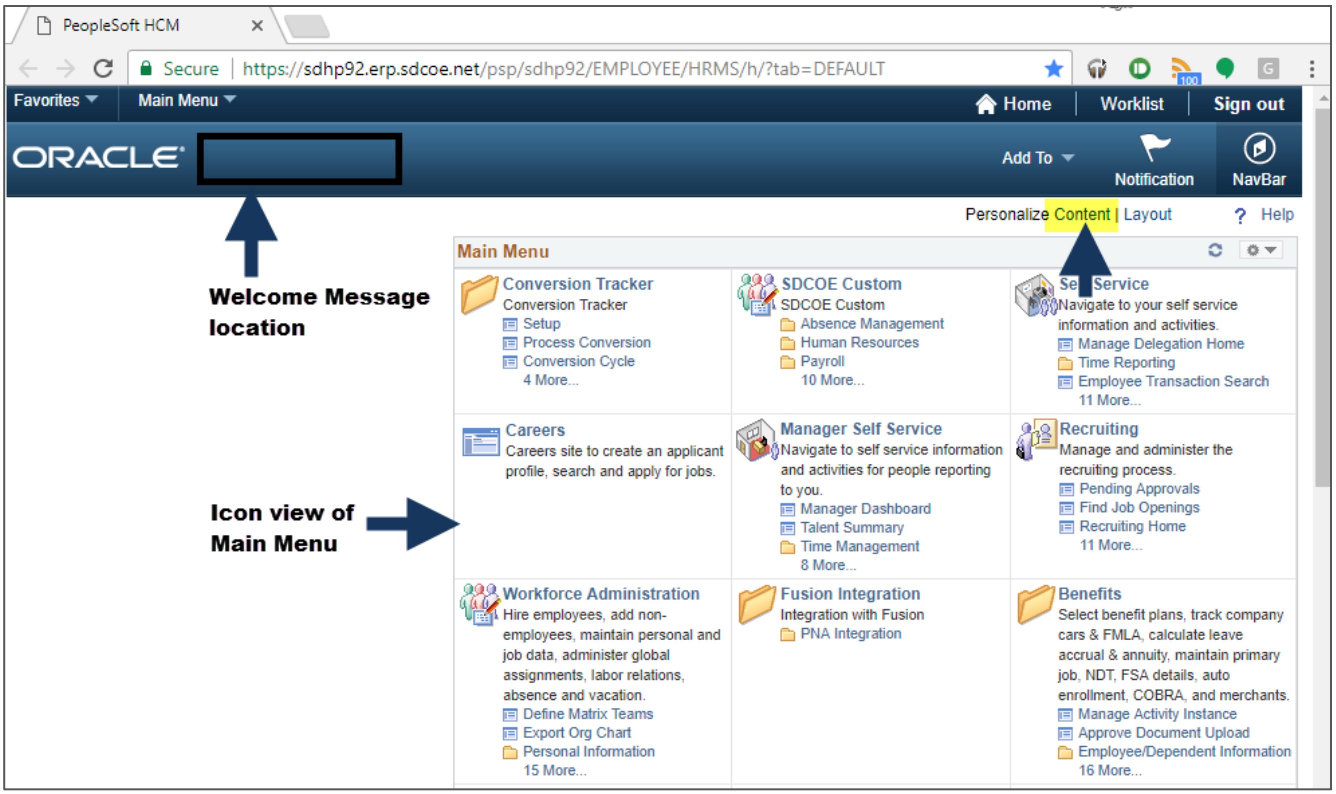
How to Personalize PeopleSoft

Version 3.0 | December 17, 2018

Personalized the Home Screen

Would you like to change the way your home screen looks? In the example below, we have displayed the main menu in icon view.

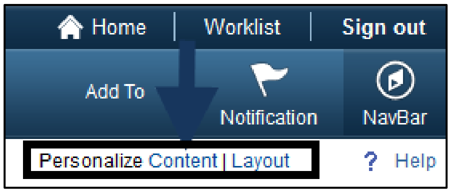
The Welcome Message feature is not enabled as of July 10, 2017 (Tools 8.55 upgrade). The Welcome Message allows you to type text that appears to the right of the Oracle logo.



