

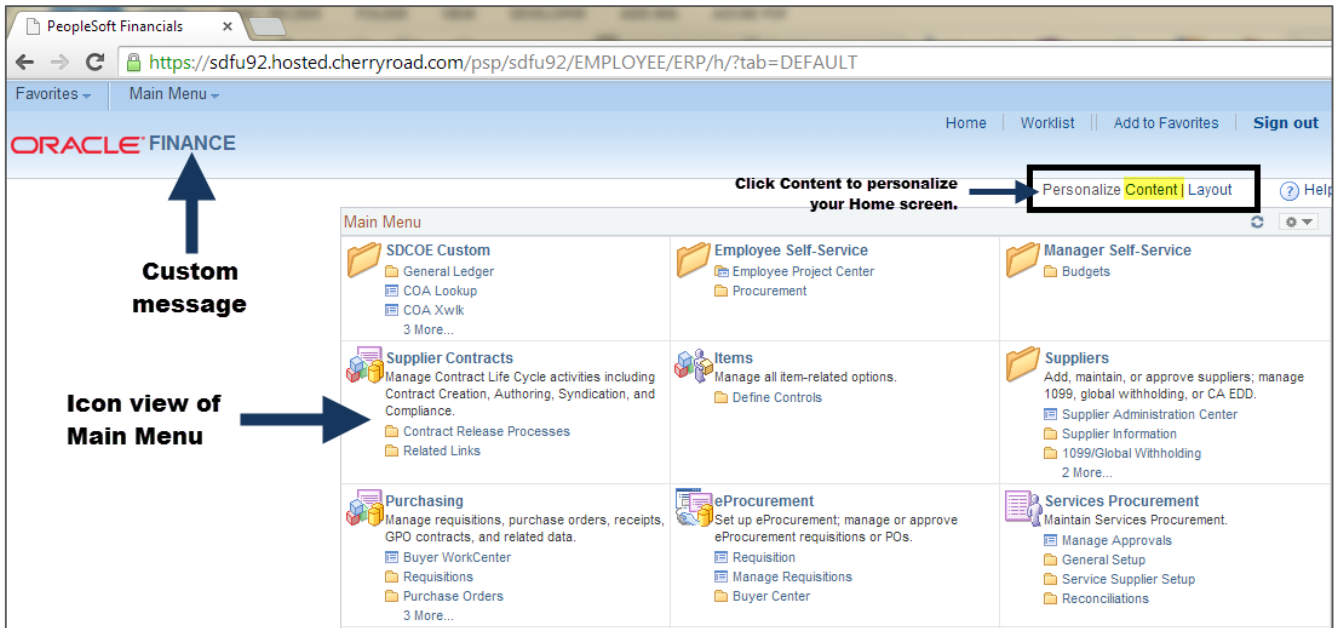


How to Personalize PeopleSoft

Version 1.0 | April 18, 2014

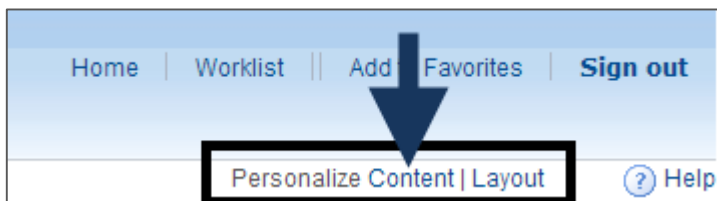
1. Personalize the Home Screen

Would you like to change the way your home screen looks? In the example below, we have put a custom message at the top (the word "FINANCE") and displayed the main menu in icon view.



Directions:

1. Launch the desired PeopleSoft application, like Financials or HCM.
2. Click **Content**, the link found at the top-right of the Home screen.



- In the window that appears, enter a welcome message and select the desired pagelets. For an icon view of the main menu, select “Main Menu.”

Personalize Content: My Page

Tab Name

Welcome Message

Choose Pagelets: Simply check the items that you want to appear on your homepage. Remember to click "Save" when done.

