabs, you can also click the page links at the bottom of each page in the component to move to the next page.

Step 3  Review Advanced Search look up tools:

- Look upReviewed in Chapter 6

- Drop DownsChange search options

  - begins with
  - begins with 
  - contains
  - not =
  - <
  - <=
  - >
  - >=
  - between
  - in
Albert Basics

- Check boxes: Include History, Correct History, and Case Sensitive
- Basic Search
- Save Search Criteria
- Add a New Value Tab

<table>
<thead>
<tr>
<th>Button</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search</td>
<td>Processes the search once you have entered search criteria in the key fields. You can also execute a search using the Enter key.</td>
</tr>
<tr>
<td>Clear</td>
<td>Clears entered text from all fields on the page so you can enter new criteria. Appears only for advanced searches</td>
</tr>
</tbody>
</table>

Step 4  Change drop down on Catalog Number to “Contains”

Step 5  Populate the number 8 and click **Search**

**Course Catalog**

Enter any information you have and click Search. Leave fields blank for a

```
Find an Existing Value | Add a New Value

Academic Institution:  =   NYUNV
Subject Area:          =   
Catalog Nbr:           contains =   8
Campus:                begins with 
Course ID:             begins with 
Description:           begins with 

☐ Include History  ☐ Correct History  ☐ Case Sensitive
```

**Basic Search**  ☐ Save Search Criteria

A **Search Results** list displays at the bottom of the search page with many records that match your search criteria. To access a specific record, click any of the underlined links in the Search Results row for that record.
The search function can retrieve up to 300 matched entries from the database. Use your browsers scroll bar to scroll through the entries. Forward and backward arrows are enabled if there is additional information to view.

**Step 6**  
Click on the Basic Search button. Basic search page enables you to search by just one field at a time by using the drop down “Search By”,

**Step 7**  
Use the drop down and select Description type D and click on Search.
Note search results more than 300, there will be a need to refine search by providing system with more specific information.

**Step 8**  **Click on Advanced Search** to return

**Step 9**  **Search Criteria** If you are conducting an advanced search, you can click the Save Search Criteria link to name and save the specifics of your search. Copy the fields below and **Click on Save Search Criteria**
Frequently used search criteria can be saved for ease of processing by user id
Saved searches can be used on like-designed pages

Step 10
Type `%super` in Description field Click on Search
Wild Cards can be used for searching. PeopleSoft applications support three wildcard characters to help you search for data in character fields. You can use these wildcards to track down the exact information that you need.

- % (percent symbol) - Match one or more characters
- _ (underscore) - Match any single character
- \ (backslash) - Escape character—do not treat the next character as a wildcard

Step 11  Use Sorting feature – **Click on the “headers” of the Wild Card results** to view how to sort

Search results are returned with a default sort order but can be changed to ascending or descending by clicking on a column heading

Ascending Sort – Click once on column heading

Procedure Complete
Practice Scenarios

Refer to the Procedure section above to practice processing (module specific activities here)

**Step 1** Navigate to Records and Enrollment, Student Term Information, Term Activate a Student

**Step 2** Use Advance Search and Basic Search functions
Chapter 4: Components, Pages and Toolbar Functions

Introduction

Components consist of several pages within the same window that pertain to a specific task. Usually these are related pages and need to be completed together.

Components contain page tabs with each tab containing a related page.

Components are accessed from the Menu pagelet. Select the desired links from the menu or navigation page to display a single page or open the first of several pages in a component.

A Page is the individual display and data entry screen for each part of CSS. You use pages to view, enter, and update data depending on your specific security access role. Each page also provides features in the form of buttons or links to help you navigate through the processes.

Objectives

♦ Understand the difference between components and pages.
♦ How to use tool bars within pages

Business Process Information

The process starts with navigation.
Procedure 1

This section outlines those pages and fields that are associated with components and pages.

**Start Procedure**

**Step 1**
Log on to system

**Step 2**
Navigate to:

Campus Community, Personal Information (student), Add/Update a Person

**Step 3**
Populate values on Search Page (use skills from Chapter 3 to locate a student)
Page tabs identify the page you are viewing and allow you to navigate through a component.

