

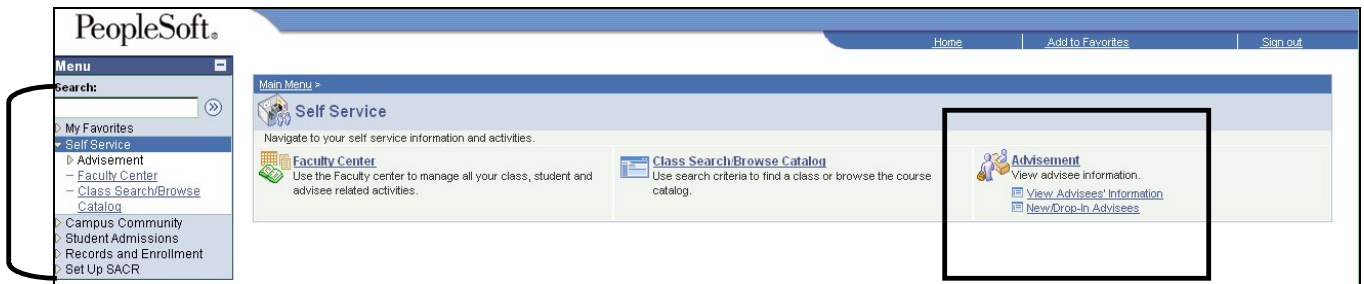
General Functionality in PeopleSoft version 8.9

This document briefly describes some of the new general functionality highlights within PeopleSoft version 8.9 and how to use them.

1. Reorganized Menu Structure

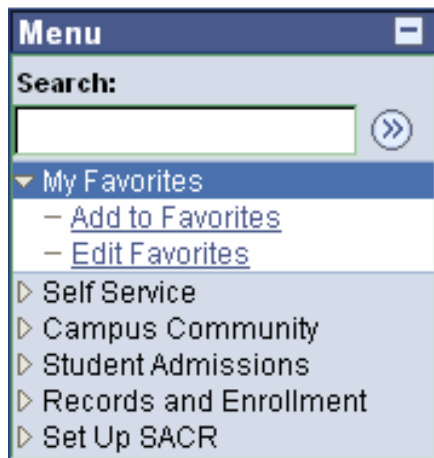
Menu Structure:

The menu structure within PeopleSoft has been reorganized for better usability. Folder contents are now visible without having to drill down and functionality has been regrouped within the new menu structure.



2. Server Based Favorites

Favorites (or bookmarks) can now be set within PeopleSoft, so no matter where you log in, you'll always have them available. Set them for all pages you use regularly.



Adding a Favorite:

Click on "Add to Favorites" at the top left of the screen to bookmark pages and return to them without searching or having to navigate through the menus or folders.

The screenshot shows the PeopleSoft user interface. On the left, a 'Menu' sidebar is visible with a search field and a list of navigation options. The 'My Favorites' option is highlighted with a blue oval. The main content area shows a search bar with 'Micha' entered, buttons for 'faculty center', 'advisement', and 'class search', and a section titled 'New Drop-In Advisees'. Below this is a 'FERPA Message for Instructor/Advisor' section with a 'search' button and a dropdown menu for 'Student Details'.

Naming the Favorite:

The "description" defaults to the PeopleSoft name. You may change the name of the favorite to whatever will help you locate the page more quickly in the future. Click the OK button when done. Your favorite will then appear under the My Favorite Menu link.

The 'Add to Favorites' dialog box is shown. It has a title bar 'Add to Favorites' and a subtitle 'Please Enter a Unique Description for this Favorite'. There is a text input field labeled '*Description:' containing the text 'New/Drop-In Advisees'. At the bottom, there are two buttons: 'OK' and 'Cancel'.

Editing a favorite:

You may also edit existing favorites if you choose by clicking on the Edit Favorite link. You may change the name of your favorites and the sequence in which they appear under the My Favorites Menu link. You may also delete them.

PeopleSoft.

Menu

Search:

- My Favorites
 - New/Drop-In Advisees
 - Edit Favorites**
- Self Service
- Campus Community
- Student Admissions
- Records and Enrollment
- Set Up SACR

Edit Favorites

Click the Save button after editing or deleting favorites.