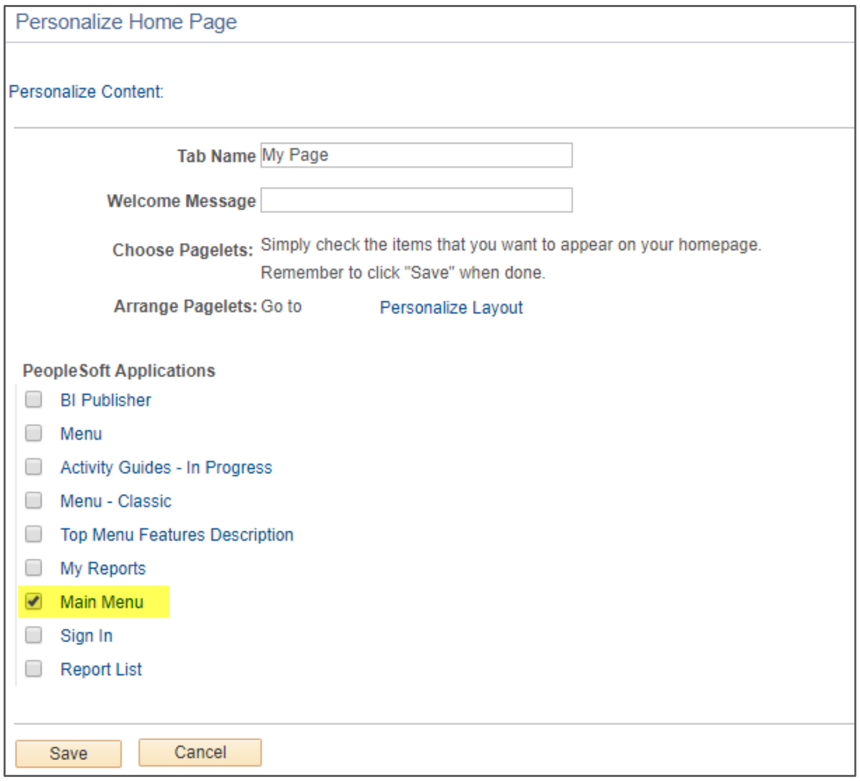
Please see the directions on the next page.

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.



