Contra Costa County PeopleSoft Training

ESS Navigation

Training Guide

Table of Contents

Navigation for Self Service Users

ESS Navigation

This course covers how to navigate using the Employee Self Service Pages.

Lessons in this course are:

- An Overview of Fluid and Classic pages
- Accessing the System
- Home Pages
- Fluid Page Elements
- Favorites

These lessons address both the new Fluid and the Classic pages. Most Employee Self Service pages are Fluid pages. However, the eBenefits portion of Self Service is still presented on classic pages. As a Self Service user, you will use both Fluid and Classic pages.

Each lesson, with the exception of the first contains one or more topics.

These topics are available for play-back through the UPK player in

- See-It! Mode—allows you to attach a "video" demonstration of the topic
- Try-It! Mode—allows you to use your mouse and keyboard to complete transactions in a simulated environment

Both See-It! And Try-It! provide guided instructions and explanations of important features of PeopleSoft transactions. The full text of the instructions and explanations included in the UPK Payer are also available in two printed documents—a Training Guide and a Job Aid. Many lessons also have associated Quick Reference Guides.
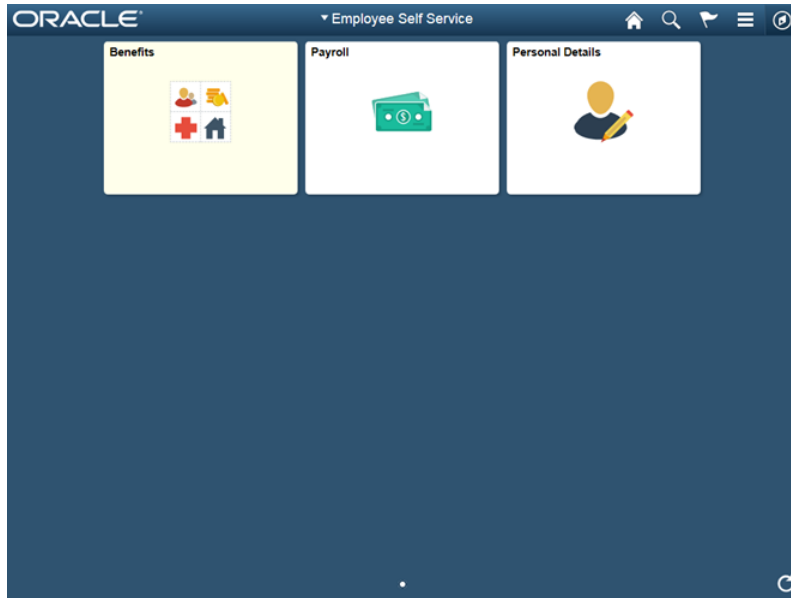
Fluid and Classic pages

PeopleSoft 9.2 introduces Fluid pages. These pages offer a simpler, easier to use user interface. In PeopleSoft 9.2 Fluid pages exist alongside "classic" PeopleSoft pages. In the Contra Costa County PeopleSoft system, both fluid and classic pages are used. On signing-in you will land on a on a Fluid Home page. Depending on your security, you may have more than one Fluid Home page. You can easily move between home pages. All PeopleSoft pages for which you have security will be accessible from the Fluid Home page. The classic Home Page that was used in PeopleSoft 8.8 (updated to version 9.2) is still available. You can access this page from a Fluid Home Page and use the menu structure on the Classic page to navigate as you did in the old system.
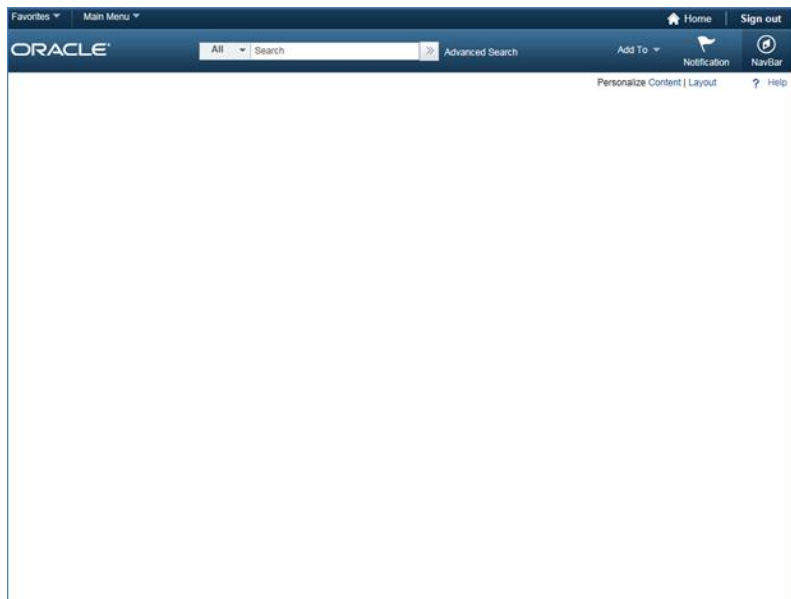
Fluid Home Page

Classic Home Page

Sample Fliud page

Sample Classic page

Accessing the System for ESS Users

This lesson covers how to

- Sign In and Out of the System

- Change your password
- Set Up Forgot Password Help
- Get a password after you have forgotten your password
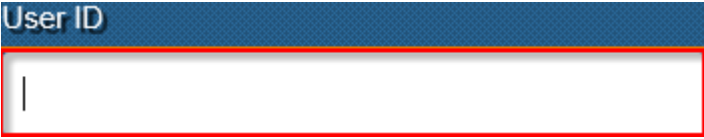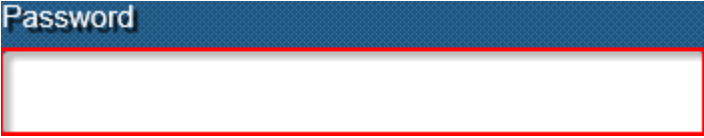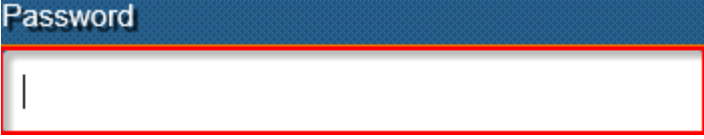
Signing In

To Sign In:

1. Enter your User ID in the **User ID** field
2. Enter your password in the **Password** field
3. Click the **Sign In** button

Procedure

Step	Action
1.	The **Sign In** page displays. To sign in, enter your User ID and your Password. Then click the **Sign In** button.

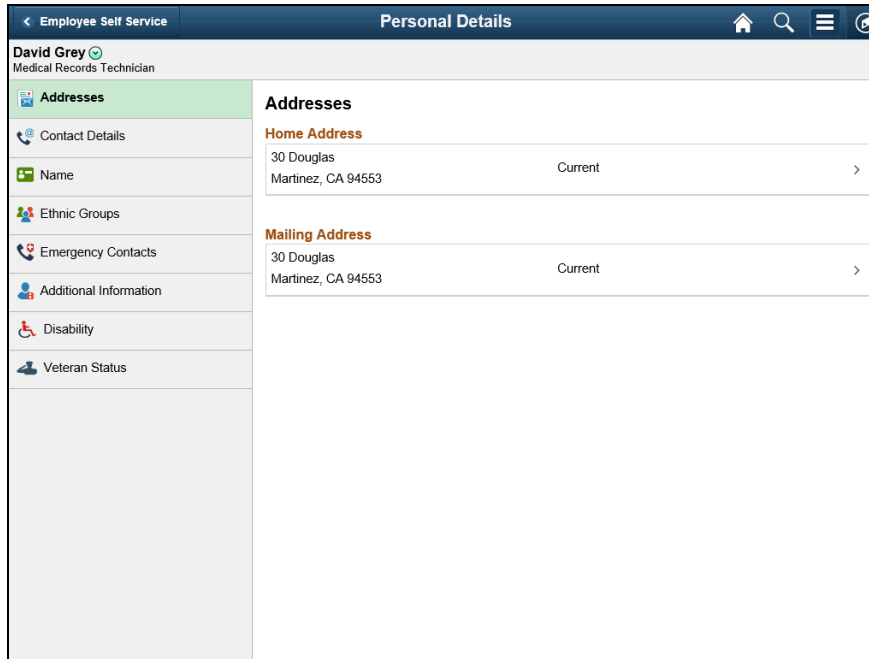| Step	Action
2.	Enter the desired information into the **User ID** field. Enter "**12345**". User ID
3.	Click in the **Password** field. Password
4.	Enter the desired information into the **Password** field. Enter "**********". Password
5.	Click the **Sign In** button. Sign In
6.	You are now on the **Employee Self Service** home page.
7.	**End of Procedure.**

Signing Out From a Fluid Page

To sign out from a Fluid page

1. Click the **Actions** icon on banner
2. Click the **Sign Out** option

Procedure

Step	Action
1.	Use the **Actions** menu on a Fluid page to sign out.

Step	Action
2.	Click the **Actions List** button.
3.	Click the **Sign Out** link.
4.	**End of Procedure.**

Signing Out from a Classic Page

To sign out from a classic page:

1. Click the Sign Out link on the Menu Bar.

Procedure

Step	Action
1.	You have navigated to the **Benefits Self Service** home page. This is a classic page. To sign out from a classic page, click the **Sign Out** link in the **Menu** bar.
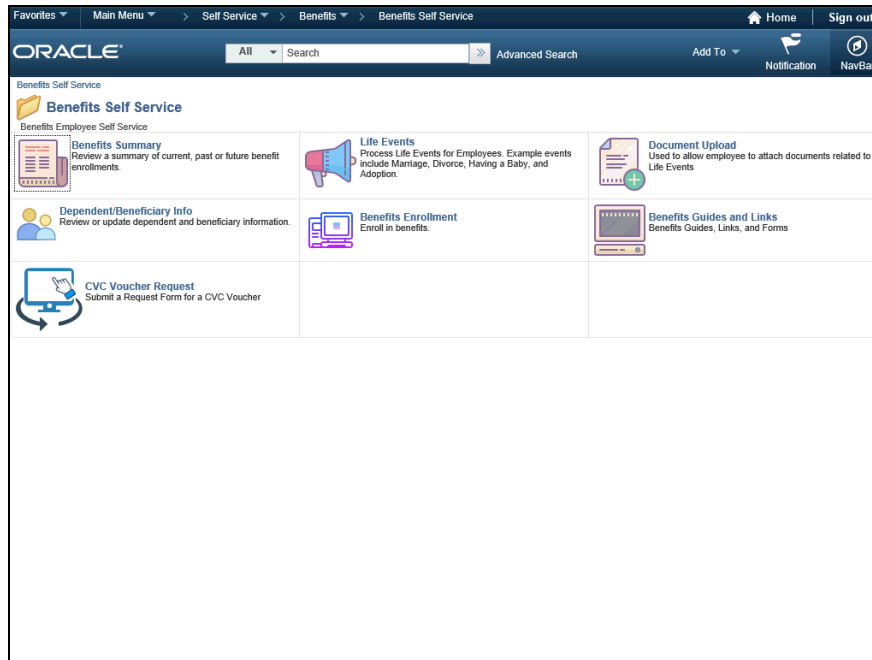
Step	Action
2.	Click the **Sign out** link. Sign out
3.	**End of Procedure.**

Changing Passwords

User IDs

User IDs are

- Assigned by the Project
- All users will be getting a new user id
- Are tied to a set of roles that determine what pages you can access, what you can do on the pages, and what data you can see
- Format: Your Employee ID

    Passwords
- New users will be assigned a temporary password
- All users will be required to change their password once they sign in using the **Change My Password** page

- o Navigation from **Fluid Home Page**: NavBar > Navigator > Change My
     Password
  o Navigation from the **Classic Home Page**: Main Menu > Change My Password

Favorites ▼	Main Menu ▼	> My Homepage	> Change My Password

ORACLE

Change Password

User ID: DREYN
Description: Copy of PS

*Current Password: [   ]
*New Password: [   ]
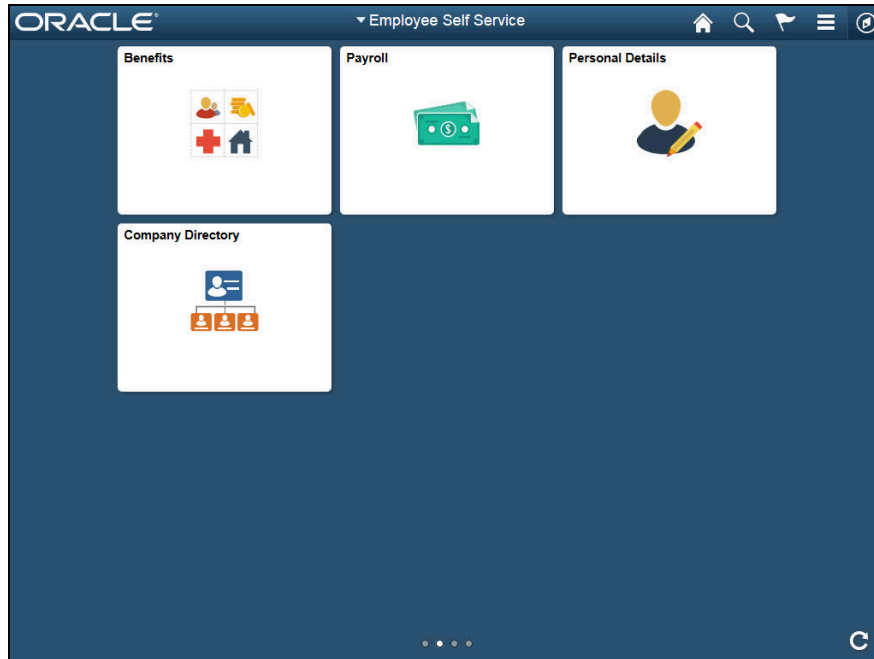*Confirm Password: [   ]

[Change Password]

- • Steps to change password
     1. Enter your project supplied password in the **Current Password** field
     2. Enter your new password in the **New Password** field (be sure to confirm to the
        password rules specified below)
     3. Reenter your new password in the **Confirm Password** field
     4. Click the **Change Password** button
- • Password rules
     o Must be eight characters long--alphanumeric, can contain special characters, and
       can be upper, lower, or mixed case
     o Can be the same your user ID or your primary email (business email)
     o You must create a new password once a year (expires in 365 days)—you will
       receive a warning email five days prior to the expiration date
     o The last two passwords you used are stored in the system
     o Your account will be locked after 10 failed log-in attempt
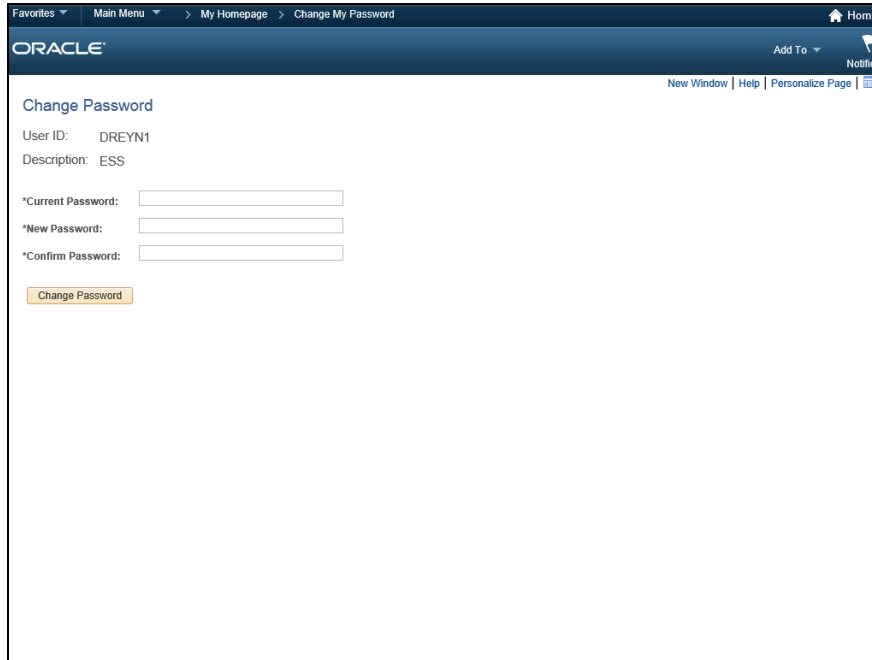
Procedure

Navigation: NavBar > Navigator > Change My Password

This topic uses the fluid navigation. You can also access the Change Password page using classic navigation:

Main Menu > Change My Password

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Step	Action
1.	Click the **NavBar** button.
2.	Click the **Navigator** button.
3.	Click the **Change My Password** link.
4.	The **Change Password** page displays. Use this page to change your password. In this example, your current password is: password1. You will change this password to password2. Begin by entering your current password in the **Current Password** field. The system will generate an error message if the value you enter in the **Current Password** field does not match the password that is stored in the system. This validation takes place after you click the **Change Password** button.

Step	Action
5.	Click in the **Current Password** field. *Current Password:
6.	Enter the desired information into the **Current Password** field. Enter "**password1**". *Current Password:
7.	Notice, the system masks your password. Next enter your new password in the **New Password** field.
8.	Click in the **New Password** field. *New Password:
9.	Enter the desired information into the **New Password** field. Enter "*********". *New Password:
10.	Notice, your new password is masked. The system automatically masks passwords. Next re-enter your new password in the **Confirm Password** field. The passwords you enter in the **New Password** and **Confirm Password** fields must match exactly. If they do not match exactly, re-enter values in both fields taking care that you enter the same value in both fields. The system generates an error message after you click the **Change Password** button if the values in these two fields do not match.

Here's the message the system generates if the values you enter in the New Password and Confirm Password fields do not match. Click OK and re-enter values it both fields.

Message

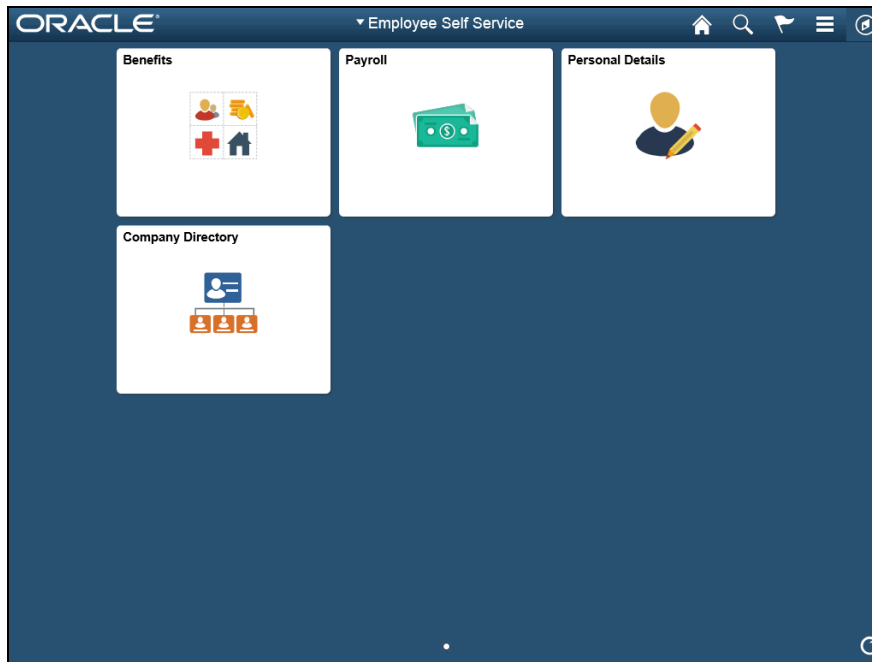The Password field does not match the Confirm Password field. (48,17)

To assign a password, the password you type in the Password field must be the exact same as the password you type in the Confirm Password field. This enables the system to verify that you've entered it correctly.

OK

Step	Action
11.	Error Message
12.	Click in the **Confirm Password** field. *Confirm Password:
13.	Enter the desired information into the **Confirm Password** field. Enter "*****". *Confirm Password:
14.	Click the **Change Password** button. Change Password
15.	Click the **OK** button. OK
16.	Click the **Home** link. Home
17.	**End of Procedure.**

Using My System Profile

Use **My System Profile** to set up your forgot password help question and answer. You can also use this component to change your password.
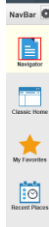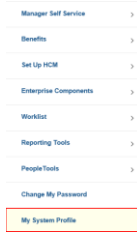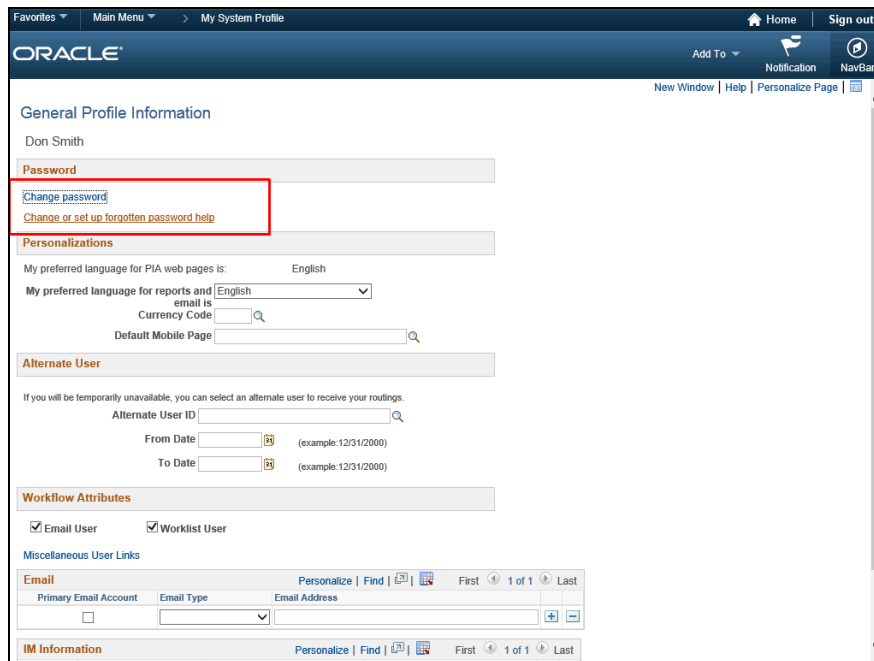
Procedure

Step	Action
1.	Click the **NavBar** button.
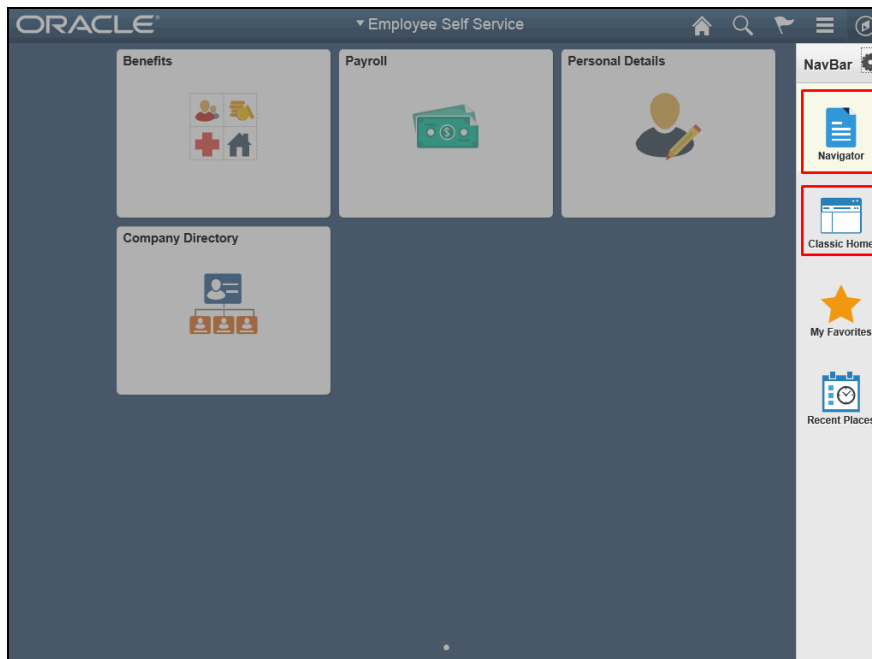
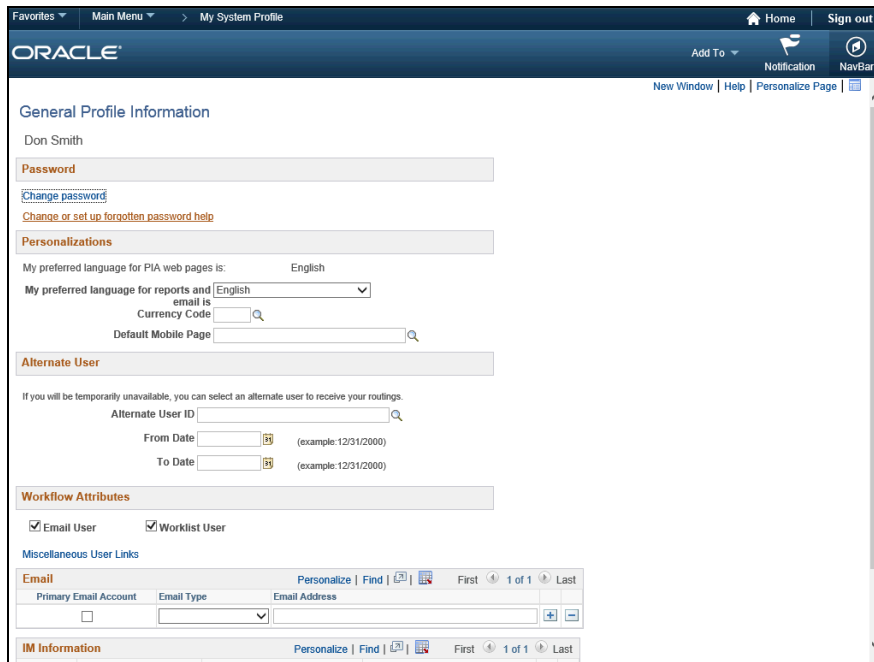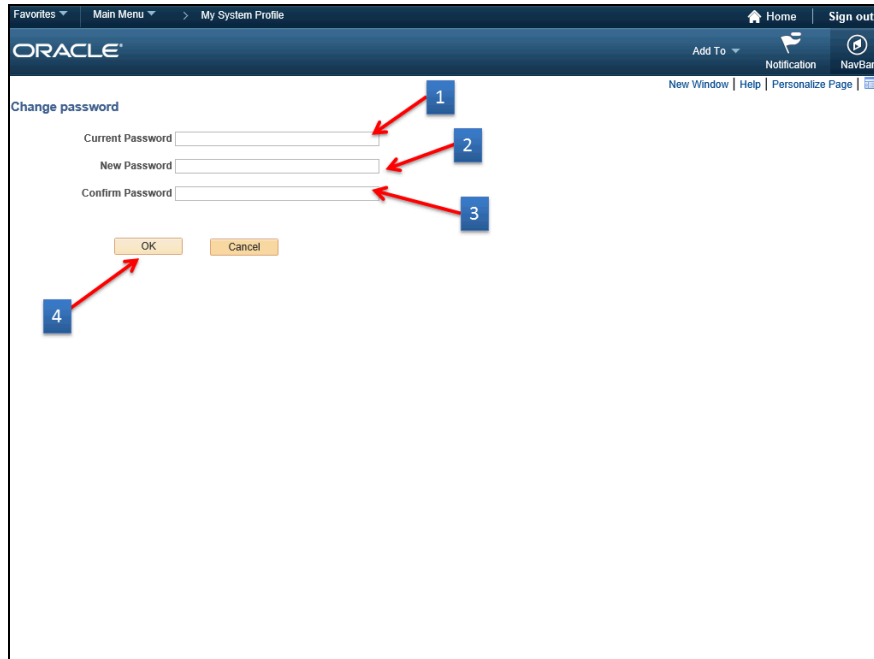| Step	Action
2.	You can access the **My System Profile** page using **Navigator** or from the **Main Menu** on your classic home page. For this example, you will use **Navigator**.
3.	Click the **Navigator** button.
4.	Click the **My System Profile** menu.

General Profile Information

Don Smith

Password

Change password
Change or set up forgotten password help

Personalizations

My preferred language for PIA web pages is: English
My preferred language for reports and   English
                              email is
                    Currency Code
              Default Mobile Page

Alternate User

If you will be temporarily unavailable, you can select an alternate user to receive your routings.

              Alternate User ID
                    From Date   (example:12/31/2000)
                      To Date   (example:12/31/2000)

Workflow Attributes

☑ Email User   ☑ Worklist User

Miscellaneous User Links

Email   Personalize | Find | 🗗 | 🔣   First ◀ 1 of 1 ▶ Last

Primary Email Account | Email Type | Email Address

IM Information   Personalize | Find | 🗗 | 🔣   First ◀ 1 of 1 ▶ Last

Step	Action
5.	The **General Profile Information** page displays.
	You can use this page to access the **Change Password** page. The page is also used to work with your forgot password questions.
	You do not need to change or enter any values on this page.
	Start with reviewing the change password page.

Step	Action
6.	Click the **Change password** link.

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Step	Action
7.	The **Change Password** page displays. You can use this page to change your current password: 1. Enter your current password in the **Current Password** field 2. Enter your new password in the **New Password** field 3. Enter your new password in the **Confirm Password** field 4. Click the **OK** button. Changing passwords is covered in other topics in Navigation training. Note you can also navigate directly to this page using the **Change My Password** link on the **Navigator** (Fluid and Classic pages) and/or on the **Main Menu** (Classic pages). For this topic, you will not change your password.

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Change password

Current Password [   ]
New Password [   ]
Confirm Password [   ]

[OK]   [Cancel]

Step	Action
8.	Click the **Cancel** button.
	Change password
	Current Password [ ]
	New Password [ ]
	Confirm Password [ ]
	[OK] [Cancel]

Step	Action
9.	Click the **Change or set up forgotten password help** link. General Profile Information Don Smith Password Change password Change or set up forgotten password help

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Step	Action
10.	The **Change or set up forgotten password help** page displays.
	You can use this page to either change the question and/or answer that is used to authenticate you, if you forget your password if you have previously set up a forgot password question/response or to create one for the first time.
	Begin by selecting a question from the **Question** drop down list. You can only set up one forgot password question.

Step	Action
11.	Click the **Question** list.

Step	Action
12.	Click the **What is the name of your first pet?** list item.

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Step	Action
13.	Next, you will enter the answer to the question you selected in the **Response** field. The answer you enter here will be used to authenticate you, if you need to reset your password after you have forgotten your password.

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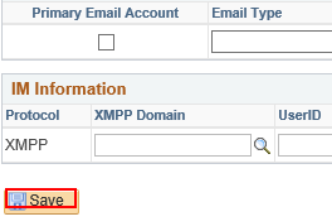
Step	Action
14.	Click in the **Response** field.
15.	Enter the desired information into the **Response** field. Enter "**Buddy**".
16.	Click the **OK** button.
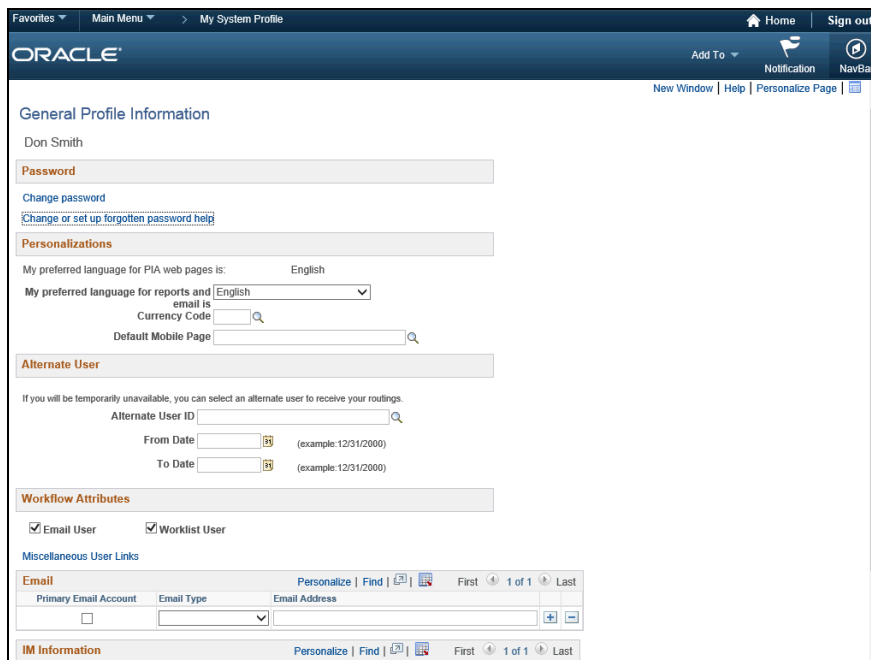
Step	Action
17.	Click the scrollbar.
18.	Click the **Save** button.
19.	Click the **Home** link.
20.	**End of Procedure.**

Forgot Password

Use the Forgot Your Password? link on the Sign In page to begin the process of recovering/resetting your password.

Procedure

Step	Action
1.	The **PeopleSoft Sign In** page displays. You realize that you have forgotten your password and will need to reset it. Use the **Forgot your password?** link.
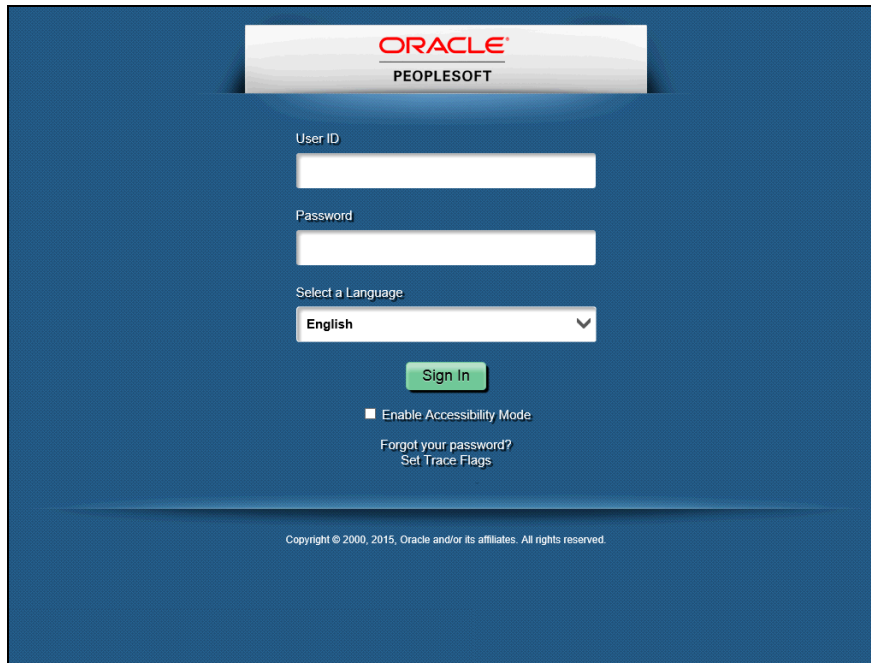
Step	Action
2.	Click the **Forgot your password?** link. Forgot your password?
3.	The system opens the **Forgotten Password** page. You can use this page to begin the process that will allow you to create a new password if you have forgotten yours or if yours has expired.
4.	Enter your User ID in the **User ID** field. Enter the desired information into the **User ID** field. Enter "**12345**". User ID
5.	Click the **Continue** button. Continue

Step	Action
6.	The **Security Question** page displays the question you selected when you set up your forgot password help using **My System Profile**. Enter the answer you provided on the **My System Profile** pages.
7.	Enter the desired information into the **Response** field. Enter "**MARYVALE**". Response

Step	Action
8.	Next, use the **Email New Password** button to have instructions sent to you for how to create a new password. The system will use your email address. Note: If you have more than one email in the system, the system will display a pop up window that will enable you to select the email to use.
9.	Click the **Email New Password** button.
10.	The **Email Confirmation** page displays. The system will send an email with instructions for how to reset your password.
11.	**End of Procedure.**

Home Page

The one topic in this lesson provides an overview of the Fluid and classic home pages that you will encounter when using Employee Self Service.

Employee Self Service Home Page

This topic provides an overview of the Employee Self Service home page and it its key features.

Procedure
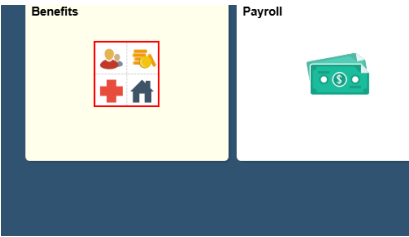
Step	Action
1.	As a Employee Self Service user, when you sign in to the system you will landed on the **Employee Self Service** home page, a Fluid page. This page displays now. The key elements on this page are: -- The banner that appears at the top of the page -- A set of Tiles that provide access to PeopleSoft components In this topic you will explore each. Your start with the tiles.