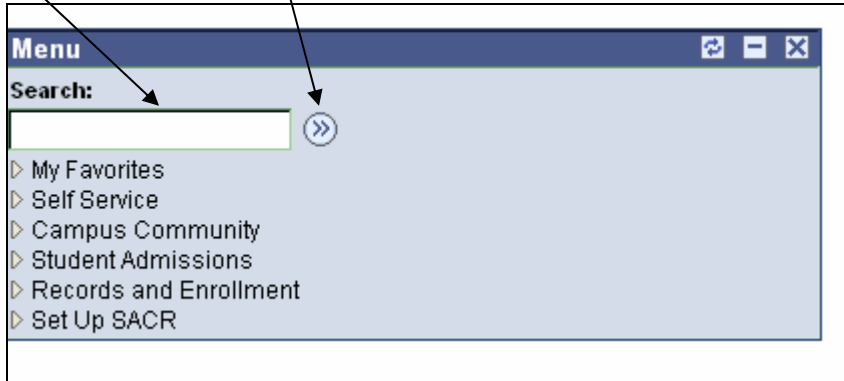
*Favorite	Sequence number	
New/Drop-In Advisees	0	Delete

Save Notify

3. Searching for a function or page.

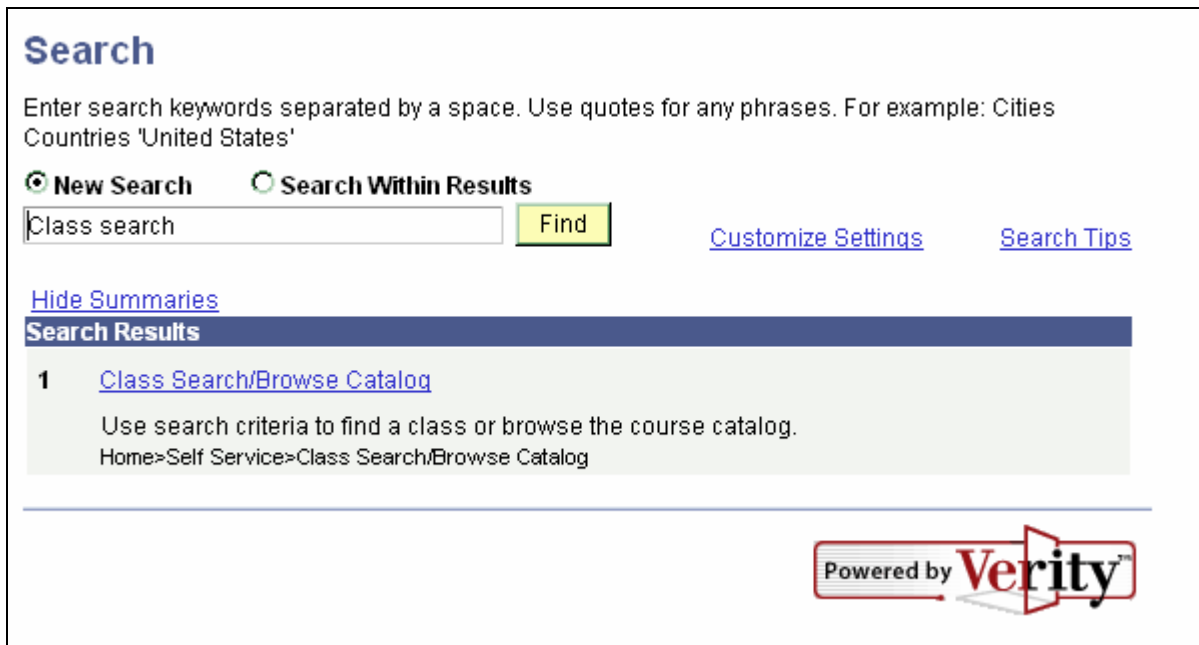
Searching:

When you are not sure of the navigation to a page, enter a word or page description into the search box and hit "Enter" or click the double arrow.




Search Results:


A list of all pages associated with the word you entered into the search engine is returned. Click on the one you want.



4. Exporting Grid Data to Excel

Anywhere in the system that you see the following icon , you may export the table you are viewing to Microsoft Excel.

Exporting a grid:

Click on the Excel icon  and your file should export to Microsoft Excel. If not, it is possible you have a pop-up blocker associated with your web browser. In Windows Explorer, you will need to hold down the Cntrl key whilst clicking on the Excel icon to allow the file to be exported. Be sure to hold your finger down on the Cntrl key until the file has finished downloading or you have finished saving it. Alternatively, you can change your popup blocker settings to allow the page to be displayed. Instructions on how to do this are different for every browser so please refer to the help menu within your browser or this document posted on the CMS website: http://www.sonoma.edu/cms/documentation/Preventing_Popups.doc

Menu

Search:

- ▶ My Favorites
- ▼ Self Service
 - ▶ Advisement
 - Faculty Center
 - [Class Search/Browse Catalog](#)
- ▶ Campus Community
- ▶ Student Admissions
- ▶ Records and Enrollment
- ▶ Set Up SACR

Faculty Center

Class Roster [View FERPA Statement](#)

1576 - ECON 201B - Intro to Microeconomics


Class Roster Information

Course	ECON 201B	Institution	Sonoma State University
Title	Intro to Microeconomics	Term	Fall 2006
Class Number	1576	Session	Regular Academic Session
Class Section	002	Career	Undergraduate
Component	Lecture		

