



# PeopleSoft Time-Saving Tricks

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# Personalization Tricks for User Preferences

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## 1. My Favorites (menu item under Home Page>Favorites):

*Allows set up of frequently used pages*

- A. Add to Favorites: adds pages to My Favorites
  - i. When adding favorites, utilize a prefix to sequence pages in a certain order; or to separate favorites by modules
- B. Edit Favorites: edit/delete pages added to My Favorites

## 2. My Preferences (menu item under Main Menu>My Personalizations for HCM OR Main Menu>My Preferences for Finance):

*Allows set up of general settings*

[https://docs.oracle.com/cd/E91187\\_01/pt855pbr2/eng/pt/tupa/task\\_DefiningUserPreferences.html?pli=ul\\_d21e39\\_tupa](https://docs.oracle.com/cd/E91187_01/pt855pbr2/eng/pt/tupa/task_DefiningUserPreferences.html?pli=ul_d21e39_tupa)

- A. Navigation Personalizations—for keyboard navigation preferences
  - i. Drop down Menu Sort Order: Ascending
  - ii. Open new browser window: Yes
  - iii. Tab over Calendar Button: Yes
  - iv. Tab over Lookup Button: Yes
  - v. Autocomplete: Yes

## 3. Personalize Content | Layout (links located in upper left corner of Home Page):

*Allows personalization of Home Page*

- A. Personalize Content – select the pagelets that you want displayed on your Home Page: Main Men
- B. Personalize Layout – select the number of columns for your Home page, and move the pagelets to the desired column: Right Column



# Personalization Tricks for Pages

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## 1. Favorites (menu under Home Page):

- A. Recently Used: list of the last five pages accessed
- B. Recent Search Results: lists Basic Search and Advanced Search that was performed

## 2. Personalize Page (link located in upper left corner of a page):

*Allows personalizing tabbing order*

- A. Page Personalization
  - i. Set tabbing order

## 3. Other Page Tricks

### A. Ctrl + Shift + J

*Displays the page definitions. The Page name within the page definitions can be useful for identifying the Record Name needed to create a query. The Component name can be useful with identifying the roles that has access to a page. To identify the roles with access to that page, run the query M\_SEC\_ROLE\_NAVIGATION; entering % in the field "Role Name %" and the Component Name in the field "Component %".*

### B. New Window (link located in upper right corner of a page)

*Allows multiple windows to be open*

### C. Personalizing Grids

[https://docs.oracle.com/cd/E91187\\_01/pt855pbr2/eng/pt/tupa/task\\_PersonalizingGrids-557c84.html?pli=ul\\_d21e75\\_tupa](https://docs.oracle.com/cd/E91187_01/pt855pbr2/eng/pt/tupa/task_PersonalizingGrids-557c84.html?pli=ul_d21e75_tupa)

- i. **Personalize** (link located within the grid header)  
*Allows for changing the order of the columns within the grid*
- ii. **Download to Excel** (icon located in upper right corner of a grid)  
*Allows search results to be downloaded into Excel*

## 4. Page Searches

[https://docs.oracle.com/cd/E91187\\_01/pt855pbr2/eng/pt/tupa/task\\_UsingPeopleSoftSearchTechnologytoRetrieveData-997fbc.html?pli=ul\\_d21e49\\_tupa](https://docs.oracle.com/cd/E91187_01/pt855pbr2/eng/pt/tupa/task_UsingPeopleSoftSearchTechnologytoRetrieveData-997fbc.html?pli=ul_d21e49_tupa)

### A. Save Search Criteria (link located on search pages)

- i. Once a saved search is named, the search can be retrieved from the dropdown labeled Use Saved Search

### B. Recent Search Results (icon located at the end of the breadcrumbs)

*Displays the last search result for that page*

### C. Using Wildcard Characters to Find Information

*Only works with the operators "begins with" and "contains"*

- i. % (percent symbol): match one or more characters. The % symbol can be placed anywhere within the search value, for example %Administrator (will list all positions containing "Administrator" in the description); Cert Sub %Administrator (will list all positions that have "Cert Sub " before "Administrator in the description)



## 5. Page Navigation Shortcuts

- A. Keyboard navigation alternatives to using a mouse

**Shift + Ctrl + K:** To view a printable list of shortcuts while on line

*Hot keys perform immediate action; Access keys moves cursor to a particular place on a page (such as a button or link), to another page in a component, or to another tab in a grid*

[https://docs.oracle.com/cd/E91187\\_01/pt855pbr2/eng/pt/tupa/task\\_UsingKeyboardShortcuts-0714ba.html](https://docs.oracle.com/cd/E91187_01/pt855pbr2/eng/pt/tupa/task_UsingKeyboardShortcuts-0714ba.html)

### i. Hot Keys

1. Alt + 1: Save
2. Alt + 2: Return to Search
3. Alt + 3: Next in List
4. Alt + 4: Previous in List
5. Ctrl + Y: Expands Main Menu

### ii. Access Keys

1. Tab: Navigates you to the next field
2. Shift + Tab: Navigates you to the prior field
3. Alt + 9: Takes you to the Help line

## Query Tricks

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(Main Menu>Reporting Tools>Query>Query Manager)

1. Perform the File Save As to save a customized query for personal use
2. Schedule a query instead of running it to HTML
3. Use the Advanced Search link on Query Manage page to perform query searches with multiple parameters
4. Set up folders to organize frequently used queries

## Other Time Saving Tricks

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1. Create a personal “knowledge database” using Excel or Word that has the ability to perform a Search on keywords
2. Create a personal folder on your Desktop to file the CRC guides for quick reference
3. Browsers
  - a. Perform Ctrl+F to find information on a page
  - b. Open multiple browser sessions
4. Screencastomatic <https://screencast-o-matic.com>  
*Requires sign up*

## CRC Resources

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Go to <http://crc.sdcoe.net> and search “personalize” for resources created by the SDCOE Customer Resource Center.