A Page is the individual display and data entry screen for each part of CS. You use pages to view, enter, and update data depending on your specific security access role. Each page also provides features in the form of buttons or links to help you navigate through the processes.

**Step 4** Working with Toolbar buttons

<table>
<thead>
<tr>
<th>Button</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="save.png" alt="Save" /></td>
<td>Save</td>
<td>Saves the information you have entered. You will generally save when you update data for a record.</td>
</tr>
<tr>
<td><img src="search.png" alt="Return to Search" /></td>
<td>Return to Search</td>
<td>This button returns you to the Search page so you can search for another record.</td>
</tr>
<tr>
<td><img src="next.png" alt="Next in List" /></td>
<td>Next in List</td>
<td>Displays the data for the next record in your search results list. This button is not available if your search results produced only one record or if the data displayed is the first record.</td>
</tr>
<tr>
<td><img src="previous.png" alt="Previous in List" /></td>
<td>Previous in List</td>
<td>Displays the data for the previous record in your search results list. This button is not available if your search results produced only one record.</td>
</tr>
<tr>
<td><img src="refresh.png" alt="Refresh" /></td>
<td>Refresh</td>
<td>Refreshes the data on the page if an update has been made.</td>
</tr>
<tr>
<td><img src="add.png" alt="Add" /></td>
<td>Add</td>
<td>Navigates you to the Add A New Value so you can add a new record.</td>
</tr>
<tr>
<td><img src="update.png" alt="Update/Display" /></td>
<td>Update/Display</td>
<td>Allows you to access existing rows of data for the record. If data is effective dated, data displayed is only Current and Future.</td>
</tr>
<tr>
<td><img src="include.png" alt="Include History" /></td>
<td>Include History</td>
<td>Displays all rows of data: Current, Future, and History.</td>
</tr>
<tr>
<td><img src="correct.png" alt="Correct History" /></td>
<td>Correct History</td>
<td>Allows you to update History rows. Usually only available with the appropriate security access role.</td>
</tr>
</tbody>
</table>
Chapter 5: Effective Dating

Introduction
Effective dating logic maintains an accurate history of information in CS. Effective dating allows storage of historical data, viewing of modifications in data over time, and entry of data for future timeframes. For example, you may want to track several events in the career of a student, such as when they applied, were accepted, and graduated.

Objectives
 Understanding effective dating

Business Process Information
The process starts with having the need to change a student’s record for example their address.
Procedure 1

This section outlines those pages and fields that must be completed in order to place or release a service indicator.

Start Procedure

Step 1
Log on

Step 2
Navigate to:

Campus Community, Personal Information (student), Add/Update a Person

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

Find an Existing Value  Add a New Value

EmpID: begins with  

Academic Career:  

National ID: begins with  

Campus ID: begins with  

Last Name: begins with  

First Name: begins with  

Include History  Correct History  Case Sensitive

Search  Clear  Basic Search  Save Search Criteria

Find an Existing Value  Add a New Value

Step 3
Populate Last Name field with John  Click Search

By default the system will give you view in Update/Display if you do not make any selections above

There are 3 options when navigating to this page. Update/Display (the default) Include History and Correct History

Update/Display  
The default action, which allows you to view or update information current and future dated rows

Include History  
Gives you the same functionality as Update/Display and includes historical rows of data.
Correct History

This action type allows the user to make changes to historical data and insert rows regardless of the effective date.

<table>
<thead>
<tr>
<th>Effective Dating Terms</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current</td>
<td>The data row with the date closest to but not greater than the current date. Only one row can be the current row.</td>
</tr>
<tr>
<td>History</td>
<td>Data rows that have effective dates earlier than the current data row.</td>
</tr>
<tr>
<td>Future</td>
<td>Data rows that have effective dates greater than the current date. A Future data row becomes the Current row on the day of the effective date and the old current row becomes a History row.</td>
</tr>
</tbody>
</table>

Many search pages contain the Include History checkbox as a page action option. This option will allow you to view all rows of an effective dated record. History, Current, and Future rows will be displayed in chronological order. If this is not checked, you see Current and Future dates only.
Practice Scenarios

Refer to the Procedure section above to practice processing

Step 1  *** Training Database needed for practice
Step 2
Step 3
Chapter 6: Translate and Look Up Tables

Introduction

Translate and look up tables are used to further define search criteria, they contain pre existing values which are to be used in a specific field.