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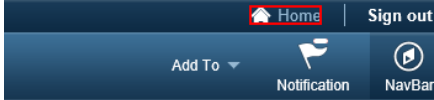
Step	Action
2.	There are three tiles on the **Employee Self Service** home page: -- **Benefits**--this tile provides access to eBenefits -- **Payroll**: this tile provides access to ePay -- **Personal Details**: this tile provides access to eProfile You explore each of this in this topic. Each is covered in greater detail in other part of PeopleSoft Training. Your start with the **Benefits** tile.
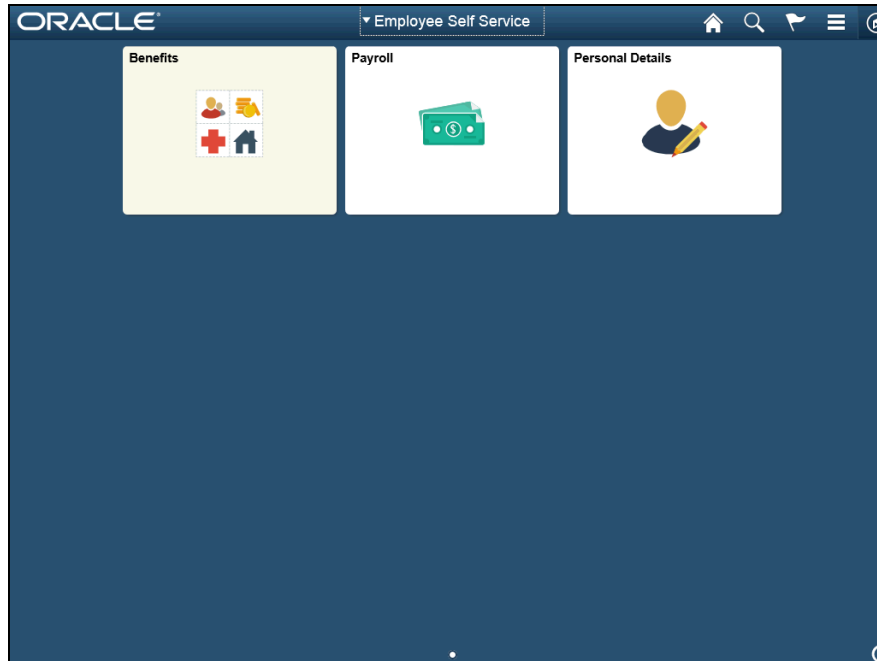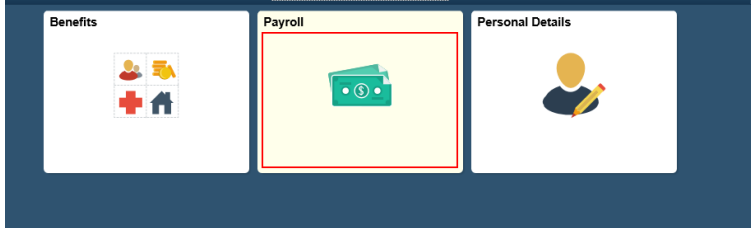
Step	Action
3.	Click the **Benefits** button.
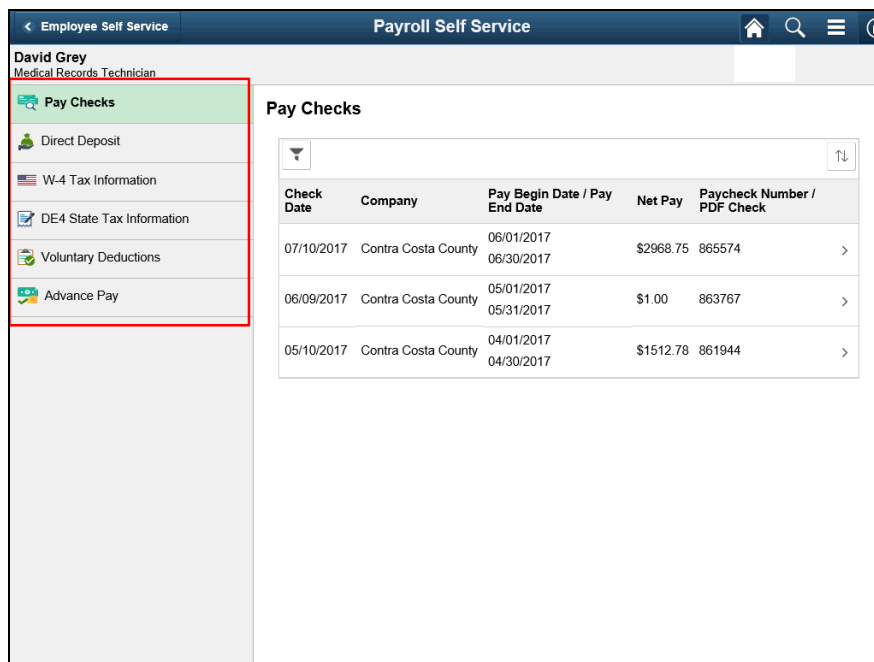
Step	Action
4.	The **Benefits Self Service** page displays. This page is a classic page. Working with classic pages is covered later in this topic. This page provides links that enable you to - Review your benefits elections - Review and edit your dependent/Beneficiaries - Review and adjust allocations on savings (deferred compensation) plans and life insurance - Add beneficiaries - Change enrollments as part of a life event - Enroll in benefits during open enrollment or at the time of hire/rehire - Upload supporting documents - Access benefit plan guides, benefits forms, and provider links - Request a CVC voucher
5.	Click the **Home** link to return to the **Employee Self Service Home** page.

Step	Action
6.	Next you will use the Payroll tile. Click the **Payroll** tile. Benefits Payroll Personal Details

Payroll Self Service
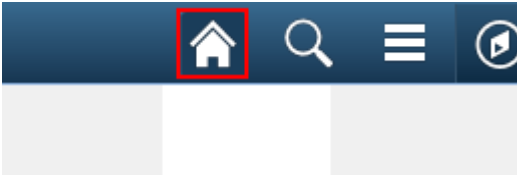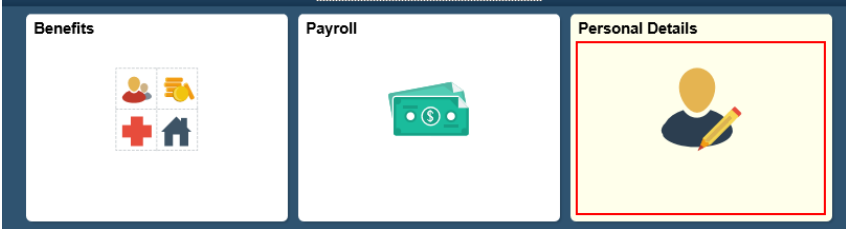
David Grey
Medical Records Technician

- Pay Checks
- Direct Deposit
- W-4 Tax Information
- DE4 State Tax Information
- Voluntary Deductions
- Advance Pay
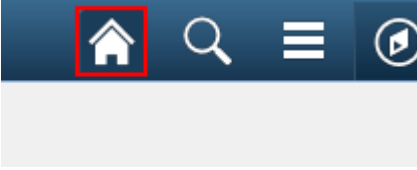
Pay Checks

Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Paycheck Number / PDF Check	
07/10/2017	Contra Costa County	06/01/2017 06/30/2017	$2968.75	865574	>
06/09/2017	Contra Costa County	05/01/2017 05/31/2017	$1.00	863767	>
05/10/2017	Contra Costa County	04/01/2017 04/30/2017	$1512.78	861944	>

Step	Action
7.	The **Payroll Self Service** page displays. You can use the links in the **Action** panel on this page to: - View your paycheck - Manage you direct deposit (request, edit, delete) - Review and update your W-4 and DE-4 tax information - Manage your voluntary deductions (add, edit, cancel) - Manage advance pay (request, edit, cancel)

Step	Action
8.	Click the **Home** button to return to the **Employee Self Service** home page.
9.	Next you will review the **Personal Details** tile. Click the **Personal Details** object.
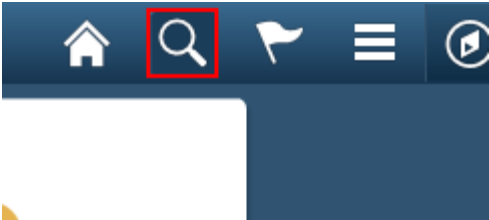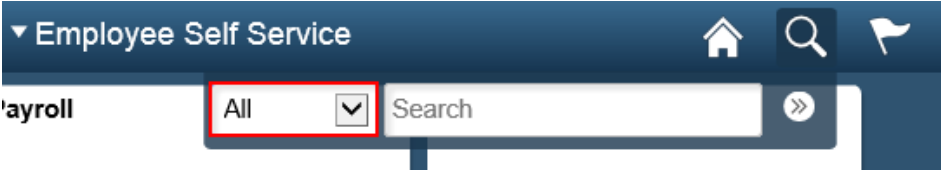
Step	Action
10.	The **Personal Details** page displays. You can use the links in this page to - Review and edit your address information - Review and edit your e-mail and phone information - Request a name change - Manage your emergency contacts (add, edit, delete) - Review additional information about yourself - Update your disability and veteran statuses
11.	Click the **Home** button to return to the **Employee Self Service** home page.
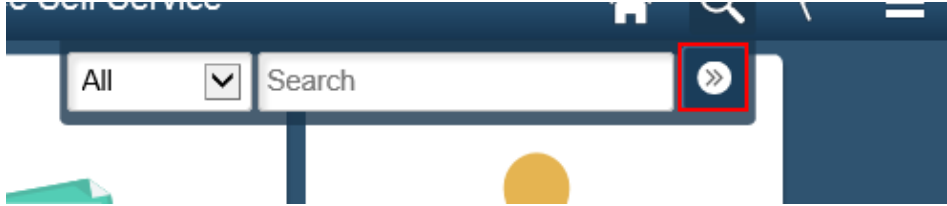
Step	Action
12.	Next you will explore the icons that appear on the banner. You have already used the **Home** icon. This navigates back to your fluid home page
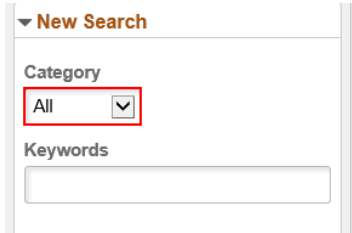
Step	Action
13.	Next, you will briefly explore the **Global Search** icon. This icon allows you to search by navigation. G**lobal Search** is used more by core users than Employee Self Service Users.
14.	Click the **Global Search** button.
15.	Click the **Category** list.
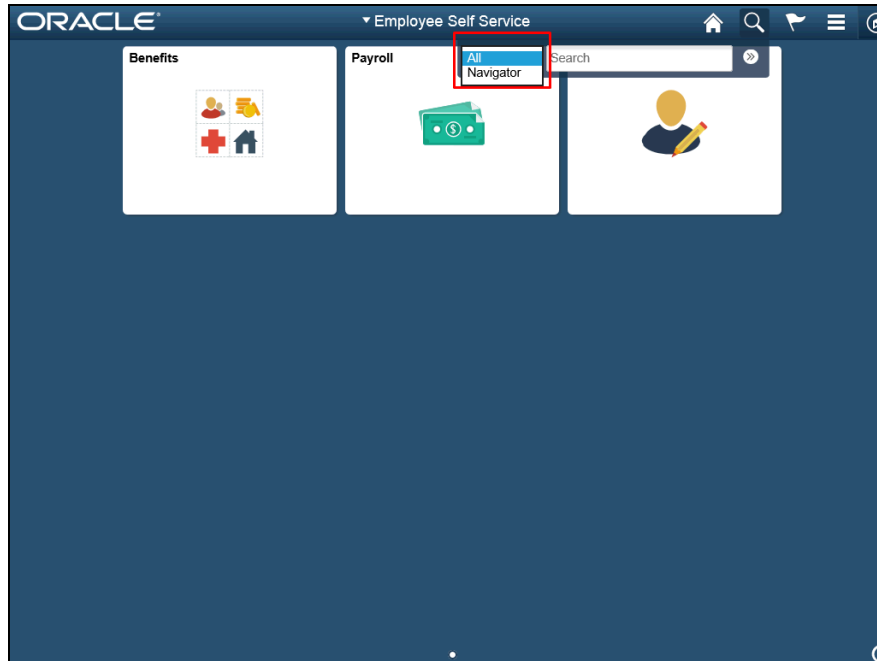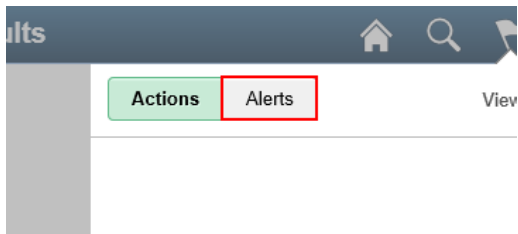
Step	Action
16.	Notice, the drop down for global search contains two options--All and Navigator. You can use **Global Search** to search for specific navigations.
17.	Click away from the Drop down to close it.
18.	Click the **Search** button to display advanced search features.
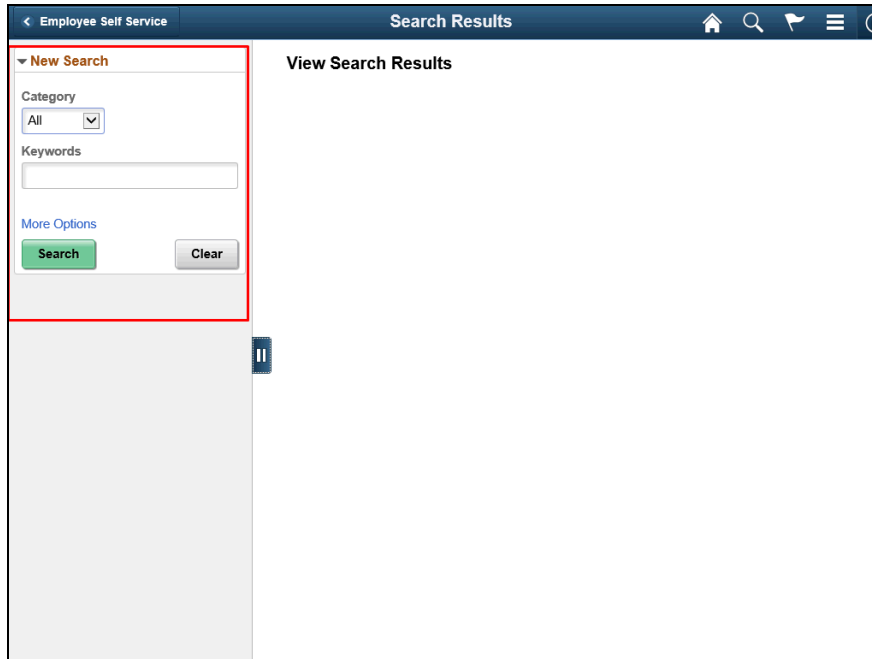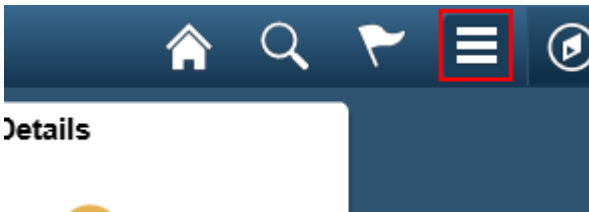
Step	Action
19.	The **Search Results** page displays. You can use the **New Search** panel to set search criteria.
20.	Click the **Category** list.
21.	Click the **Navigator** list item.
22.	Next, you will review the **Notifications** Icon.
23.	Click the **Notifications** button.
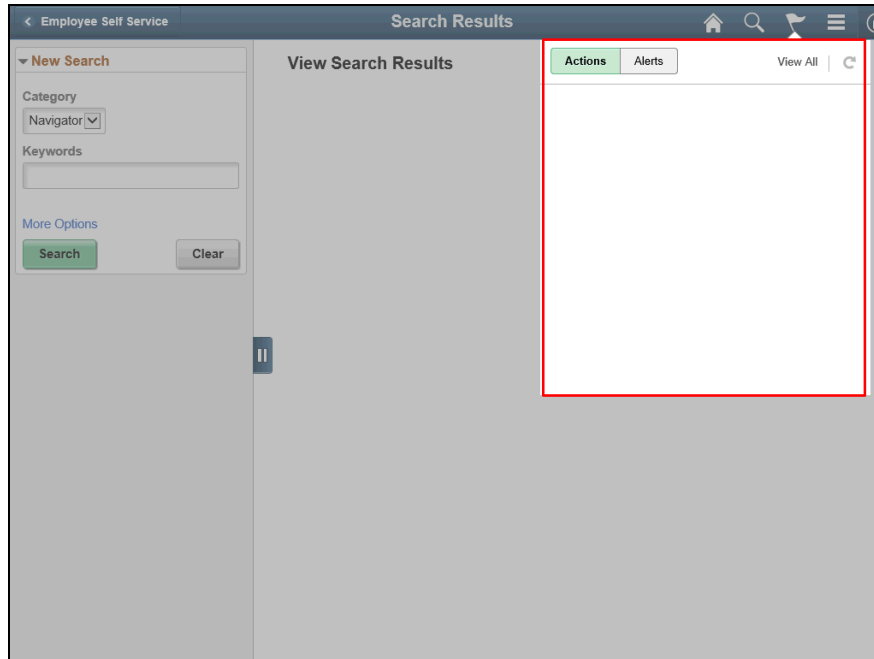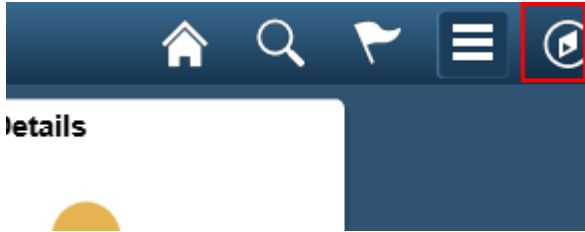
Step	Action
24.	The **Notifications** window displays. There are two tabs, **Actions** and **Alerts.** Actions are links that take you directly to a page on which you must perform an action, i.e. an approval.
25.	Click the **Alerts** button.
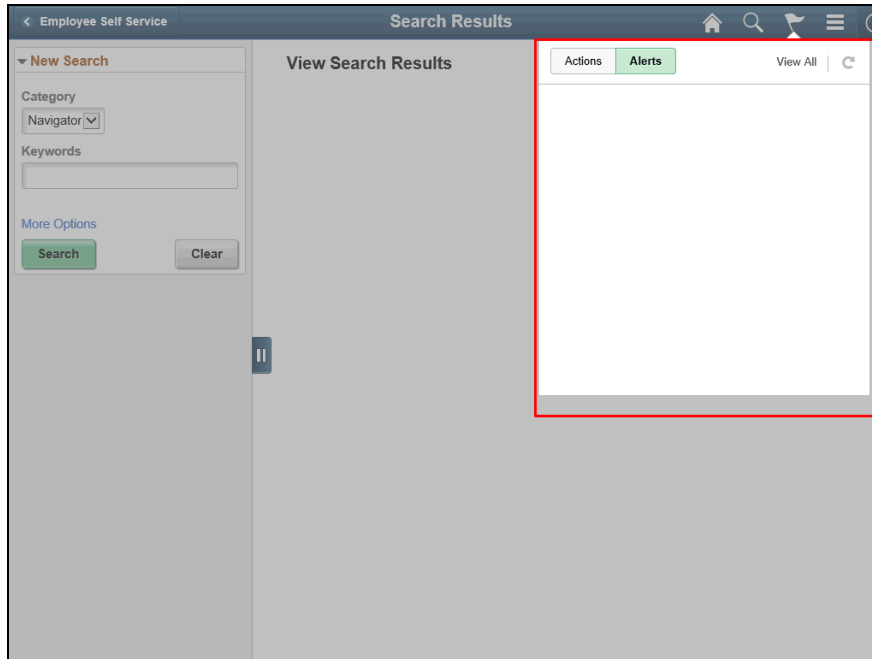
Step	Action
26.	**Alerts** are links that take you to a page where some data or a status has changed.
27.	Click away from the **Notifications** window to close it.
28.	Click the **Home** button.
29.	Next, you will explore the **Actions List**.
30.	Click the **Actions List** button.

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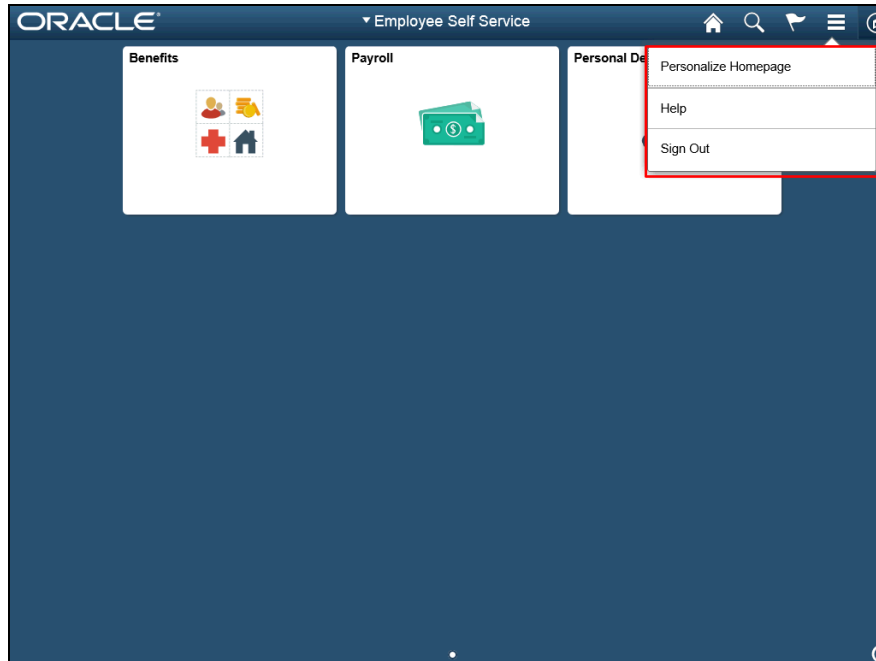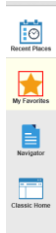
Step	Action
31.	The **Actions List** menu displays a set of actions that are available to you. This list will vary depending on your security and what page you are on.
32.	Click away from the **Actions List** to close it.
33.	Click the **NavBar** button.
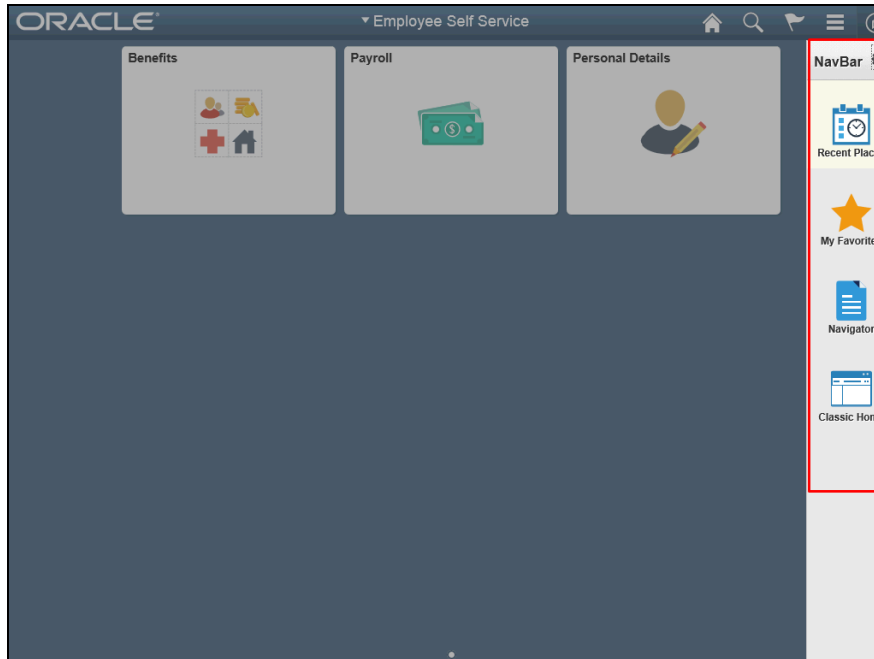
Step	Action
34.	The **NavBar** displays. By default, four icons display. You can change the order this display using the Personalize the **NavBar** button. These four icons are: **Recent Places** **My Favorites** **Navigator** **Classic Home**
35.	Click the **Recent Places** button.
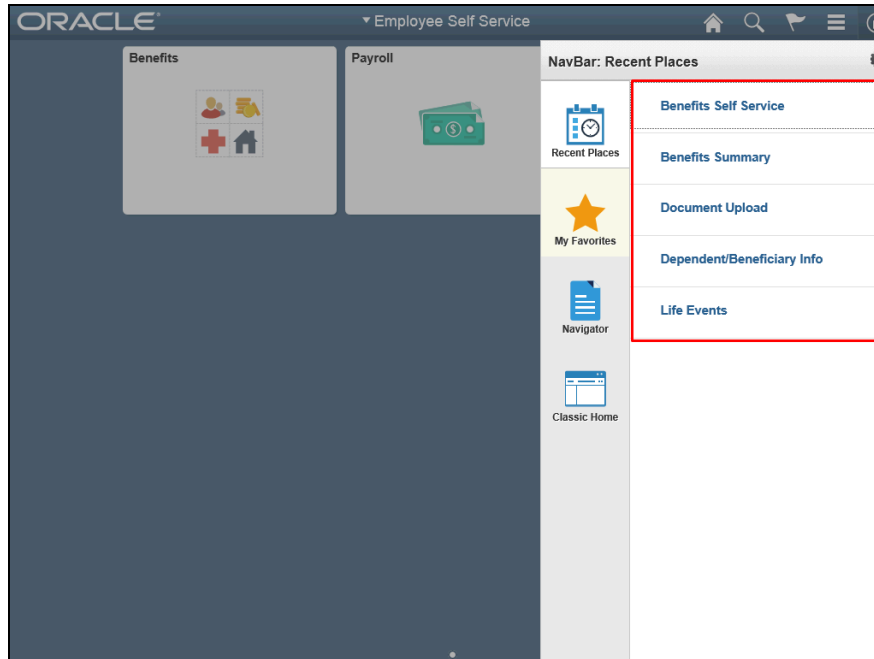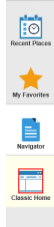
Step	Action
36.	**Recent Places** display. This section contains links to pages that you have visited recently.
37.	Click the **My Favorites** button.
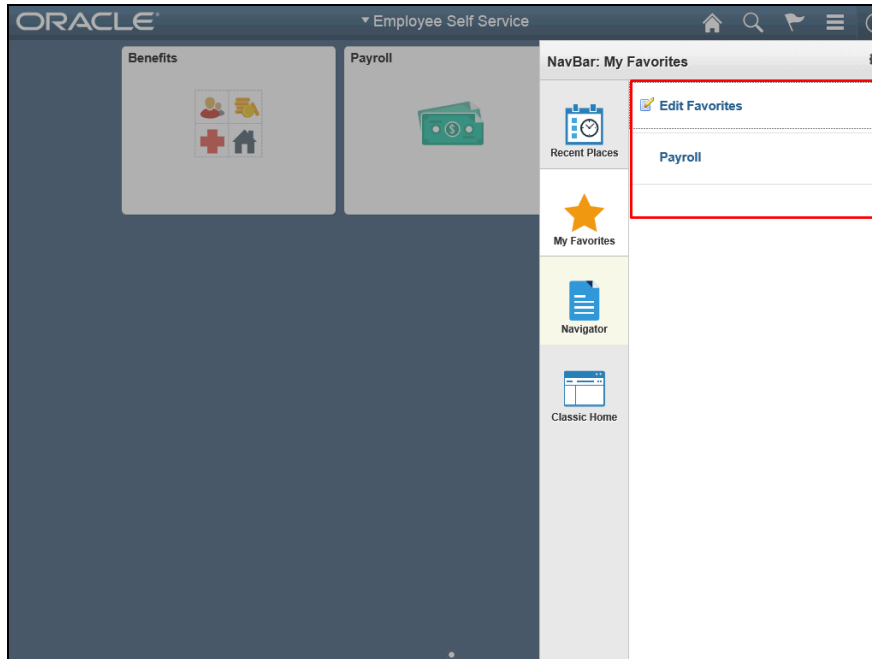
Step	Action
38.	My **Favorites** display. This section of the **NavBar** contains links to pages that you have marked as favorites. Working with favorites is covered in other topics.
39.	Click the **Navigator** button.
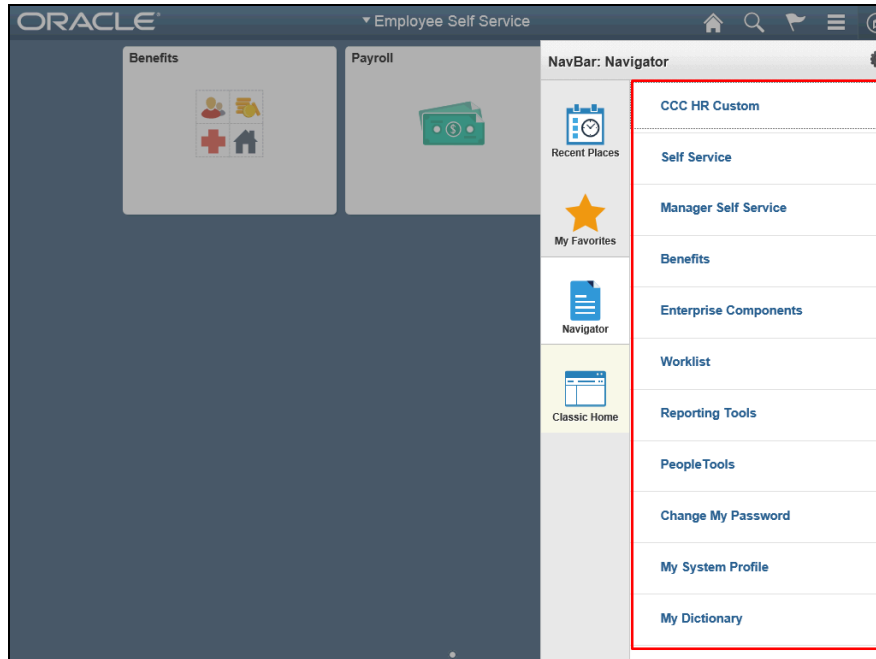
Step	Action
40.	The **Navigator** displays a set of links. These links are the same links that appear on the **Main Menu** on a classic page. The links that you will see depend on your security. You will see the links that you will need to use to complete job tasks.
41.	Click the **Classic Home** button.
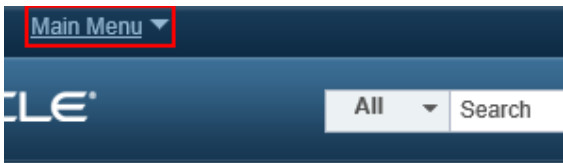
Step	Action
42.	The **Classic Home** page displays. All classic pages have the **Menu Bar** and the **Banner** that appear at the top of the page. In this topic, you will explore each of the features on the **Menu Bar** and **Banner**: - Favorites - Main Menu - Home - Sign out - Add To - Notification - NavBar
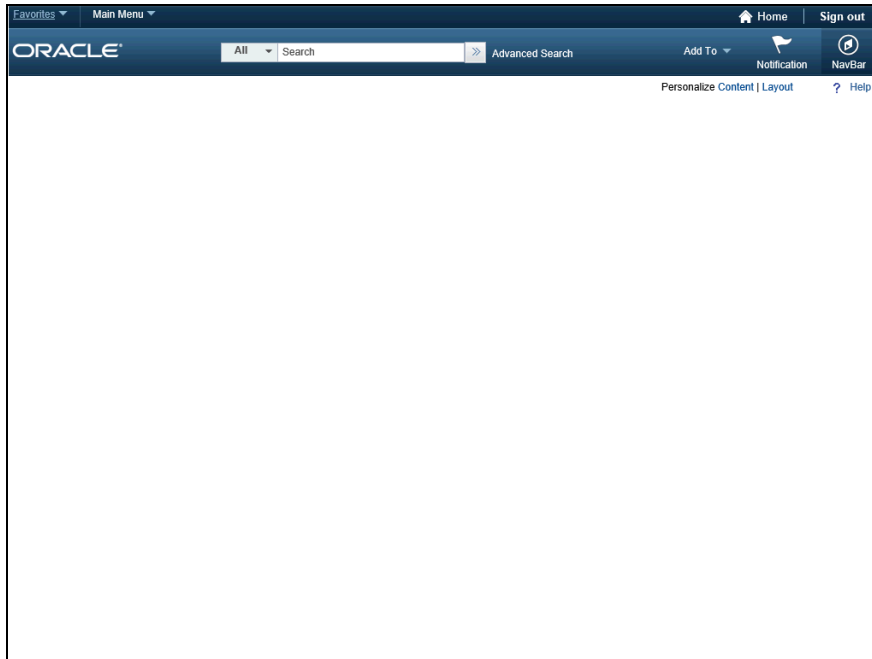
Step	Action
43.	Click the **Favorites** button.

Step	Action
44.	The **Favorites** menu displays. This menu contains two sections: - **Recently Used**: this section lists pages you have recently visited - **My Favorites**: this section contains two links that allow you to manage your favorites (**Add to Favorites** and **Edit Favorites**). It also lists pages that you have identified as favorites. Note: Working with favorites is covered in other portions of Navigation training.
45.	Click away from the **Favorites** menu to close.
46.	Click the **Main Menu** button.

Step	Action
47.	The **Main Menu** displays. You can use the links on this menu to navigate to other portions of PeopleSoft. The links that you will see will depend on your security. You will be able to see the links that you'll need to do your job. The links that display here are typical of what Employee Self Service Users will see. Depending on your role, you may see additional links. If you currently use PeopleSoft, the **Main Menu** will be familiar.
48.	Click away from the **Menu** to close it.
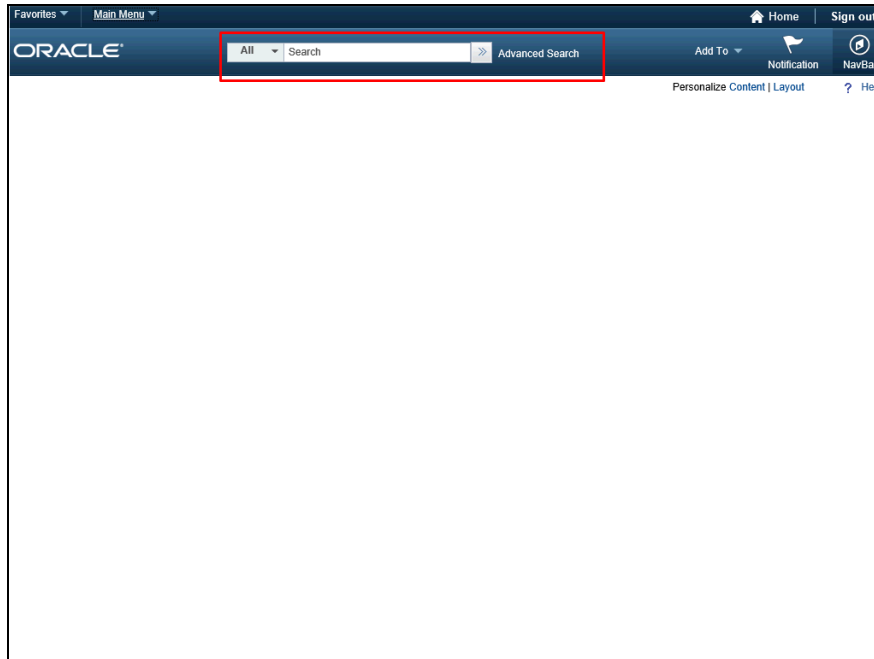
Step	Action
49.	You can use the **Search** feature to search on Navigation.

For this topic, you will not explore this further. |
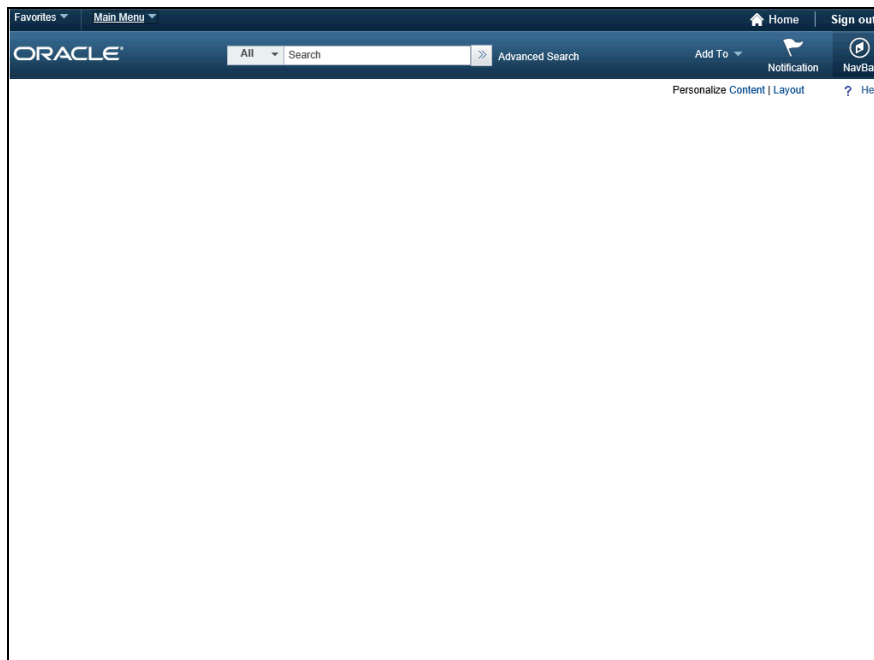
Step	Action
50.	Click the **Add To** link.
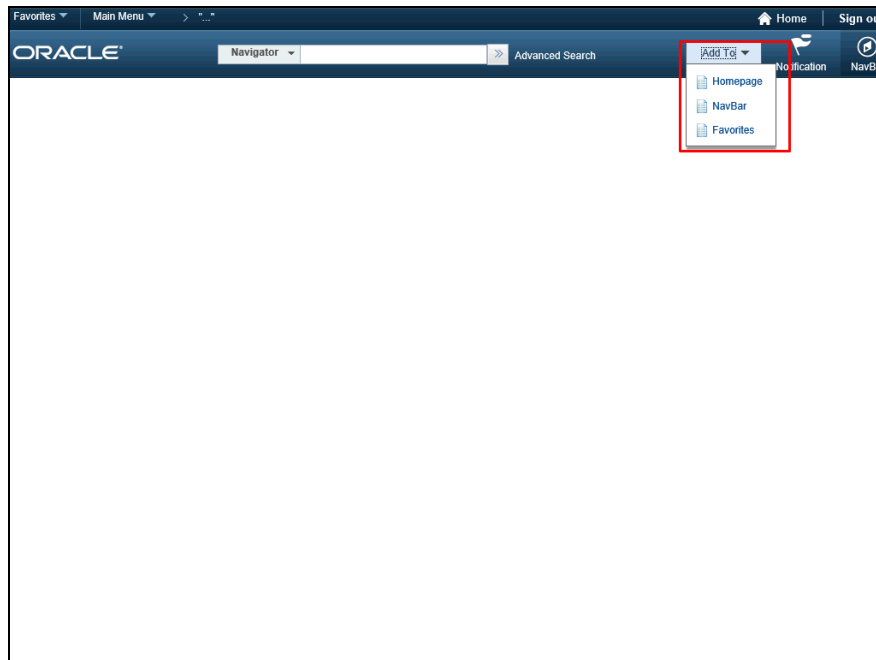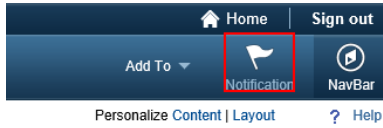
Step	Action
51.	The **Add To** menu displays. You can use the options on this menu to -- Add the page you are on to your Fluid Home page -- Add an icon for this page to the **NavBar** -- Add this page to your favorites
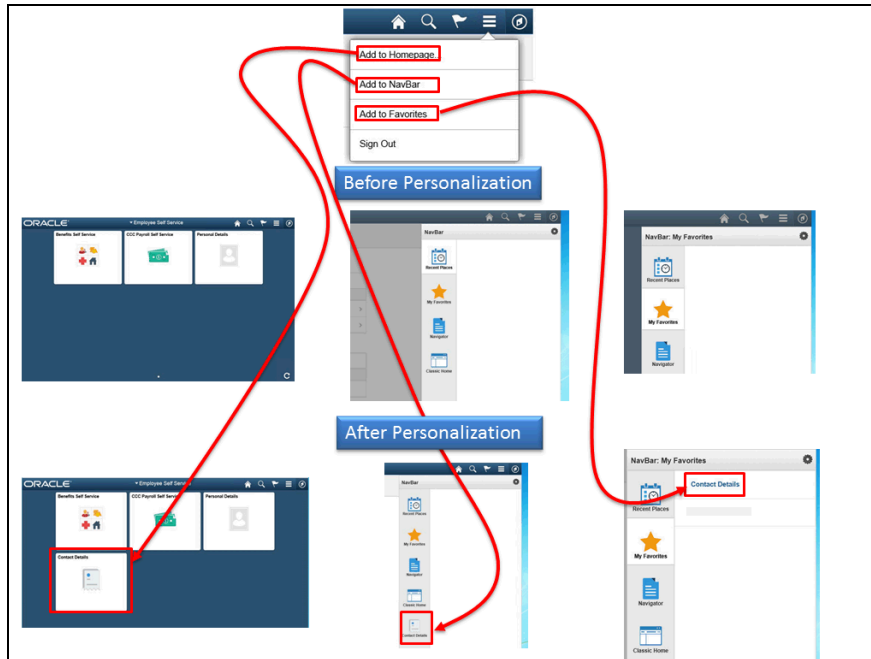
Step	Action
52.	Examples of Personalization.
53.	Click away from the **Add To** menu to close it.
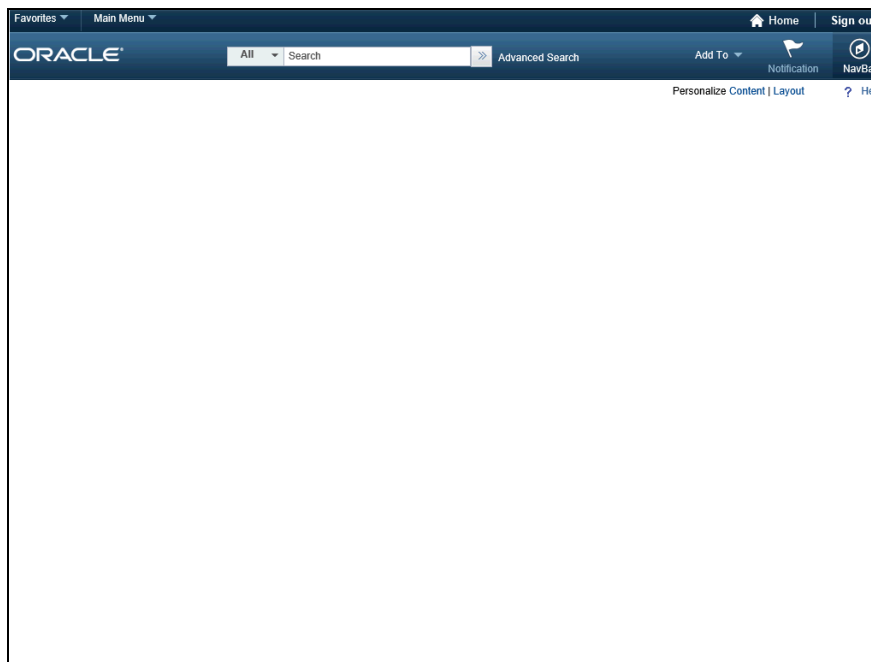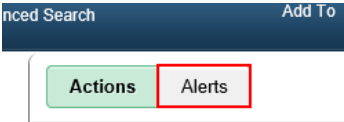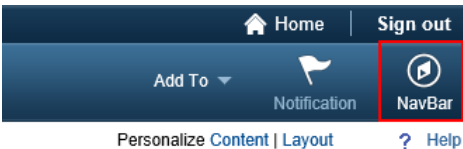
Step	Action
54.	Click the **Notification** button.
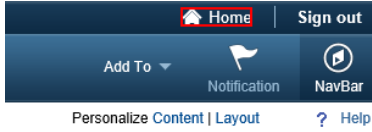
Step	Action
55.	The **Notification** window displays. This window displays two buttons: -- **Actions**: links to transactions that require your attention, i.e., a request that is awaiting your approval -- **Alerts**: links to transactions where a status or other information may have changed These links enable you to go directly to the page that requires your action or which displays the changed status/information. For this example, you have no actions or alerts.