Arrange Pagelets: Go to [Personalize Layout](#)

PeopleSoft Applications

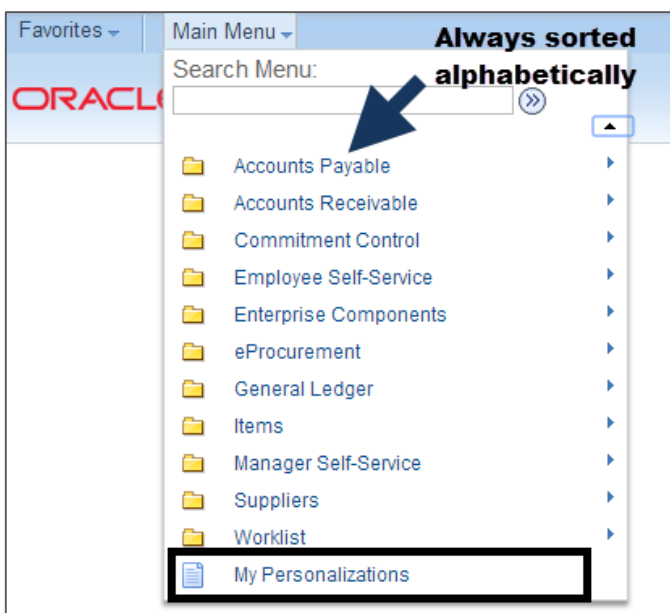
- Menu
- Activity Guides - In Progress
- Menu - Classic
- Top Menu Features Description
- My Reports
- Main Menu
- Report List

[Return to Home](#)

- Click **Save**. If desired, click the **Layout** link to change from 2-column to 3-column view.
NOTE: If you use Finance and HCM applications, you need to do this separately in each application.

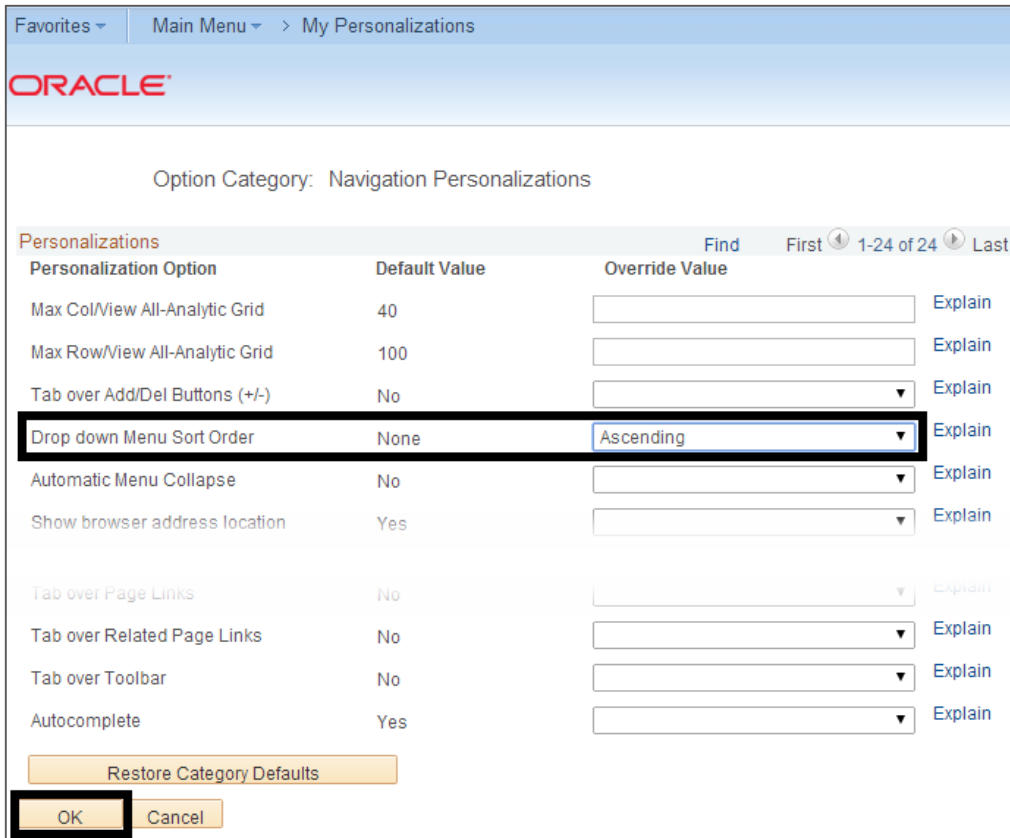
2. Perma-sort alphabetically the Main Menu

Want to always have your Main Menu sorted alphabetically? To alphabetically sort the Main Menu once, you can click the black arrows (↔) at the top-right of the main menu. To perma-sort the Main Menu (always sorted alphabetically), use **My Personalizations**.



Directions:

1. Launch the desired PeopleSoft application, like Financials or HCM.
2. Navigate to **Main Menu > My Personalizations**.
3. Select **Personalize Navigation Personalizations**.
4. For the **Drop down Menu Sort Order** option select *Ascending*. Click **OK**.