Objectives

♦ Understand the difference between translate and look up tables

Business Process Information

There is a need to set up predetermined tables with pre populated values. End users can click on look ups (which could contain hundreds of values) or use drop downs (which have a smaller pick list) to select values from only those given.
Procedure 1

This section outlines those pages and fields that are used when working with drop downs and look up fields.

Start Procedure

Step 1
Log on

Step 2
Navigate to

Campus Community, Personal Information (student), Add/Update a Person

Step 3
Populate “John” in last name field and click on Search

Step 4
Click on drop down to see all Marital Status values

Step 5
Select one from list given

- Separated
- Civil Partnership
- Common-Law
- Dissolved Civil Partnership
- Divorced
- Head of Household
- Married
- Separated
- Single
- Surviving Civil Partner
- Unknown
- Widowed
### Look Up Country

<table>
<thead>
<tr>
<th>Country</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AUS</td>
<td>Australia</td>
</tr>
<tr>
<td>BEL</td>
<td>Belgium</td>
</tr>
<tr>
<td>BRA</td>
<td>Brazil</td>
</tr>
<tr>
<td>CAN</td>
<td>Canada</td>
</tr>
<tr>
<td>CHE</td>
<td>Switzerland</td>
</tr>
<tr>
<td>CHN</td>
<td>China</td>
</tr>
<tr>
<td>DEU</td>
<td>Germany</td>
</tr>
<tr>
<td>ESP</td>
<td>Spain</td>
</tr>
<tr>
<td>FRA</td>
<td>France</td>
</tr>
<tr>
<td>GBR</td>
<td>United Kingdom</td>
</tr>
<tr>
<td>HKG</td>
<td>Hong Kong</td>
</tr>
<tr>
<td>IND</td>
<td>India</td>
</tr>
<tr>
<td>IRL</td>
<td>Ireland</td>
</tr>
<tr>
<td>ITA</td>
<td>Italy</td>
</tr>
<tr>
<td>JPN</td>
<td>Japan</td>
</tr>
<tr>
<td>MEX</td>
<td>Mexico</td>
</tr>
<tr>
<td>MYS</td>
<td>Malaysia</td>
</tr>
<tr>
<td>NLD</td>
<td>Netherlands</td>
</tr>
<tr>
<td>SGP</td>
<td>Singapore</td>
</tr>
<tr>
<td>THA</td>
<td>Thailand</td>
</tr>
<tr>
<td>USA</td>
<td>United States</td>
</tr>
</tbody>
</table>
Practice Scenarios

Refer to the Procedure section above to practice processing

Step 1 *** Training Database needed for practice
Step 2
Step 3
Chapter 7: Viewing and Modifying Data

Introduction

Viewing student records and updating or modifying existing data is part of record keeping. Effective dates are tools which are used to manage these activities. This chapter will look at how effective dates and daily business practices of modifying student records should be maintained in order to present consistent information and data throughout the system.

Objectives

♦ Understanding how to view, update or modify existing student data.

Business Process Information

The process starts with the need to view or modify existing data.

Procedure 1

This section outlines those pages and fields that used to view and update a record in CS.

Start Procedure

Step 1
Log on

Step 2
Navigate to:

Campus Community, Personal Information (student), Add/Update a Person

Step 3
Search on 11277685
View and explain these details
ADD in middle of page and bottom of page
Find/View All
Check boxes
Update/display
Include History

Customize/Find/View/Sort multiple rows
The save button triggers a number of defined business rules (e.g. does the user have permission to save the types of changes made) the user may receive a specific error message depending on the results of the data integrity checks.

When working with components there is often a set number of fields that need to be populated so it is advisable to wait until the final page of the component has been completed before attempting to save.

You can return to a previous component or page by using your favorites or the left hand menu navigation.

If you have not saved the data you have updated before you go back, the following message will appear allowing you to return to the page and save.