Step	Action
56.	Click the **Alerts** button.
57.	Click away from the window to close it.
58.	Click the **NavBar** button.

Step	Action
59.	The **NavBar** displays. By default, this bar displays four icons: -- **Recent Places** -- **My Favorites** -- **Navigator** -- **Classic Home** The **NavBar** on a classic page is identical to the **NavBar** that displays on a Fluid page.
60.	Click away to close the **NavBar**.
61.	Click the **Home** link.
62.	**End of Procedure.**

Fluid Page Elements

This lesson covers the use of Fluid Page Elements, e.g., drop down lists, check boxes, text entry, entering dates and/or phone numbers, lookups, grids, etc.. These elements are used to complete transactions using fluid pages. The topics covered in this lesson are important to all users of the new system—Employee Self Service users, Managers, and Core Users.

The following topics are included in this lesson:

- Using the Action Panel
- Using the Information Panel
- Using Drop Down lists
- Using Text Entry Fields
- Using Add New Buttons
- Using Check Boxes
- Using Sliders
- Using Save/Cancel Buttons
- Using Confirmation Pages
- Entering Dates
- Using the Calendar Icon to Select Dates
- Entering Phone Numbers
- Using Lookups
- Working with Grids
- Using Tabs
- Using Related Actions
- Using Decision Support

These topics are available for play-back through the UPK player in

- See-It! Mode—allows you to attach a "video" demonstration of the topic
- Try-It! Mode—allows you to use your mouse and keyboard to complete transactions in a simulated environment

Both See-It! And Try-It! provide guided instructions and explanations of important features of PeopleSoft transactions. The full text of the instructions and explanations included in the UPK Payer are also available in two printed documents—a Training Guide and a Job Aid.

Using the Action Panel

The action panel appears to the right on many fluid pages. This panel provides links which allow users to access portions of a PeopleSoft component. Actions panels are particularly prominent in the Employee Self Service portion of PeopleSoft.

Here is an example of an Action panel:

Clicking a link in the Action Panel changes the information displayed in the Information panel that appears on the left.

Procedure

In this topic you will review using the links in the Action panel. Our example will be from the **Personal Details** page accessed from the **Employee Self Service** home page.

Contra Costa County
PeopleSoft Training
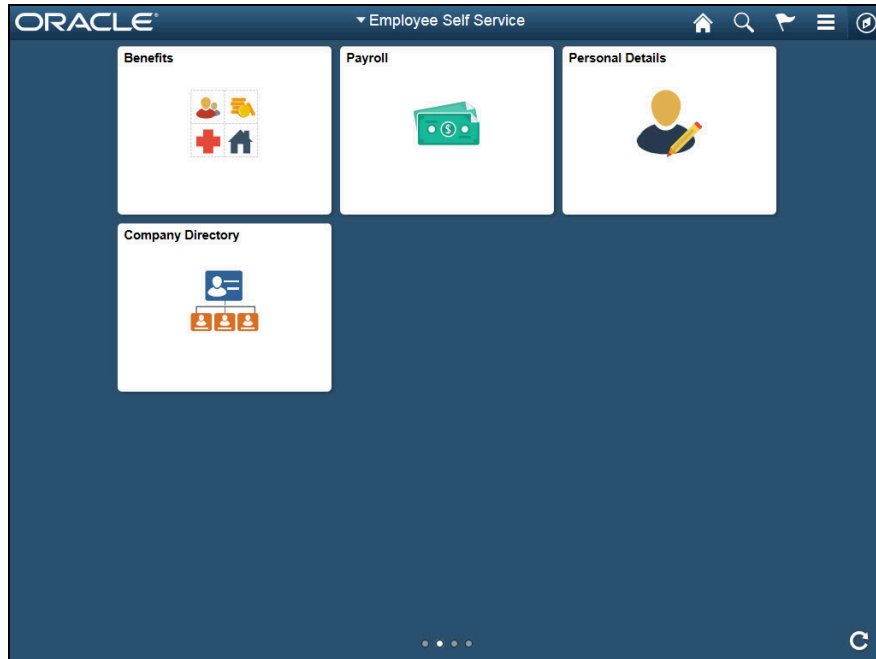
Step	Action
1.	Click the **Personal Details** tile.

< My Homepage	Personal Details	🏠 🚩 ☰ ⊚

David Smith ⊘

Header Panel

Addresses

✉ Addresses
📞 Contact Details
📇 Name
👥 Ethnic Groups
📍 Emergency Contacts
👤 Additional Information
♿ Disability
🎖 Veteran Status

Addresses

Home Address
1000 Pine Drive
Concord, CA 94518   Current   ›
Contra Costa

Mailing Address
1000 Pine Drive
Concord, CA 94518   Current   ›
Contra Costa

Information Panel
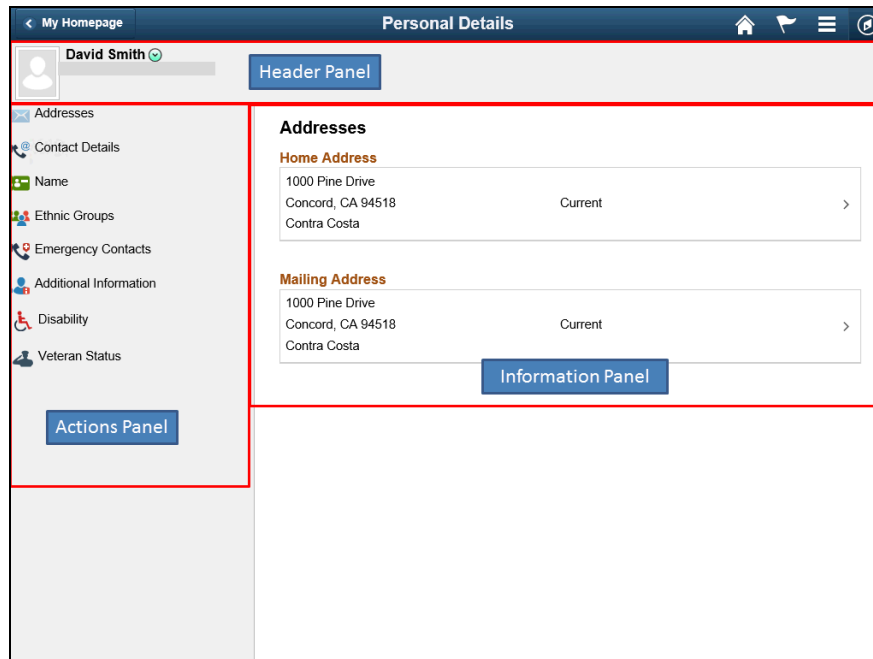
Actions Panel

Step	Action
2.	The **Personal Details** page displays. This page contains three panels: -- Header panel -- Left Side Actions panel -- Right Side Information panel
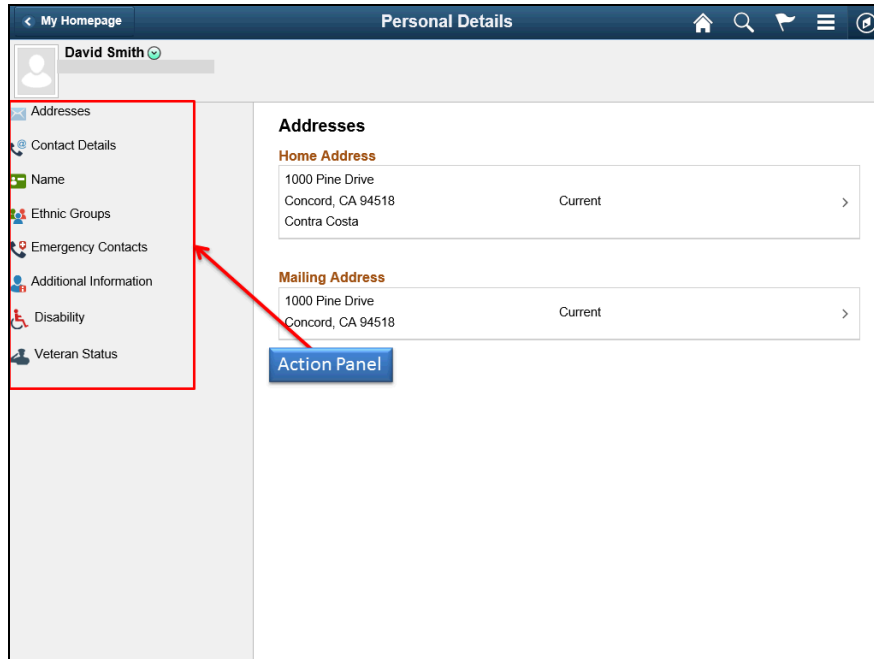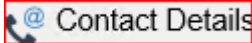
Step	Action
3.	Click on a link in the **Actions** panel to change what is displayed in the information. In this example, you will click on each of the links in the action panel for the **Personal Details** page.

Step	Action
4.	The right side information panel currently displays the **Addressees** grids. This grid lists your current **Home Address** and **Mailing Address**. You can use this page to edit one or both of these addresses. Maintaining your address information is covered in another topic in the Contra Costa County Employee Self Service eProfile training.
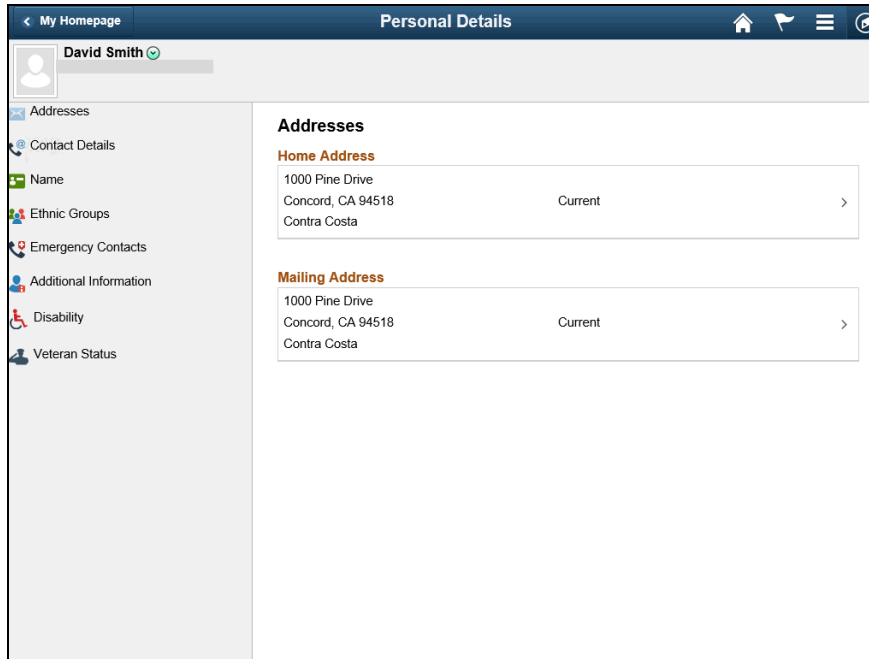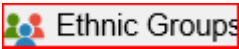
Step	Action
5.	Next, you'll use the **Contact Details** link. Click the **Contact Details** link.
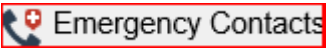
Step	Action
6.	The right side information panel now displays your **Contact Details**. This panel contains two grids: -- **Phone**: this grid lists your phone numbers as stored in the system. You can store up to 4 phone number--Business, Home, Cell, and Pager1. -- **Email:** this grid lists your email address as stored on the system. Your business email address is stored in the system. You cannot edit or delete this address. You cannot add additional email addresses. You can use this page to edit, add, or delete address information. These actions are covered in other topics in Contra County PeopleSoft Employee Self Service eProfile training.
7.	Next, you will use the **Name** link. Click the **Name** link. ![Name]
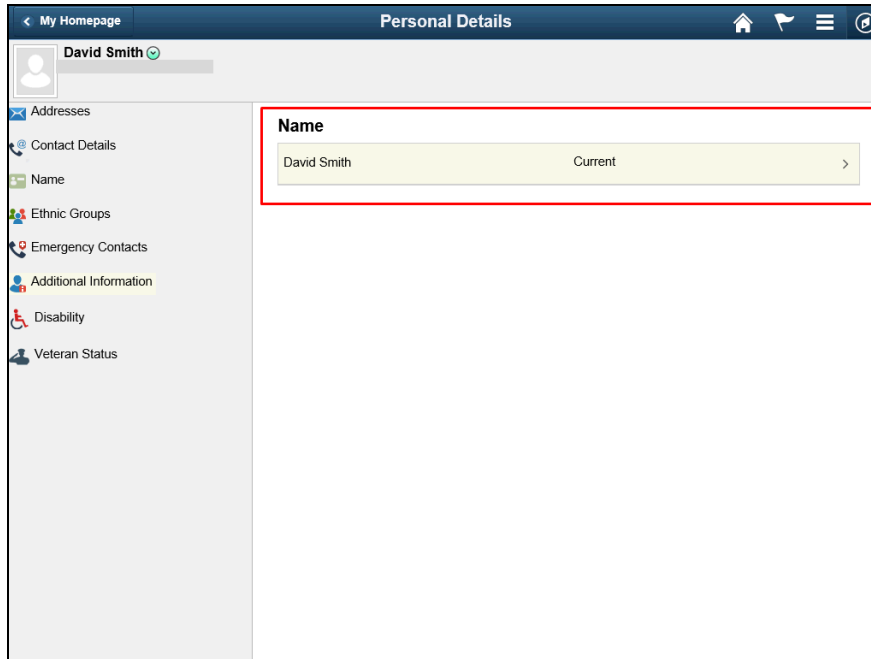
Step	Action
8.	The right side information panel now displays your current name information as stored in the system. You can use this page to request that your name information be changed. This action is covered in another topic in Contra Costa County PeopleSoft Employee Self Service eProfile training.
9.	Next you will use the **Ethnic Groups** link. Click the **Ethnic Groups** link.
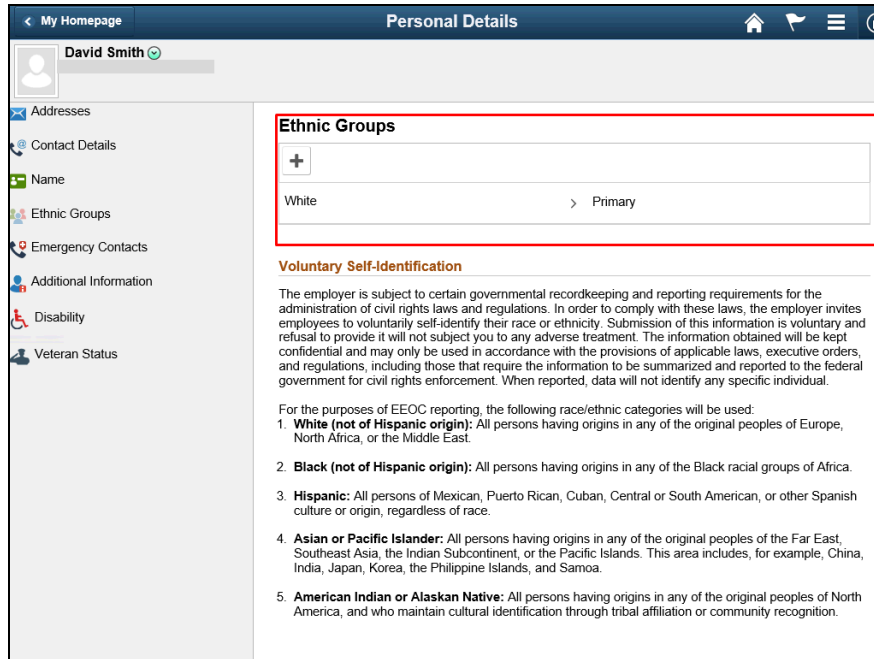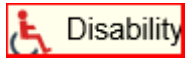
Step	Action
10.	The right side information panel now displays your current Ethnic Group Self Identification.

You can use this page to edit, add, or delete an ethnic group self identification. These actions are covered in other topics in Contra Costa County PeopleSoft Employee Self Service eProfile training. |
| 11. | Next you will use the **Emergency Contacts** link.

Click the **Emergency Contacts** link.
![Emergency Contacts icon] Emergency Contacts |

Contra Costa County
PeopleSoft Training

	Personal Details	
David Smith ⊘		

| Addresses |
| Contact Details |
| Name |
| Ethnic Groups |
| Emergency Contacts |
| Additional Information |
| Disability |
| Veteran Status |

Emergency Contacts

➕

Contact Name	Relationship	Preferred	
James	Sibling	✓	›
Susan Jones	Friend		›
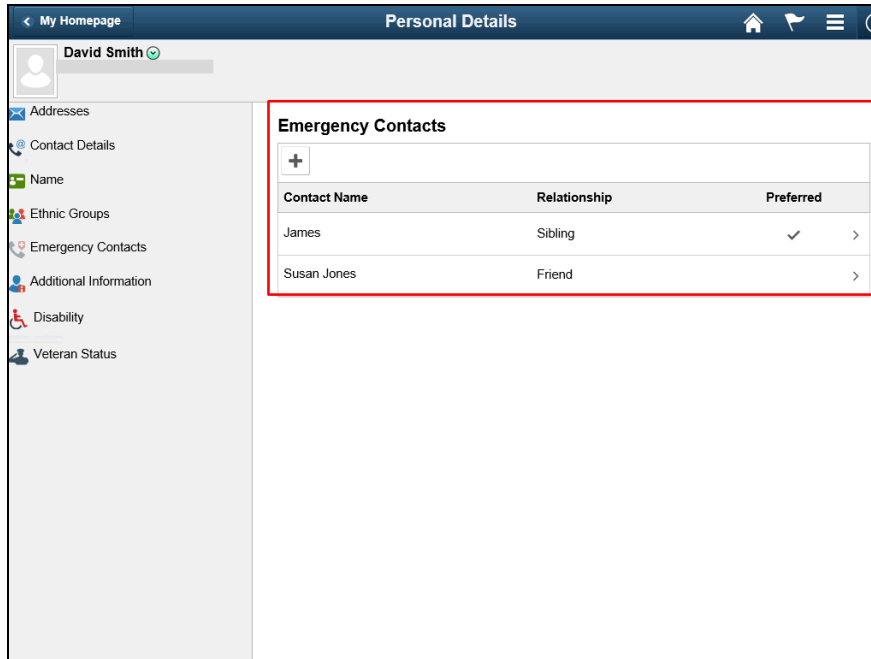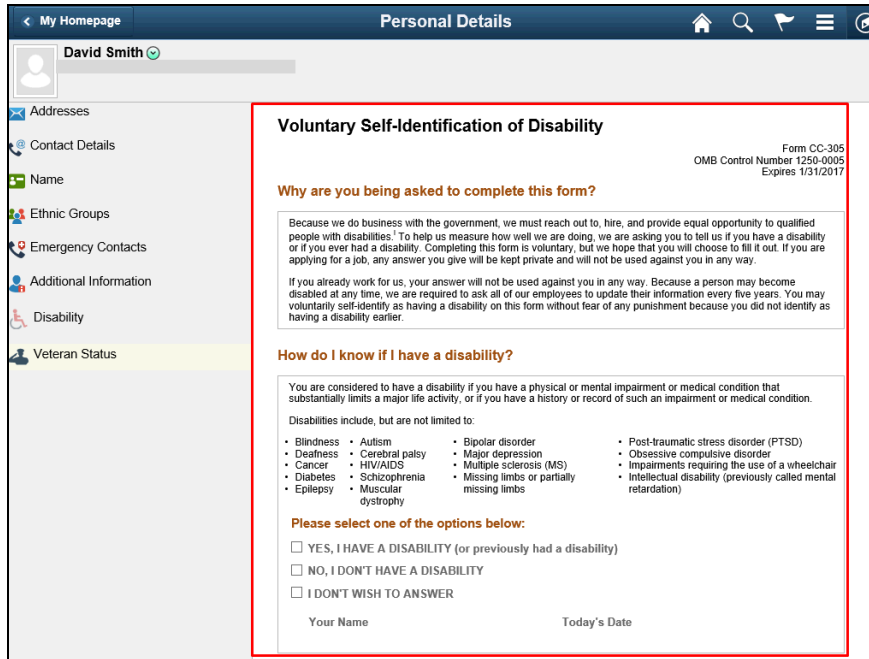
Step	Action
12.	The right side information panel now displays your current emergency contact information.
	You can use this page to add, edit, and/or delete emergency contacts.
	These actions are covered in other topics in Contra Costa County PeopleSoft Employee Self Service eProfile training.
13.	Next, you'll use the **Additional Information** link.
	Click the **Additional Information** link.
	Additional Information
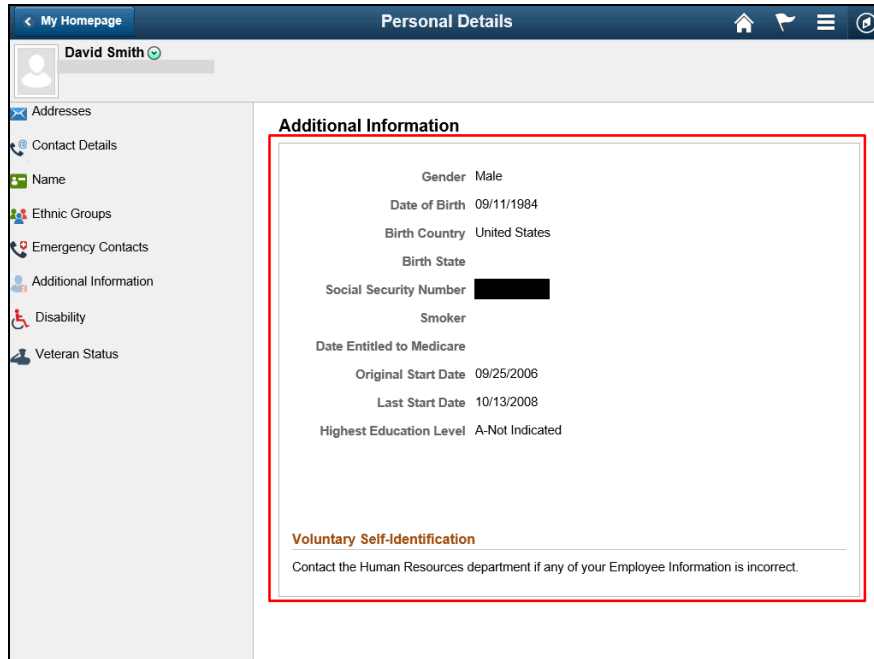
Step	Action
14.	The right side information panel now displays additional information. This information is presented in view only mode. You cannot edit or delete this information.

If any of this information is incorrect, you must contact Human Resources to have it changed. |
| 15. | Next, you will use the **Disability** link.

Click the **Disability** link. |

Step	Action
16.	The **Voluntary Self-Identification of Disability** page displays in the information panel. You can use this page to indicate whether or not you have a disability. Or you can decline to answer.
17.	Next you will use the **Veteran Status** link. Click the **Veteran Status** link.
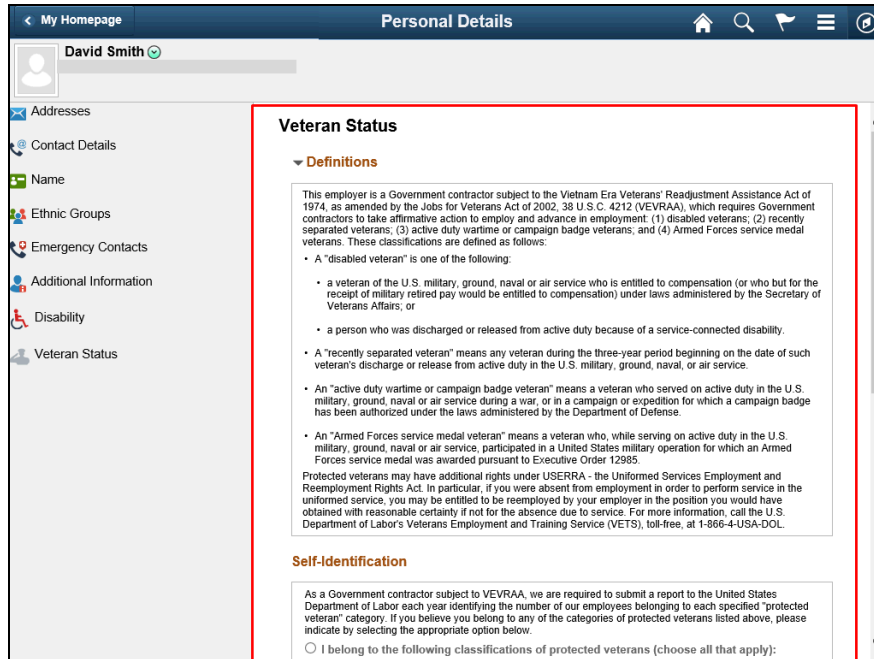
Step	Action
18.	The **Veteran Status** page displays in the information panel. Use this page to indicate your status as a veteran If you are not a veteran you can also indicate that using this page.
19.	Click the **My Homepage** button.
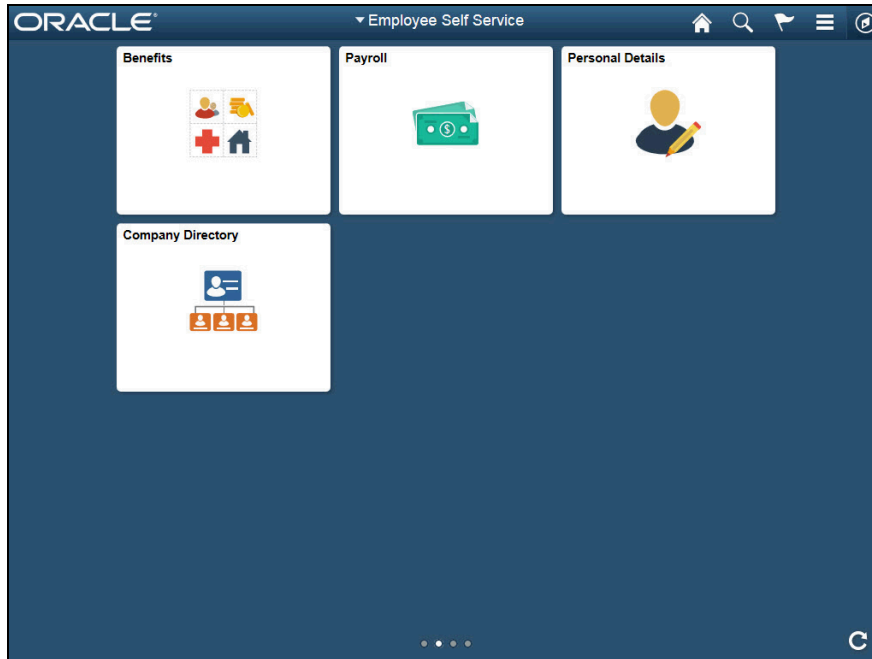
Step	Action
20.	**Note**: You can click the links in the Action panel in any order. You do not have to start with the top link as we did in this example. You can start with any link you want and click only those links that you want to work with.
21.	**End of Procedure.**

Using the Information Panel

Information panels display details about the Action panel item that was selected. Often these panels allow users to edit, add, or delete information. Information in an information panel is displayed in a grid.

Here's an example of an Information panel.

In this example, clicking on one of the addresses listed in the **Addresses** grid, opens a page that allows you to edit the address.

Procedure

Contra Costa County
PeopleSoft Training
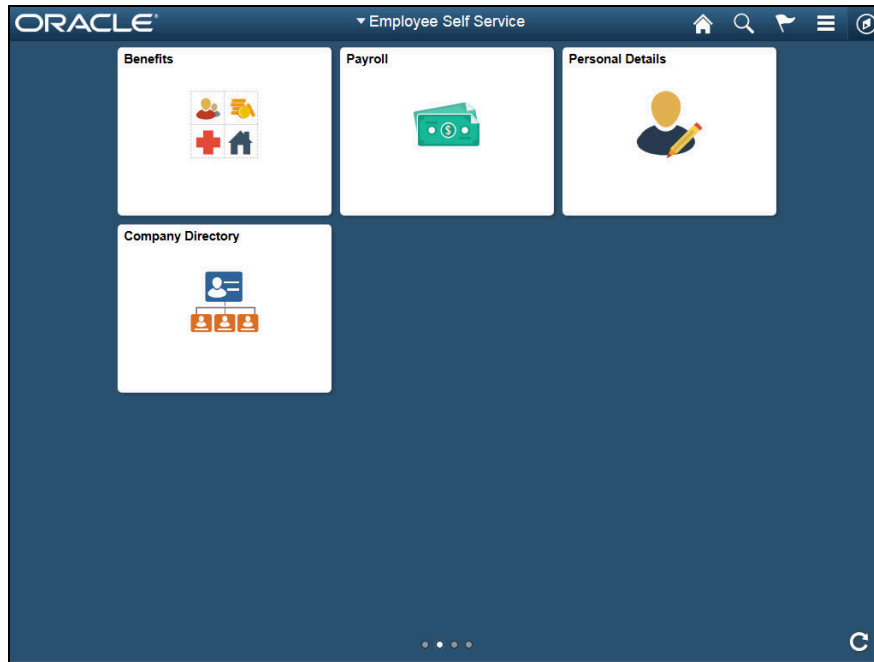
Step	Action
1.	This example demonstrates how to use Information panels to add or edit information. All examples are drawn from the eProfile, **Personal Details** page. See Employee Self Service Training: eProfile for details about navigation and eProfile transactions.

Step	Action
2.	For this example, you have navigated to the **Personal Details** page from the **Employee Self Service Home Page**. Address information is displayed in the grid on the **Information** panel. To edit address information for one of your addresses, click on the row for the address you want to edit in the **Information** panel. In this example, you want to edit your home address.

Step	Action
3.	Click the row for your **Home Address**.
	Current

Step	Action
4.	The **Address** page displays. You can use this page to edit your home address information. Editing address information is covered in other portions of Contra Costa County PeopleSoft Training: Employee Self Service: Maintaining Home and Mailing Addresses.
5.	For this example we have navigated to the **Contact Details** portion of the **Personal Details** page by clicking on **Contact Details** in the **Action** panel. Contract Information--Phone and Email--displays in the grids on this page. To edit this information, click on the row in the grid for the information you want to edit. You can also use the **Plus** button to add a new row to the grid.
6.	Click on the row for the **Home** phone. Home

Step	Action
7.	The **Phone Number** page displays with information about your home phone number. You can edit this information. The **Delete** button enables you to delete phone information. If you had used the **Plus** button, the **Phone Number** page would display without any phone information. See the eProfile portion of Employee Self Service training for more information about adding, editing, or deleting contact information.

Step	Action
8.	You have used the **Ethnic Group** Link in the **Action** panel top display the **Ethnic Group** portion of the **Personal Details** page in the **Information** panel. Your current self-identification is displayed in the grid in the **Information** panel. To edit this information, click on the row you want to edit. This grid can have multiple rows. To add an additional self-identification, click the **Plus** button.
9.	Click the **Add an Ethnic Group** button. ✚

Step	Action
10.	The **Ethnic Group** page displays. Use this page to add/select information about the Ethnic Group Self-identification you are adding. See the eProfile portion of Employee Self Service training for more details about working with ethnic group self-identifications.
11.	**End of Procedure.**

Using Drop-down lists

Drop down lists in fluid work like drop down lists on Classic PeopleSoft pages. To use a drop down list, click in the arrow in the list field. The list will display. Then click the option you want to use. The value you select will display in the field. If you type the first letter of one of the values that is included in a drop down list, the system will display that value in the field. Generally, it is better to simply use the drop down list arrow to display the list and to select a value.

Here is an example of a fluid drop down list:
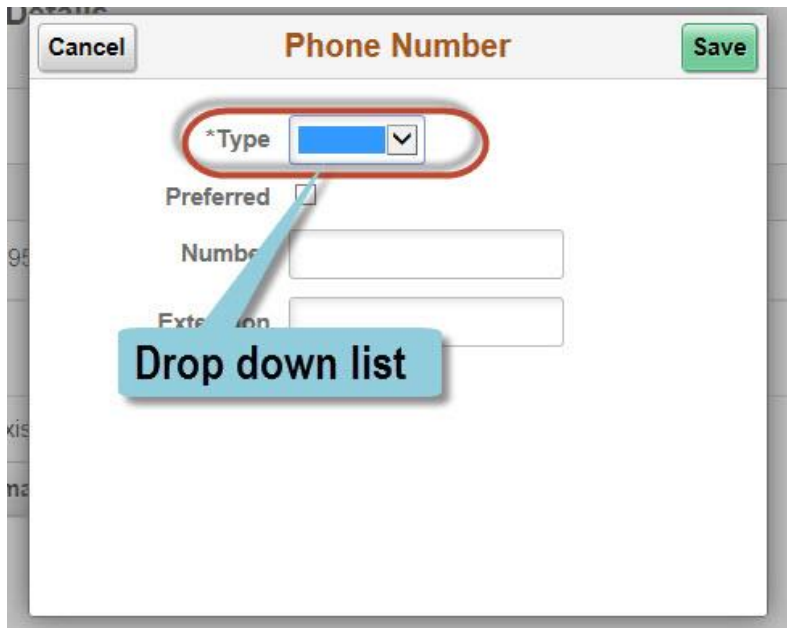
Here is the list with the choices displayed:
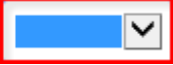
Click in one of the values in the list to display it in the field.

Procedure

Step	Action
1.	In this topic, you will review how to use drop down lists to select values.
	Drop down lists allow you to select from a list of valid values.
	To use a drop down list, click in the field and then select the value from the list that displays.
	If you know the first letter or letters of the value you want to use, you can type those in and the system will display a list of all valid values that start with the character you enter in the field. If only one value exists that starts with the characters you typed, the system will populate the field with that value.
	Some drop down lists contain a large number of values. In those cases you can use the scroll bar to help you locate the value you want. With large lists you can also enter the first letter of a value. The system will populate the field with the first value in the list that begins with the letter you entered. You can use the down arrow key on your key board to scroll down the list until you find the value you want to use.
2.	Here is an example of clicking in a drop down list to select a value.