The screenshot shows the Oracle PeopleSoft interface for 'My Personalizations' under the 'Navigation Personalizations' category. A table lists various personalization options with their default values and override values. The 'Drop down Menu Sort Order' option is highlighted with a black box, showing its default value as 'None' and its override value as 'Ascending'. Other options include 'Max Col/View All-Analytic Grid', 'Max Row/View All-Analytic Grid', 'Tab over Add/Del Buttons (+/-)', 'Automatic Menu Collapse', 'Show browser address location', 'Tab over Page Links', 'Tab over Related Page Links', 'Tab over Toolbar', and 'Autocomplete'. At the bottom, there are buttons for 'Restore Category Defaults', 'OK', and 'Cancel'.

Personalization Option	Default Value	Override Value	Find	First	1-24 of 24	Last
Max Col/View All-Analytic Grid	40	<input type="text"/>				
Max Row/View All-Analytic Grid	100	<input type="text"/>				
Tab over Add/Del Buttons (+/-)	No	<input type="text"/>				
Drop down Menu Sort Order	None	Ascending				
Automatic Menu Collapse	No	<input type="text"/>				
Show browser address location	Yes	<input type="text"/>				
Tab over Page Links	No	<input type="text"/>				
Tab over Related Page Links	No	<input type="text"/>				
Tab over Toolbar	No	<input type="text"/>				
Autocomplete	Yes	<input type="text"/>				

5. If you don't see the change immediately, log out and log back in to the application.
NOTE: If you use Finance and HCM applications, you need to do this separately in each application.

3. Turn Autocomplete Off

Do you want to turn off Autocomplete? In PeopleSoft, the **Autocomplete** feature allows you to see suggestions as you're typing a value in a field. You can select one of values on the list to fill out the field, or keep typing. In the example below, we typed "al" and a list of items that begins with "AL" appears. By default, Autocomplete option is set to Yes. If you prefer to type in all values manually and not have the floating suggestions appear, you can turn off Autocomplete using **My Personalizations**.

IMPORTANT! With Autocomplete off, the system will still let you know if the value you typed in the field is invalid. You will also still be able to click on the magnifying glass to expand the complete list of valid values and select from it.

Purchase Order

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

Search Criteria

Business Unit: = [] **Autocomplete**

PO ID: begins with []

Purchase Order Date: = []

PO Status: = []

Short Supplier Name: begins with al

Short Supplier N	Supplier Name	Supplier ID
AL SCHAFFE-001	AL SCHAFFER	AS2013
AL WARD-001	AL WARD	325
AL'S KUBOT-001	AL'S KUBOTA TRACTOR, INC.	A00270
AL-MAX SANI-001	AL-MAX SANITATION	ALMAX
ALAYSA ART-001	ALAYSA ARTEAGA	ALAANT
ALBA ELIZA-001	Alba Elizabeth Razo Lugo	0000001369
ALBERT ALB-001	ALBERT ALBRAND	ALBRAN
ALBERT MAR-001	ALBERT MARTIN	ALBMAR
ALBERT WHI-001	ALBERT WHITMAN & COMPANY	A00079
ALBERTO CA-001	ALBERTO CABRERA III	A00025
ALEJANDRIN-001	ALEJANDRINA CUEVAS	313
ALEKS CORP-001	ALEKS CORPORATION	ALEKS6
ALERT LOCK-001	ALERT LOCKSMITH & SECURITY	A00090
ALERT SERV-001	ALERT SERVICES, INC.	A00007
ALEXANDER,-001	ALEXANDER, JANEL	ALE100

Supplier ID: begins with []

Supplier Name: begins with []

Buyer: begins with []

Buyer Name: begins with []

PO Type: = []

Purchase Order Reference: begins with []

Hold From Further Processing

Case Sensitive

Search Clear Basic Search Save

Directions:

1. Launch the desired PeopleSoft application, like Financials or HCM.
2. Navigate to **Main Menu > My Personalizations**.
3. Select **Personalize Navigation Personalizations**.



4. For the **Autocomplete** option (at the bottom) select **No**. Click **OK**.

Max rows for View All	100	<input type="text"/>	Explain
Tab over Grid Tabs	No	<input type="text"/>	Explain
Tab over Header Icons	No	<input type="text"/>	Explain
Tab over Lookup Button	No	<input type="text"/>	Explain
Tab over Navigation Bar	No	<input type="text"/>	Explain
Tab over Browser Elements	No	<input type="text"/>	Explain
Tab over Page Links	No	<input type="text"/>	Explain
Tab over Related Page Links	No	<input type="text"/>	Explain
Tab over Toolbar	No	<input type="text"/>	Explain
Autocomplete	Yes	<input type="text"/> No Yes	Explain

Restore Category Defaults

OK Cancel

NOTE: If you use Finance and HCM applications, you need to do this separately in each application.