If you click ‘Cancel’ here any changes you made within the component or the page will NOT be saved.

Clicking Ok will take you back to your previous page allowing you to click the Save button located at the bottom of the page.

Practice Scenarios

Refer to the Procedure section above to practice processing

Step 1 *** add data entry when training database available
Step 2
Step 3
Chapter 8: Adding Favorites and User Defaults

Introduction
Use delivered functionality to make your data entry more efficient.

Objectives
- Understand how to set up and use your User Defaults and your Favorites.

Business Process Information
The process starts with the need to be more efficient with time management.
Procedure 1

This section outlines those pages and fields that must be completed in order to place or release a service indicator.

Start Procedure

Step 1
Log on to system

Step 2
Navigate to

Financial Aid, Financial Aid Term, Maintain Student FA Term

Step 2
Click on My Favorites

Step 3
Click on Add to Favorites
Add to Favorites

Please Enter a Unique Description for this Favorite

Description:  

OK    Cancel

You are able to change the delivered Description to something which is more user friendly to you here.

**Step 4**  
Click on **OK**

Each end user Favorite list is unique and multiple components can be added. You are able to edit this list.

**Step 5**  
Click on **Edit Favorites**

Make changes to your favorites or delete from list. Save changes
Adding User Defaults

The system automatically loads default values into data pages for a particular user ID. The user default settings that you establish in the User Defaults component can be overridden on any page in the system. User defaults (which are optional) can save time and minimize data entry errors.

Step 1      Navigate to:

Set Up, SACR, User Defaults

Some field set up is dependent on other fields being populated. Example: Selecting an academic Term, the Academic Career field would have to have been set up prior to term selection.
Communication speed keys enable you to create shortcuts for specifying common communication data. Users can select from base default communication keys or modify them. Users can also set up their own communication keys in addition to the base communication keys.
You can see only those items associated with the 3C groups to which you have access, as indicated by the selected check boxes. You can temporarily disable access to specific 3C groups that you do not want to view each time. Clear the Inquiry Indicator check box for those groups that you do not want to include in the default. The Update Indicator check box appears if the user can enter and edit data in the 3C group. Users cannot change update access on this page.
Chapter 9: Using the Help Feature

Introduction
Use the help link to provide additional information or guidance on any page which you have navigated by clicking on the help link.

Objectives
- Understand how People books works

Procedure 1
This section outlines the steps needed in order to use the help link.

Start Procedure

Step 1
Log on to system

Step 2
Navigate to Financial Aid, Financial Aid Term, Maintain Student FA Term

Step 3
Populate known student values and click on Search

Step 4
Click on Help link

Step 5
View Peoplebooks
Methods to Build Financial Aid Terms

You can build Financial Aid Terms in one of three ways:

- Manually
- Online
- In batch

Use the manual build process when data from Student Records is not available for a student, when you receive new records, or after an add/drop period. To build a financial aid term manually for a student, you must enter all required data in the Financial Aid Term component. The data you enter manually is replaced when term enrollment, program, or admissions data becomes available for the student.

Build terms online if there are records for a student from Student Records and you want to see this data at the changes to this data. Click the Build button on the FA Term page to run the online build process.

Build terms in batch to process multiple students at the same time using data from Student Records or PeopleSoft Enterprise Recruiting and Admissions (if you choose to build for both updates and projections). To build financial aid terms in batch, create an FA Term driver record and then run the background process using the FA Term driver record on the Build FA Terms page.

Building Financial Aid Terms Online

This section lists common elements and discusses how:

- Set aids for financial aid term

Click on Show Reference Pane to change the view and select additional content related to this page.
Chapter 10: Tips and Shortcuts

Introduction
Use this information to speed up your data entry. NYU has created data entry “standards” which should be complied with when doing data entry. There is a separate document with the detailed information provided.

Objectives
♦ Learn quick keys for data entry

Using the “Search” Feature
Populate search words and click on arrow

Click on Home at the Universal Navigation Header (anywhere in the application) to return to your base menu
Peoplesoft Navigation Tips and Tools

Data Grid Buttons and Links

The table below explains data grid buttons and links. These options appear in the navigation header, within the row itself, or to the right of the tabs in a tabbed grid as appropriate.

