Signing on to PeopleSoft

PeopleSoft is totally web-based, so you access it by using an Internet browser such as Internet Explorer. If you are familiar with browsing web pages, you will find that navigating PeopleSoft is fairly simple.

The logon page requires a **user ID** and a **Password** and both are case sensitive. User ID needs to be in all caps. This password cannot be like any other passwords you have for any other systems, it has to be unique.
General Information

Passwords:
Please update your password on Enroll & Pay.

Click on "Change my password" which is toward the bottom of the menu found on the left side of the screen.

Enroll & Pay will require you to update your password every 180 days. Choose a password which is at least eight characters long. It must contain an upper case, a lower case, a digit and a special character. Special characters are listed below:

! @ # $ % ^ & * ( ) - _ = + \ [ ] {} ; : / ? . > <

Please do your part to help us maintain a secure system by keeping your password secure. Choose a password that you can remember and do not leave it where others might access it. Avoid using words, names or easy-to-guess combinations when choosing a password. Please don’t synchronize your Enroll & Pay password with your KU online ID or your Outlook email password.

Never share your password with someone else. University staff who need access to the system should register for training at www.sis.ku.edu

If you forget your password or have difficulty signing into the system, call Student Information Systems at 785-864-5221.
Time Out Warning:

WARNING: The PeopleSoft browser window is designed to “time-out” after a period of 20-30 minutes. This is a security feature to prevent someone from walking away from a computer and leaving the system open. If the browser becomes inactive, the user will get a warning as shown below that the session is going to time-out. Using the navigation or clicking on a lookup will reset the timer. If it does time-out, the user will need to login again.

Icons:
When viewing student data in PeopleSoft, there are several informational icons that may appear in the upper right portion of each page. As explained below, clicking on an icon may result in a new page that will give information about what the icon represents.

Service Indicators:
When a student has a Service Indicator on their record, you will find this informational icon to the right of their ID number and it will appear on each page of the student’s record by the presence of an icon that indicates whether it is a negative indicator (meaning that service to the student is impacted), or a positive indicator (which can be used as a flag of some sort).

Negative Indicator icon: ![Negative Indicator icon]  Positive Indicator icon: ![Positive Indicator icon]

Service Indicators can be placed or removed by authorized staff members.

In the screen shot below is an example of the detail box that opens when the user clicks on a Service Indicator icon. Pressing the Cancel button closes this detail box.
**FERPA icon:** The FERPA (Family Educational Rights and Privacy Act) icon looks like a window shade \[\text{window shade} \]\text{window shade} and would appear on each page of the student’s record.

If a student has a FERPA icon this indicates the student has requested that their directory information (as defined in the KU official publications) be withheld. Clicking on the window shade icon opens this detail box:

![FERPA Icon](image)

**NOTE:** The ‘No Photo Designated Releasable’ listed in the above screen shot does not mean we define photos as directory information. They currently are still not defined as directory information.

Pressing the Return button closes this detail box.

**Viewing an individual Student Photo, follow this navigation:**

Campus Community>Personal Student Information (Student)>Biographical (Student)>Student FERPA>Review FERPA Display

Type in the student's ID number and click on the FERPA Photo tab and their photo will display.
If a student is deceased, there will be a label that appears on each page of the student’s record:

This label indicates that a date of death has been recorded for this student. It is not an active icon, simply a label. Security will dictate who is able to label a student’s record with the DECEASED flag.
USER DEFAULTS

User defaults allow users to set default values for certain types of data that are entered on a regular basis.

- User defaults do not clear automatically when the system is exited or the computer is shut off.
- User defaults can be turned on and off or reset as often as the user wishes by returning to the User Default pages.
- The defaults will apply to the specific User ID of the person who set them, not the terminal they were set on.
- User defaults can be overwritten during the data entry process.

Care is needed when using defaults. They should not reduce your attention to detail. All fields on the entry pages should be checked carefully against the student's data whether a field is set as a default or not.

Setting User Defaults

Click on the following navigation to get to the User Defaults pages: Main Menu>Set Up SACR>User Defaults
### User Defaults 1 Page

<table>
<thead>
<tr>
<th>User ID</th>
<th>TESTER</th>
<th>Name</th>
<th>TESTER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Institution</td>
<td>UKANS</td>
<td>University of Kansas</td>
<td></td>
</tr>
<tr>
<td>Career Group SetID</td>
<td>UKANS</td>
<td>University of Kansas</td>
<td></td>
</tr>
<tr>
<td>Facility Group SetID</td>
<td>UKANS</td>
<td>University of Kansas</td>
<td></td>
</tr>
<tr>
<td>Academic Career</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Academic Group</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subject Area</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Term</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Academic Programs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Academic Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Academic Sub-Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Clicking on the magnifying glass, or entering Alt + 5 will give a search window of valid values for each field.