3. In the window that appears, select the desired pagelets. For an icon view of the main menu, select “Main Menu.”

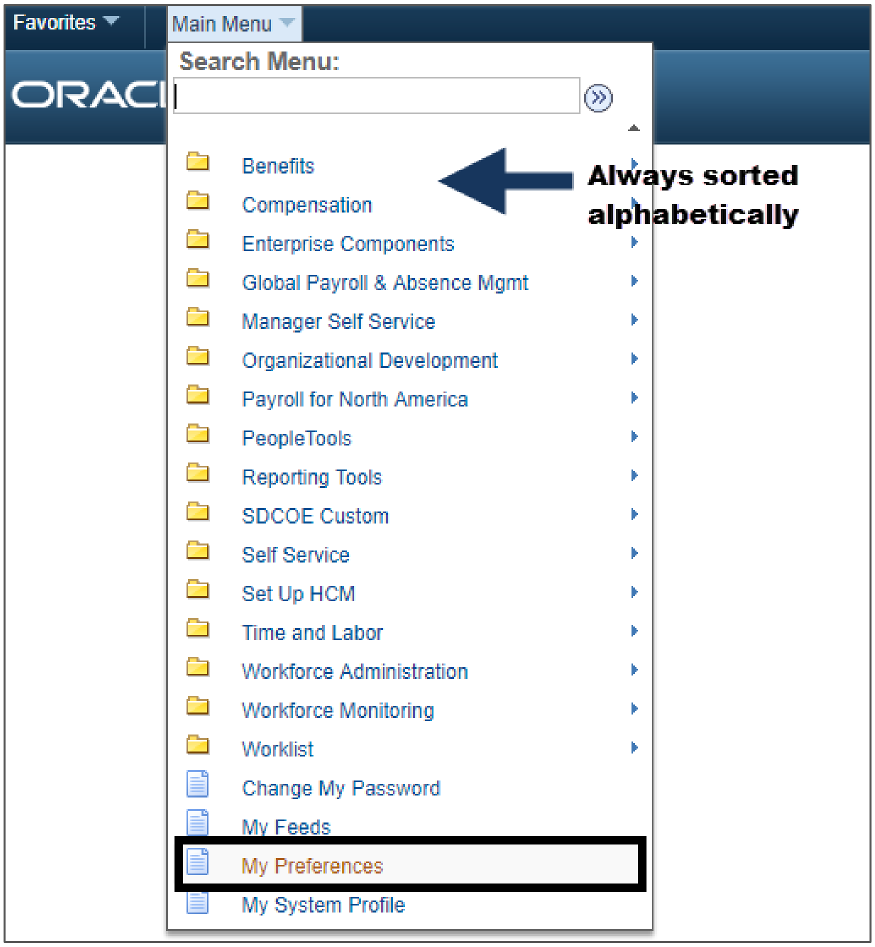


NOTE: The Welcome Message feature is not enabled as of July 10, 2017 (Tools 8.55 upgrade).

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

Perma-sort Alphabetically the Main Menu

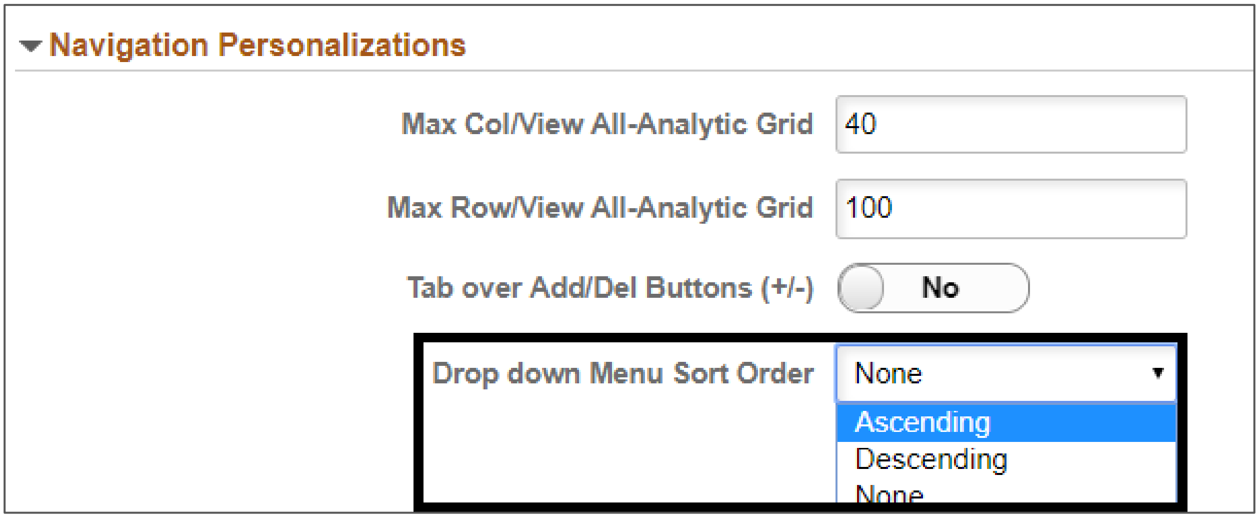
Want to always have your Main Menu sorted alphabetically? To alphabetically sort the Main Menu once, you can click the black arrows (⬍) at the top-right of the main menu. To perma-sort the Main Menu (always sorted alphabetically), use **My Preferences**.