Day	Tues Thurs	Instructor	
Time	8:00AM 9:50AM		
Location	Salazar Hall		

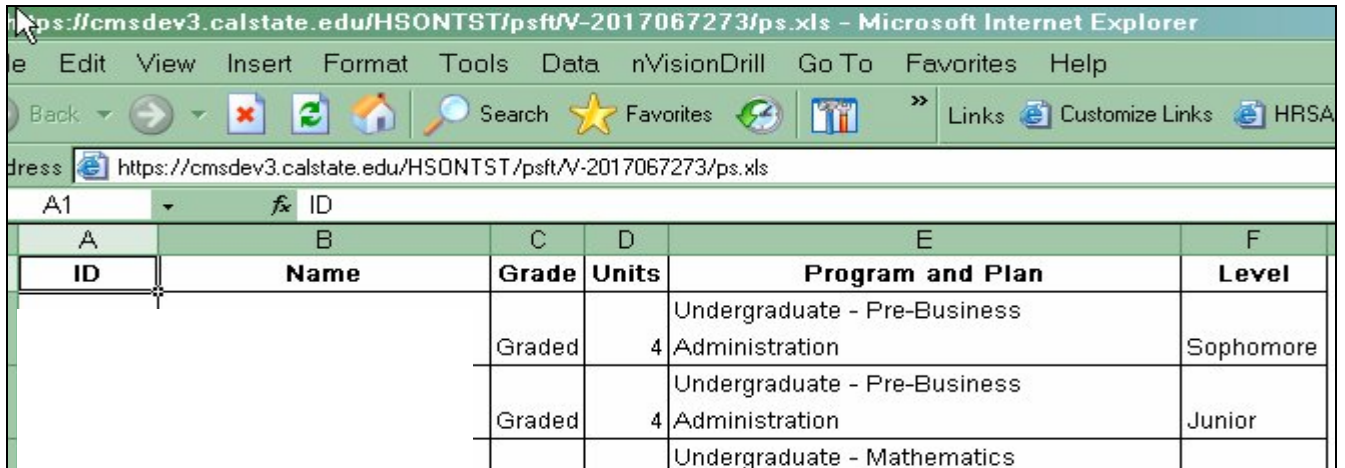
Enrollment Status Enrolled change

Total Students 58 **Enroll Capacity** 62

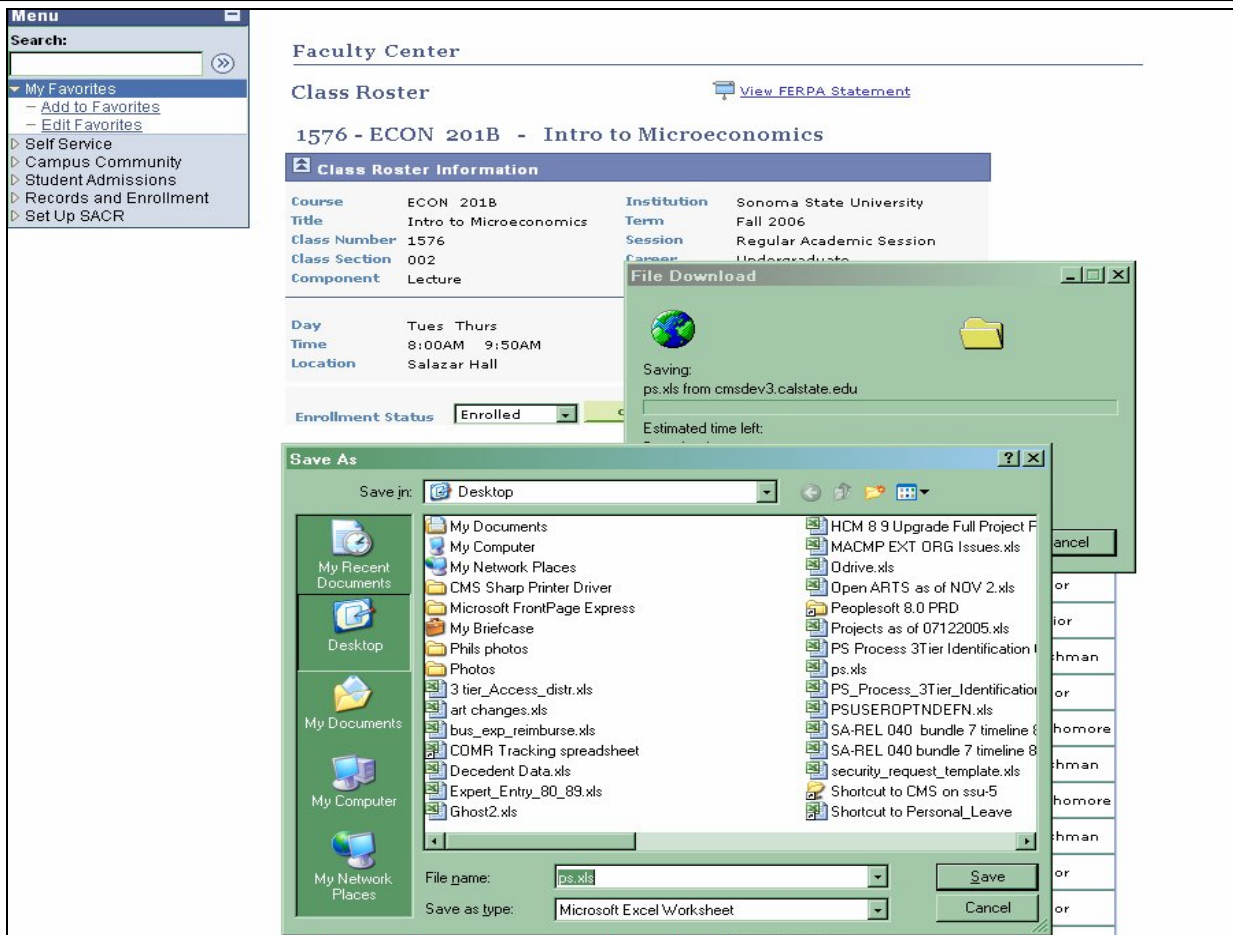
Enrolled Students		Customize Find 	First	1-58 of 58	Last
ID	Name	Grade	Units	Program and Plan	Level
1		Graded	4.00	Undergraduate - Pre-Business Administration	Sophomore
2		Graded	4.00	Undergraduate - Pre-Business Administration	Junior
3		Graded	4.00	Undergraduate - Mathematics (BS)/Economics (Minor)	Senior
4		Graded	4.00	Undergraduate - Pre-Business Administration	Freshman
5		Graded	4.00	Undergraduate - Pre-Business Administration	Junior