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**Academic Institution, Career Group SetID, and Facility Group SetID** should all be set to **UKANS, University of Kansas**.

☀ Clicking on the magnifying glass, or entering Alt + 5, will give you a search window of valid values for a prompt table field.
Go to the User Defaults 2 page by clicking on the page tab along the top or clicking on the page link at the bottom of the page.

**User Defaults 2 Page**

SetID should be set to **UKANS**.

Institution Set should be set to **UKANS**.
Go to the User Defaults 4 page by clicking on the page tab along the top or clicking on the page link at the bottom of the page.

**User Defaults 4 Page**

- The Carry ID checkbox if checked (will default to be checked) will populate the ID from page to page unless you sign out or are forced logged off after 20 minutes of no activity.
- Then click on the Save button.

**User Defaults Summary**

The defaults selected are personalized by operator to aid in data entry. However, they do not eliminate the need for care in data entry and should only be used for frequently entered values.
Navigation

The navigational structure is made up of folders that enable you to navigate to the desired page. The Main Menu or Home page, contains a general list of the areas you can link to.

**NOTE:** Users will have different access levels within the Main Menu and then within folders based on their business needs.

The Main Menu column lists menu items. These menu items enable you to navigate to folders and specific pages. Some of the main menu items for PeopleSoft are:

- Campus Community has biodemo data, names, addresses, phones and citizenship.
- Student Admissions contains admissions data.
- Records and Enrollment contains a student’s enrollment, grades, program/plan, term information, class permission numbers, degrees and transfer credit information.
- Curriculum Management contains catalog, schedule of classes, rosters, and instructor schedules.
- Setup SACR contains user defaults.
When you select a menu item from the Main Menu column, a list of folders or pages appear. The folder can be selected to see more detail or the specific page can be selected.

The **navigational header** remains constant, containing links to Home, Add to Favorites and Sign out.

The **menu navigation** (breadcrumbs) once a menu item in the Main Menu column has been selected this will begin appearing. Clicking on any but the last one gives a drop down allowing you to change your navigation/path.
Special menu items, Basic Student Information, Detail Student Information, and Catalog/Schedule of Classes, have been created to summarize information in a single folder. The information in these folders is also in their main location. These folders navigate directly to the pages without having to navigate to additional folder levels. The Student Services Center summarizes different information about a student on a single page.
**Components** are a group of related pages that pertain to a specific task and can consist of one or several pages within the same window. They are usually pages that are related and need to be completed together. Components contain *folder tabs* that provide access to a specific page.

As you finish one page, you click the *folder tab* of the next page you want to open in the component. You can also click the *page link* at the bottom of the page instead of the folder tab to move between component pages.

The *page action* buttons just above the page links are another method for quick navigation.

The *mode* buttons will show you which levels of access are available to you on a given page. A grayed-out button indicates which mode you are currently using.
About Hot Keys

Hot keys perform immediate actions. When you press one, the designated action occurs. **NOTE:** Several hot keys perform different functions depending on the page that you are on, such as a transaction page or a search page.

**CTRL+K**
When on a search or transaction page, accesses a page with a list of keyboard navigation shortcuts using hot keys.

**ALT+1**
Saves a page in a transaction.
Moves to the Search or Add button on a search or look up page.

**ALT+2**
Returns to the search page from the transaction page.

**ALT+3**
View the next row in the list when the button is active.

**ALT+4**
View the previous row in the list when the button is active.

**ALT+5**
Accesses the Look Up page (magnifying glass) for the current field.
Moves to the OK button on a secondary page.

**ALT+7**
Inserts a row in a grid or scroll area.

**ALT+8**
Deletes a row in a grid or scroll area.

**ALT+0**
When in Expert Entry mode, activates the Refresh button, which validates the data entered on the page.

**ALT+.**
View the next set of rows in a grid or scroll area.

**ALT+,**
View a previous set of rows in a grid or scroll area.

**ALT+/**
Finds data in a grid or scroll area.

**ALT+\**
View all rows of data in a grid, scroll area, or search page results list.

**ALT+\**
Toggles between Add a New Value and Find an Existing Value on a search page.

**CTRL+J**
Displays the system information page.

**CTRL+Y**
Toggles the menu pagelet between collapse and expand.

**ENTER**
Activates the OK button, where appropriate.
On a search page, activates the Search button.
On a look up page, activates the lookup button.

