

# PEOPLESOFT 9.2 & CUNYfirst: Navigation Basics

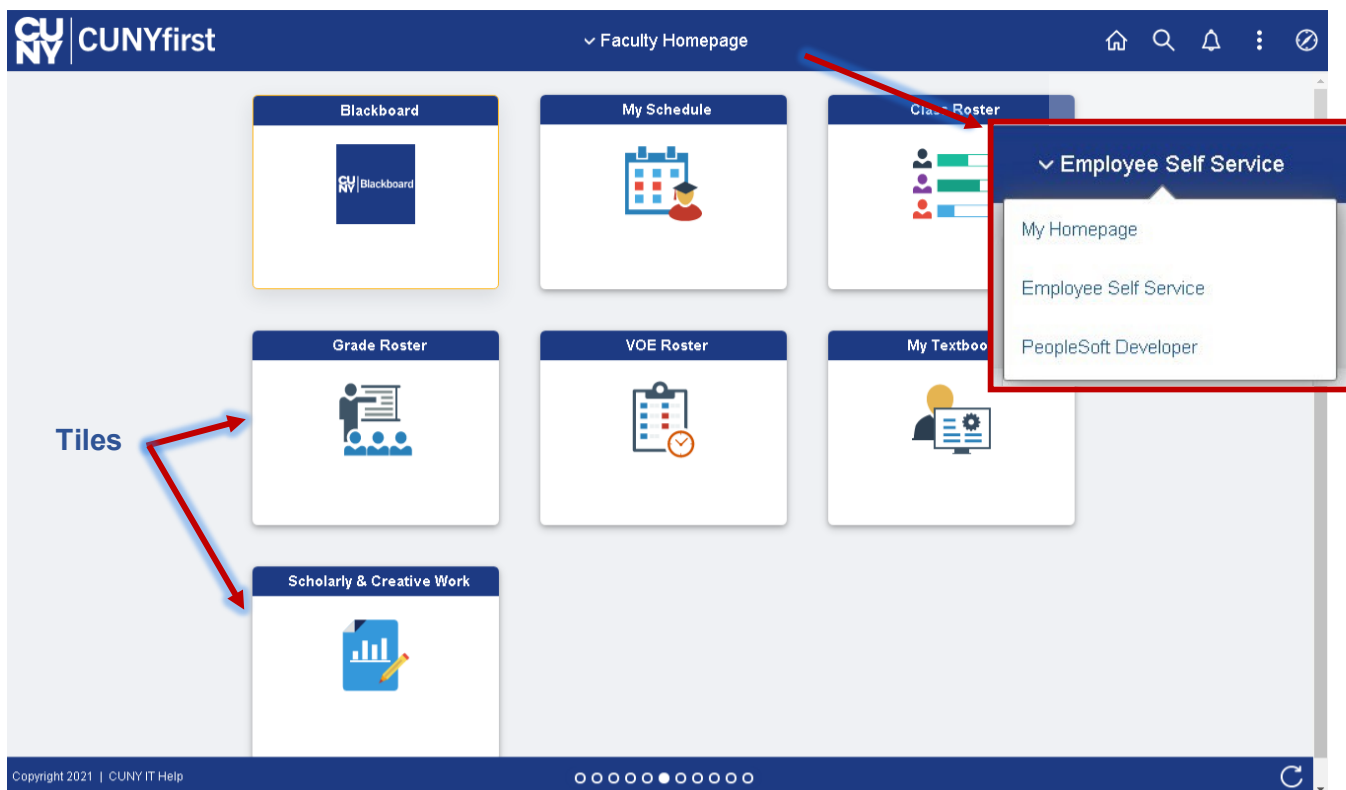
## New Terminology

With new performance improvements comes new terminology. The definitions below are provided to assist in understanding the PeopleSoft 9.2 upgrade to CUNYfirst.

**Fluid** – Fluid is a new interface where tiles are added to homepages for navigational ease instead of the Classic cascading pagelets/menus. Fluid is a modern, responsive user interface that provides the flexibility to work seamlessly from desktops, tablets and phones.

**Homepage** - The landing page for PeopleSoft navigation. A user can have several homepages but only one default homepage. Homepages can be customized to accommodate your personal interaction with the system. Click on the **Homepage** drop-down arrow to access other component homepages.