<table>
<thead>
<tr>
<th>Button or Link</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>+</td>
<td>Inserts a new row.</td>
</tr>
<tr>
<td>-</td>
<td>Deletes the current row of data.</td>
</tr>
<tr>
<td>Find</td>
<td>Enables you to find a string of text.</td>
</tr>
<tr>
<td>View All</td>
<td>Displays all rows of data on a page. When this feature is enabled, the link changes to read View 1 so that you can return to the original setting.</td>
</tr>
<tr>
<td>First</td>
<td>Takes you to the first row of data.</td>
</tr>
<tr>
<td>Prev</td>
<td>Displays the previous row.</td>
</tr>
<tr>
<td>Next</td>
<td>Displays the next row of data.</td>
</tr>
<tr>
<td>Last</td>
<td>Takes you to the last row of data.</td>
</tr>
<tr>
<td>1 of X</td>
<td>Numbering system for the rows. If a grid or scroll area with five rows is set to view one row at a time, the navigation header reads &quot;1 of 5.&quot; If the grid or scroll area is set to view three rows of data at a time, it reads &quot;1-3 of 5.&quot; Click the arrows to view the next series of rows.</td>
</tr>
</tbody>
</table>
Effective Dates

Effective-dating logic maintains an accurate history of information in PeopleSoft. Effective dating allows storage of historical data, viewing of changes in data over time, and entry of future data. For example, you may want to track several events in the career of a student, such as when they applied, were accepted, and graduated.

PeopleSoft categorizes effective-dated rows into the following basic types:

<table>
<thead>
<tr>
<th>Effective Dating</th>
<th>Description</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Current</td>
<td>The data row with the date closest to—but not greater than—the current date. <strong>Note:</strong> Only one row can be the current row.</td>
<td></td>
</tr>
<tr>
<td>History</td>
<td>Data rows that have effective dates earlier than the current data row.</td>
<td></td>
</tr>
<tr>
<td>Future</td>
<td>Data rows that have effective dates later than the current date.</td>
<td></td>
</tr>
</tbody>
</table>
Keyboard Short Cuts

<table>
<thead>
<tr>
<th>Alt+ \</th>
<th>Add a New Value</th>
<th>Toggles between &quot;Add a New Value&quot; and &quot;Find an Existing Value&quot; in a Search page.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alt+ /</td>
<td>Find</td>
<td>Find data in grid or scroll area.</td>
</tr>
<tr>
<td>Alt+ ′</td>
<td>View All</td>
<td>View all rows of data in grid, scroll area or search page results list.</td>
</tr>
<tr>
<td>Ctrl K</td>
<td>–</td>
<td>When in a search page or transaction page, opens a page with a list of keyboard navigation shortcuts using hot keys and access keys.</td>
</tr>
<tr>
<td>Enter</td>
<td>OK</td>
<td>Activates the Okay button where appropriate.</td>
</tr>
<tr>
<td></td>
<td>Search</td>
<td>On a Search page, activates the search button.</td>
</tr>
<tr>
<td></td>
<td>Lookup</td>
<td>On a Lookup page, activates Lookup button.</td>
</tr>
<tr>
<td>Esc</td>
<td>Cancel</td>
<td>Activates the cancel button where appropriate.</td>
</tr>
</tbody>
</table>

Shortcut Keys

<table>
<thead>
<tr>
<th>Shortcut Key</th>
<th>Button or Link</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alt+5</td>
<td>📅</td>
<td>Opens lookup page. Opens the calendar prompt.</td>
</tr>
<tr>
<td>Alt+6</td>
<td></td>
<td>Opens the pop-up window on a page.</td>
</tr>
<tr>
<td>Alt+7</td>
<td>📊 Add</td>
<td>Inserts one or more rows in a grid or scroll area.</td>
</tr>
<tr>
<td>Alt+8</td>
<td>📊 Delete</td>
<td>Deletes row in a grid or scroll area.</td>
</tr>
<tr>
<td>Alt+0</td>
<td>🔄 Refresh</td>
<td>When in Expert Entry mode, validates data entered in page.</td>
</tr>
<tr>
<td>Alt+.</td>
<td>Next</td>
<td>Next in grid, scroll, or search page results list.</td>
</tr>
<tr>
<td>Alt+.</td>
<td>Previous</td>
<td>Previous in grid, scroll area, or search page results list.</td>
</tr>
</tbody>
</table>
**Shortcut Access Keys**