Step	Action
3.	Click the **Type** list.
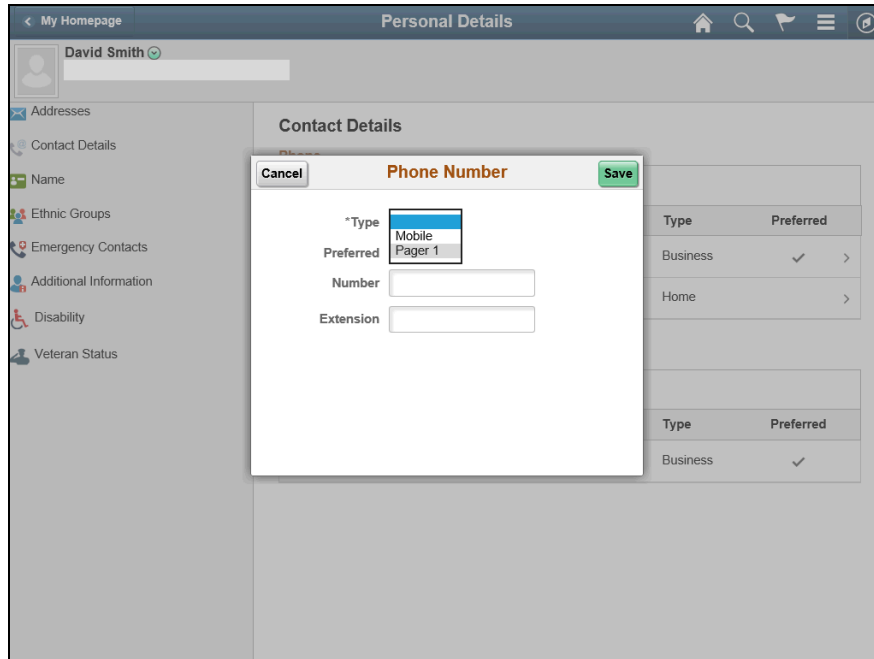
Step	Action
4.	Click the **Pager 1** list item. Pager 1
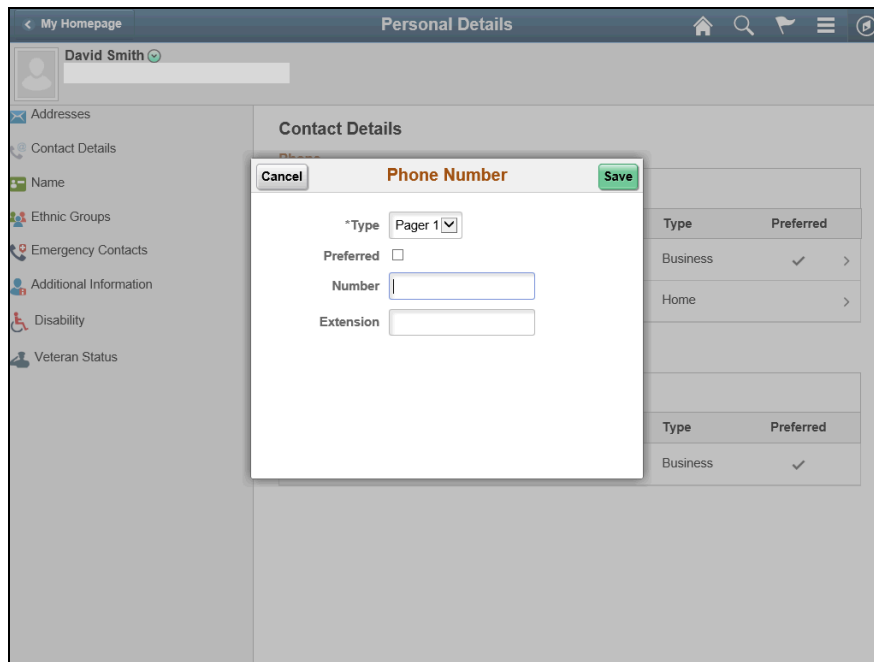
Step	Action
5.	Click in the **Number** field.
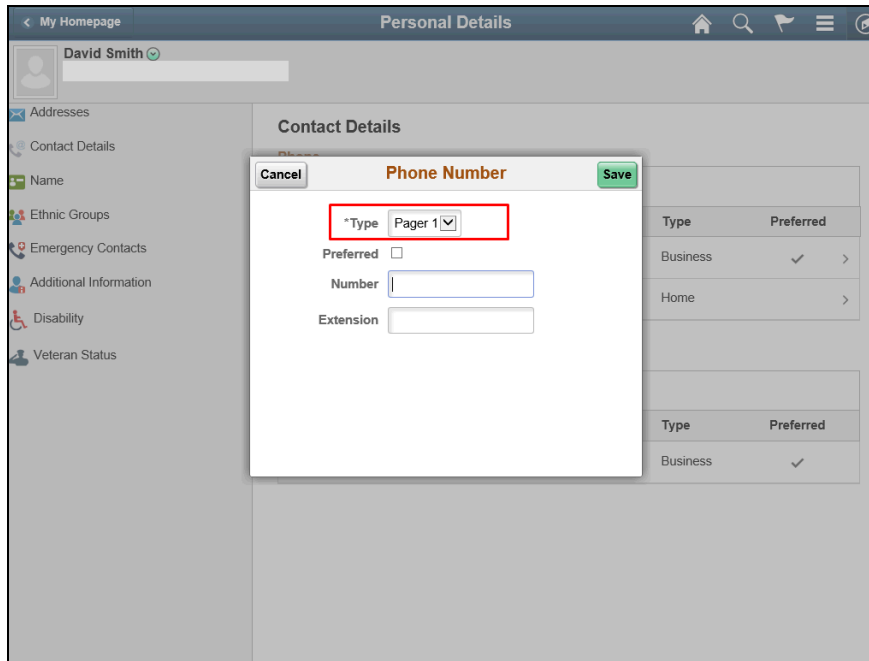
Step	Action
6.	Notice the value you select is now displayed in the **Type** field.
7.	Here's an example of changing the value that has been previously selected.
8.	Click the **Type** list.
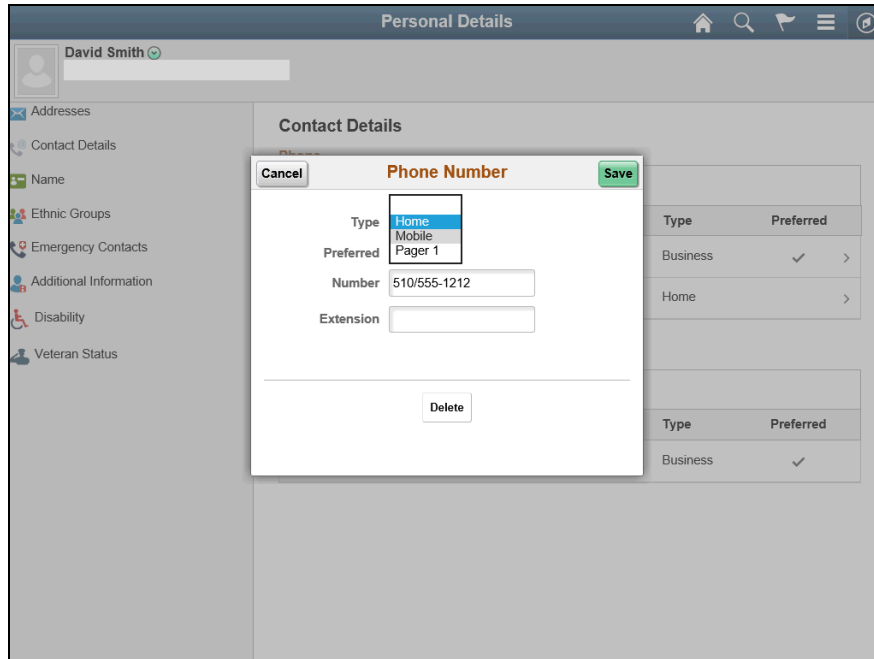
Step	Action
9.	Click the **Mobile** list item. Mobile
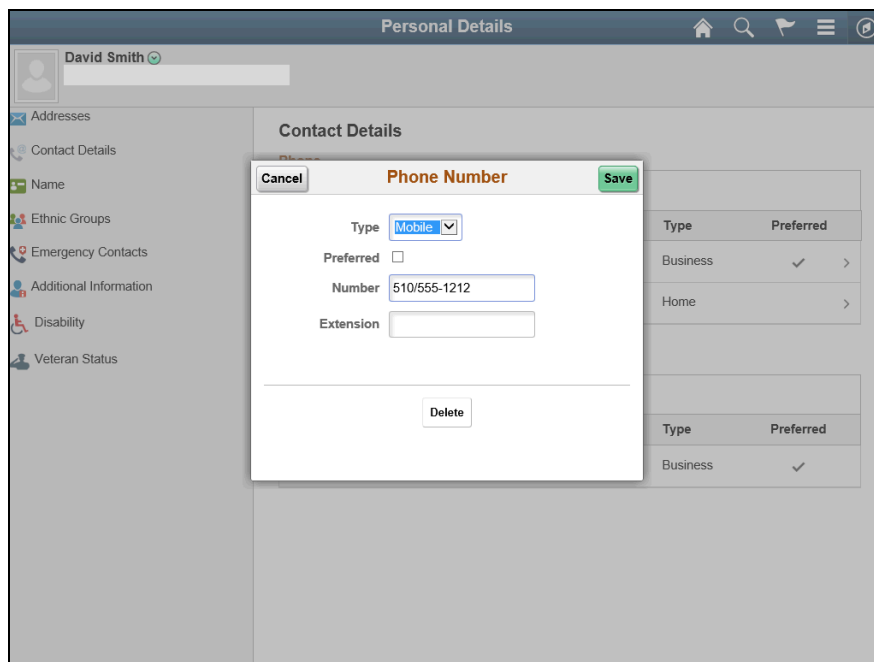
Step	Action
10.	Click in the **Number** field. Number 510/555-1212
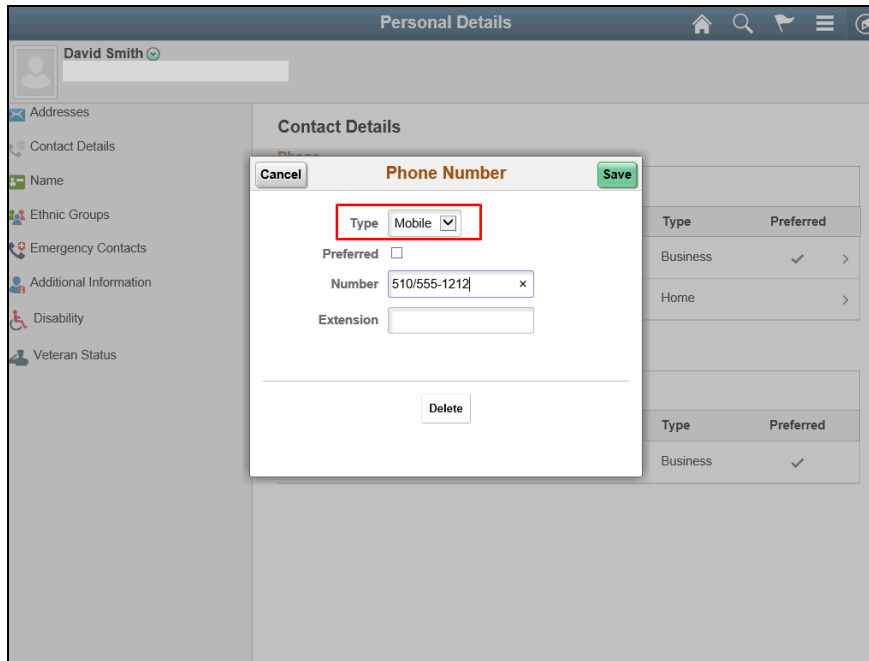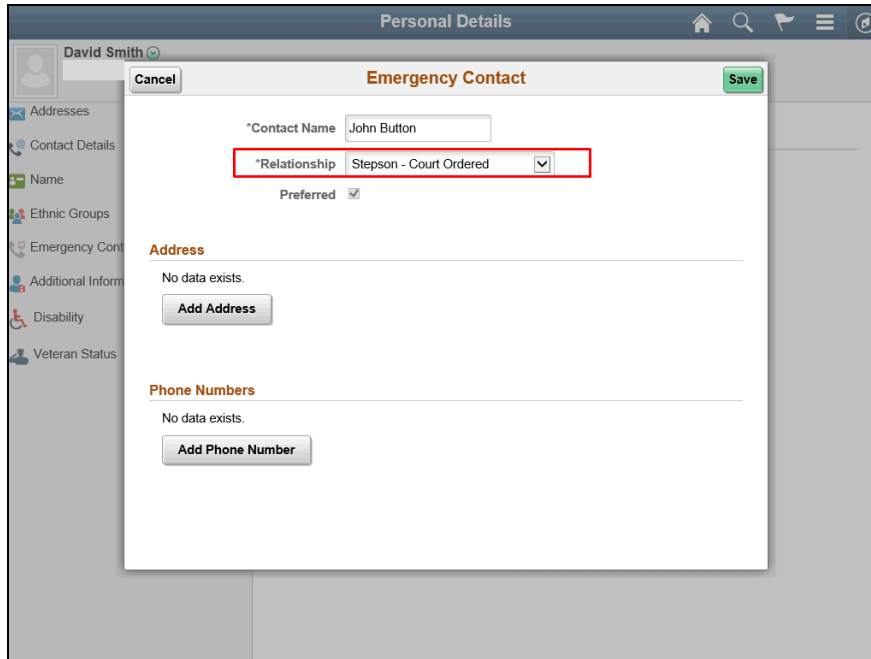
Step	Action
11.	Notice, the new value you selected now displays in the **Type** field.
12.	Here's an example of a drop down list that uses a scroll bar.
13.	Click the **Relationship** list. *Relationship
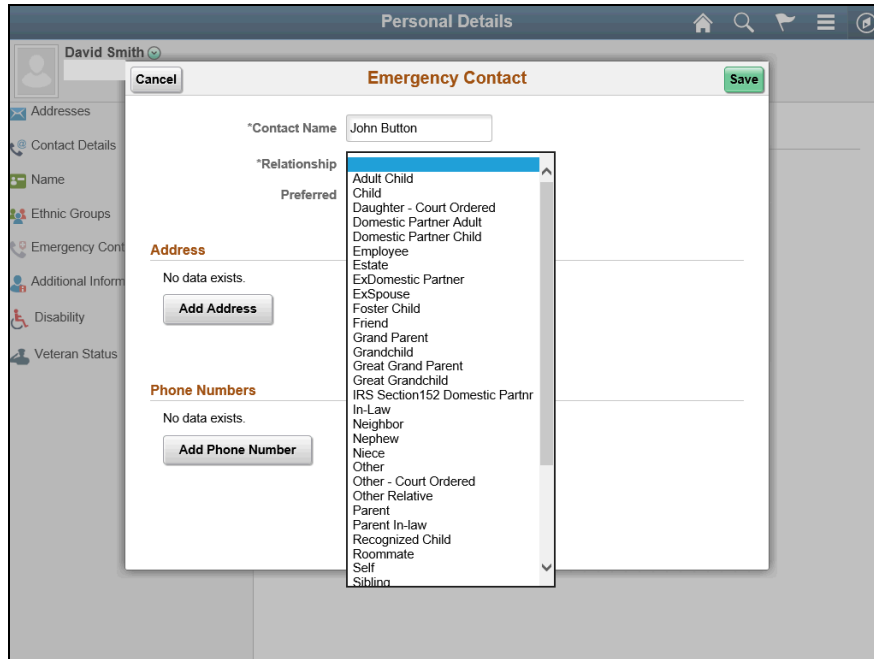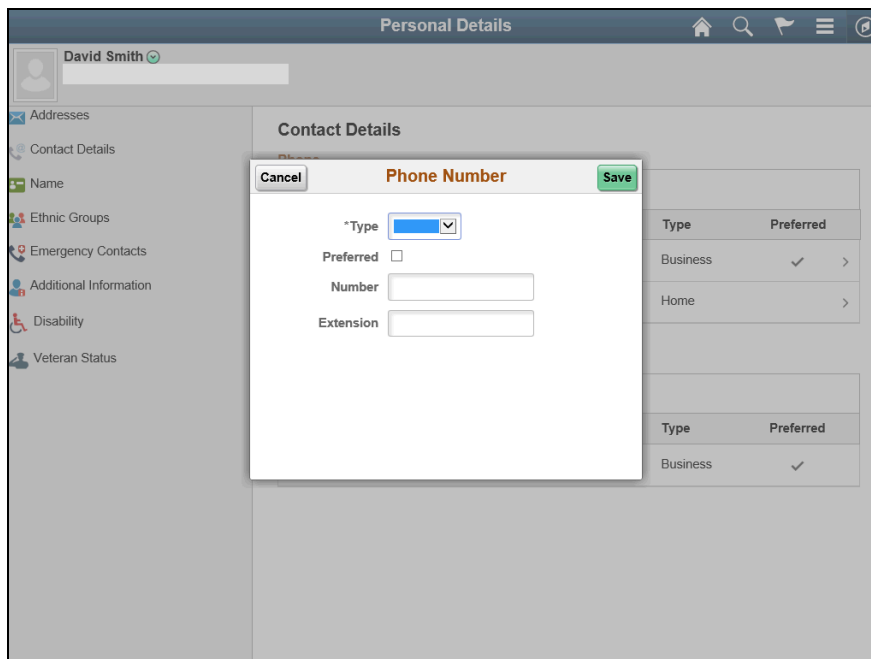
Step	Action
14.	Click the scrollbar.
15.	Click the **Stepson - Court Ordered** list item.
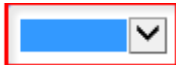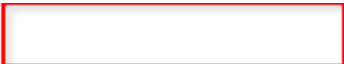
Step	Action
16.	Notice the value you selected now appears in the **Relationship** field.
17.	Here are two examples of using your keyboard to select a value in a drop down field.
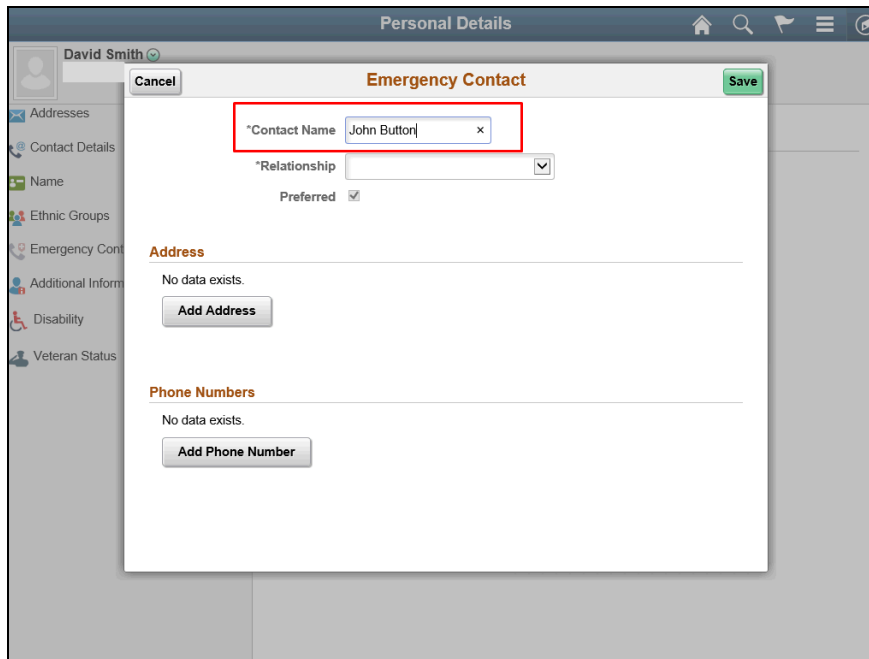
Step	Action
18.	Enter the desired information into the **Type** field. Enter "**m**".
	*Type [dropdown]
19.	Click in the **Number** field.
	Number [input field]
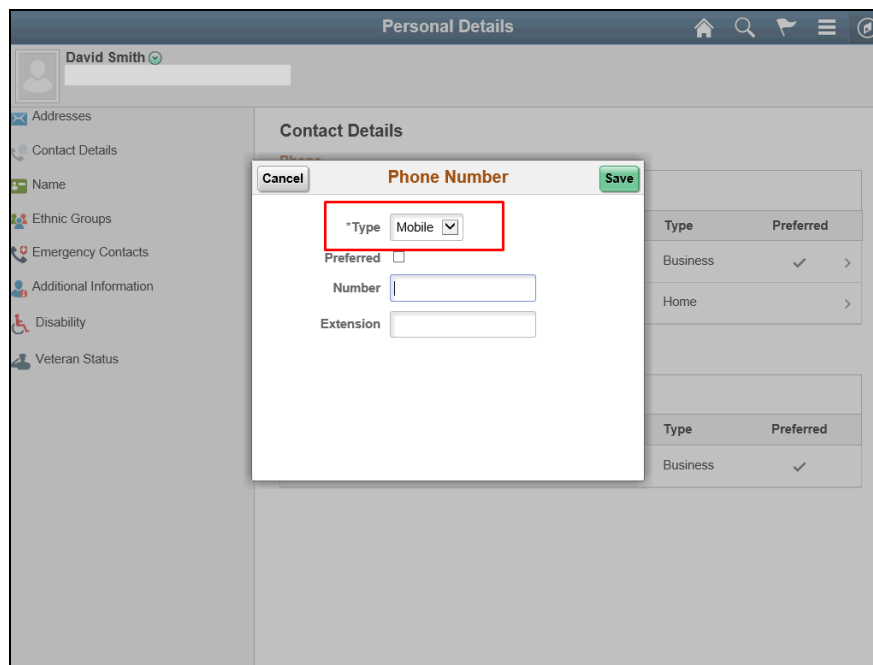
Step	Action
20.	Notice the **Type** field now displays Mobile.
21.	Here is another example of using your keyboard to select a value from a drop down list.
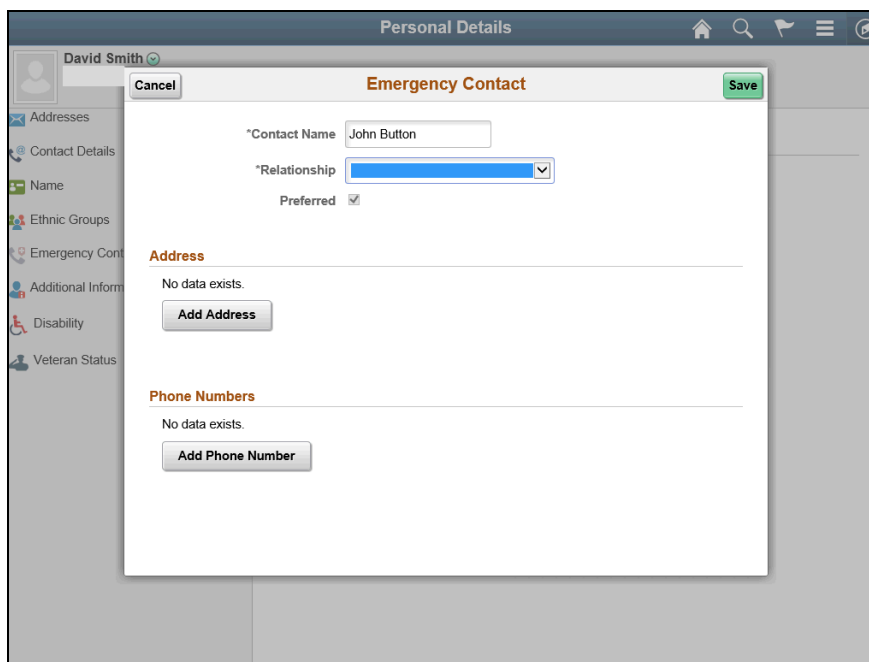
Step	Action
22.	Notice the focus is currently in the **Contact Name** field,
	Press **[Tab]** to move the focus to the **Relationship** field**.**
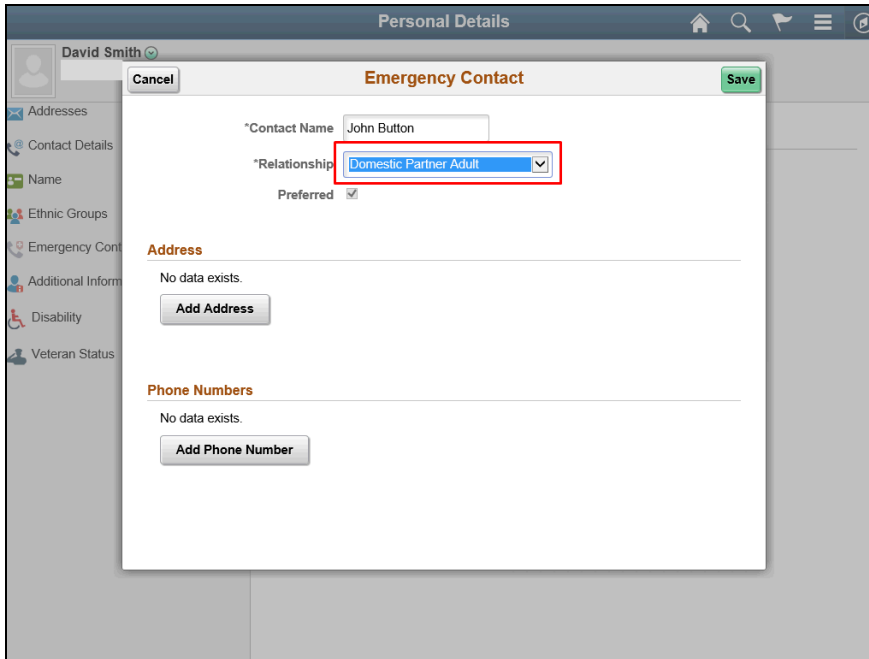
Step	Action
23.	Enter the desired information into the **Relationship** field. Enter "**d**". *Relationship [_____] [v]
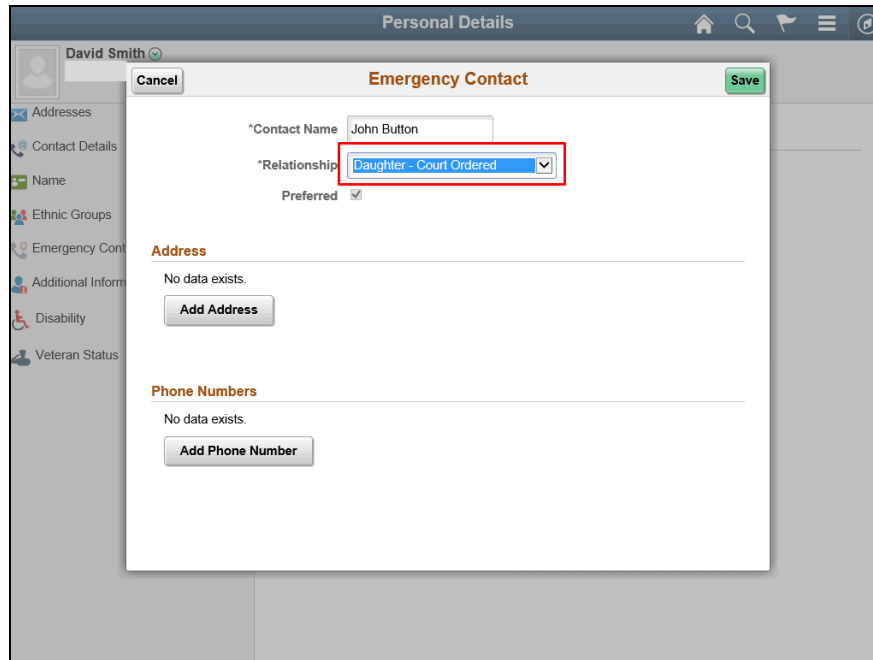
Step	Action
24.	Use the down arrow key on your keyboard to move down the list until you find the value you want to use. In this example, you want to select Grandchild. Press **[Down Arrow]**.
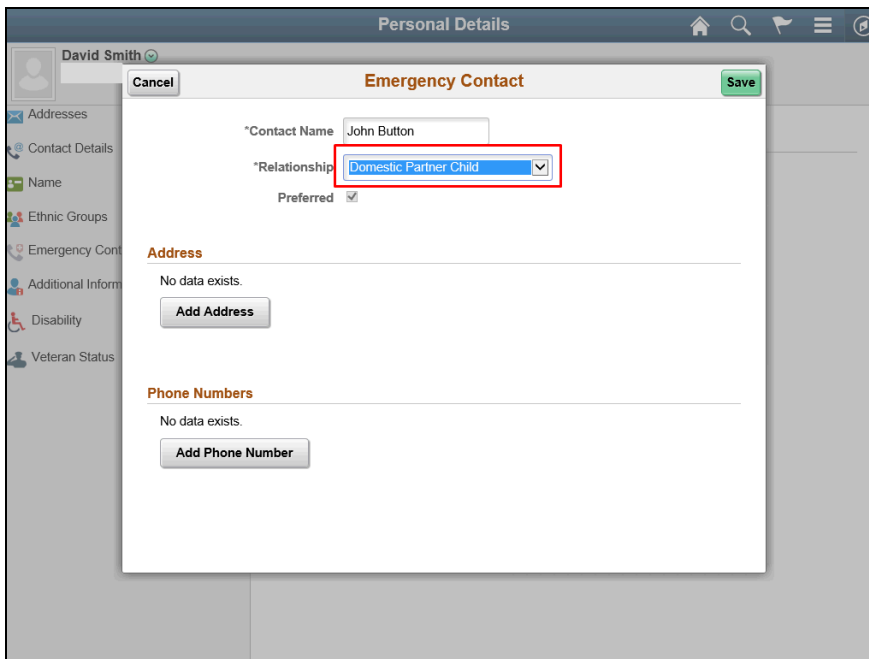
Step	Action
25.	Notice the value in the **Relationship** field has changed. Press **[Down Arrow]**.
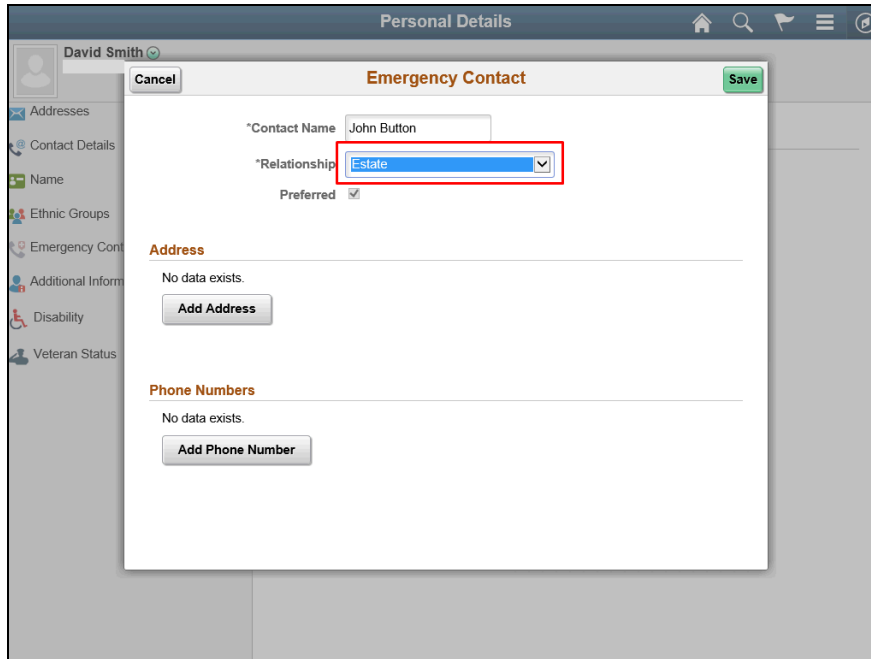
Step	Action
26.	Notice the value in the **Relationship** field has changed. Press **[Down Arrow]**.
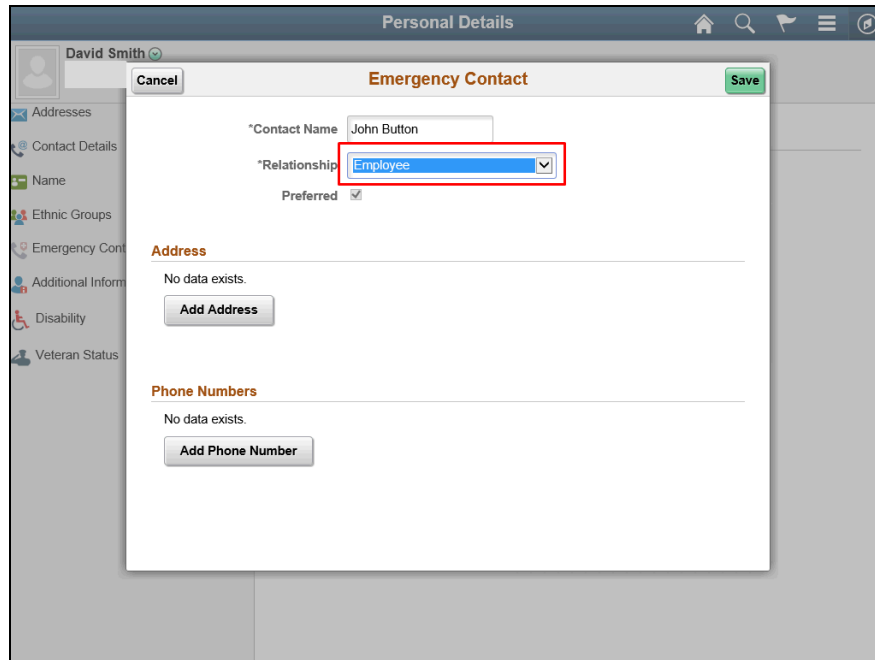
Step	Action
27.	Notice the value in the **Relationship** field has changed. Press **[Down Arrow]**.
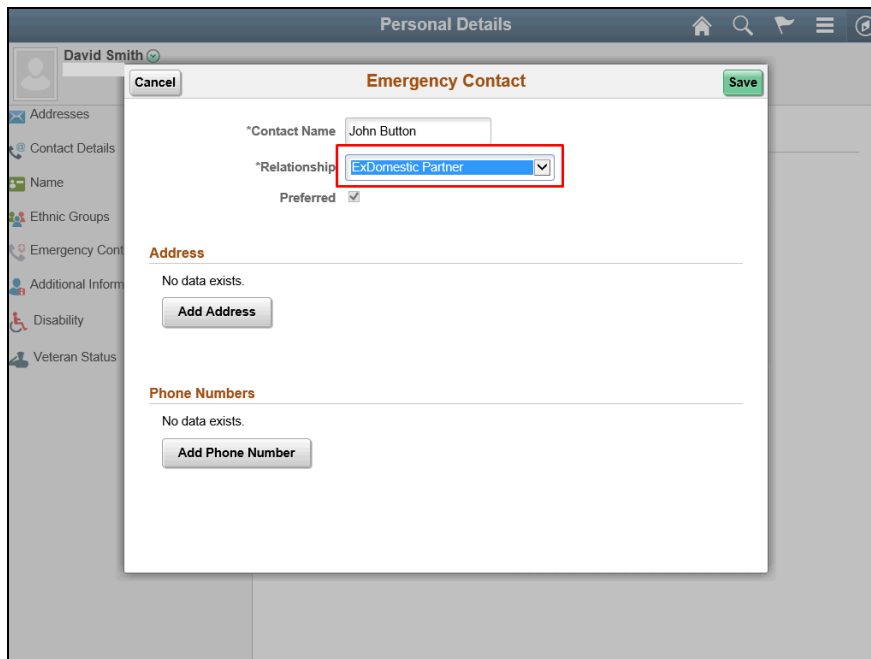
Step	Action
28.	Notice the value in the **Relationship** field has changed. Press **[Down Arrow]**.
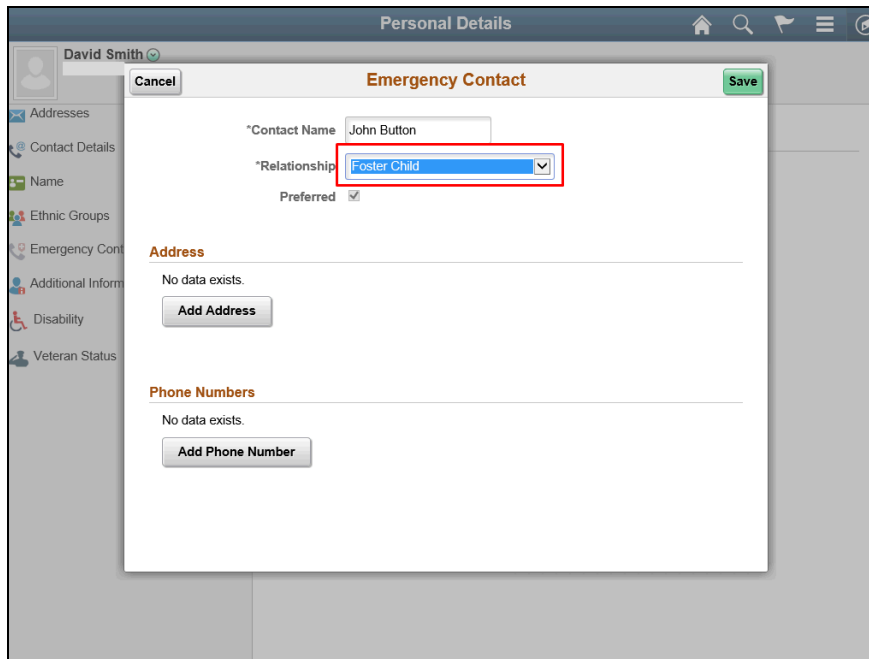
Step	Action
29.	Notice the value in the **Relationship** field has changed. Press **[Down Arrow]**.
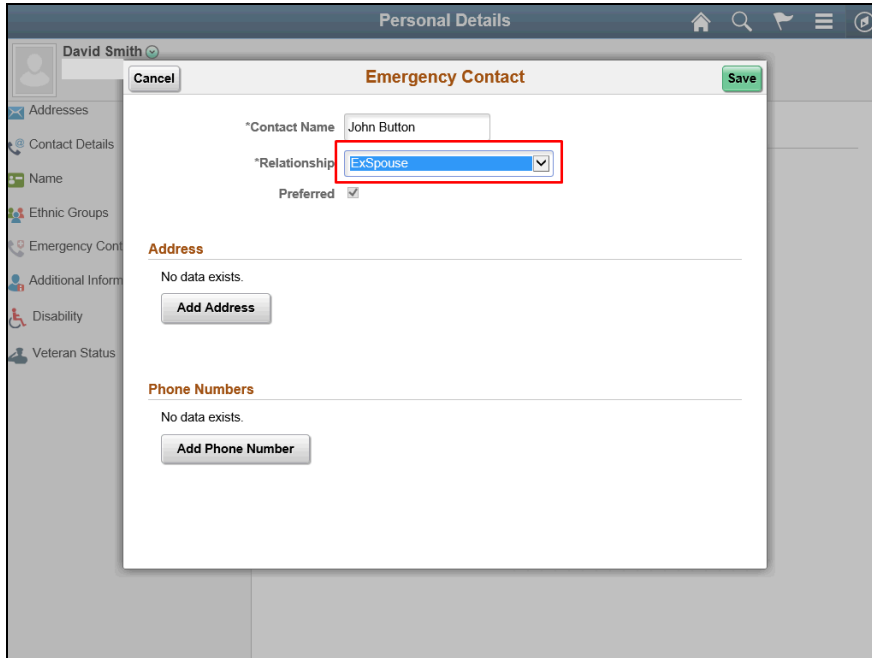
Step	Action
30.	Notice the value in the **Relationship** field has changed. Press **[Down Arrow]**.
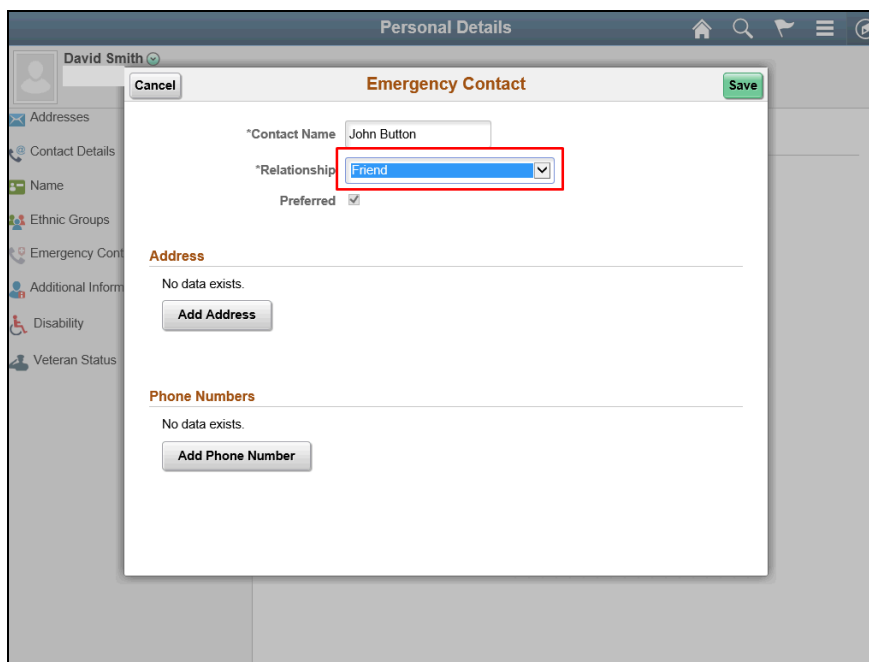
Step	Action
31.	Notice the value in the **Relationship** field has changed. Press **[Down Arrow]**.
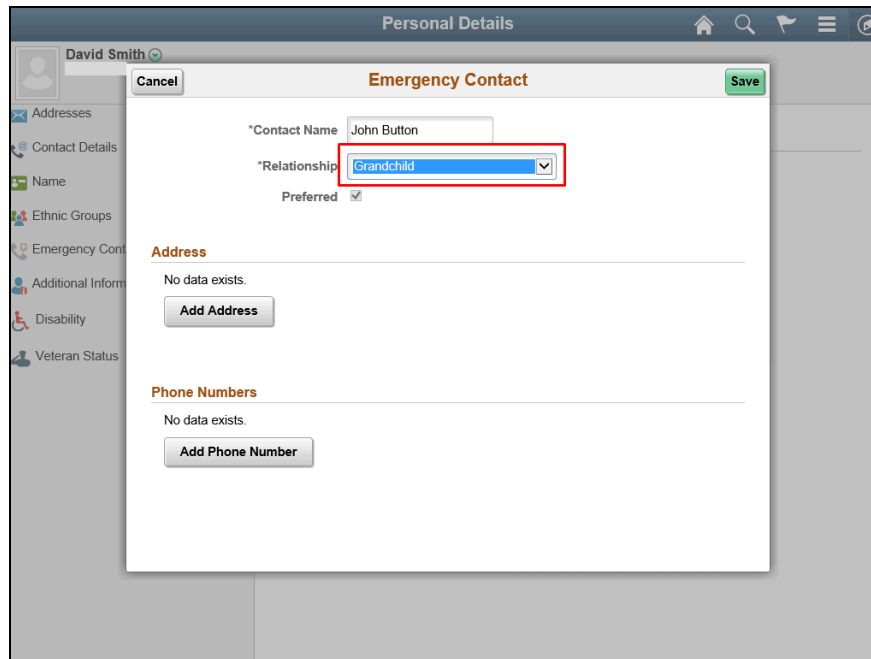
Step	Action
32.	Notice the value in the **Relationship** field has changed. Press **[Down Arrow]**.
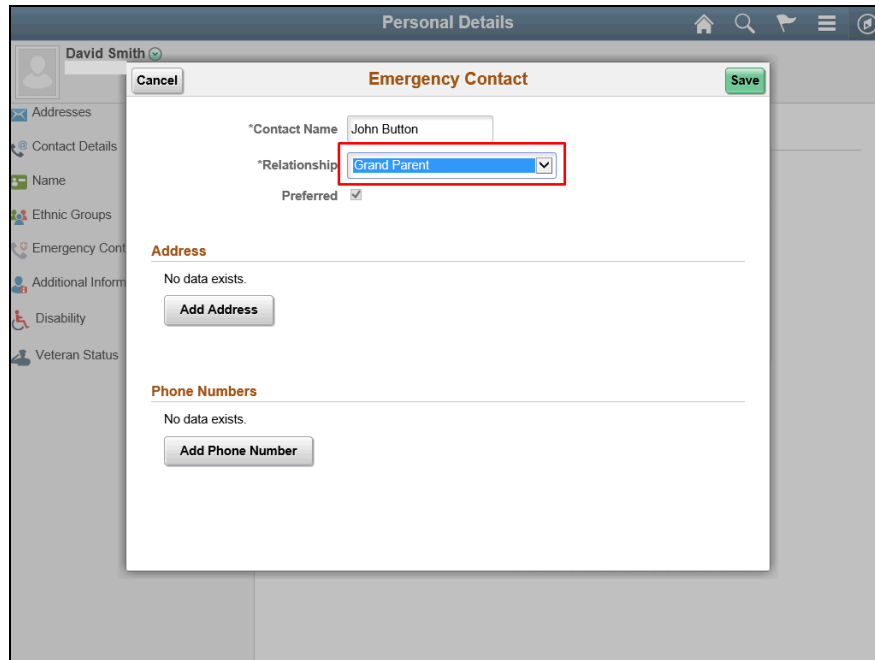
Step	Action
33.	Notice the value in the **Relationship** field has changed. Press **[Down Arrow]**.
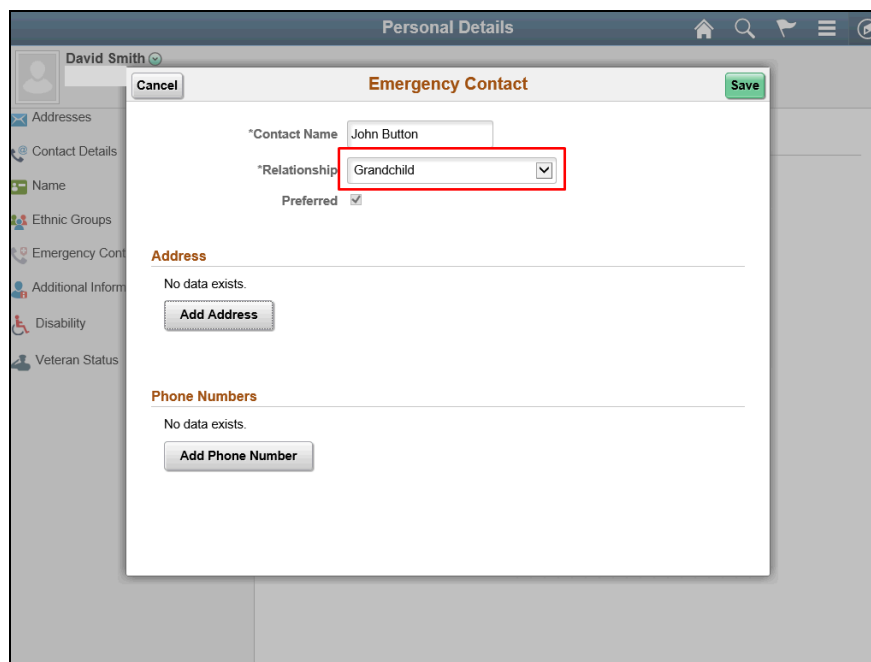
Step	Action
34.	Notice the value in the **Relationship** field is now Grandchild.