**Tile** – visual navigation component within the fluid interface.

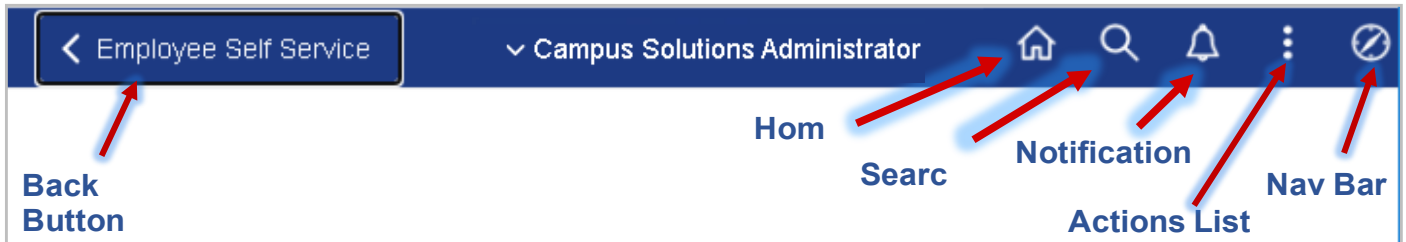


**Navigation Collection** – groups of similar function-related processes organized together in an accessible sidebar menu, accessed through tiles. This left panel navigation, available through the collection tiles, only provides access to standard delivered pages



## Navigating the Fluid Homepage

The ribbon at the top of the screen is referred to as the banner, which contains the main elements utilized to navigate the system. The header Menu contains five icons located in the top right corner of the banner: Home, Search, Notifications, Actions List and NavBar.

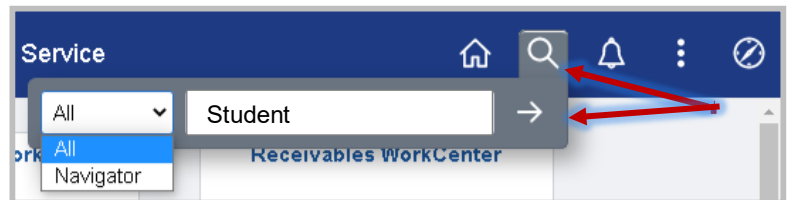


### Home

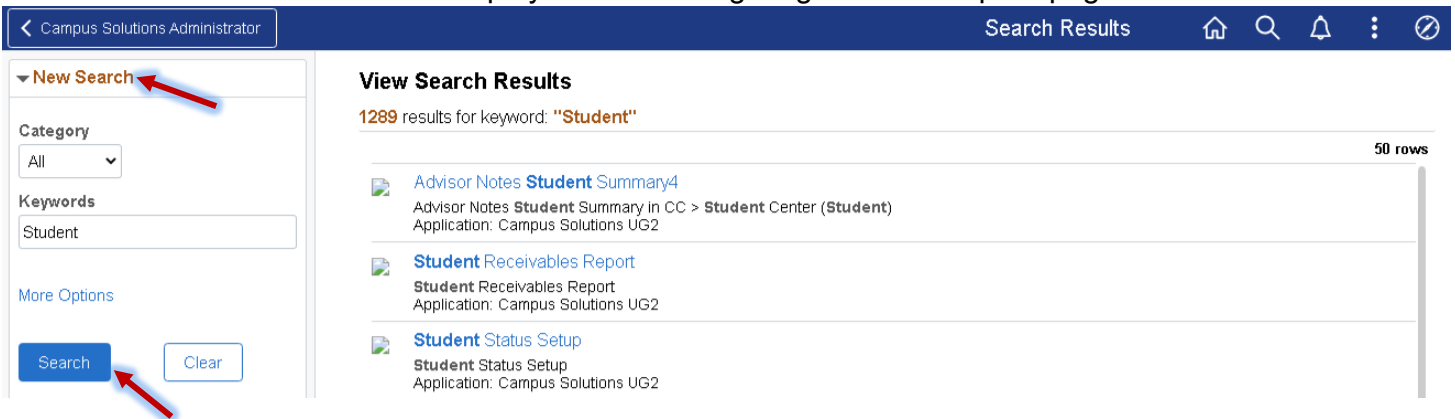
Takes the user back to the default homepage (e.g., Employee Self Service or Manager Self Service), no matter where they are in the system.