Access keys move the cursor to a particular push button on your page. Pressing [Enter] executes the command—the equivalent of clicking the button with your normal select mouse button. The table below outlines the keystrokes you may use in place of clicking the equivalent action button with your mouse. After pressing the desired key combination from the list below, you must then press the [Enter] key to execute the action. For example, to save a page you would press Alt+1 followed by the [Enter] key. Note that Some access keys have multiple actions assigned to them, and their usage depends on the currently active page.

<table>
<thead>
<tr>
<th>Shortcut Access Key</th>
<th>Button or Link</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alt+1</td>
<td><img src="#" alt="Save" /></td>
<td>Save page in a transaction. Move to Search or Add button on a Search or Prompt page. Move to OK button on an auxiliary page.</td>
</tr>
<tr>
<td>Alt+2</td>
<td><img src="#" alt="Return to Search" /></td>
<td>Return to search page from transaction page.</td>
</tr>
<tr>
<td>Alt+3</td>
<td><img src="#" alt="Next in List" /></td>
<td>View next row in list when button is active.</td>
</tr>
<tr>
<td>Alt+4</td>
<td><img src="#" alt="Previous in List" /></td>
<td>View previous row in list when button is active.</td>
</tr>
<tr>
<td>Alt+9</td>
<td><img src="#" alt="Home&gt;" /></td>
<td>Toggles between menu items in the breadcrumbs.</td>
</tr>
<tr>
<td>Alt+1</td>
<td><img src="#" alt="Update/Display" />, <img src="#" alt="Include History" />, <img src="#" alt="Correct History" /></td>
<td>Toggles between action modes on the toolbar in a transaction page.</td>
</tr>
</tbody>
</table>

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**Button**

<table>
<thead>
<tr>
<th>Button</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="#" alt="Save" /></td>
<td>Save</td>
<td>Saves the information you’ve entered. You’ll generally save when you come to the end of a component. <strong>Save</strong> always updates the data for all pages in a group. When data is saved, the “Saved” message appears briefly in the upper right corner of the page.</td>
</tr>
<tr>
<td><img src="#" alt="Return to Search" /></td>
<td>Return to Search Page</td>
<td>Returns you to the search page.</td>
</tr>
<tr>
<td><img src="#" alt="Next in List" /></td>
<td>Next In List</td>
<td>Displays the data for the next data row in your search results grid. This button is gray if you didn’t select the data row from a search results grid, if there was only one row in the grid, or if the data displayed is the last row in the grid.</td>
</tr>
<tr>
<td><img src="#" alt="Previous in List" /></td>
<td>Previous in List</td>
<td>Displays the data for the previous data row in your search results grid. This button is gray if you didn’t select the data row from the search results grid, if there was only one row in the grid, or if the data displayed is the first row in the grid.</td>
</tr>
<tr>
<td><img src="#" alt="Refresh" /></td>
<td>Refresh</td>
<td>Redisplays the page you are looking at. Scott, is that right?</td>
</tr>
<tr>
<td><img src="#" alt="Add" /></td>
<td>Add</td>
<td>Displays the Add a New Value screen so you can add a new transaction.</td>
</tr>
<tr>
<td><img src="#" alt="Update/Display" /></td>
<td>Update/Display</td>
<td>Accesses existing rows of data on the database. If data is effective-dated, displays only current and future rows.</td>
</tr>
<tr>
<td><img src="#" alt="Include History" /></td>
<td>Include History</td>
<td>Displays all rows of data: current, future, and history.</td>
</tr>
<tr>
<td><img src="#" alt="Correct History" /></td>
<td>Correction</td>
<td>Accesses existing rows of data in the database and displays all effective-dated rows. Allows you to update all rows, including history rows. Usually not available. Use with caution!</td>
</tr>
</tbody>
</table>