PeopleSoft Tips and Shortcuts

PeopleSoft - Printing Screen Shots

<table>
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<tr>
<th>PeopleSoft - How to Print a Panel Shot</th>
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Some PeopleSoft panels have a PRINT button which when clicked print a pre-defined report. For panels that do not have PRINT buttons you can only print a panel shot:

**Option #1**

- Open the PeopleSoft panel that you want to print. Press the **Print Screen** button on your keyboard
- Open a new document in Microsoft WORD
- Click the **Paste** button in WORD to paste the panel shot into the WORD document
- Click the **Print** button to print the WORD document
- Save the document if needed

PeopleSoft - Definitions

<table>
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<th>PeopleSoft - Actions - Add, Update/Display, Update/Display All and Correction</th>
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- **"Add"** - adds a new row of data to the database with a new high-level key. For example, when you add a new employee or student to the database.
- **"Update/Display"** opens the panel with only the most current effective-dated row of information
- **"Update/Display All"** - this choice is available only for panels that are effective-dated. Effective-Dated panels track historical data. Opens the panel with all of the effective-dated rows displayed. Use the scroll bar to view each row. If you are updating information you cannot update current or history rows and you can only insert a row with an effective date that is equal to or greater than the current row.
- **"Correction"** - the same as Update/Display All except this action allows you to change history rows also. Because of this, access to this action is limited.
PeopleSoft Tips and Shortcuts

PeopleSoft - Favorites

You can bookmark the navigation to a panel that you use often so that it can be accessed easily from the Favorites menu. This is a great timesaver!

- Open the panel that you want to bookmark

```
Manage Academic Records - Use - Appointments
File Edit View Go Favorites Use Inquire Help

Add to Favorites...
Delete Favorites...
Student Enrollment App

Student Program/Plan - Update/Display
```

- The "bookmark" to the panel now appears in your PeopleSoft FAVORITES menu.

- Click the panel name in the FAVORITES menu and you will go directly to a search box for that panel.

**Caution…** Favorites are saved on your local computer. If you change computers you will have to save your Favorites again.
PeopleSoft Tips and Shortcuts

PeopleSoft – Go ->Recent Option

Click the GO menu and select RECENT. A list of all of the panels and records that you visited since you signed on for this session will be displayed. Click the one that you want to navigate back to (the most recent one is on the top).

Or, you can click the Back (or Previous Step) button on your toolbar to go back one step at a time in your navigation.

PeopleSoft – Multiple Windows Open

PeopleSoft - Working With Multiple PeopleSoft Windows Open

This is a smart way to work especially if you use PeopleSoft for many different applications - i.e., your daily work involves Admissions, Student Records and Financial Aid.

- Click the GO menu and choose New Window
- Click the next PeopleSoft Menu Group (Window) that you want to open. The first window will be minimized on your Windows task bar. You can switch between the two PeopleSoft windows by clicking the button on the Windows task bar.