### Search

The **Global Search** option allows you to search the entire **system** for keywords related to a function or task.

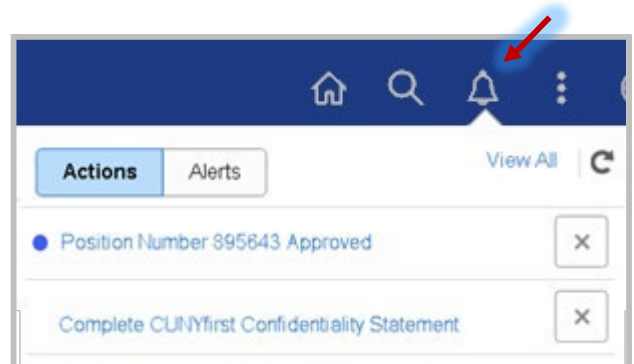


The search results display in a two-panel window. To modify the search, expand the arrow next to **New Search** and the search window displays without navigating back to the prior page.



### Notifications

The **Notifications** icon displays a badge with a number count on the bell icon in the banner to notify the user of any new actions or alerts. These notifications include links that allow users to navigate directly to an item that needs attention.



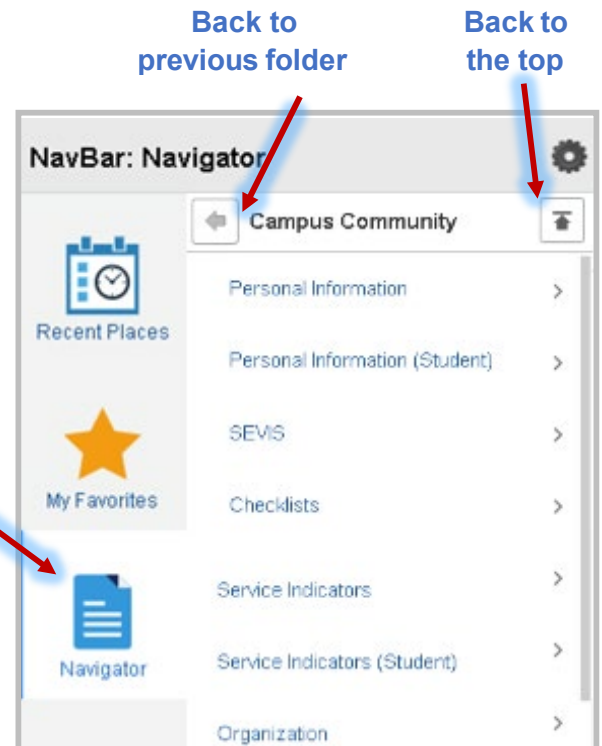
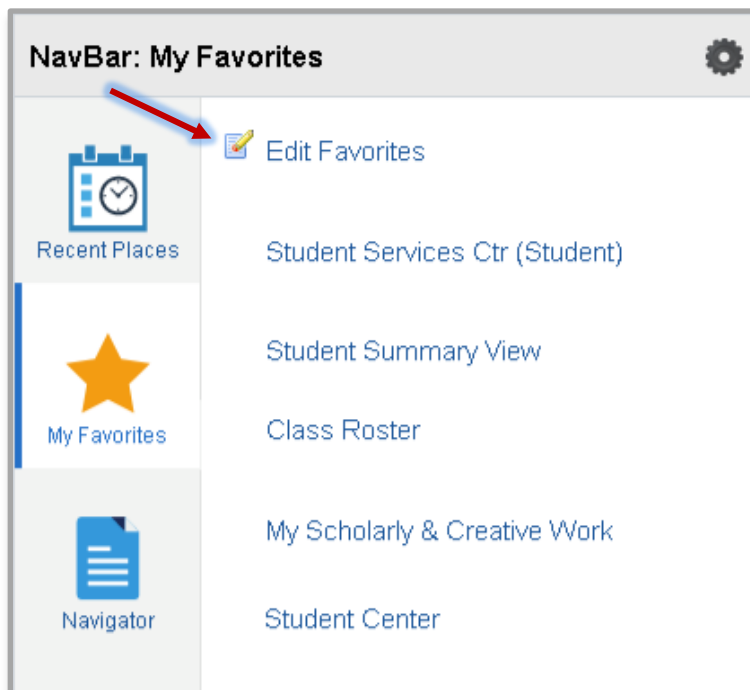
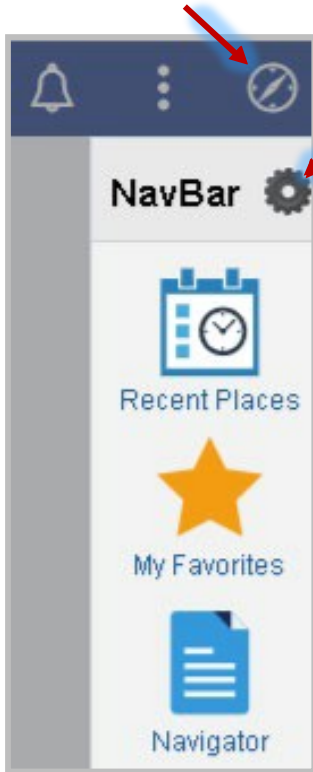
## NavBar