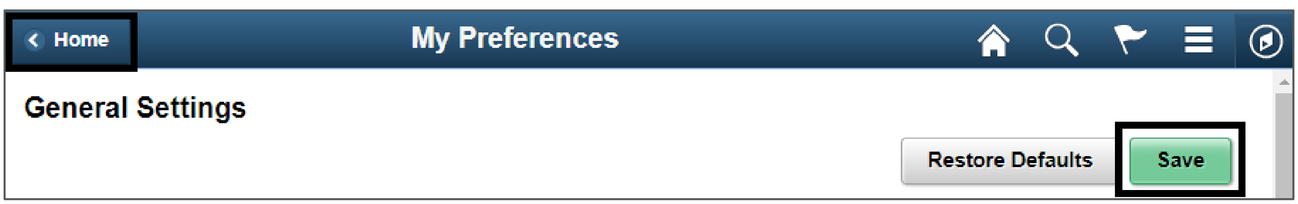
Please see the directions on the next page.

Directions:

1. Launch the desired PeopleSoft application, like Financials or HCM.
2. Navigate to **Main Menu > My Preferences**.
3. Go to the fourth folder called **Navigation Personalizations**.
4. For the **Drop down Menu Sort Order** option select *Ascending*.



5. Click **Save** (top right of screen). Look for an indication at the top of your screen that your personalizations have been saved.

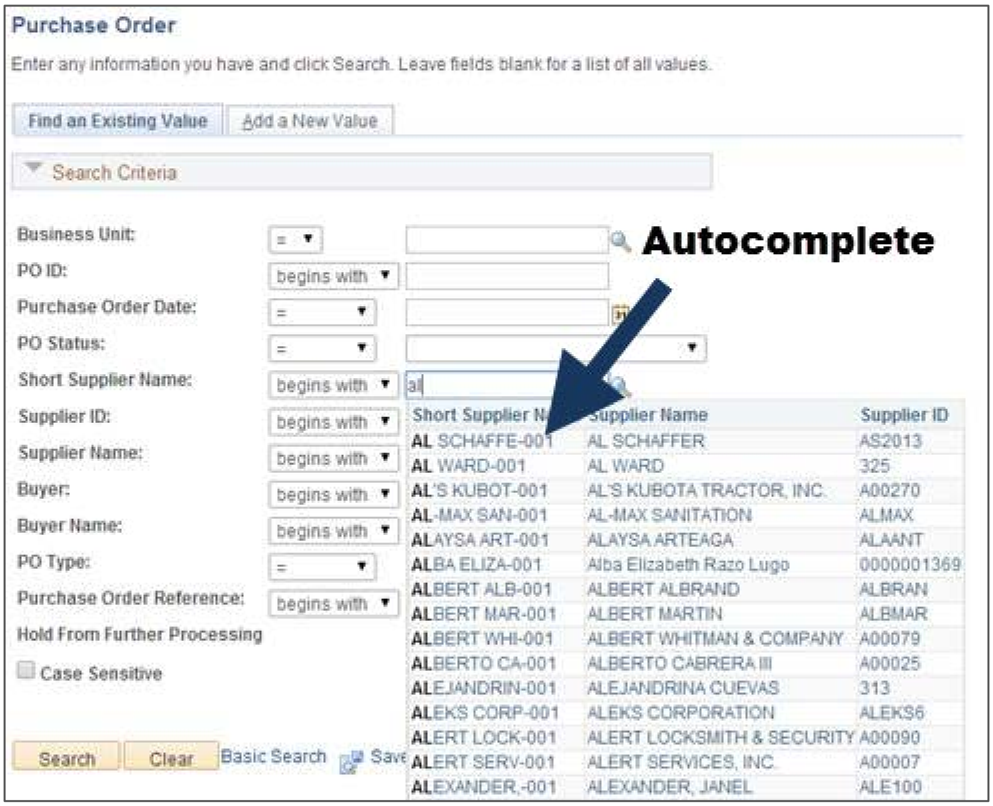


6. Click **Home**.
7. If you don't see the change immediately, log out and log back in to the application. **NOTE:** If you use Finance and HCM applications, you need to do this separately in each application.