Downloading into Excel:

Once you download your file, if you use Windows internet Explorer, it will look similar to the screen cap below.



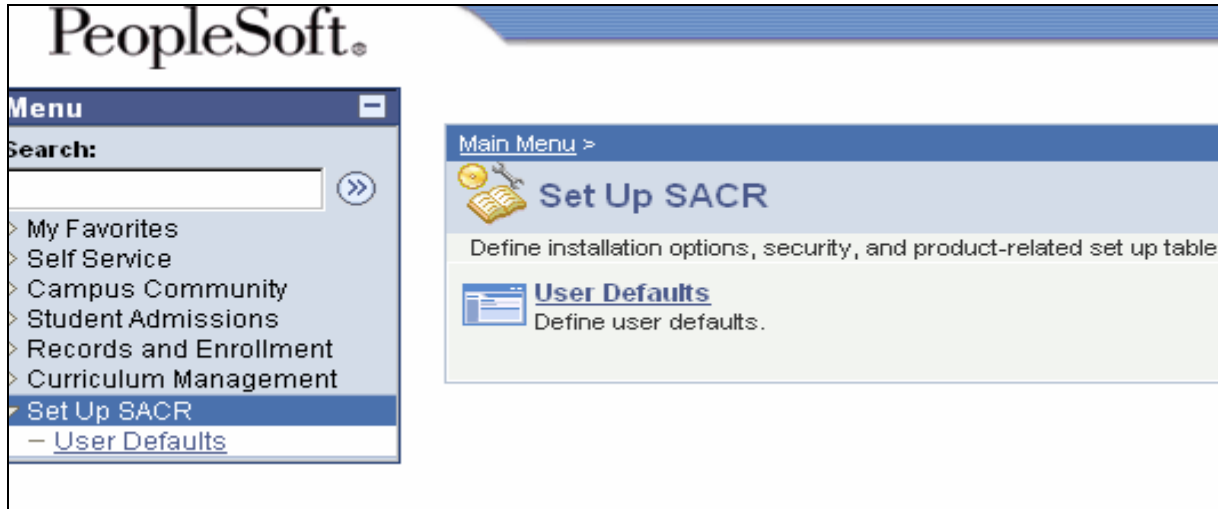
PeopleSoft automatically puts the data into the Browser based Excel format (see screen cap below). You cannot format it in this type of output. If you need to format the file then save as a Microsoft Excel Worksheet.



4. Setting User Defaults

You can set the default term and other items specific to your user login.

Define your User Defaults by navigating to Set up SACR and clicking on User Defaults



To set the TERM box to the current term, use the magnifying glass to find the code for the current term. For example, Fall 2006 = 2067. Be sure to click on save at the bottom after selecting a term.