The NavBar is an alternative way to access all component pages within CUNYfirst. It contains several default tiles, as well as the **Personalize NavBar** icon that allows you to personalize the tiles that appear within your NavBar in addition to the default tiles.

The default tiles include:

- **Recent Places** – This item shows the last 5 pages you’ve visited via the NavBar Navigator and allows you to quickly revisit them.
- **My Favorites** – This items shows you all of the CUNYfirst pages you have added to your favorites. You can change the order in which your favorites appear within this item or delete favorites by clicking on **Edit Favorites**.
- **Navigator** – provides access to all components page for which the user has security access.

You can click into expandable menu items within Navigator to view the menu items and pages within. There are two buttons next to the menu item selected. The “Back to…” button to the left of the menu item name returns the user to the previous menu. The “Back to Root” button on the right returns the user to the main **Navigator** menu.



## Using Keyboard Shortcuts in PeopleSoft

From any PeopleSoft page except a menu page, you can hold down the **Ctrl+Shift+K** key to display a list of PeopleSoft keyboard shortcuts. (The page can then be printed by clicking the Print link.) These keyboard shortcuts allow you to navigate using the keyboard rather than the mouse

A *hot key* combination performs an immediate action, without pressing the Enter key.

For example, if focus is on a field (you type a partial value in a field, tab to the field, or click in the field input area) and the field has a Lookup button, you can press the Alt+5 key combination to display the Lookup page.

Keyboard Shortcut	Result
<b>Alt + 1</b>	Executes different buttons depending on the page type <ul style="list-style-type: none"> <li>• Save button on the Toolbar in a page</li> <li>• OK button on a secondary page</li> <li>• Search or Add button on a Search or Lookup page</li> </ul>
<b>Alt + 2</b>	Return to Search
<b>Alt + 3</b>	Next in List
<b>Alt + 4</b>	Previous in List
<b>Alt + 5</b>	Valid Lookup Values
<b>Alt + 7</b>	Insert Row in grid or scroll area
<b>Alt + 8</b>	Delete Row in grid or scroll area
<b>Alt + 0</b>	Refreshes the page by invoking the Refresh button on the Toolbar
<b>Alt + .</b>	Next set of rows in grid or scroll area [e.g., Alt period]
<b>Alt + ,</b>	Previous set of rows in grid or scroll area [e.g., Alt comma]
<b>Alt + /</b>	Find in grid or scroll area [e.g., Alt forward slash]
<b>Alt + ' </b>	View All in grid or scroll area [e.g., Alt prime]
<b>Alt + \</b>	Toggle between Add and Update on the Search page [e.g., Alt backslash]
<b>Ctrl + Shift + J</b>	System Information
<b>Ctrl + Shift + K</b>	Keyboard Information
<b>Ctrl + Y</b>	Takes you to the Search box of the Menu
<b>Enter</b>	Invokes the following buttons where present: OK, Search and Lookup
<b>Esc</b>	Cancel
<b>Alt + 9</b>	Takes you to the New Window link
<b>Ctrl + Z</b>	Takes you to the Search box of the Menu. From there, you can: <ul style="list-style-type: none"> <li>• Perform your search</li> <li>• Use your tab key to navigate through the menu hierarchy.</li> </ul>