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 Preferences**.

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.



Directions:

1. Launch the desired PeopleSoft application, like Financials or HCM.
2. Navigate to **Main Menu > My Preferences**.
3. Go to the fourth folder called **Navigation Personalizations**.
4. For the **Autocomplete** option (at the bottom of the list) select *No*.
5. Click **Save** (top right of screen). Look for an indication at the top of your screen that your personalizations have been saved.
6. Click **Home**.
7. 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.

Personalize Columns (Grids)

In certain areas of PeopleSoft you will notice that the fields are arranged in a grid with columns. You can customize the way you enter data in these fields. To do this, you click the **Personalize** link located directly above a grid.

Before

Here is the **Express Item Entry** screen, used to enter a purchasing requisition.

Notice the following default settings:

- There are three tabs: **Details**, **Supplier Information,** and **Item Information**.
- Each tab has fields where data can be entered. For example, on the Details tab, you can see **Item ID**, **Description**, **Quantity**, **UOM**, **Category**, **Price**, and **Merchandise Amount**.
- You have the option to click an icon to **expand all tabs** to have all fields appear on the screen at once – you may have to scroll to the right to see all fields.
- You can click **Personalize** (found at the top of any grid) to select exactly which fields in which order you want to see.

After

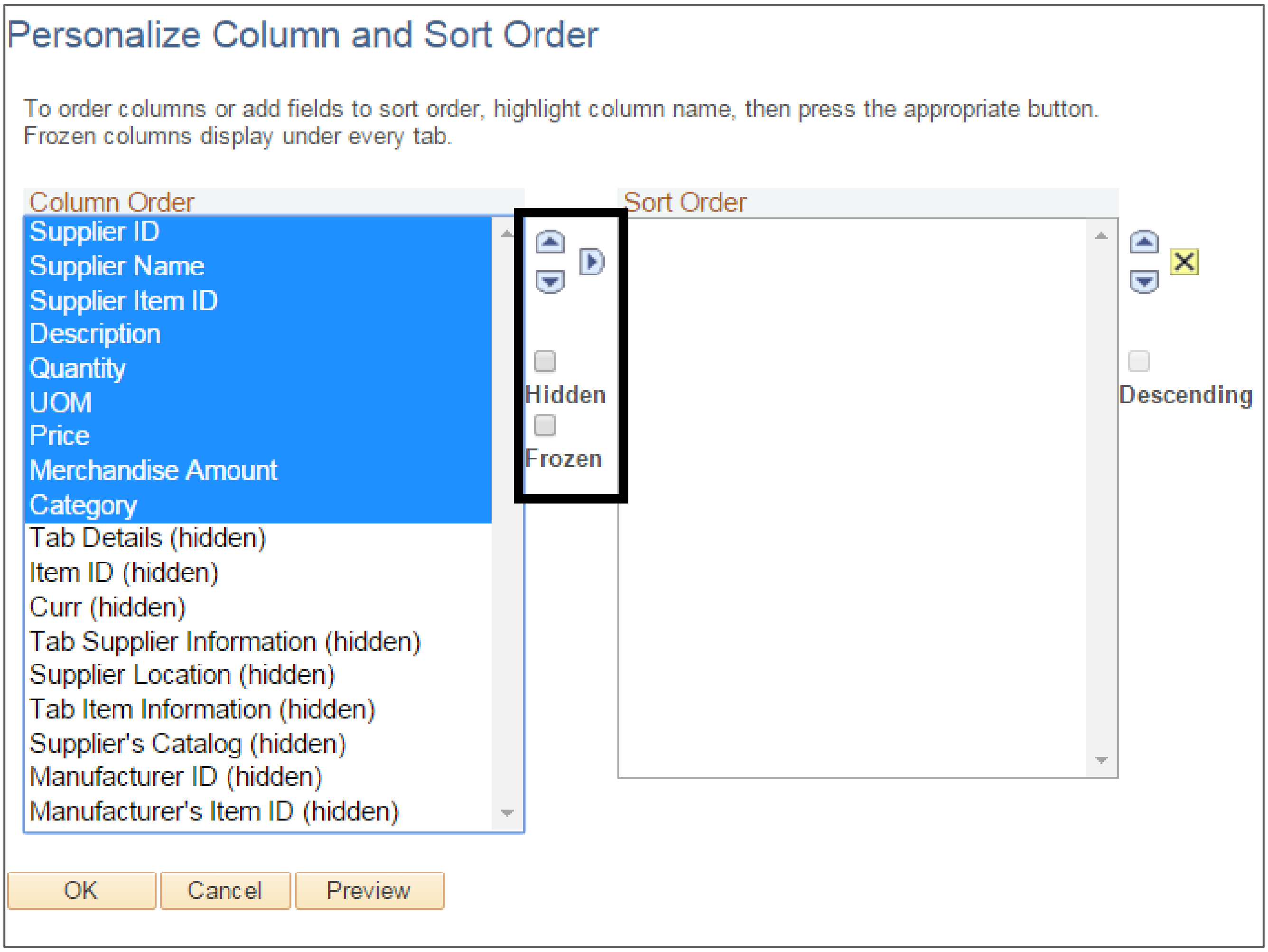
Here is the grid on the **Express Item Entry** screen after a user has personalized it.