**ESC**
Activates the Cancel button, where appropriate.
Key Points to Remember:

- On the Main Menu or Home Page is a general list of areas you can link to in an application.

- The underlined hyperlinks in the final level of menu headings replace the menu with the page you select.

- PeopleSoft navigational structure uses menu items and folders, set up like hyperlinks that enable you to navigate to the desired page or component.

- Buttons are used for navigating, searching, processing and page action functions.
Searches in PeopleSoft

There are two different types of searches in PeopleSoft. The **Basic Search** and the **Advanced Search**.

The **Basic Search** (shown below) will show the Advanced Search link which means that you are currently in a Basic Search function. The drop down arrow to the right of the Search by field allows you to do a search using one field with these different values: Academic Career, Campus ID (former/legacy system 6 digit ID number), ID (Enroll & Pay 7 digit ID number), First Name, Last Name and National ID (Social Security Number).

Entering a different ID, such as Campus (former/legacy system 6 digit ID number) or National ID (Social Security number) or entering the Last Name and all or part of the first name will return the student’s Enroll & Pay 7 digit ID number.
The Advanced Search (shown below) will show the Basic Search link which means that you are currently in an Advanced Search function. Unlike the Basic Search which only has one field with multiple values, the Advanced Search allows you to search using multiple fields and they are: ID (Enroll & Pay 7 digit ID number), Academic Career, National ID (Social Security Number), Campus ID (former/legacy system 6 digit ID number), Last Name and First Name.

In the above sample, the Last Name and the first character of the First Name were entered. This returns a Search Results list of all students with that last name and first character of the first name. By using some portion of the First Name in the search, the number of rows in the Search Results returned can be greatly reduced. (NOTE: Using Last Name only is not recommended unless it is a very unique last name. A Last Name search for something like Smith could cause the search to fail due to an excessive number of records being found.)

Unless both names are fairly common, a search with Last Name and part of the First Name can be sufficient.

★ HINT: When using Names for a search, if the search is the Last Name and the first character of the First Name the Search Results list will appear in alphabetical order. This is especially helpful if the Last Name is a common name. If using a portion of the Last Name, only the Last Name is in alphabetic order.
Favorites

Frequently used pages can be set as Favorites for quick and easy access to them without needing to use the full navigation path.

Favorites are saved as part of your user id, rather than the browser, so they will be available if you change computers.

Creating Favorites

- Navigate to the search window of the page you want to create as a favorite.
- Click on the Favorites drop down at the top of the page.
- Choose Add to Favorites.

After choosing Add to Favorites, another window will open that will allow you to edit the description of the page you want to save. Click the ok button.
• Your Favorite now resides in My Favorites.

  ➢ Choosing a specific Favorite will take you directly to that page.

Editing Favorites

• Clicking on the Edit Favorites under My Favorites will allow you to alter or delete a Favorite you have already created.

  ➢ Click on the Save button to save your changes.
**PeopleSoft Academic Structure**

Career → Program → Plan → Sub-Plan

**Careers**
- UGDL Undergraduate Lawrence
- GRDL Graduate Lawrence
- UGDK Undergraduate Kansas City
- GRDK Graduate Kansas City
- LAW School of Law
- MED School of Medicine
- CNED Continuing Education

**Programs** KU Schools
- **Examples:** UGDL Career
  - CLASU Liberal Arts–Undergraduate Program
- UGDK Career
  - AHLTU Health Professions-Undergraduate Program
- GRDL Career
  - EDUCG Education–Graduate Program
- GRDK Career
  - NURSG Nursing-Graduate Program

**Plans** Majors/Co-Majors/Minors
- **Examples:** CLASU Program
  - BIOLA-BS Biology BS Plan
  - AHLTU Program
    - CLSH-BS Clinical Laboratory ScienceBS Plan
  - EDUCG Program
    - SPEDGD-EDS Special Education EDS Plan
    - (Specialist in Education)
  - NURSG Program
    - NURSGN-PHD NursingPHD Plan

**Sub-Plan** Concentrations/Emphasis
- **Examples:** BIOLA-BS Plan
  - GENETICS Genetics Sub-Plan
  - CLSH-BS Plan
    - MOLBIOTECH Molecular Biotechnology Sub-Plan