Press **[Enter]** to select this value. |

Step	Action
35.	Notice the **Relationship** field now displays Grandchild, the value you just selected.
36.	**End of Procedure.**

Using Text Entry Fields

Text entry fields work the same in Fluid pages as they do in Classic PeopleSoft pages. Left click in the text entry field and then enter the text you want to use in that field.

Here's an example of a Fluid text entry field.

Procedure

Contra Costa County
PeopleSoft Training
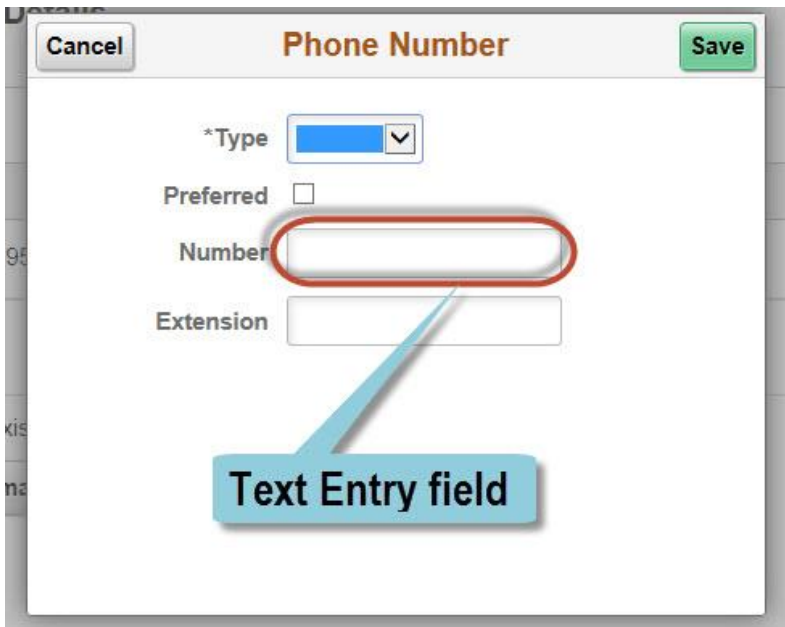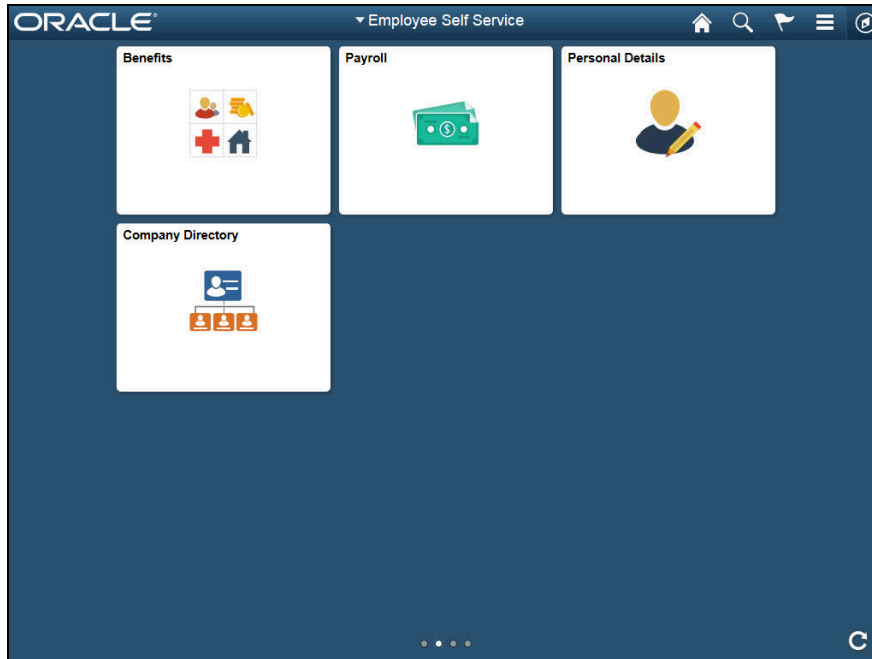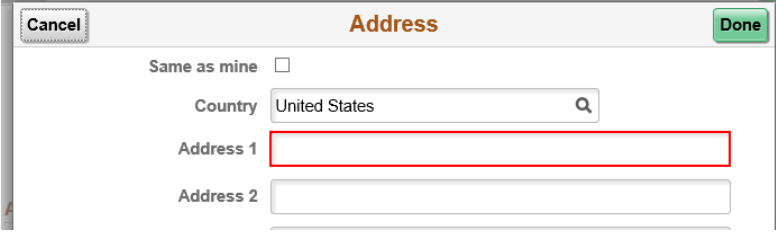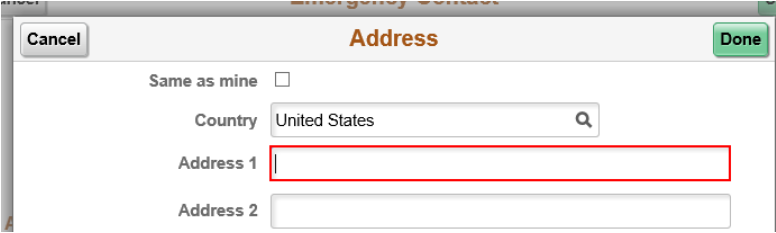
Step	Action
1.	This example demonstrates how to text entry fields. For this example, you will enter address information for a new emergency contact. For more details about adding, editing, and deleting emergency contact information see the eProfile portion of Employee Self Service Training.
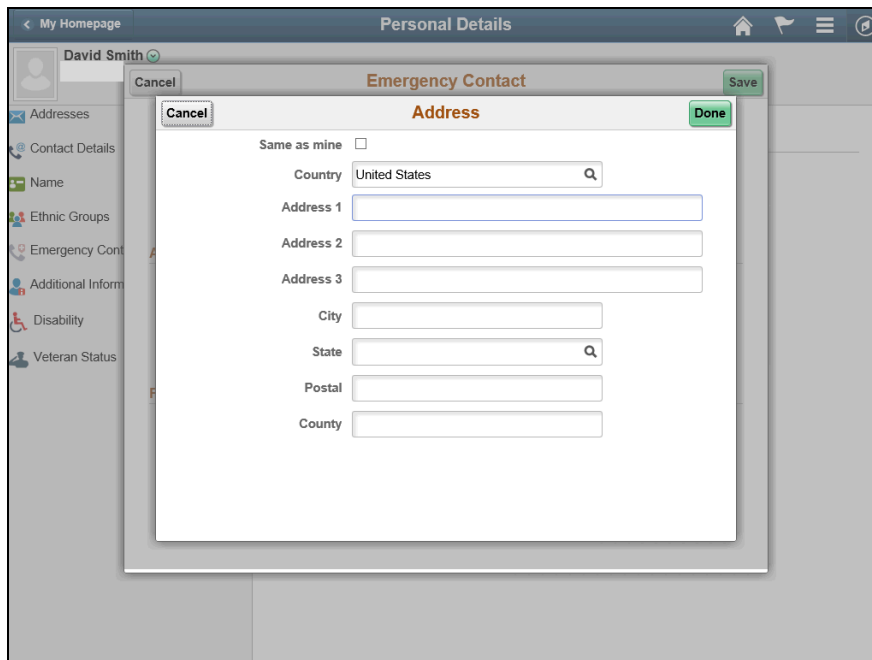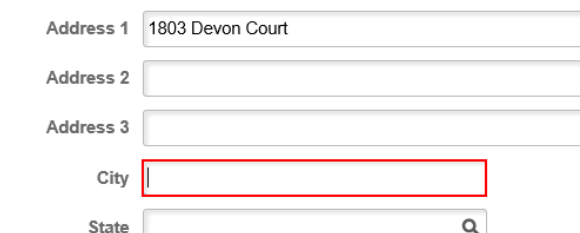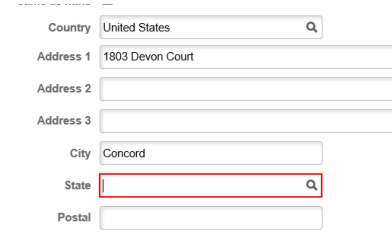
Step	Action
2.	To use a text entry field. Click in the field you want to edit and use your key board to enter text. To move to the next field, click in the field you want to edit. You can also use the Tab key to move to the next field.
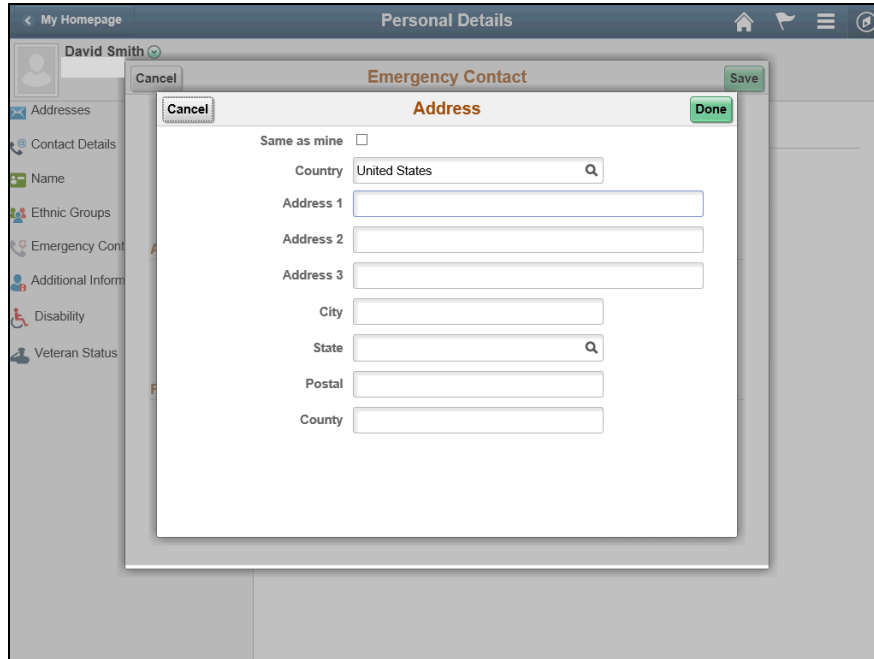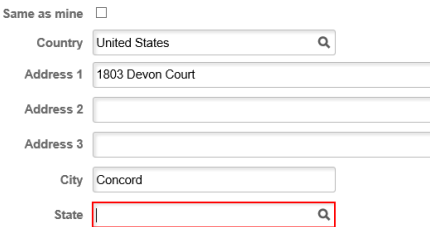
Step	Action
3.	Click in the **Address 1** field.
4.	Enter the desired information into the **Address 1** field. Enter "**1803 Devon Court**".

Step	Action
5.	Click in the **City** field.
6.	Enter the desired information into the **City** field. Enter "**Concord**".
7.	Click in the **State** field.
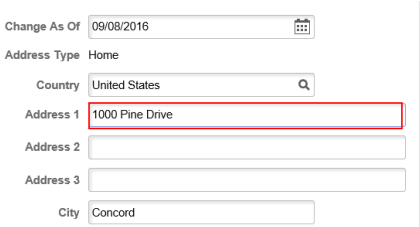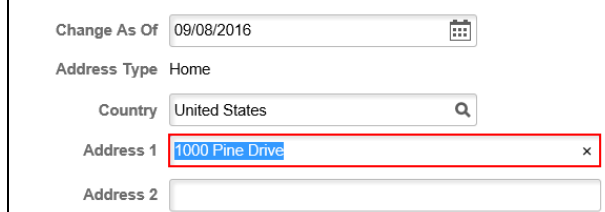
Step	Action
8.	Notice, the **State** Field has a look up button. This field uses a prompt table that contained a list of all valid values for the field. You can type directly in this field (or use the lookup button to select a value). The system will in some cases anticipate the value you intend based on the characters you enter and display it box below the field. In the example here, you want to enter California in the **State** field.
9.	Enter the desired information into the **State** field. Enter "**CA**". Same as mine ☐ Country United States Address 1 1803 Devon Court Address 2 Address 3 City Concord State
10.	Note the system displays a selection below the State field based on the value you typed in the State field. Click the **CA California** object to select it. CA California

Step	Action
11.	Note the **State** field now displays California.
12.	Click in the **Postal** field.
13.	Enter the desired information into the **Postal** field. Enter "**94520**".
14.	Click in the **County** field.
15.	Enter the desired information into the **County** field. Enter "**Contra Costa**".

Step	Action
16.	Next, you will edit an existing value in a text entry field. We have navigated to the **Address** page for your home address and will change the value that appears in the Address 1 field. To edit an existing value, either Select the value by using your mouse to highlight the text you want to edit and either press the Delete key on your key board or type directly over the highlighted text. or Select the entire text in a field by tabbing into the field from the previous field or using shift/tab to tab back to the field from fields below the field you want to edit.
17.	Click in the **Address 1** field.

Step	Action
18.	Enter the desired information into the **Address 1** field. Enter "**2641 Prospect Street**".
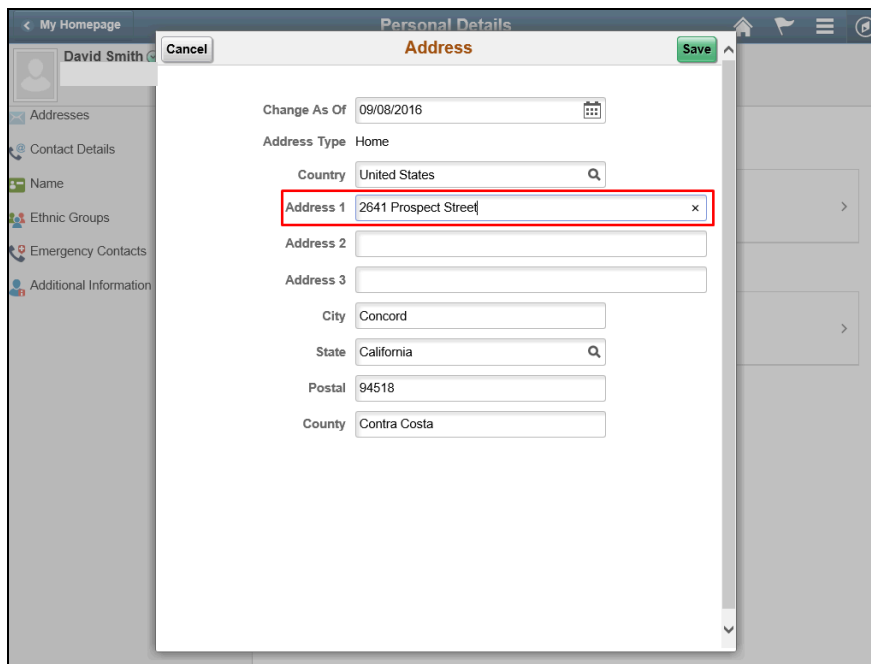
Step	Action
19.	Notice the **Address 1** field now contains the new address information.
20.	**End of Procedure.**

Using Add Buttons

Some Fluid pages enable you to add new values, e.g., a new phone number or email address, or a new Ethnic Self Identification. These pages contain one or more Add buttons. Clicking one of these buttons opens a new fluid page that appears as a window on top of the base fluid page. You can use this new page to enter information about the item you want to add.

Here's an example of an Add button:

Contra Costa County
PeopleSoft Training
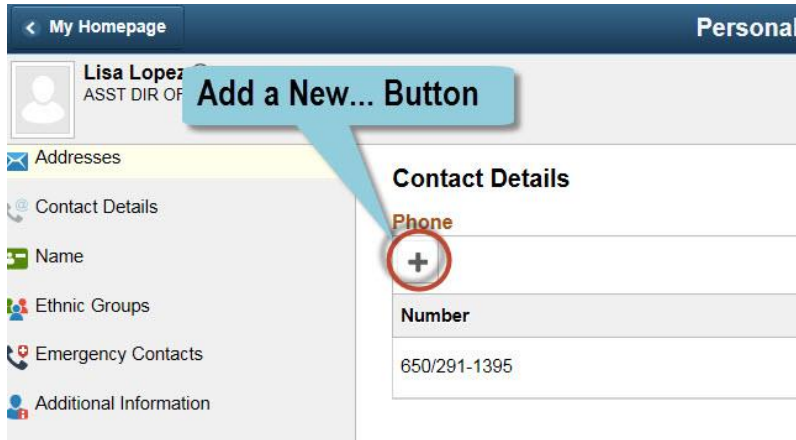
Here's an example of a page that displays after you have clicked an Add button:
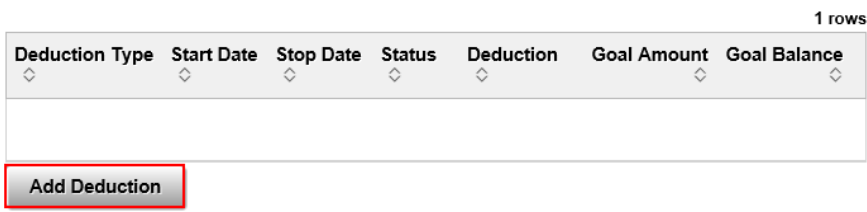
Procedure
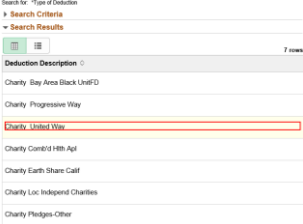
Step	Action
1.	This topic demonstrates how to use Add buttons to add new and/or additional information to grids on fluid pages.

Step	Action
2.	Here is an example of an **Add** button that displays when the grid in the information panel of a fluid page is empty. In this example, you will add a voluntary deduction. Note: Adding voluntary deductions is covered fully in the ePay portion of Employee of Self Service training.

Step	Action
3.	You have navigated to the Voluntary Deduction list page: Employee Self Service > Payroll > Payroll Self Service > Voluntary Deductions. You currently have no voluntary deductions. Use the **Add Deduction** button to begin the process of adding a voluntary deduction. Click the **Add Deduction** button.
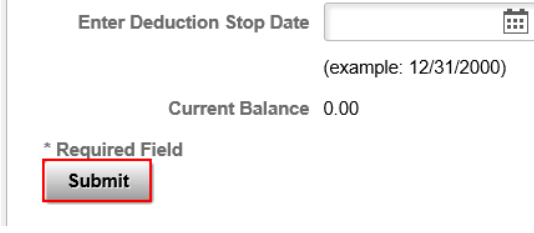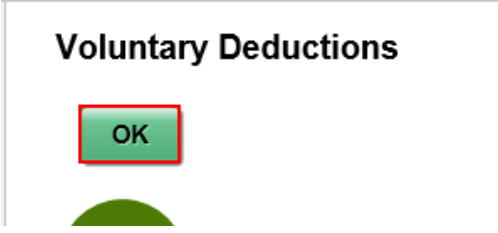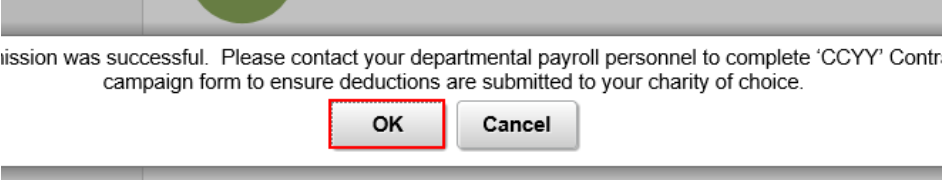
Step	Action
4.	Click the **Look up *Type of Deduction** button. **Voluntary Deductions** *Type of Deduction [🔍]
5.	Click the **Charity United Way** object. Search for: *Type of Deduction ▶ Search Criteria ▼ Search Results 7 rows Deduction Description Charity Bay Area Black UnitFD Charity Progressive Way Charity United Way Charity Comb'd Hlth Apl Charity Earth Share Calif Charity Loc Independ Charities Charity Pledges-Other
6.	Click in the **Enter Amount** field. Use this field to indicate the amount you want deducted from your pay each month for this deduction. **Voluntary Deductions** *Type of Deduction [Charity United Way × 🔍] Flat Amount Amount *Enter Amount [ ]
7.	Enter the desired information into the **Enter Amount** field. Enter "**25**". *Type of Deduction [Charity United Way 🔍] Flat Amount Amount *Enter Amount [ ]

Step	Action
8.	Click in the **Take deduction until I reach this Goal Amount** field. Use this field to indicate the total amount you want to contribute as part of this deduction. **Voluntary Deductions** *Type of Deduction Charity United Way Flat Amount Amount *Enter Amount 25 Take deduction until I reach this Goal Amount
9.	Enter the desired information into the **Take deduction until I reach this Goal Amount** field. Enter "**500**". **Voluntary Deductions** *Type of Deduction Charity United Way Flat Amount Amount *Enter Amount 25 Take deduction until I reach this Goal Amount *Enter Deduction Start Date
10.	Click in the **Enter Deduction Start Date** field. Use this field to indicate the date on which you want the deduction to start. **Voluntary Deductions** *Type of Deduction Charity United Way Flat Amount Amount *Enter Amount 25 Take deduction until I reach this Goal Amount 500 *Enter Deduction Start Date
11.	Enter the desired information into the **Enter Deduction Start Date** field. Enter "**2/15/2017**". Flat Amount Amount *Enter Amount 25 Take deduction until I reach this Goal Amount 500 *Enter Deduction Start Date

Step	Action
12.	The deduction must be processed by the payroll staff. Click the **Submit** button. Enter Deduction Stop Date [_____] 📅 (example: 12/31/2000) Current Balance 0.00 * Required Field [**Submit**]
13.	**Note**: because the deduction must be processed by the payroll staff or because the current payroll may already be in process, the deduction may not show up in your net paycheck. Click the **OK** button. **Voluntary Deductions** [**OK**]
14.	Click the **OK** button. ...ission was successful. Please contact your departmental payroll personnel to complete 'CCYY' Contr... campaign form to ensure deductions are submitted to your charity of choice. [**OK**] [**Cancel**]
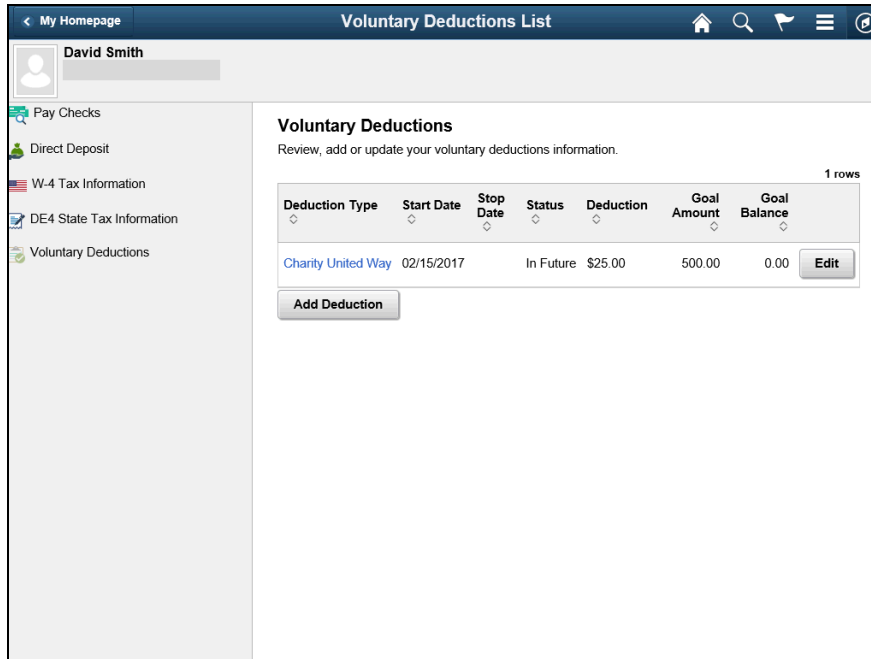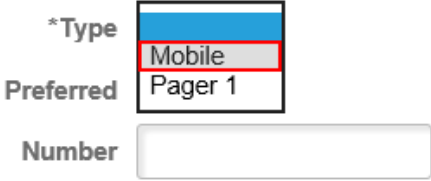
Step	Action
15.	Note the **Voluntary Deductions** grid now displays the deduction information you just entered. You can use the **Add Deduction** button to add additional deductions of the same or other types.
16.	Here is an example of an **Add** button when the grid on the fluid page contains data. In this case, you will add an additional value. In this example, you will add additional phone number. Adding phone information is covered in the eProfile portion of Employee Self Service training.
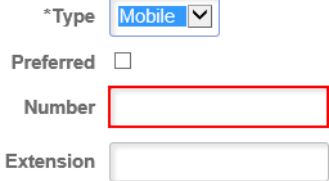
Step	Action
17.	You have navigated to the **Contact Details** portion of the **Personal Details** page: Employee Self Service > Personal Details tile > Contact Information. Currently you have two phone numbers listed. You will use the **Plus (Add Phone)** button to add an additional phone number. Click the **Add Phone** button.
18.	Click the **Type** list.

Step	Action
19.	Click the **Mobile** list item.
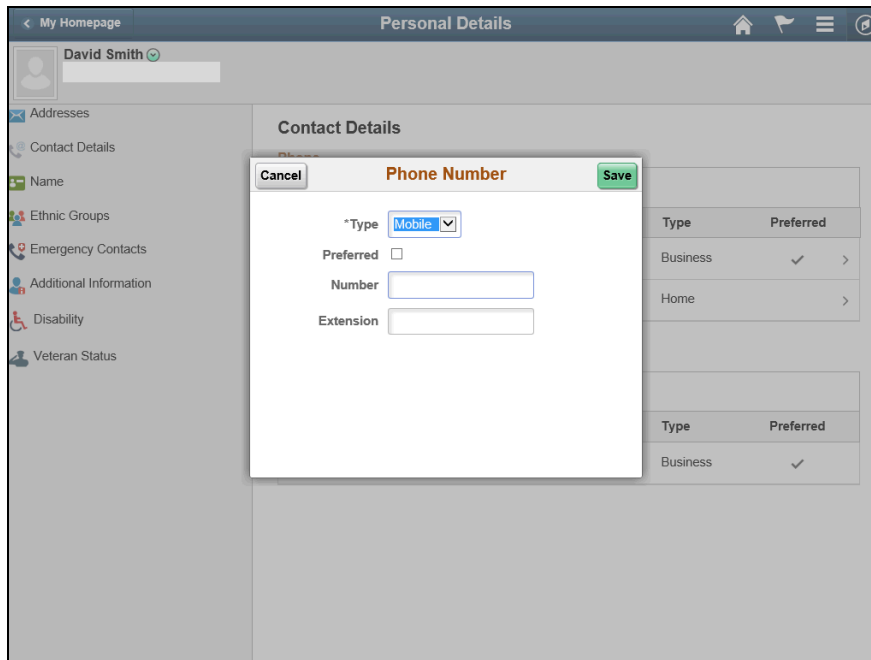
Step	Action
20.	Click in the **Number** field.

Step	Action
21.	Enter the desired information into the **Number** field. Enter "**925/556-2112**". *Type Mobile Preferred ☐ Number [ ] Extension [ ]
22.	Click the **Save** button. Cancel **Phone Number** Save *Type Mobile Preferred ☐ Number 925/556-2112 × Extension [ ]
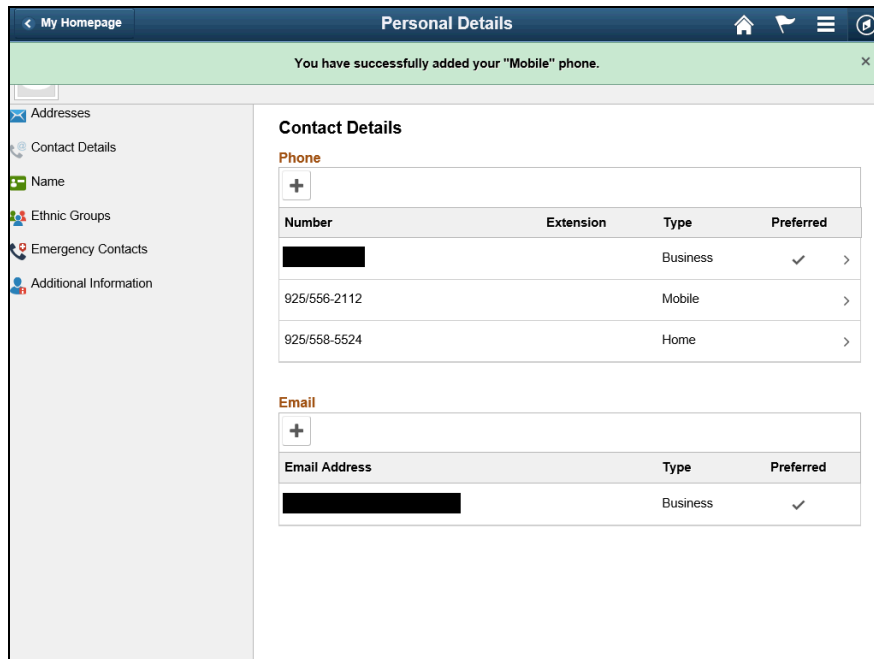
Step	Action
23.	Notice the system issues a message across the top of the page indicating that you have successfully added your mobile phone. Also notice that the **Phone** grid now lists three phone types including the phone you just added.

Step	Action
24.	**End of Procedure.**

Using Check Boxes and Radio Buttons

Some fluid pages contain fields that require you to select a check box to select a value or an option. Check boxes in fluid work the same way they do in Classic PeopleSoft pages. Click an unselected Check box to select it. If a check box is selected, click it to unselect it.

Here's an example of a field that uses a check box:
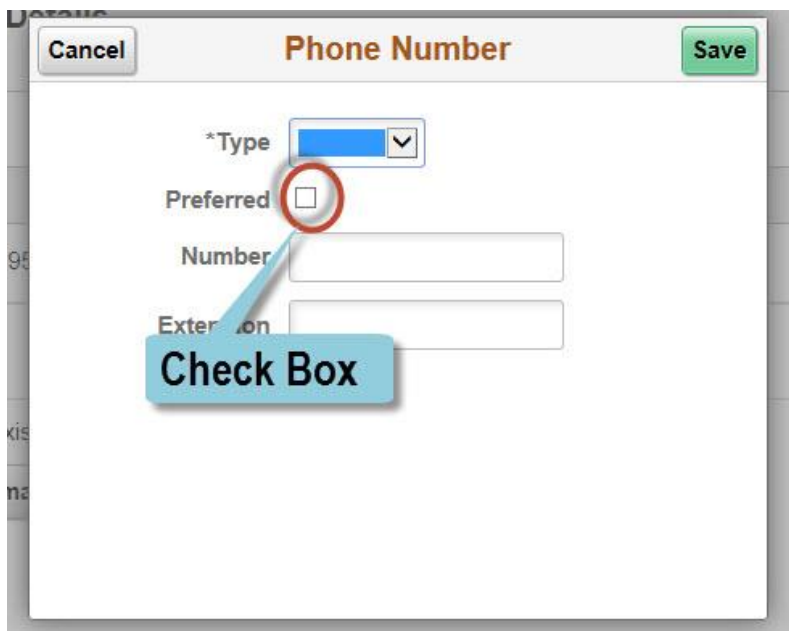
This check box is not selected. Click the Check box to select it.

