

Personalizing PeopleSoft

Presented by Vanessa Boyle & Peyri Herrera | November 19, 2015



SAN DIEGO COUNTY
OFFICE OF EDUCATION

CUSTOMER RESOURCE CENTER

Topics

- Customize your Home screen
- Add/edit/delete your Favorites
- Turn off Autocomplete
- Sort your Main Menu alphabetically and make it “stick”
- Personalize columns
- Personalize the tab order for data entry on pages



Personalize Links

You can customize the way you enter data in the fields located on columns (the grids with tabs along the top) and on the page using the **Personalize links**.



Shortcuts for Data Entry

- **Tab** = Moves to the next field
- **Shift + Tab** = Moves to the previous field
- **Enter** = Opens/selects the highlighted field
 - If the cursor is on a magnifying glass, hit Enter to open it
 - If the cursor is on a button, hit Enter to select it



Personalize Columns (Grids)

Before (Default Settings)

Express Item Entry ?

Line Personalize Find | View All | First 1 of 1 Last

Details Supplier Information Item Information

Item ID	Description	Quantity	UOM	Category	Price	Merchandise Amount		
1							USD	+ -

Add to Cart

After – Just the fields you want, in the order you want

Express Item Entry ?

Line Personalize Find | View All | First 1 of 1 Last

Supplier ID Supplier Name Supplier Item ID Description Quantity UOM Price Merchandise Amount Category

Supplier ID	Supplier Name	Supplier Item ID	Description	Quantity	UOM	Price	Merchandise Amount	Category
1								

Add to Cart



Personalize Columns (Grids)

Personalize Column and Sort Order

To order columns or add fields to sort order, highlight column name, then press the appropriate button.
Frozen columns display under every tab.

Column Order

- Supplier ID
- Supplier Name
- Supplier Item ID
- Description
- Quantity
- UOM
- Price
- Merchandise Amount
- Category
- Tab Details (hidden)
- Item ID (hidden)
- Curr (hidden)
- Tab Supplier Information (hidden)
- Supplier Location (hidden)
- Tab Item Information (hidden)
- Supplier's Catalog (hidden)
- Manufacturer ID (hidden)
- Manufacturer's Item ID (hidden)

Sort Order

- Descending

How to do it:

- Use the arrows to move items up/down to arrange the column order
- Use “hidden” to hide fields
- Click Preview to preview it
- Click OK to save it

OK Cancel Preview



Personalize Page

Personalize Page is at the top-right on pages used for data entry (Add, not Find)

Favorites ▾ Main Menu ▾ > Accounts Payable ▾ > Vouchers ▾ > Add/Update ▾ > Regular Entry

Home | Worklist || Add to Favorites | **Sign out**

ORACLE

| New Window | Help | **Personalize Page**

Invoice Information | Payments | Voucher Attributes

Business Unit 00700
Voucher ID NEXT
Voucher Style Regular Voucher
Invoice Date


Invoice No
Accounting Date 11/19/2015
*Pay Terms 00 Due Now
Basis Date Type Inv Date

Invoice Total

Line Total	0.00
*Currency	USD
Miscellaneous	<input type="text"/>



Personalize Page

Special Requests 


Enter information about the non-catalog item you would like to order.


Item Details


*Item Description


*Price

*Quantity


*Category 


*Currency 

*Unit of Measure 

Due Date 

Supplier


Supplier ID 

Supplier Name 

Supplier Item ID

[Suggest New Supplier](#)


Manufacturer

Mfg ID 

Manufacturer

Mfg Item ID

Additional Information



Send to Supplier Show at Receipt Show at Voucher

Request New Item

Request New Item An email notification will be sent to a buyer regarding this new item request

8

First map out the fields that you want to use, in the order you want to tab through.

Then click Personalize Page at the top right.



Personalize Page

Special Requests ?

Enter information about the non-catalog item you would like to order:

Item Details

*Item Description

*Price

*Quantity

*Category

*Currency

*Unit of Measure

Due Date

Supplier

Supplier ID

Supplier Name

Supplier Item ID

Manufacturer

Mfg ID

Manufacturer

Mfg Item ID

Additional Information

Send to Supplier Show at Receipt Show at Voucher

Request New Item

Request New Item An email notification will be sent to a buyer regarding this new item request

**Clear the fields by clicking
“Clear Tabbing Order.”**

**Click the fields in the order
you want the tab to move.**

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