Notice the following personalizations:

- No tabs
- Only 9 fields are displayed and in a specified order: **Supplier ID**, **Supplier Name**, **Supplier Item ID**, **Description**, **Quantity**, **UOM**, **Price**, **Merchandise Amount**, and **Category**.
- Data entry can now be done without having to click the three tabs. The user can easily tab through the fields in the desired order.

Directions:

1. Click **Personalize**. This is the link found directly above a grid.
2. When the **Personalize Column and Sort Order** window appears, click a field and move it up/down, hide it, or freeze it.



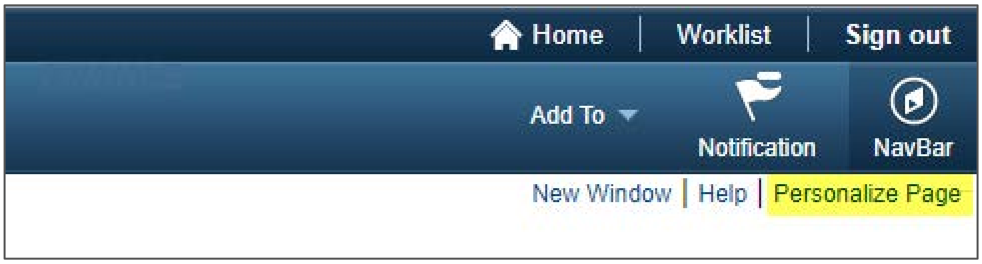
- Use the **up/down arrows** to change the order in which it appears.
- Click **Hidden** to hide the field.
- Click **Frozen** to “freeze” the field (similar to Freeze Panes in Excel).

  NOTE: You can Control-click or Shift-click fields to select some or all at once, then use the arrows, Hidden, and Frozen to make changes to multiple fields.

3. Click **Preview** if you want to see the changes before committing.
4. Click **OK.** The fields on this screen are now personalized for you and will stay this way when you use this screen.