Here's an example of a field with a check box that is selected:
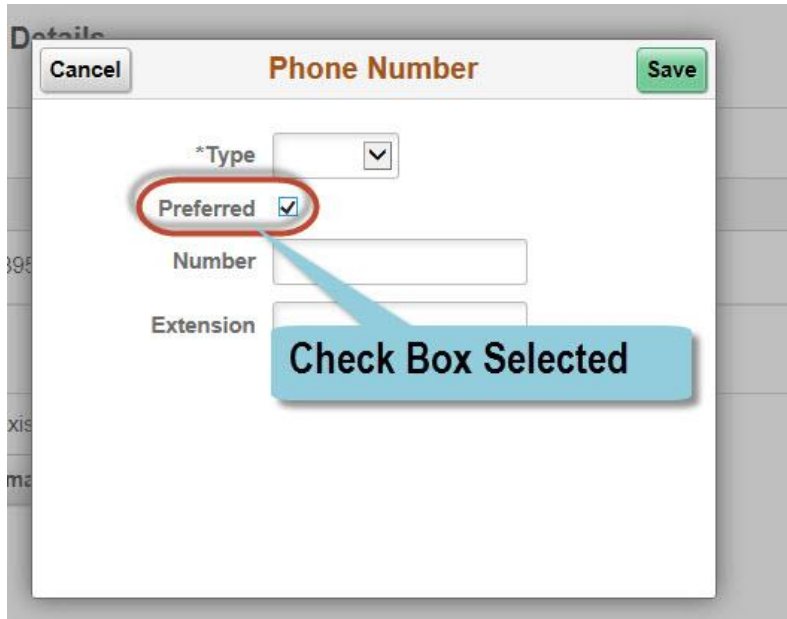
Click the Check

Procedure
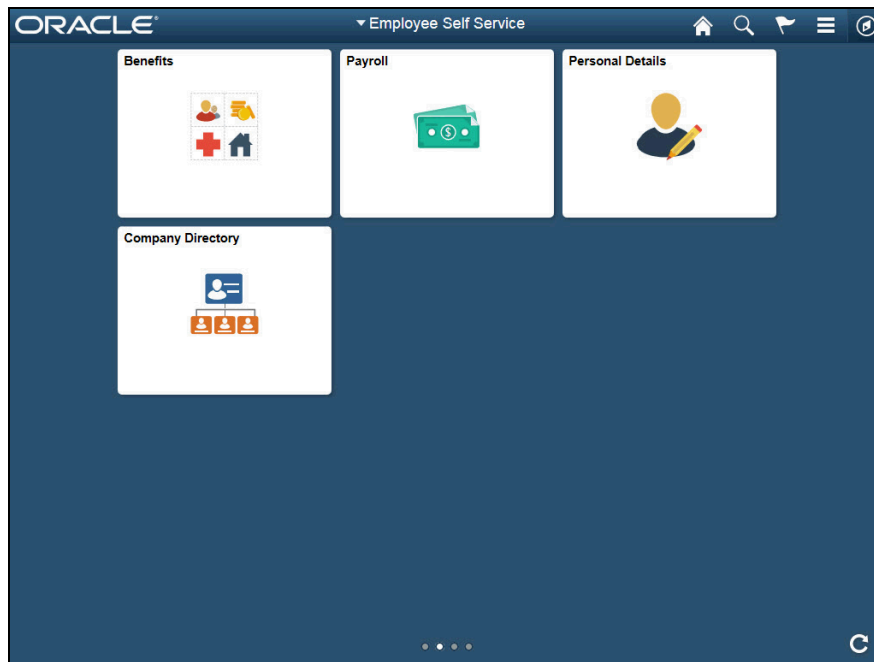
Step	Action
1.	This topic covers the use of check boxes and Radio buttons to select values and options.
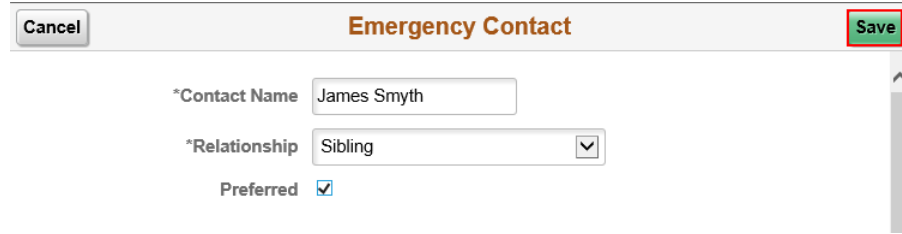
Step	Action
2.	This example demonstrates how to use a check box to select a value. You will use a check box to indicate that an emergency contact is your preferred emergency contact.

Step	Action
3.	You have navigated to the **Emergency Contact** page for emergency contact James Smyth and will mark this contact as your preferred contact: **Employee Self Service > Personal Details Tile > Emergency Contact**. Click the **Preferred** option.

Step	Action
4.	Click the **Save** button.
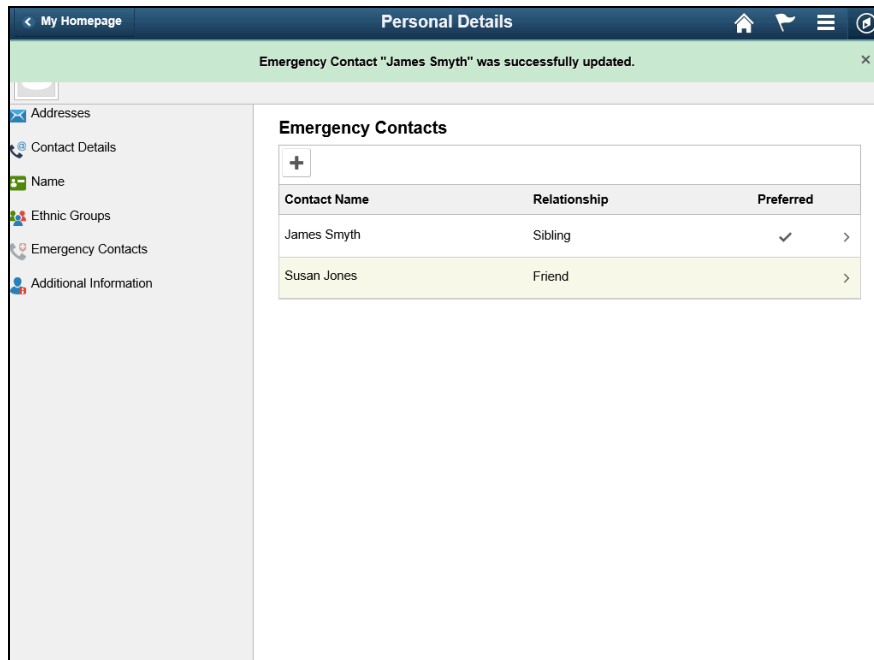
Step	Action
5.	Notice the system displays a confirmation message indicating that you successfully updated James Smyth. Also notice that James Symth is your preferred contact.
6.	This portion of the topic demonstrates how to deselect a check box and how to use a Radio button. Radio buttons present mutually exclusive options. You cannot select multiple Radio buttons in a group.

Step	Action
7.	For this example you navigated the **Veteran Status** page and scrolled to the **Self-Identification** section of that page: Employee Self Service > Personal Details Tile > Veteran Status.

This section contains four radio buttons. The first radio button has four check boxes under it. |

Step	Action
8.	Notice that the **Disabled Veteran** check box is selected. For this example, you will deselect it. Click the **Disabled Veteran** check box. ![Self-Identification section with Disabled Veteran checkbox selected](image)

Step	Action
9.	Notice the **Disabled Veteran** check Box is no longer selected. You will now select the **Active Duty Wartime or Campaign Badge Veteran** check box. Click the **Active Duty Wartime or Campaign Badge Veteran** check box.
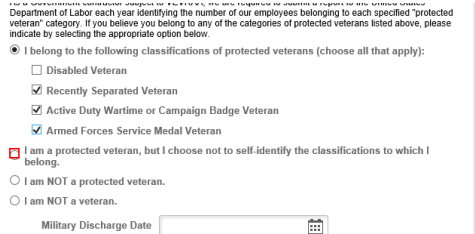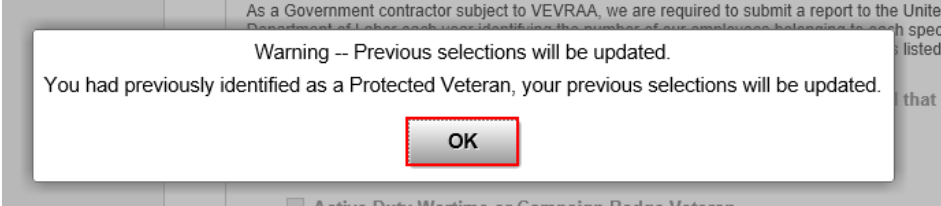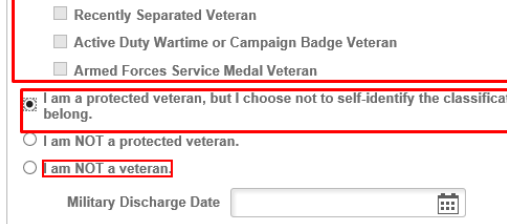
Step	Action
10.	Notice the **Active Duty Wartime or Campaign Badge Veteran** check box is now selected. Note it is possible to select multiple check boxes. For this example, you will select two other check boxes: -- **Recently Separated Veteran** -- **Armed Forces Service Medal Veteran**

Step	Action
11.	Click the **Recently Separated Veteran** check box.
12.	Click the **Armed Forces Service Medal Veteran** check box.

Step	Action
13.	Notice, three check boxes are now selected under the top level Radio button option. Next you will select a different Radio button.

Step	Action
14.	Click the **I am a protected veteran, but I choose not to self-identify the c** option.
15.	Click the **OK** button.
16.	Notice your previous selections have been deselected and that the **I am a protected veteran.**... Radio button is now selected. Next you will select another Radio button. Click the **I am NOT a veteran.** option.

Step	Action
17.	Notice the previous selection has been deselected and the **I am NOT a Veteran Radio** button is now selected.
18.	**End of Procedure.**

Using Sliders

Some fluid pages use sliders to select options. Classic PeopleSoft pages do not use Sliders. Sliders work like check boxes; they are used to select a binary option—e.g., yes or no; selected or not selected. Click in the slider to change the selected option.
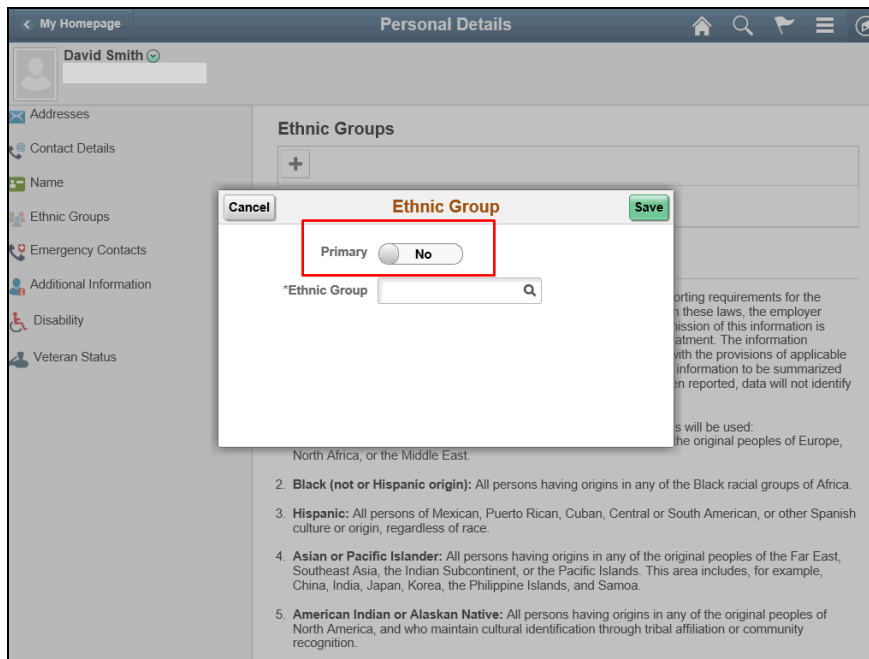
Here's an example of a slider with the No option selected:

Here's an example of a slider with the Yes option selected.

Contra Costa County
PeopleSoft Training

Procedure

Step	Action
1.	This topic demonstrates how to use sliders to select values/options.

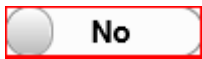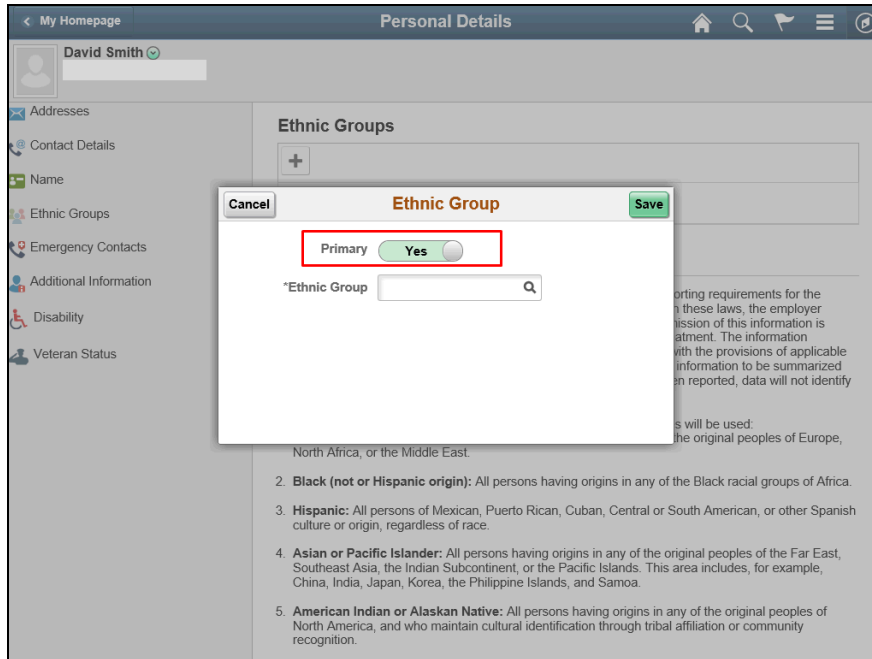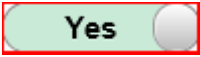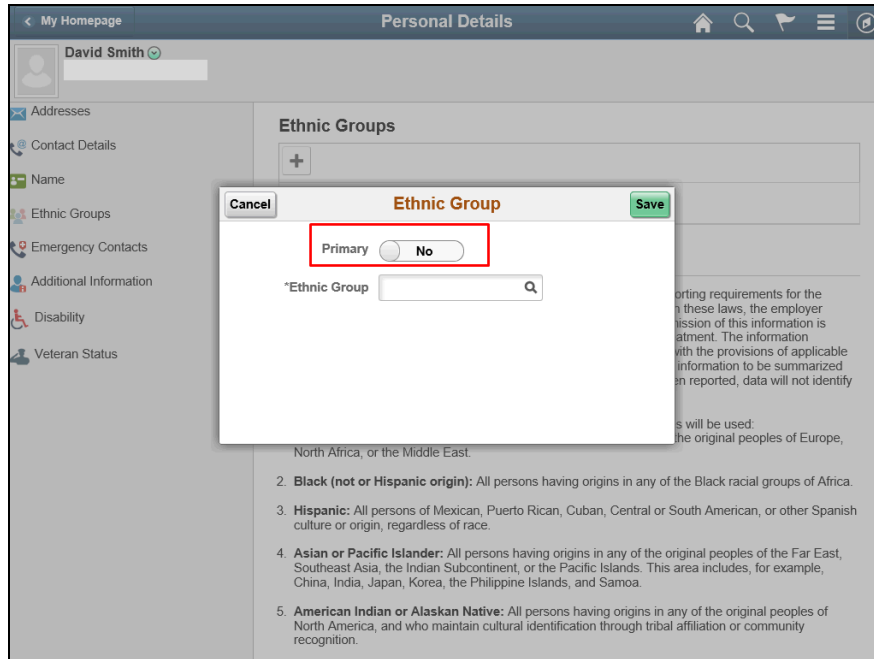| Step	Action
2.	Notice, the **Ethnic Group** page has a slider in the **Primary** field. You have navigated to the **Ethnic Group** page and are in the process of adding an ethnic group self identification: Employee Self Service > Personal Details tile > Ethnic Groups > Add an Ethnic Group button. Currently the option is set to "no". The ethnic group that you will add will not be your primary ethnic group. To change this selection, click the slider for the **Primary** field.
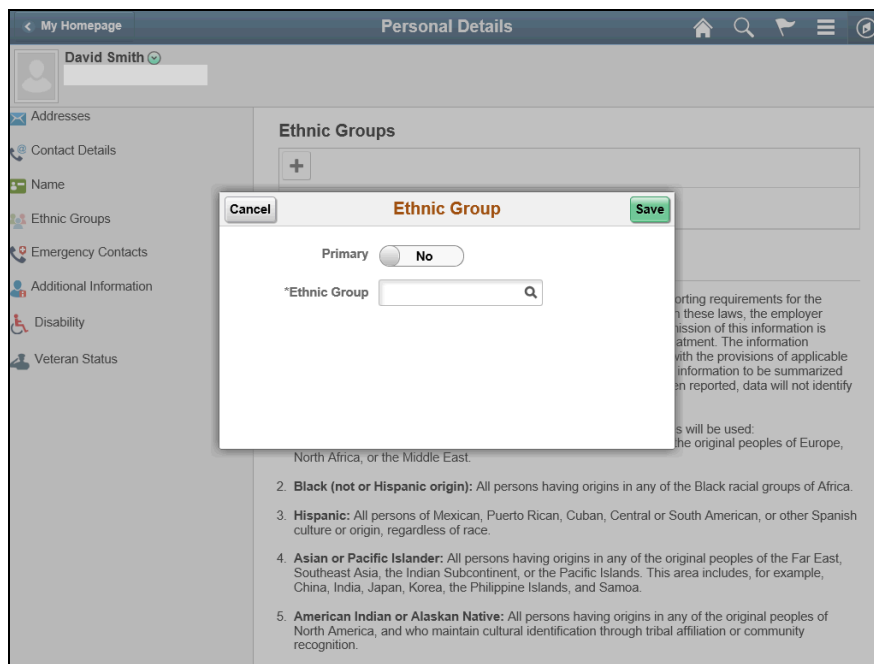
Step	Action
3.	Click the **Primary** option.

Step	Action
4.	Notice the slider for the **Primary** field now indicates "Yes". The ethnic group you are adding will be your primary ethnic group.
5.	To change your selection to "No", click the **Primary** option.

Step	Action
6.	Notice the slider in the **Primary** field now indicates "No". The ethnic group you are adding will not be your primary ethnic group.
7.	**End of Procedure.**

Entering dates

You can enter a date directly into a date field using any of the following formats:

2/15/2017

02/15/2017

02-15-2017

2-15-2017

2/15/17

02/15/17

2-15-17

02-15-17

The system will automatically change the date to 02/15/2017.

Here's an example of a date field:

Procedure
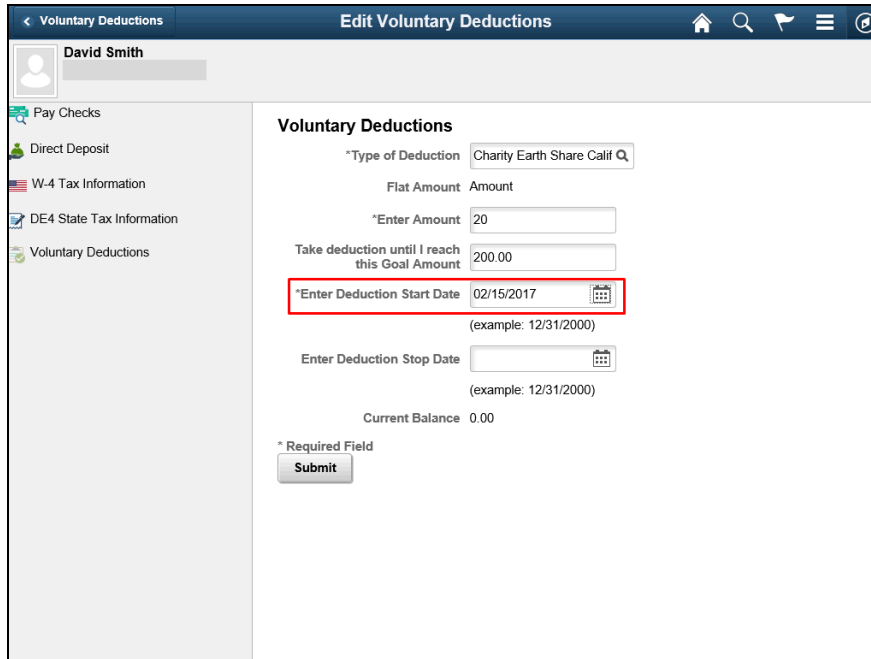
Step	Action
1.	This topic demonstrates how to enter a date in a Date field. You can enter a date using several different formats. The system will convert the date to the following format once you tab or click away from the **Date** field: MM/DD/YYYY February 15, 2017 will be saved as 02/15/2017. Dates must be entered using numbers. The date field will not accept alpha characters. The system will generate an error message if you use an invalid format. Click **Ok** on the error message box and use one of the formats demonstrated in this topic.

Step	Action
2.	For this topic, we will use the **Enter Deduction Start Date** field on the **Voluntary Deduction** page: Employee Self Service > Payroll Tile > Voluntary Deductions > Add Deduction.
3.	For this example you will enter the date as 2/15/2017.

Step	Action
4.	Click in the **Enter Deduction Start Date** field.
5.	Enter the desired information into the **Enter Deduction Start Date** field. Enter "**2/15/2017**".
6.	Press **[Tab]**.

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Step	Action
7.	Notice the system automatically changed the format of the date to 02/15/2017.
8.	For this example you will enter the date as 02/15/2017.
9.	Click in the **Enter Deduction Start Date** field.
10.	Enter the desired information into the **Enter Deduction Start Date** field. Enter "**02/15/2017**".
11.	Press **[Tab]**.

Step	Action
12.	Notice the system automatically changed the format of the date to 02/15/2017.
13.	For this example you will enter the date as 02-15-2017.
14.	Click in the **Enter Deduction Start Date** field. *Enter Deduction Start Date
15.	Enter the desired information into the **Enter Deduction Start Date** field. Enter "**02-15-2017**". *Enter Deduction Start Date
16.	Press **[Tab]**.

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Step	Action
17.	Notice the system automatically changed the format of the date to 02/15/2017.
18.	For this example you will enter the date as 2/15/17.
19.	Click in the **Enter Deduction Start Date** field.
20.	Enter the desired information into the **Enter Deduction Start Date** field. Enter "**2/15/2017**".
21.	Press **[Tab]**.

Step	Action
22.	Notice the system automatically changed the format of the date to 02/15/2017.
23.	For this example you will enter the date as 02/15/17.
24.	Click in the **Enter Deduction Start Date** field.
25.	Enter the desired information into the **Enter Deduction Start Date** field. Enter "**02/15/2017**".
26.	Press **[Tab]**.

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Step	Action
27.	Notice the system automatically changed the format of the date to 02/15/2017.
28.	For this example you will enter the date as 2/15/2017.
29.	Click in the **Enter Deduction Start Date** field.
30.	Enter the desired information into the **Enter Deduction Start Date** field. Enter "**02/15/17**".
31.	Press **[Tab]**.

Step	Action
32.	Notice the system automatically changed the format of the date to 02/15/2017.
33.	For this example you will enter the date as 2-15-17.
34.	Click in the **Enter Deduction Start Date** field. *Enter Deduction Start Date
35.	Enter the desired information into the **Enter Deduction Start Date** field. Enter "**2-15-17**". *Enter Deduction Start Date
36.	Press **[Tab]**.

Step	Action
37.	Notice the system automatically changed the format of the date to 02/15/2017.
38.	For this example you will enter the date as 02-15-17.
39.	Click in the **Enter Deduction Start Date** field.
40.	Enter the desired information into the **Enter Deduction Start Date** field. Enter "**02-15-17**".
41.	Press **[Tab]**.

Step	Action
42.	Notice the system automatically changed the format of the date to 02/15/2017.
43.	**End of Procedure.**

Using the Calendar button to select a date

Each date field in Fluid contains a Calendar button. You can use this button to select a date. The calendar button in fluid works the same as the calendar button on classic PeopleSoft pages.

Here an example of the Calendar button:

Change As Of	02/13/2017	📅
Address Type	Home	
Country	United States	🔍
Address 1	1000 Pine Drive	
Address 2		
Address 3		
City	Concord	
State	California	🔍
Postal	94518	
County	Contra Costa	

Clicking the Calendar button opens the Calendar window. You can use this window to select a date. This window works the same way as the calendar window on classic PeopleSoft pages.

Here is an example of the Calendar window:
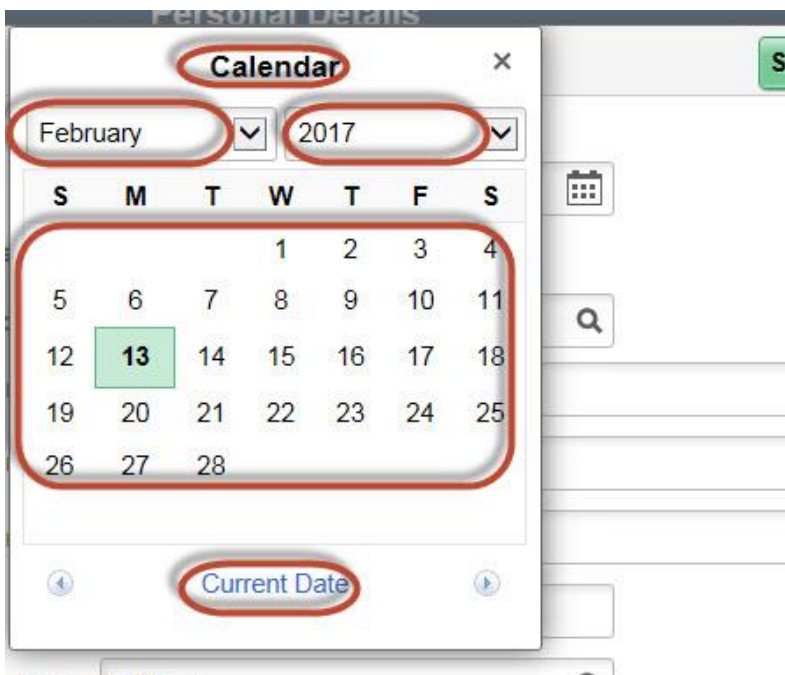
To use this window:

1. The current date is selected—in the example here February 13, 2017.
2. Use the month and year drop downs to select the month and year of the date you want to include in the date field

3. Click on the date in the calendar to select the day of the month
4. If you want to be sure that the date field will contain the current date, click the current date link
5. Once you have selected a day of the month, the calendar window will close and the date field will be populated with the date you have selected

Procedure

Step	Action
1.	This topic demonstrates how to use the **Calendar** or **Choose a Date** button to select a date.
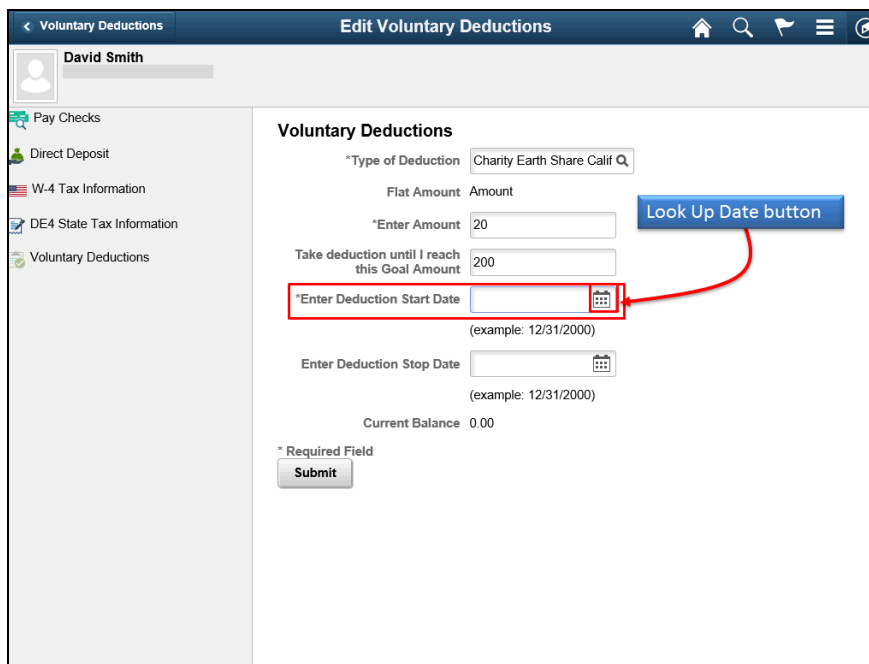
Step	Action
2.	For this topic, we will use the **Enter Deduction Start Date** field on the Voluntary deduction page: Employee Self Service > Payroll Tile > Voluntary Deductions > Add Deduction.
3.	First, you will use the **Choose a Date** button to select 3/15/2017.

Step	Action
4.	Click in the **Enter Deduction Start Date** field.

Step	Action
5.	Click the **Choose a date** button.

Step	Action
6.	The **Calendar** page displays. The current date is selected. For this example the current date is 2/22/2017.
7.	Begin by changing the month from February to March. Click the **Month** drop down. February
8.	Click the **March** list item. March

Step	Action
9.	Note: March now displays in the **Month** drop down. For this example you do not have to select a different year. If the date you want is in a different year from the current year (or the year displayed in the Year drop down, use the drop down to select the appropriate year. Next, select the day of the month. The current day (the 22nd) is currently selected. You must click on a day in the calendar in order to save the date you are entering.
10.	In this example, you want to select the 15th. Click **15.** 15

Step	Action
11.	Notice the **Calendar** page closes and the date you selected, 3/15/2017, now displays in the **Enter Deduction Start Date f**ield.
12.	Next, you will use the **Choose a Date** button to change the date you just selected back to the current date, 2/2/2017.
13.	Click the **Choose a date** button.

Step	Action
14.	The **Calendar** page currently displays 3/15/2017, the date you just selected. You can use the **Current Date** link to select the current date.
15.	Click the **Current Date** link. Current Date

Step	Action
16.	Notice the **Enter Deduction Start Date** field now displays the current date, for this example 2/22/2017.
17.	**End of Procedure.**

Entering Phone Numbers

You can enter phones in the following formats:
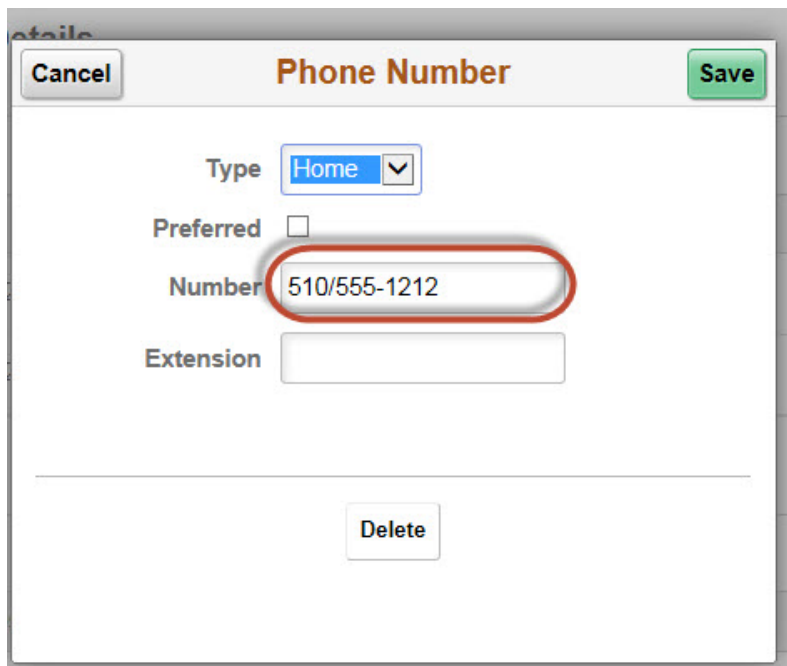
555-555-1212

555/555-1212

The system changes the format to 555/555-1212

These fields function just like phone number fields in Classic PeopleSoft pages.

Here is an example of a phone number field.

Procedure

Step	Action
1.	This topic demonstrates how to enter phone numbers. You can use either of two formats: xxx-xxx-xxxx or xxx/xxx-xxxx.

Step	Action
2.	First you will enter a phone number using the following format: xxx-xxx-xxxx Sample: 555-555-1212
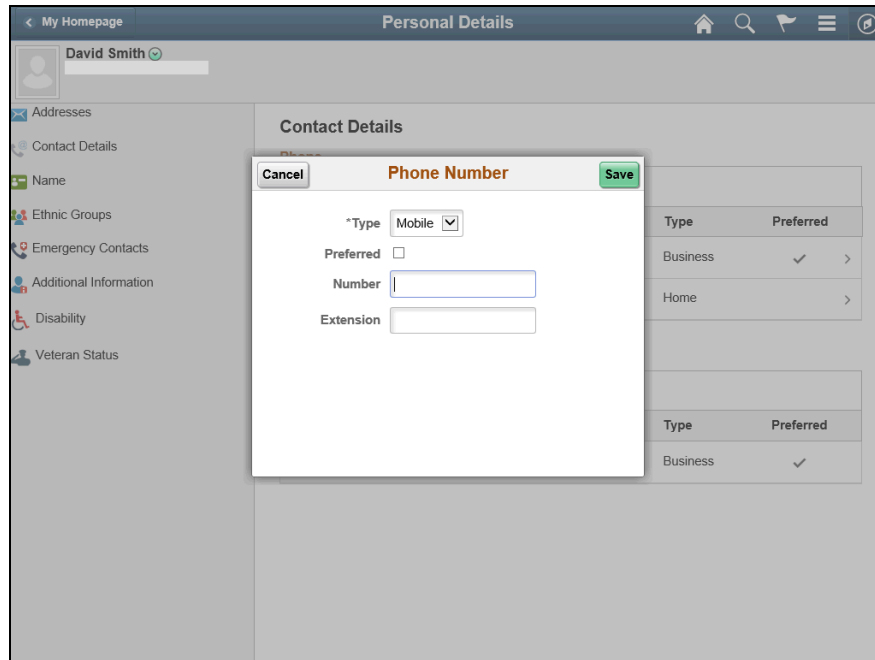
Step	Action
3.	Click in the **Number** field. Number
4.	Enter the desired information into the **Number** field. Enter "**555-555-1212**". Number
5.	Click in the **Extension** field. Extension
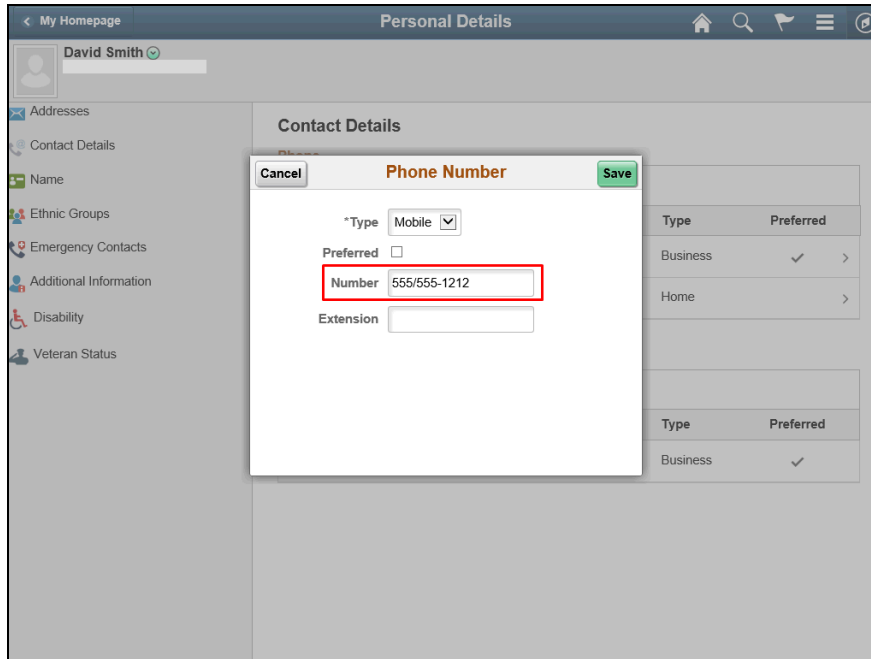
Step	Action
6.	Note the system automatically changed the format of the phone number to 555/555-1212.
7.	Next you will enter the phone number using the following format: xxx/xxx-xxxx Sample: 555/555/1212
8.	Click in the **Number** field. Number
9.	Enter the desired information into the **Number** field. Enter "**555/555-1212**". Number │
10.	Click in the **Extension** field. Extension
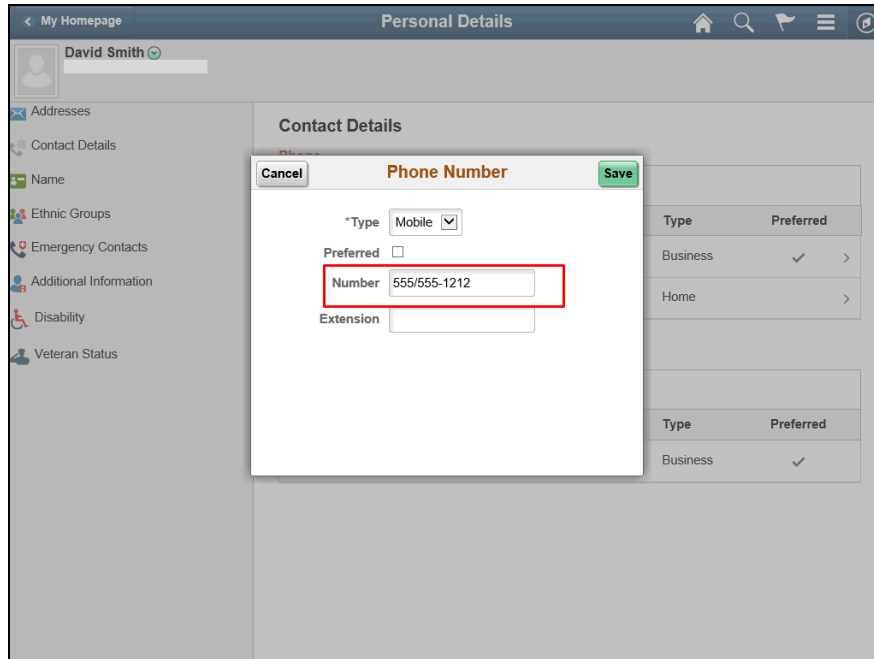
Step	Action
11.	Notice the system maintained the format you used to enter the phone number, the standard format for PeopleSoft.
12.	**End of Procedure.**

Working with Fluid Grids

Data in Fluid pages is often displayed in a grid. This is true for many displays of data in the information panel of a fluid page and in search results on Look Up pages.

Here is an example of a fluid grid:

Here is an example of a grid on a lookup page:

Procedure

Step	Action
1.	Click the **Payroll** tile.
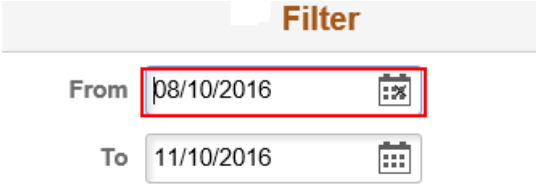
Step	Action
2.	The **Pay Check** page displays. This page currently displays your four most recent pay checks. These checks cover the period between 8/10/2016 and 11/10/2016. You can use the **Filter** button and the **Sort Arrows** to change what information is displayed in the grid and the order in which it is displayed.

Step	Action
3.	For this example, you will first select to view all pay checks issued between 10/1/2016 and 11/10/2016.
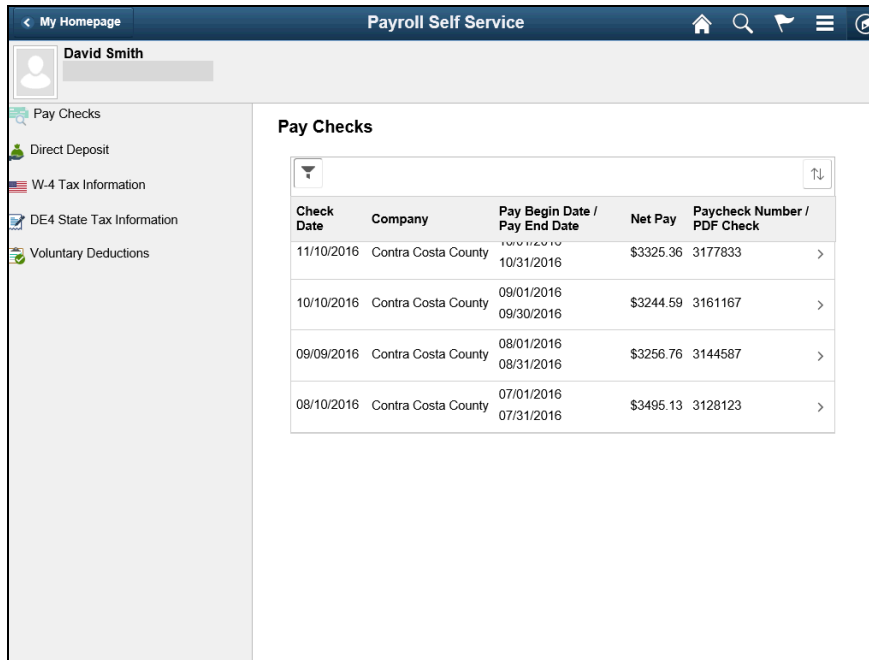
Step	Action
4.	Click the **Filter** button.
5.	Click in the **From** field.
6.	Enter the desired information into the **From** field. Enter "**10/1/2016**".
7.	Click the **Done** button.
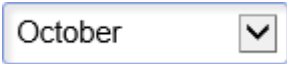
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Step	Action
8.	Notice, the grid now displays only two checks, those issued on 11/10/2016 and 10/10/2016. These checks fall within the date range you set on the **Filter** page. Next, you will set a filter to display all checks issued between July 1, 2016 and November 10, 2016.
9.	Click the **Filter** button.
10.	In this example you will use the calendar button to select a date for the **From** field. Click the **Choose a date** button.

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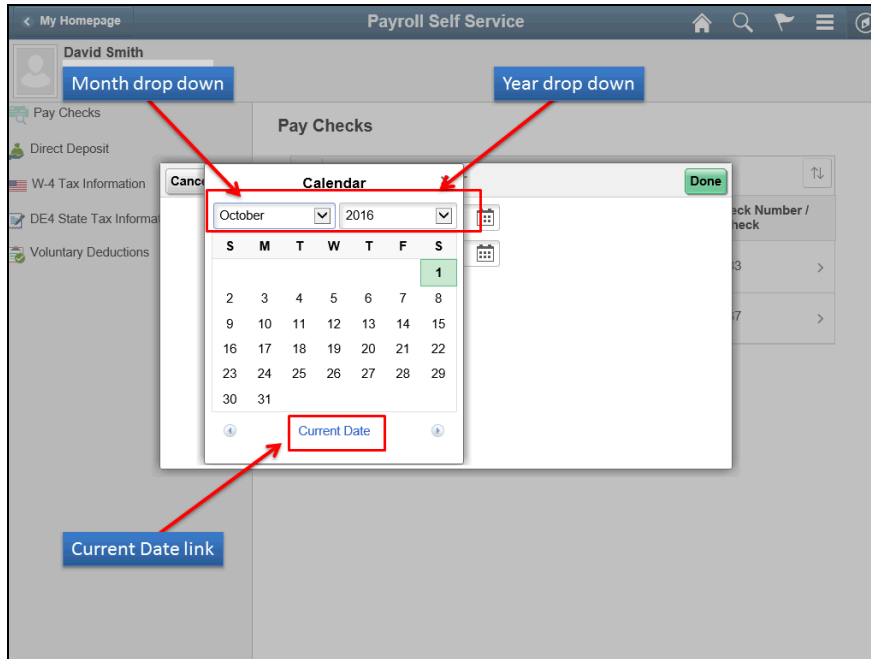
Step	Action
11.	Use the drop downs to select a month and. if necessary to change the year. Then select a date from the calendar. To select the current date, click the **Current Date** link.
12.	Click the **Month** list.
13.	Click the **July** list item.
14.	Click **1**.
15.	Note, the **From** field now populates with the date you selected. For this example, you do not need to change the date in the **To** field. Click the **Done** button.

Step	Action
16.	Next, you will use the sort arrows to change the order in which information is displayed in the grid.
17.	Click the **Grid Sort** button.

Step	Action
18.	The **Grid Sort** menu displays. You can sort the grid on any of the items lists in the **Grid Sort** menu. Each item acts as a toggle--sorting the grid in either ascending or descending order. Click on a menu item to sort the grid. For this example, you will first sort the grid on Net Pay. Currently the grid is sorted on Check Date (in descending order--the most recent date on the top).
19.	Click the **Net Pay** link. Net Pay
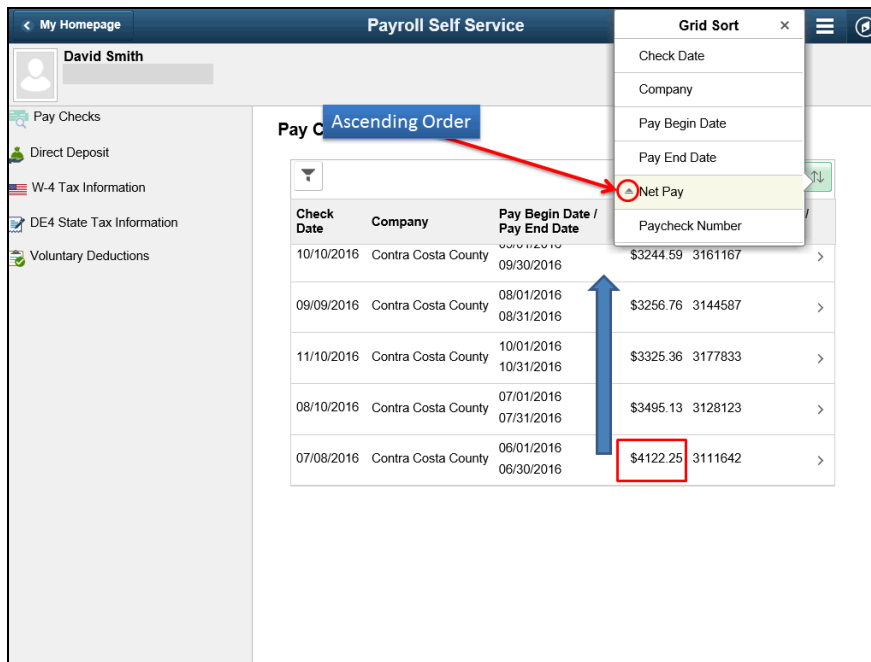
Step	Action
20.	Notice the grid is now sorted on Net Pay in ascending order--the largest net pay is on the bottom. You will toggle the sort order by clicking again on the **Net Pay** menu item.
21.	Click the **Net Pay** link. ▲ Net Pay
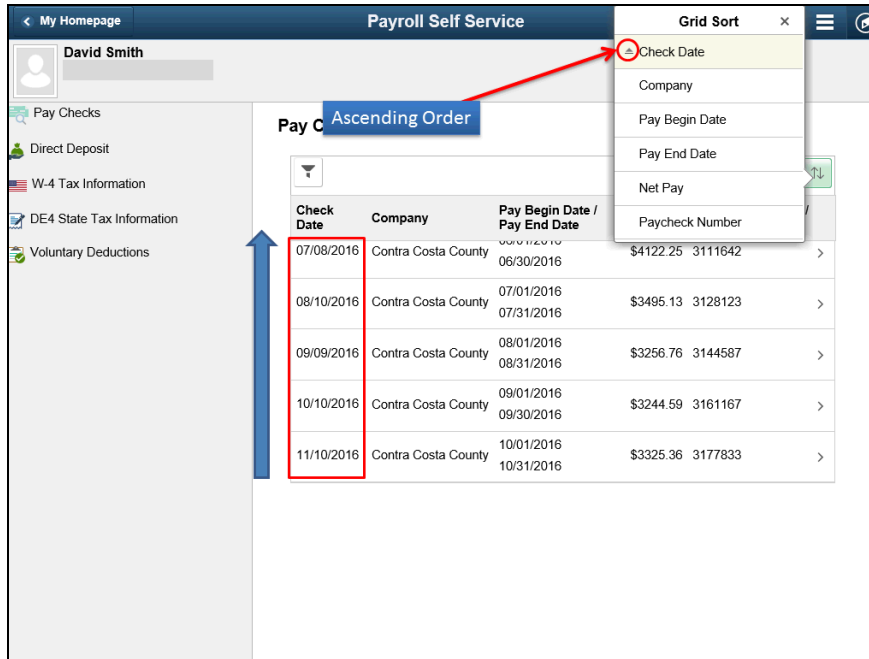
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Step	Action
22.	Notice the grid is now sorted in descending order based on Net Pay--the smallest net pay amount is on the button row of the grid.
23.	Next, you will sort the grid on Check date. Click the **Check Date** link. Check Date

Step	Action
24.	Notice the grid is now sorted in ascending order based on Check Date. Next you will toggle the sort to sort on Check Date in Descending order.
25.	Click the **Check Date** link. ▲ Check Date

Step	Action
26.	Notice the grid is now sorted with the most recent check at the top.
27.	Click the **Close** button. ❌
28.	Click the **Home** button. 🏠
29.	**End of Procedure.**

Using Save and Cancel Buttons

Save and Cancel button on Fluid pages work the same as Save or Cancel buttons on Classic pages.

Clicking a Save button saves (writes to the database) and information you have entered and opens a confirmation page or displays a confirmation message in the banner at the top of the fluid page. Clicking a cancel button discards any information you have entered and returns you to the previous page.
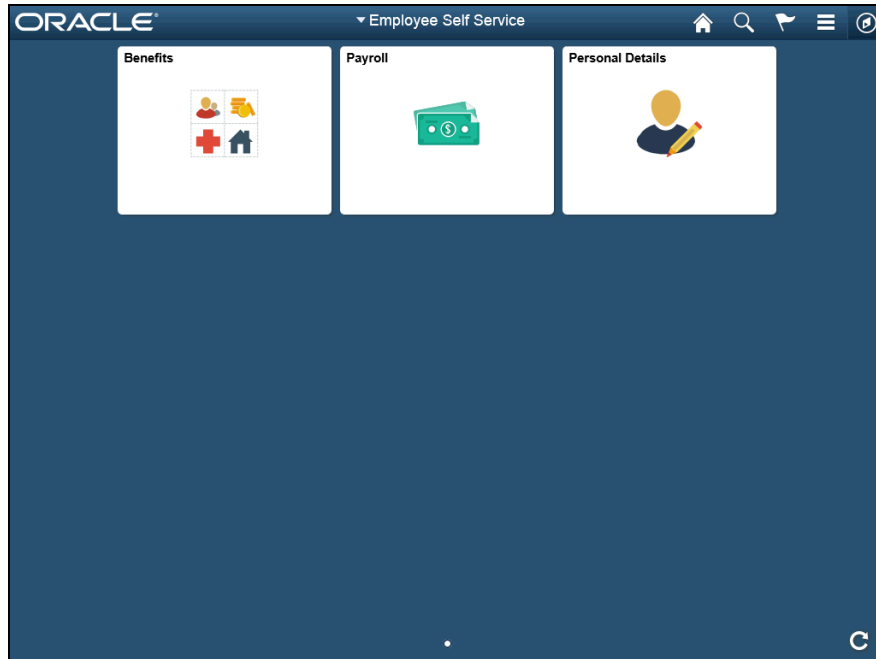
Here is an example of a Fluid page that has a Save and a Cancel button.
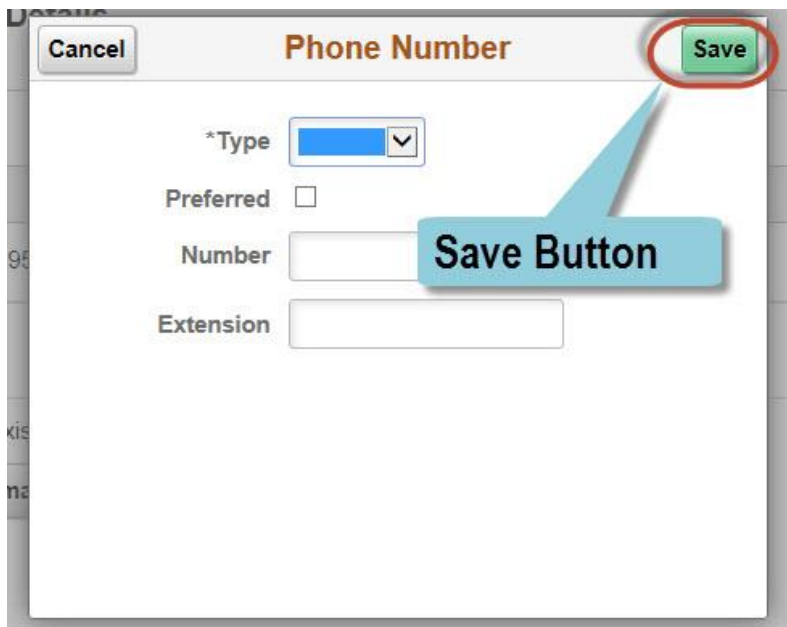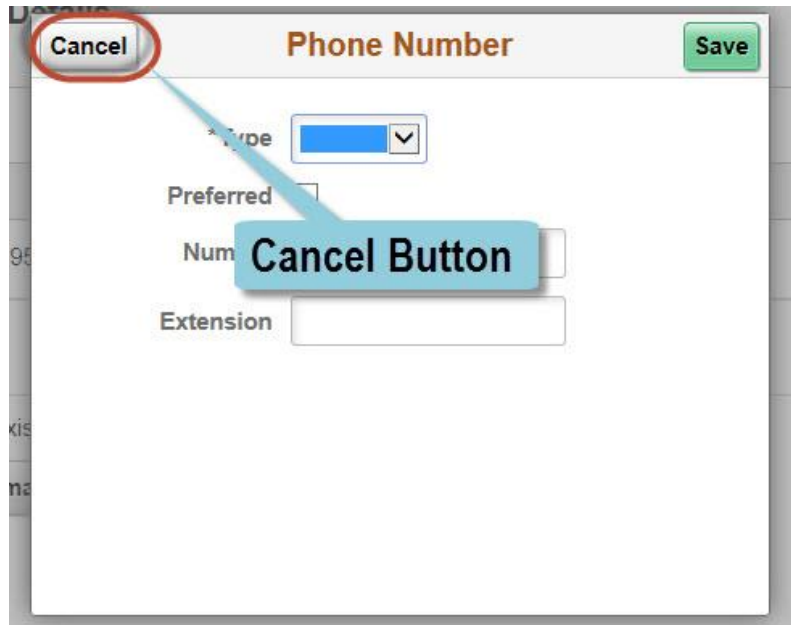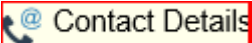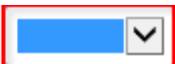
Procedure

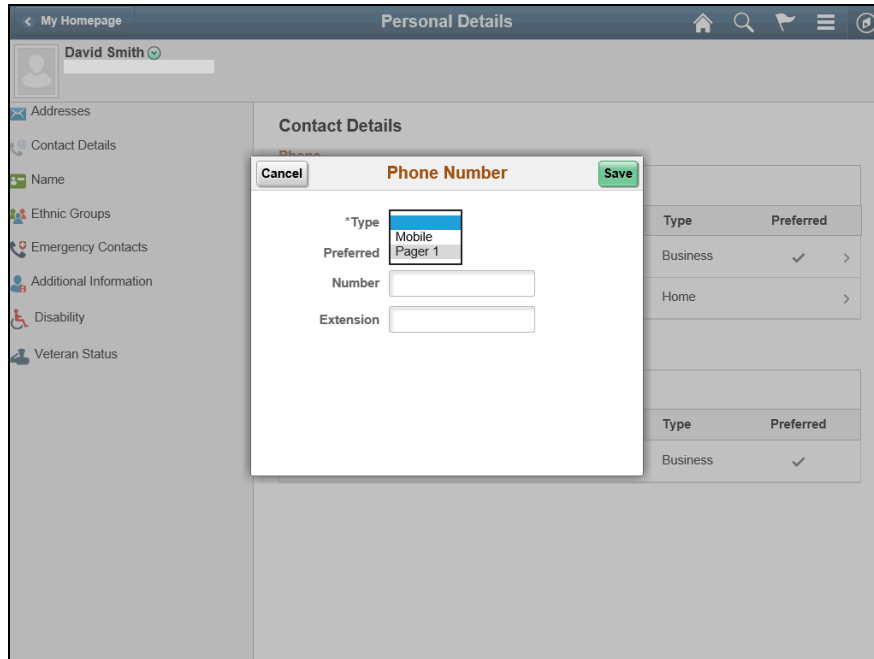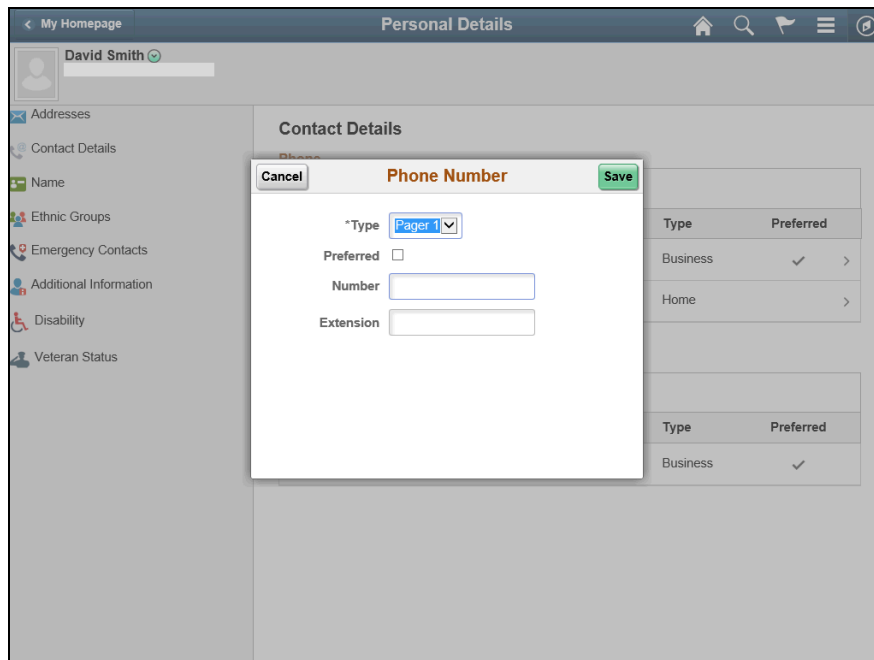| Step	Action
1.	This topic demonstrates how to use the **Cancel** and **Save** buttons.
2.	In the first example, you will begin to add a phone number and then decide to cancel. The information you entered is not saved or written to the database.

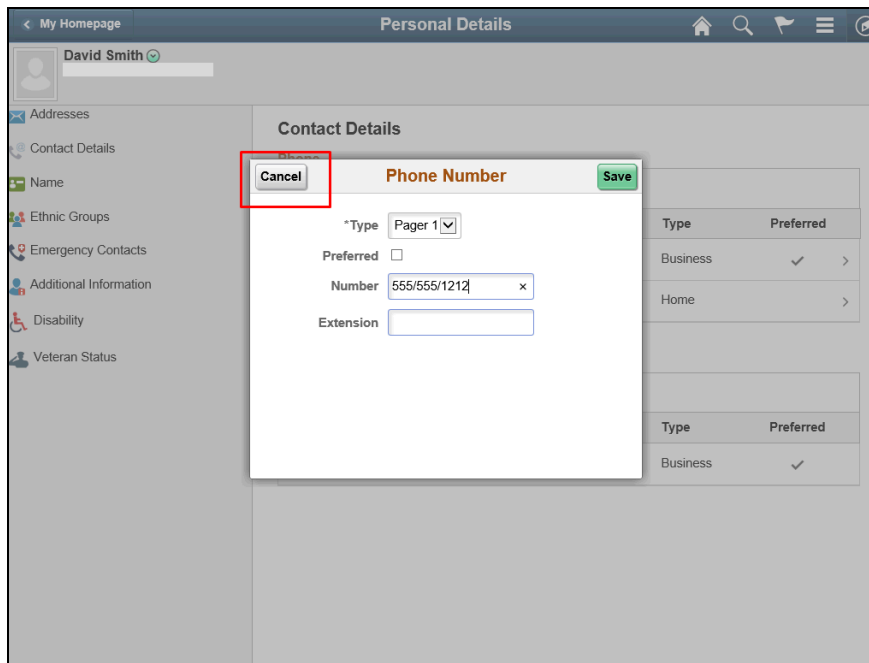| Step	Action
3.	You will navigate to the **Personal Details** page and then select **Contact Details** in the action panel. Click the **Personal Details** object.
4.	Click the **Contact Details** link. 📞@ Contact Details

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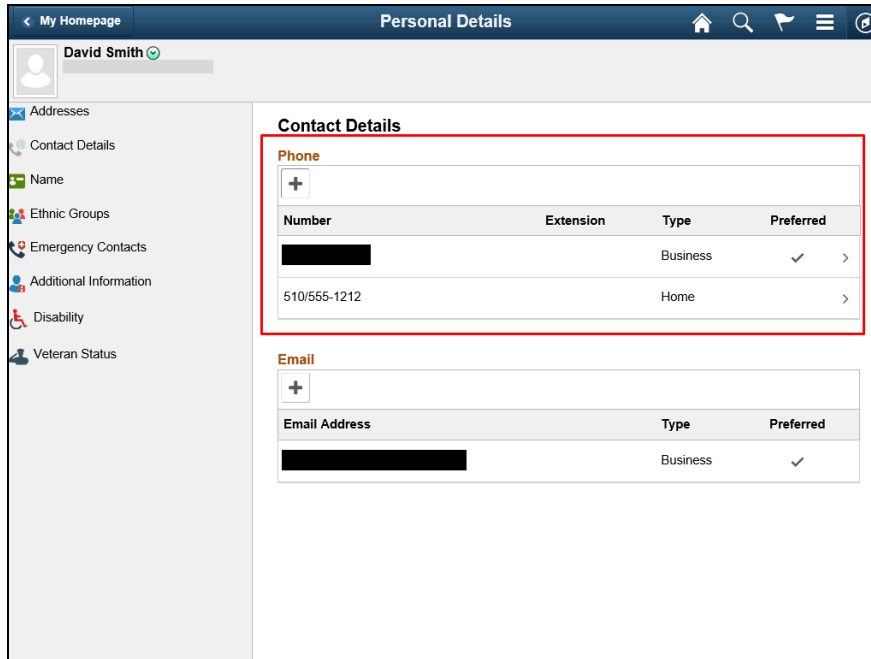
Step	Action
5.	Notice the **Phone** grid displays two phone numbers, a business phone and a home phone. You will start to add a third number, a pager.
6.	Click the **Add Phone** button to begin adding phone number information.
7.	Click the **Type** list.

Step	Action
8.	Click the **Pager 1** list item. Pager 1

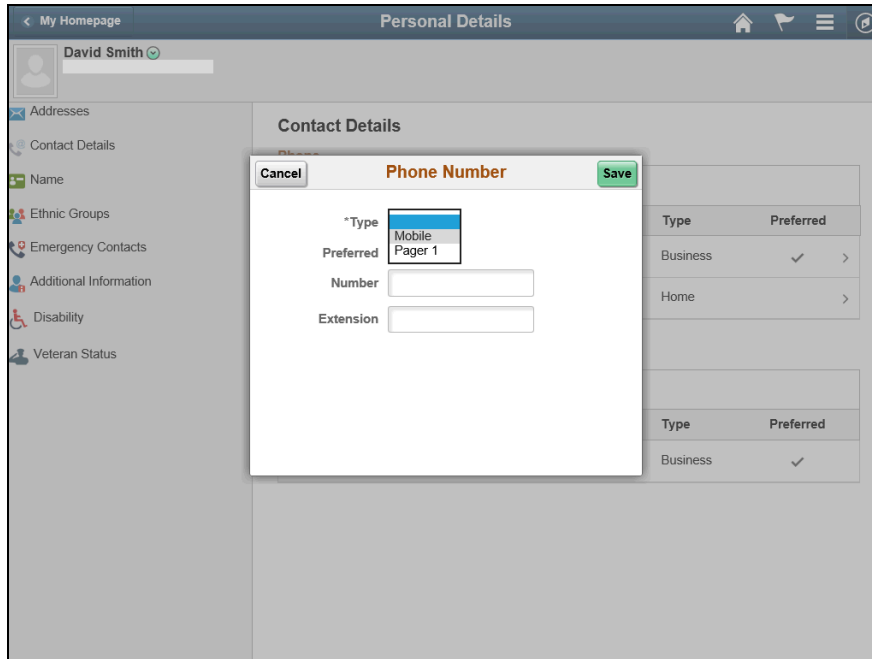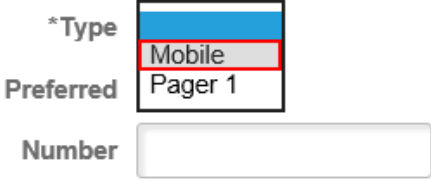| Step	Action
9.	Click in the **Number** field.
	Number
10.	Enter the desired information into the **Number** field. Enter "**555/555/1212**".
	Number

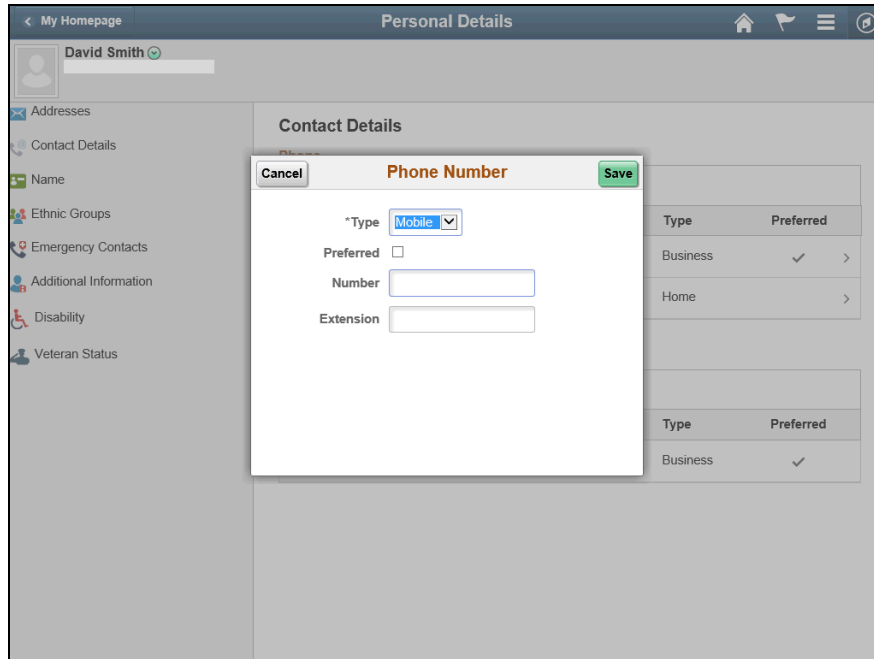| Step	Action
11.	You have decided not to add this phone. You will use the **Cancel** button to discard the information you just entered. The **Phone Number** page will close and you will be returned to the **Contacts Details** page.
12.	Click the **Cancel** button.
	Cancel

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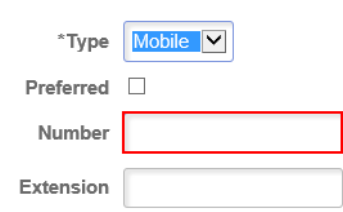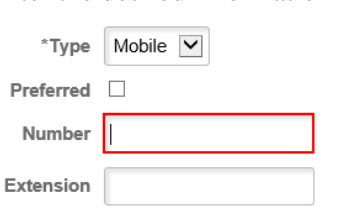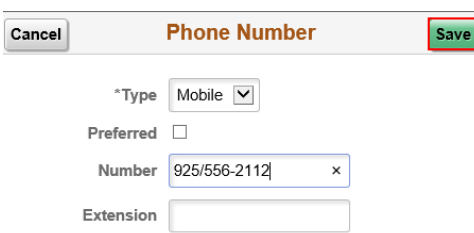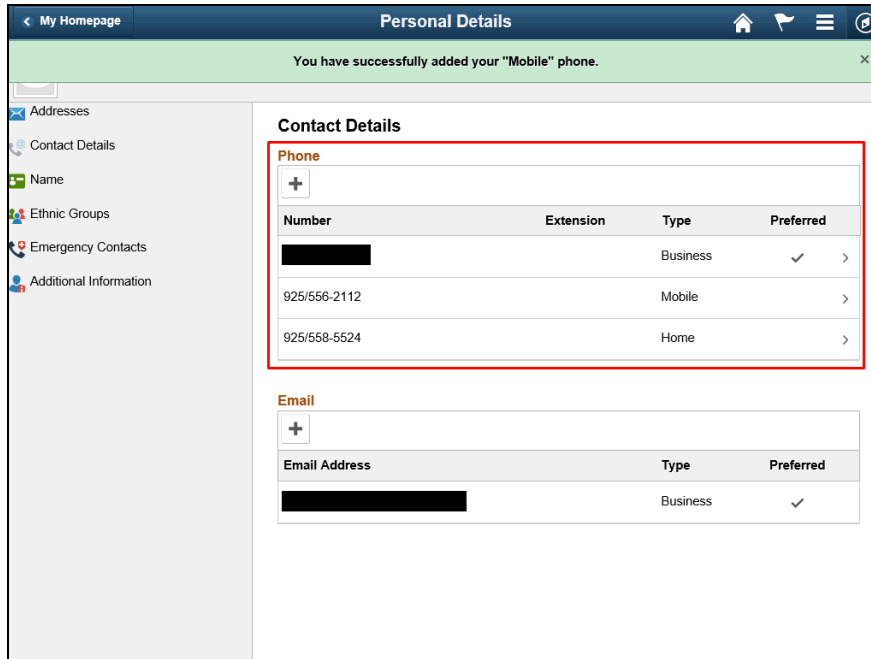| Step	Action
13.	Notice, the phone information you began to enter and then canceled was not saved. The **Phone** gird contains the same two phone numbers that it initially had.
14.	In this example, you will add and save a new phone to the **Phone** grid.
15.	Click the **Add Phone** button.
16.	Click the **Type** list.

Step	Action
17.	Click the **Mobile** list item.

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| Step	Action
18.	Click in the **Number** field. *Type [Mobile ▼] Preferred ☐ Number [_____] Extension [_____]
19.	Enter the desired information into the **Number** field. Enter "**925/556-2112**". *Type [Mobile ▼] Preferred ☐ Number [|_____] Extension [_____]
20.	Click the **Save** button. [Cancel] **Phone Number** [Save] *Type [Mobile ▼] Preferred ☐ Number [925/556-2112 ×] Extension [_____]

Step	Action
21.	Notice the system issues a message across the top of the page indicating that you have successfully added your mobile phone. Also notice that the **Phone** grid now lists three phone types.
22.	**End of Procedure.**

Using Confirmation pages

Confirmation pages in fluid display after you have added new data or have selected to delete data. These pages ask you to acknowledge that the data you have added has been submitted to the database. In some cases it may require further approval or processing before it is added to the permanent record in the database. A delete confirmation displays if you have opted to delete an item; this page asks you to confirm that you, in fact, want to delete the item.
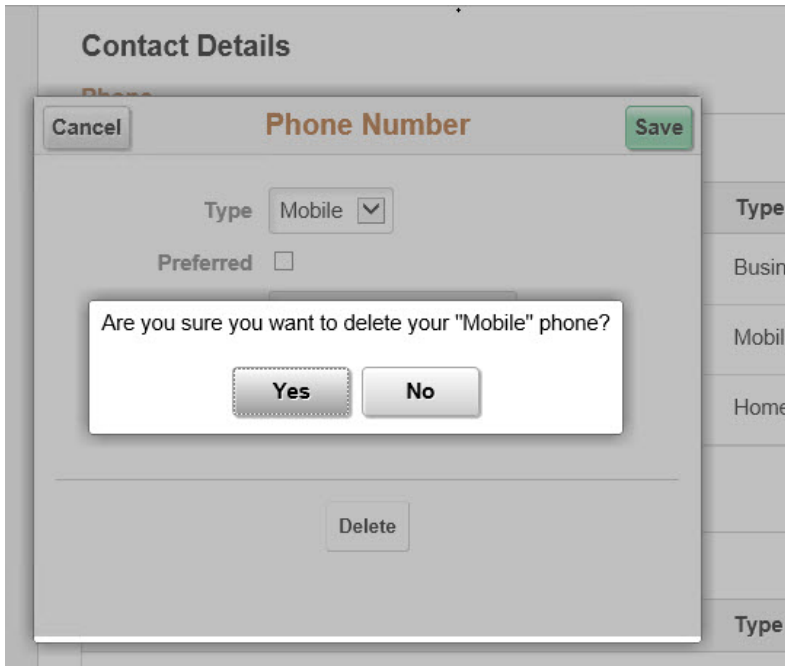
Here is an example of a page that confirms that your submission was successful.
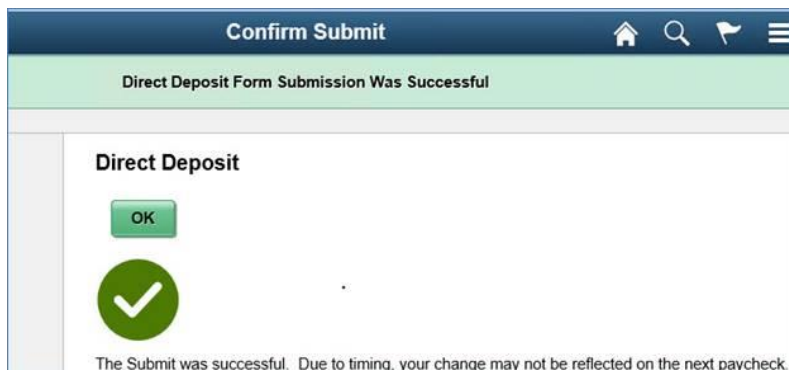
Click the OK button.

Here is an example of a page that asks you to confirm that you want to delete a phone number.

Click the Yes button to confirm the delete. Click the No button if you decide you do not want to delete the information.

Using Lookups

Some fields on fluid pages contain a lookup button ("magnifying glass").These buttons work the same as a lookup button on a classic PeopleSoft page. You use the button to display a list of valid values for the field.

Here's an example of a fluid field with a lookup icon.

When you click a lookup button the system displays a Lookup page that lists all valid values for the field. Here's an example of a lookup page:
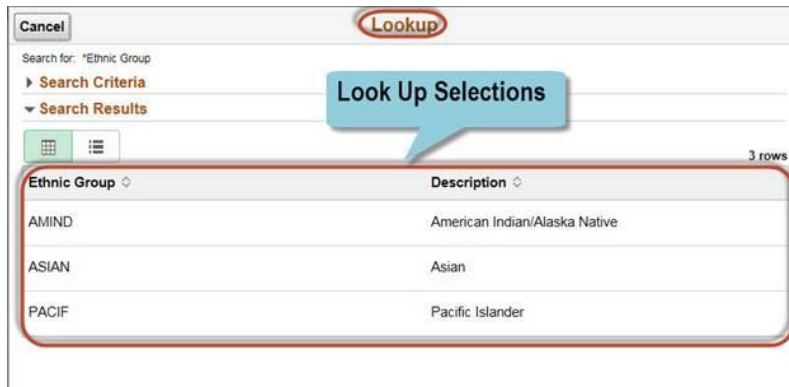
Values are displayed in a grid. Click on a value to select it. The selected value will populate the field.

Note: You can type directly in a field with a lookup icon. The search results will return all values that begin with the characters you typed in the field.

You can use the Search Criteria section (collapsed in the previous screen shot) to limit the values displayed if the number of values returned is large.