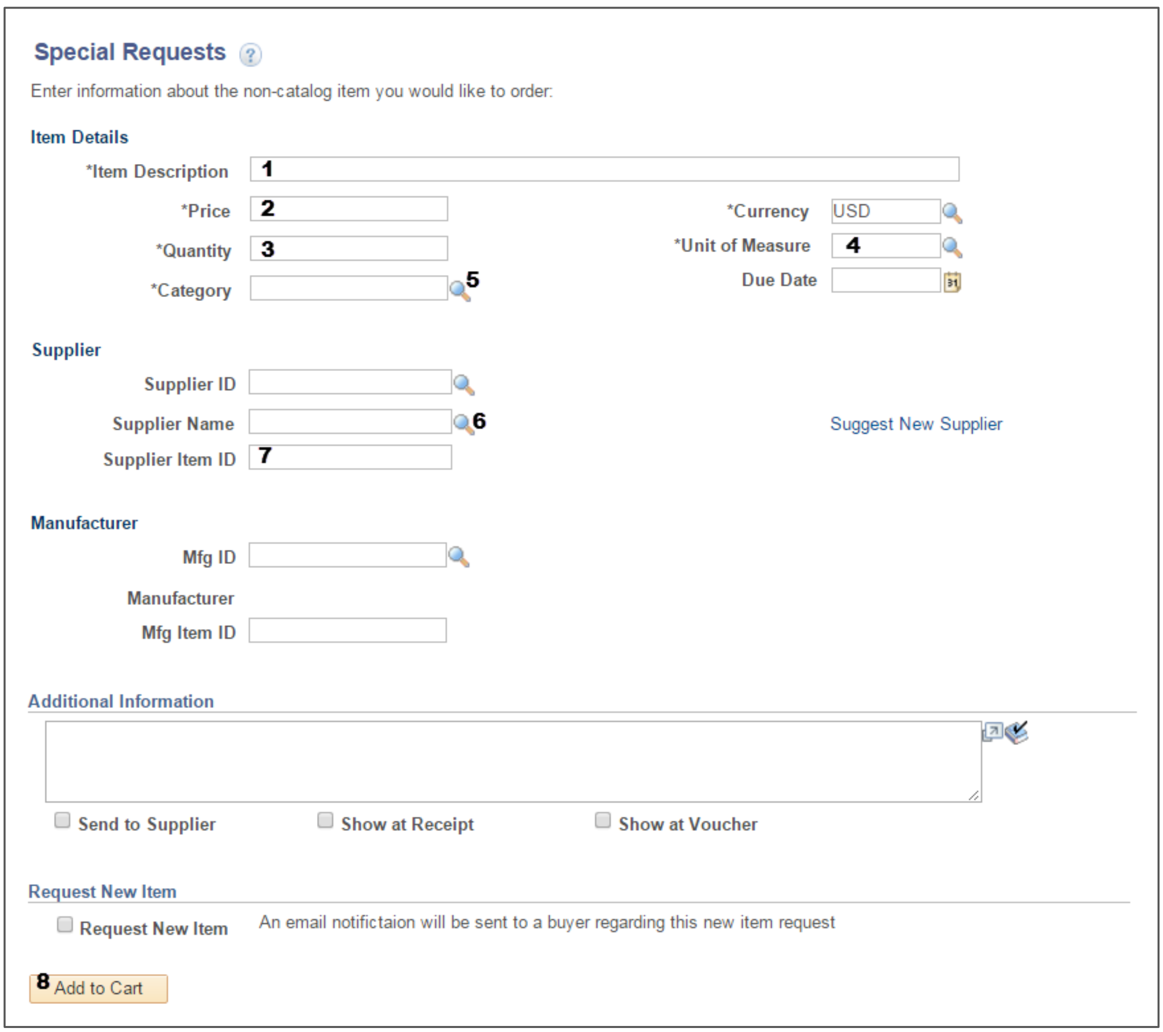
Personalize Data Entry Tab Order on a Page

There is a **Personalize Page** link at the top-right on pages used for data entry. Use this if you want to change your data entry tab order.

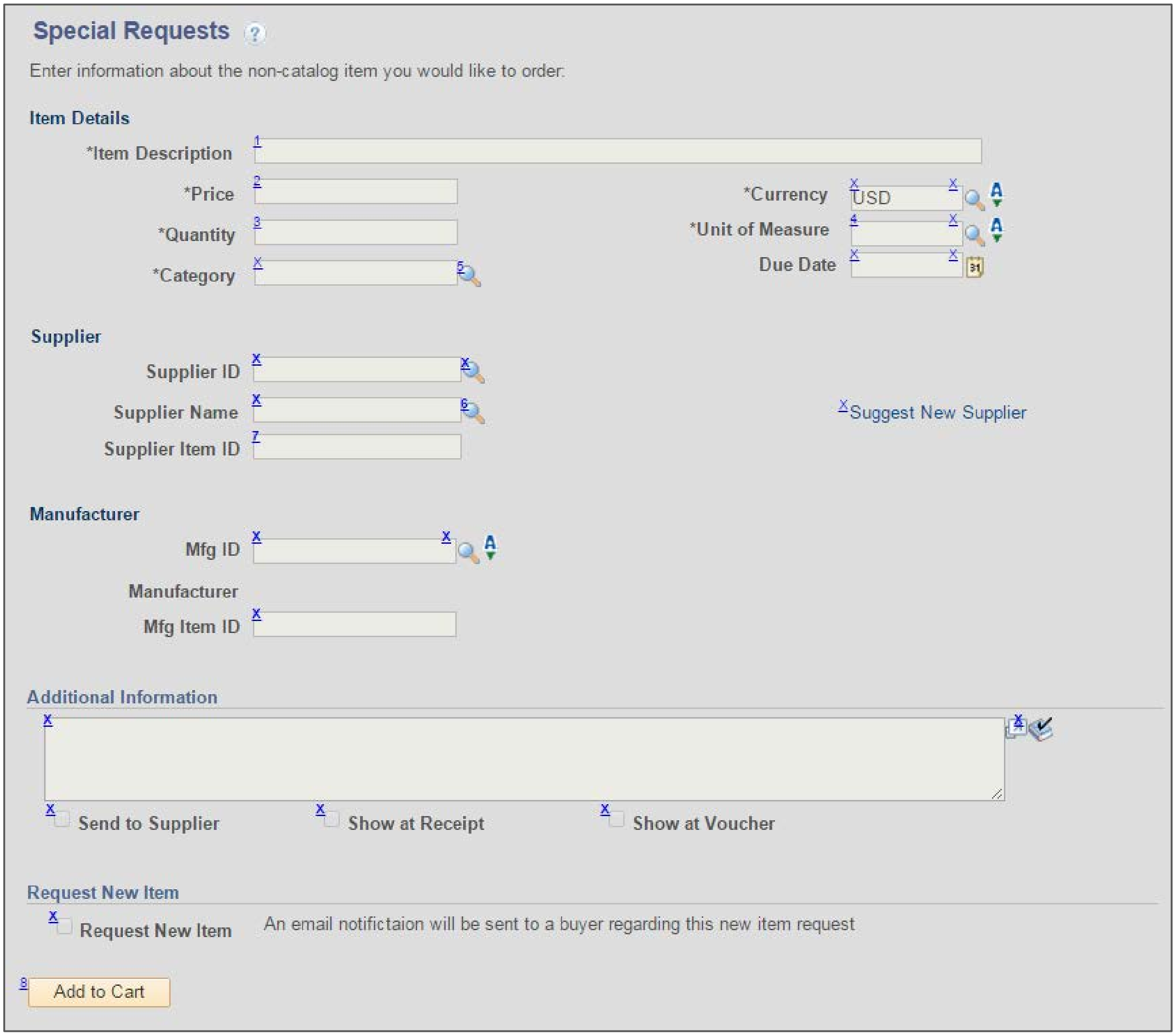


Directions:

1. Go to the desired screen. You might need to find a record first. Map out the fields that you want to use, in the order you want to tab through. For example, the **Special Requests** screen has many fields. If you only want to tab through 8 of them, figure out which ones and in which order.



2. Click the **Personalize Page** link at the top right of the screen.
3. Clear the fields, then click the X's to indicate the new tab order.



- Clear the fields by clicking **Clear Tabbing Order**.
- Click the fields in the order you want the tab to move. Here you can see fields marked 1, 2, 3, 4, 5, 6, 7, 8. Anything with an X will not be included in the tab order.

4. Click **OK** at the bottom of the page (not shown).