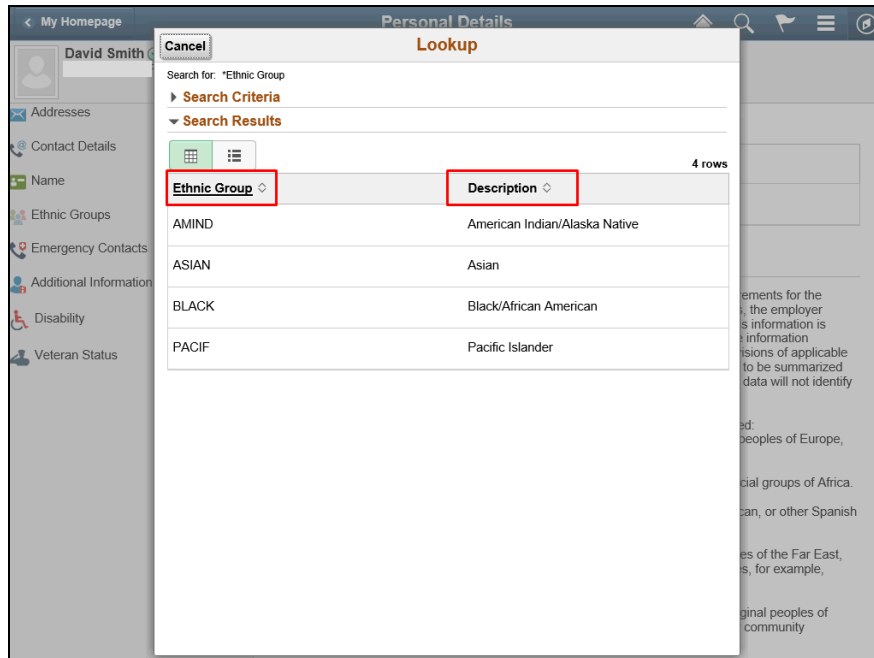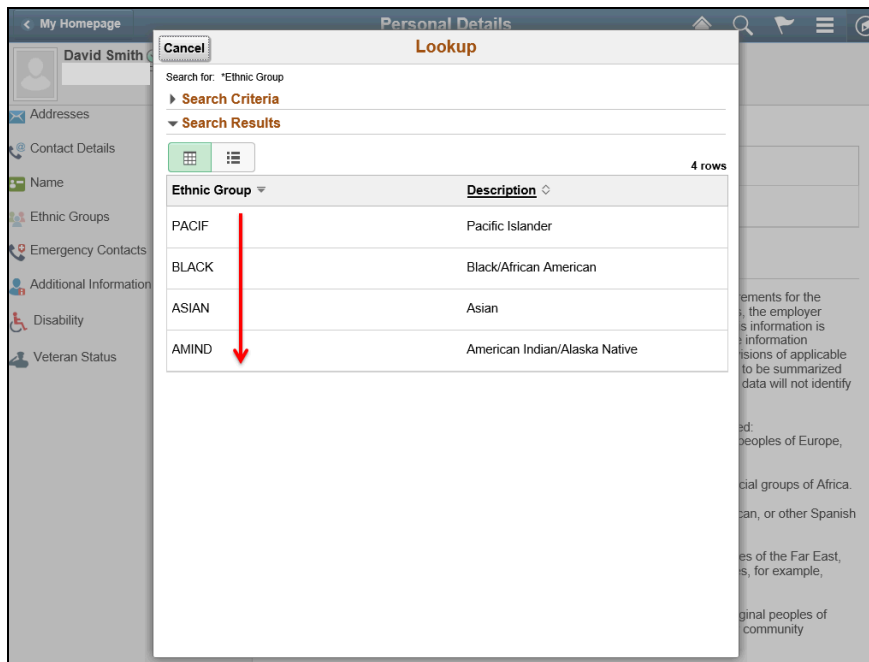Here's an example of a Lookup page with the search criteria expanded:
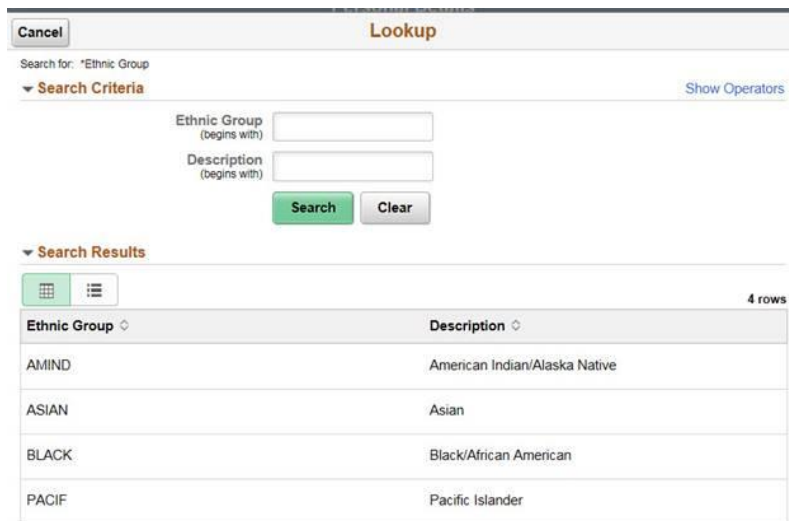
Procedure

Step	Action
1.	This topic demonstrates how to use lookups.
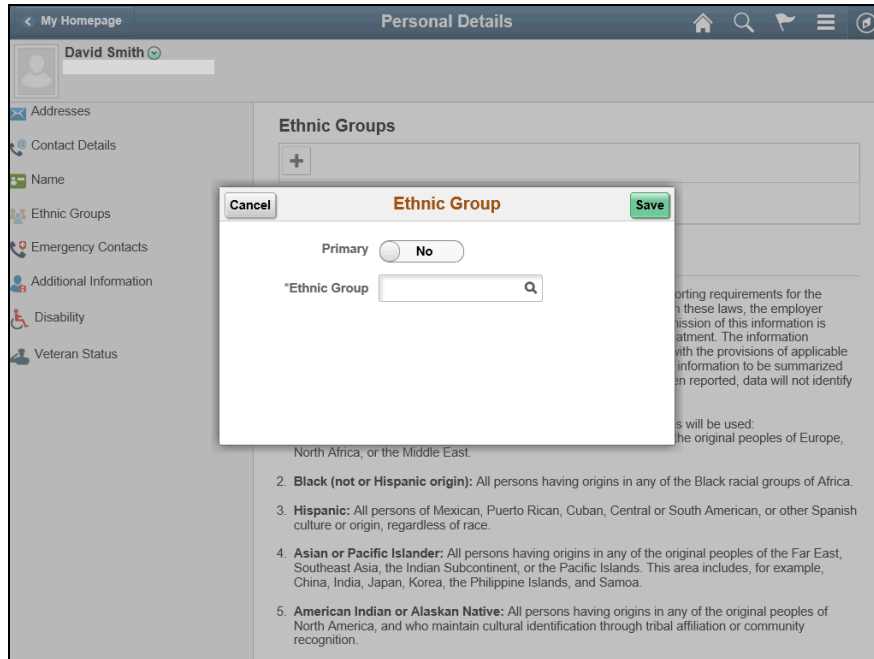
Step	Action
2.	Click the **Look up Ethnic Group** button to access the Lookup page for Ethnic Group.

Step	Action
3.	The **Search Results** display in a grid as a table. In this example all possible results display.
	The grid has two columns-- **Ethnic Group** and **Description.** The header labels for each of these columns is a toggle. Clicking on one of the headers toggles the order in which the results are displayed between ascending and descending order.
	You will explore each of these toggles, starting with **Ethnic Group**.
4.	Currently Ethnic Groups are displayed in Ascending order.
	Click the **Ethnic Group** link.
	Ethnic Group ◇
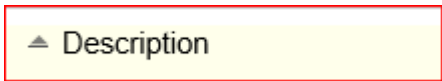
Step	Action
5.	Notice the **Ethnic Group** column now displays in descending order.
6.	In this example, the **Description** column also displays in descending order.
	Note it is not always the case that the order of columns in a grid mirror one another.
	Click the **Description** link to toggle the display so that the values in the description field display in ascending order.
	Description ◇
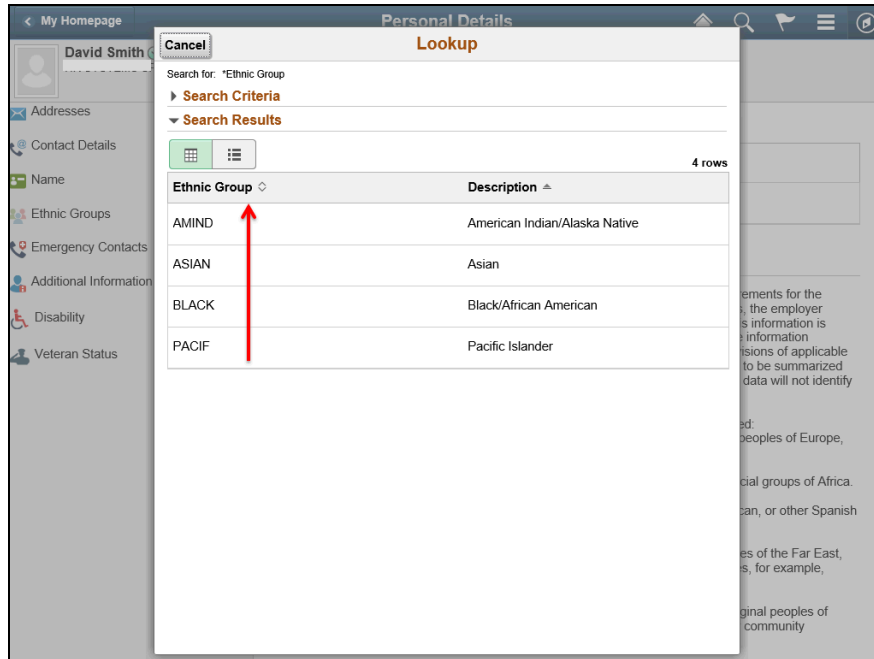
Step	Action
7.	Notice the values in the **Description** column now display in ascending order.
8.	Click the **List** option to display the values in the search results as a list. ![List icon]
9.	Click the **Grid Sort** button to begin changing the sort order of the list. ![Grid Sort icon]
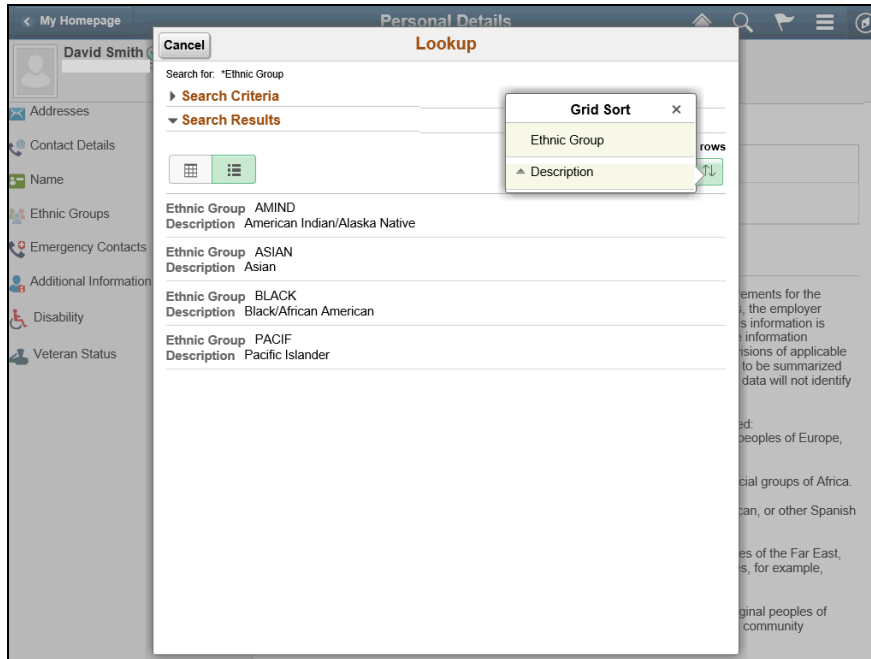
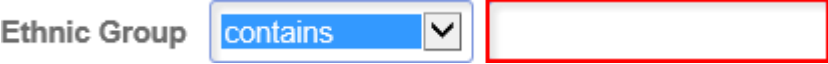| Step	Action
10.	A **Grid Sort** menu displays. The items in the menu are toggles which toggle display based on **Ethnic Group** or **Description** between ascending and descending order. You will experiment by using the menu items to change the display of the list.
11.	The list is now displayed in ascending order by description. Click the **Description** link. ▲ Description
12.	Click the **Ethnic Group** link to change the display by Ethnic Group. Ethnic Group
13.	Click the **Close** button. ☒
14.	Click the **Grid** option. ⊞
15.	Next you will explore how to use search filters to narrow search results.
16.	Click the **Search Criteria** link to expand the **Search Criteria** section. ▶ Search Criteria
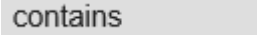
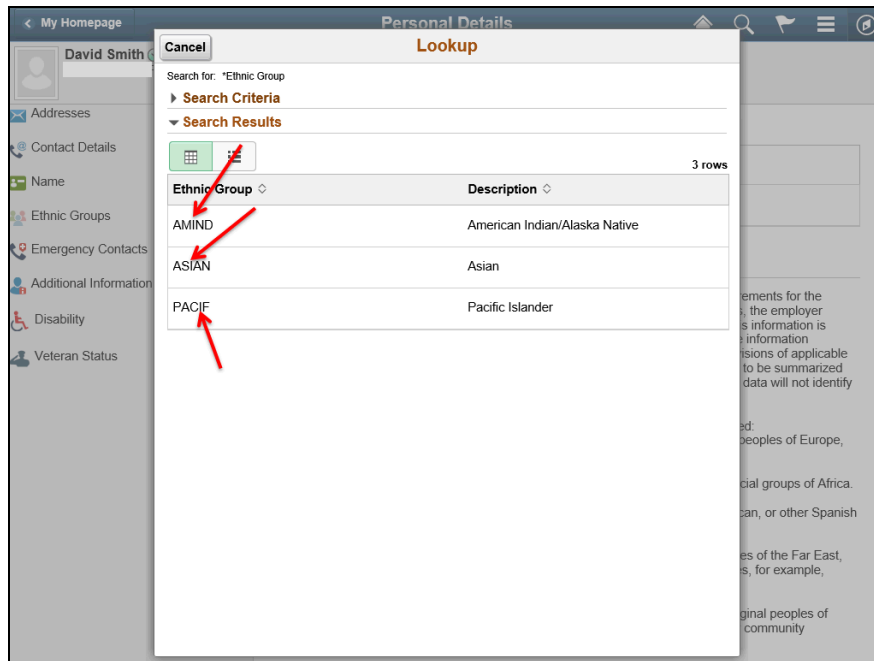| Step	Action
17.	Begin by using the **Ethnic Group** field to limit search results to those ethic groups that begin with "p" Click in the **Ethnic Group** field. Ethnic Group (begins with)
18.	Enter the desired information into the **Ethnic Group** field. Enter "**p**". Ethnic Group (begins with)
19.	Click the **Search** button. Search
20.	Notice, only one Ethnic Group now appears in the **Search Results**, PACIF. This group begins with a "p". Click the **Search Criteria** link to expand the **Search Criteria** section. ▶ Search Criteria
21.	Click the **Clear** button to clear the search criteria. Clear
22.	Next you will use the **Description** field to limit **Search Results** to all ethnic groups whose description begins with a "p". Click in the **Description** field. Description (begins with)
23.	Enter the desired information into the **Description** field. Enter "**p**". Description (begins with)
24.	Click the **Search** button. Search
25.	Notice the Search Results now contain only one item. Its description begins with a "p". Click the **Search Criteria** link. ▶ Search Criteria
26.	Click the **Clear** button to clear search criteria. Clear

Step	Action
27.	Leave all criteria fields empty. Click the **Search** button to return all results. Search
28.	Click the **Search Criteria** link to expand the **Search Criteria** section. ▶ Search Criteria
29.	Click the **Show Operators** link to display operators that you can use with criteria fields. Show Operators
30.	Click the **begins with** list. begins with ▼
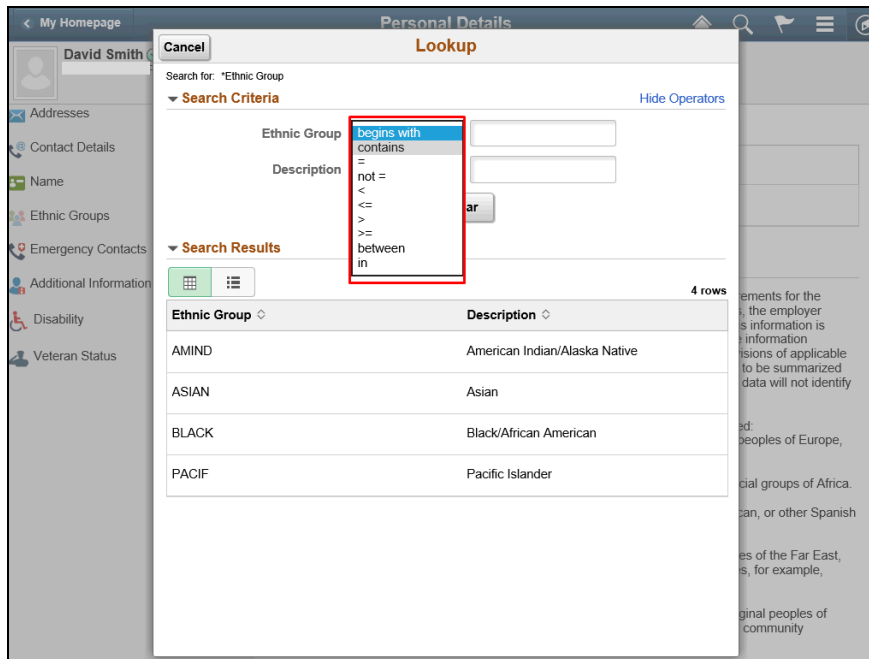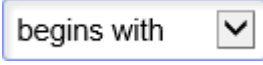
Step	Action
31.	You can use these operators in combination with criteria field to further refine search results. Note: "begins with" is the default operator.
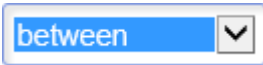
Step	Action
32.	For this example you will use the contains operator and search for all ethnic groups whose ethic group code contains a "i". Click the **contains** list item. contains
33.	Click in the **Ethnic Group** field. Ethnic Group contains
34.	Enter the desired information into the **Ethnic Group** field. Enter "**i**". Ethnic Group contains
35.	Click the **Search** button. Search
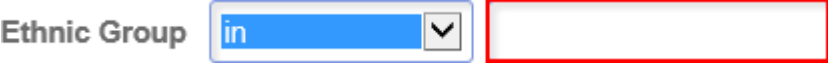
Step	Action
36.	Notice the **Search Results** now display 3 items. Each contains an "i".
37.	Click the **Search Criteria** link. ▷ Search Criteria

Step	Action
38.	Click the **Clear** button. Clear
39.	Click the **begins with** list. begins with
40.	Click the **between** list item. between
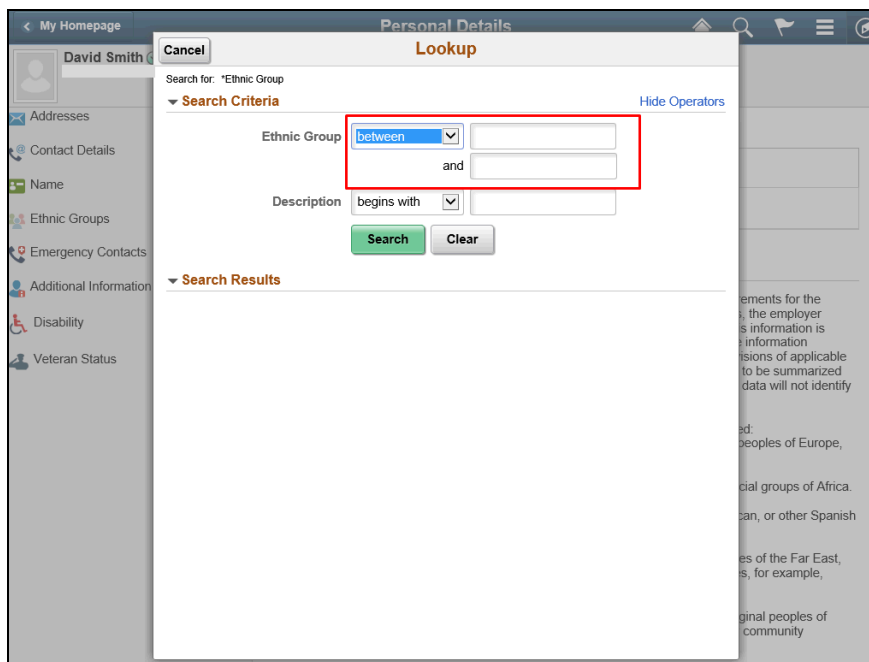
Step	Action
41.	The between operator allows you to limit all results to items that fall between the values you enter in the two search criteria text boxes. For this example, you will not use the between operator.
42.	Click the **between** list. between

Step	Action
43.	The in operator allows you to limit search results to items that are included in a list that you specify. Enter the list in the text field and separate each item with a comma (,). You can leave spaces between the items. Click the **in** list item. in
44.	For this example, you will search for all ethnic groups in the following list: AMIND and BLACK. Click in the **Ethnic Group** field. Ethnic Group — in
45.	Enter the desired information into the **Ethnic Group** field. Enter "**AMIND,BLACK**". Ethnic Group — in
46.	Click the **Search** button. Search
47.	Notice the **Search Results** now display two items: AMIND and BLACK. Click the **Search Criteria** link. ▶ Search Criteria
48.	Click the **Clear** button. Clear
49.	Click the **Cancel** button. Cancel
50.	**End of Procedure.**

Favorites

The topics in this lesson cover how to

- Create favorites from fluid and classic pages
- Navigate using favorites
- Edit favorites

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Creating Favorites

This topic covers how to favorite fluid and classic pages.

Procedure

In this topic you will create three favorites for fluid and classic pages:
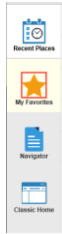
 -- Payroll (Fluid)
 -- Contact Details (Fluid)
 -- Benefits Summary (Classic)
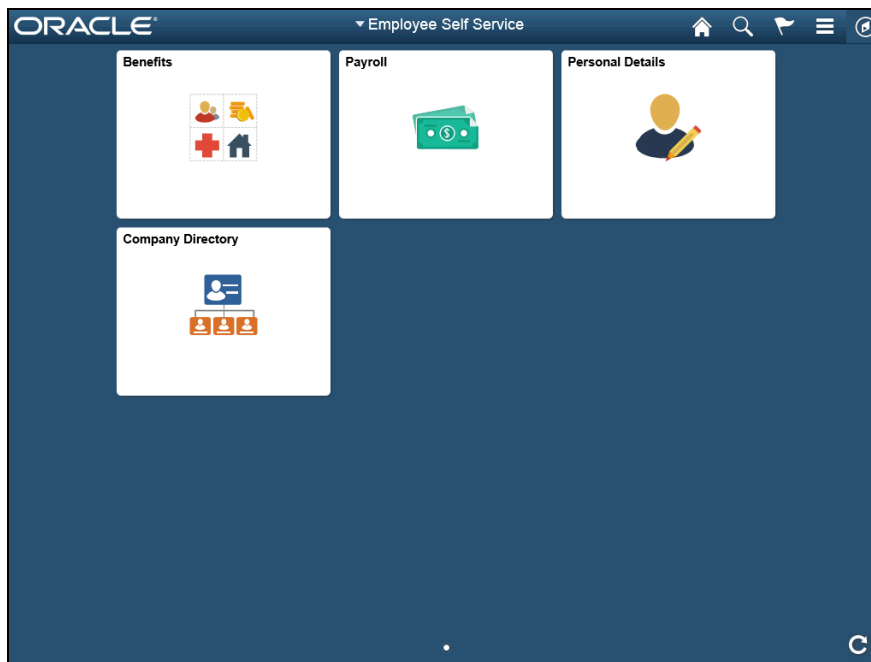
Step	Action
1.	First you will use the **NavBar** to review your current favorites.

Step	Action
2.	Click the **NavBar** button.
3.	Click the **My Favorites** button.

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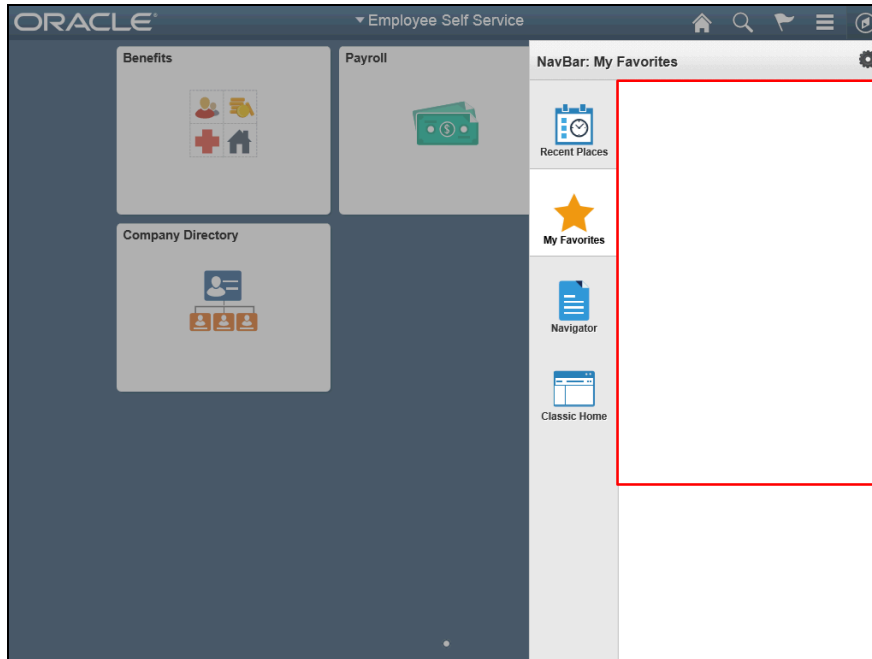
Step	Action
4.	Notice, you currently do not have any favorites. You will begin by adding the **Payroll** page (a Fluid page) to your favorites. Use the **Payroll** tile to navigate to the **Payroll** page.
5.	Click outside the **NavBar** and the **Tiles** to close the **NavBar**.
6.	Click the **Payroll** button.

Step	Action
7.	The **Payroll** pages display. Use the **Actions** icon on the banner to add this page to your favorites.
8.	Click the **Actions List** button.
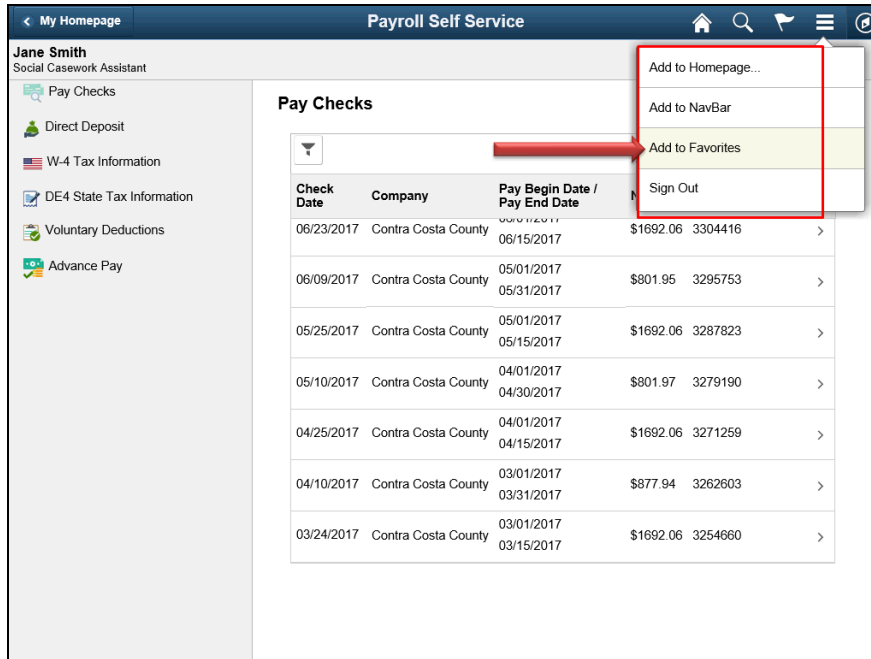
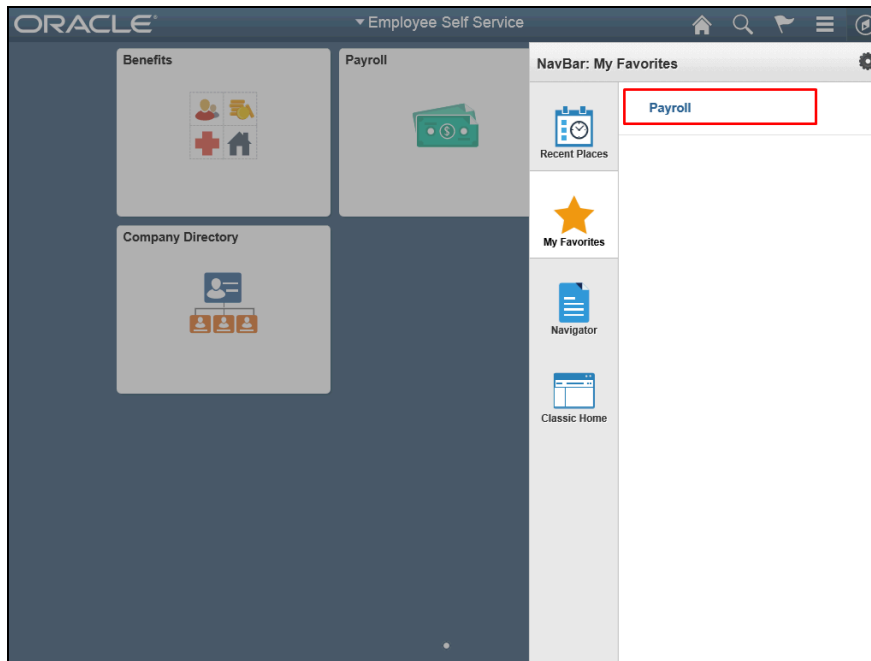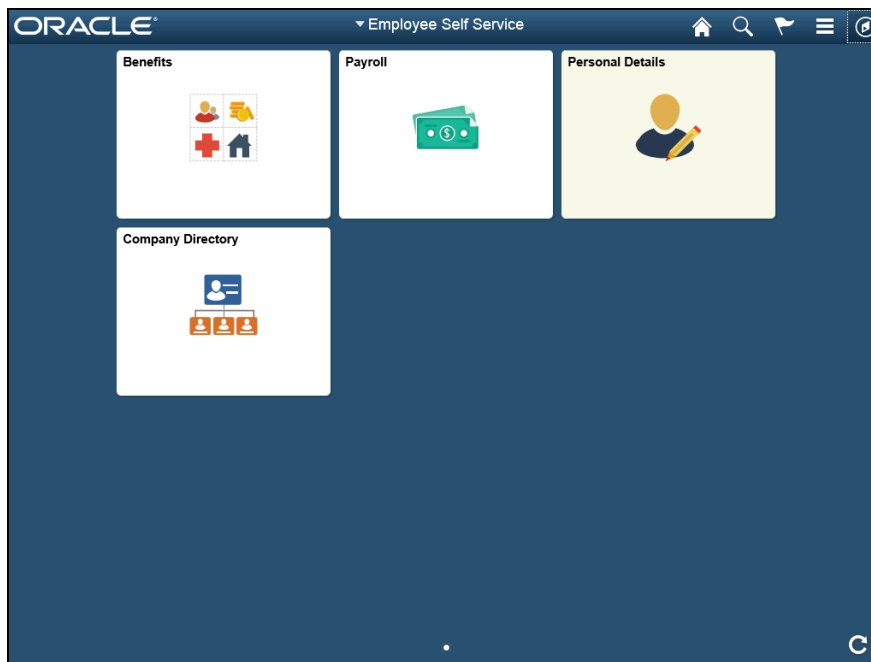| Step	Action
9.	Notice the **Actions** menu displays several options. For this topic you will use the **Add to Favorites** option.
10.	Click the **Add to Favorites** link.
11.	Click the **OK** button.

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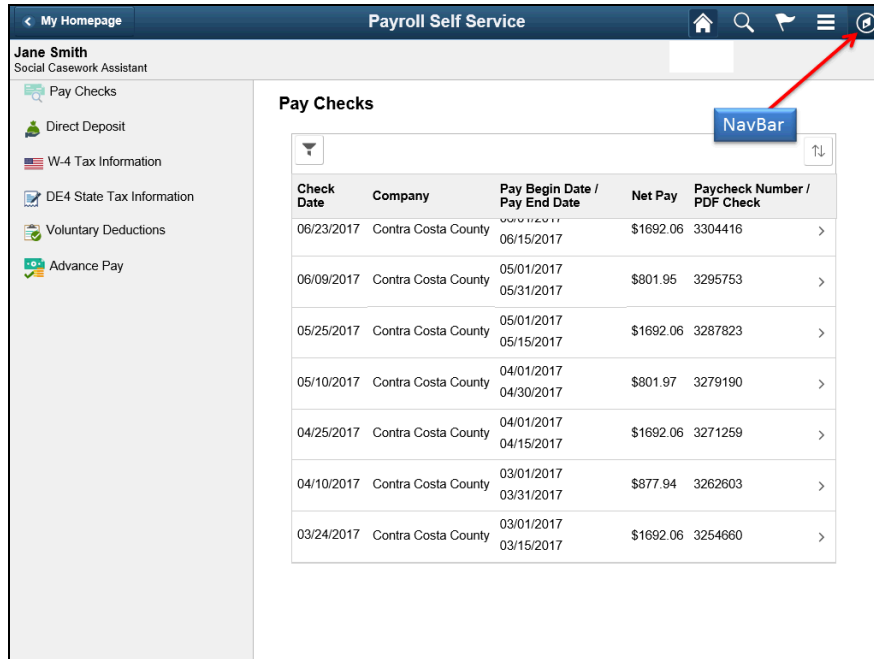
Step	Action
12.	Next you will navigate back to the **Employee Self Service Home Page** and confirm that the **Payroll** page has been added to your favorites. Note: you could also use the **NavBar** on this page to navigate to your favorites.
13.	Click the **Home** button.
14.	Click the **NavBar** button.
15.	Click the **My Favorites** button.
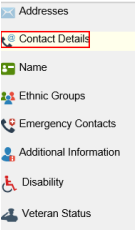
Step	Action
16.	Notice the **Payroll** page now displays in the **My Favorites** section on the **NavBar**.
17.	Click outside the **NavBar** and the **Tiles** to close the **NavBar**.

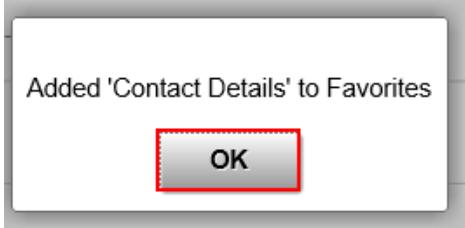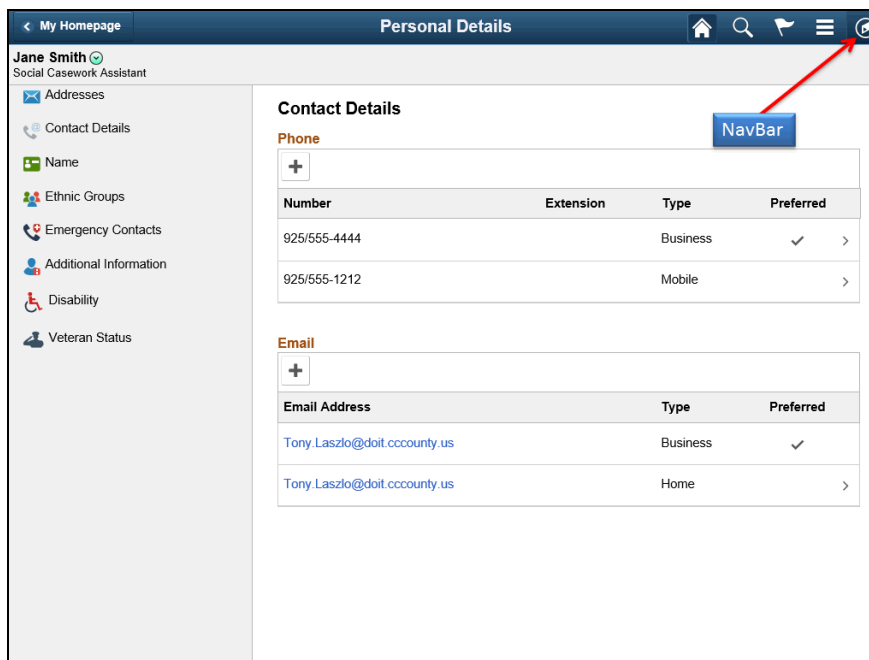| Step	Action
18.	Next you will add the **Contact Details** page to your favorites. This page is found under the **Personal Details** tile.
19.	Click the **Personal Details** button.
20.	Click the **Contact Details** link.
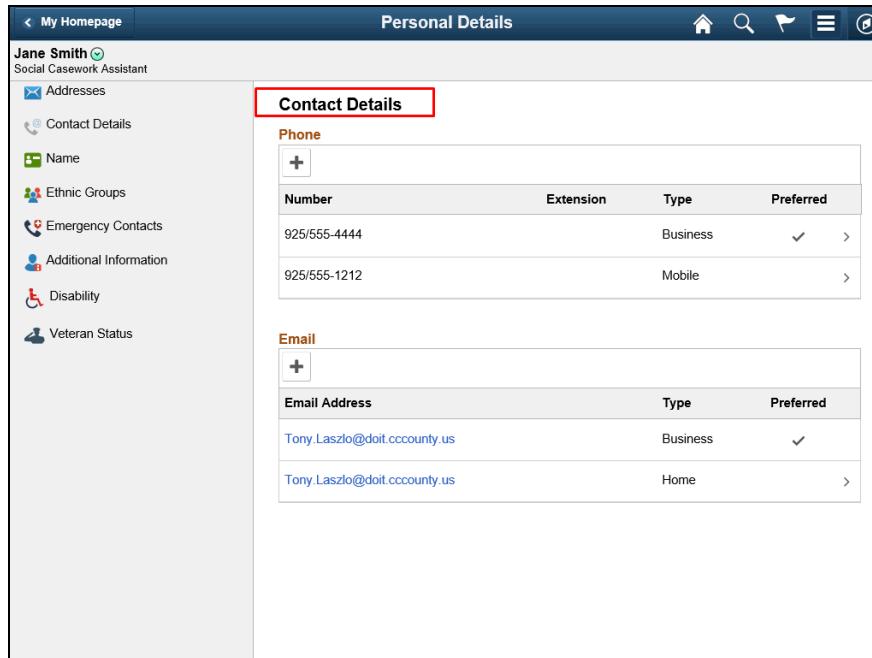
Step	Action
21.	The **Personal Details** page displays. You will use the **Actions** menu to add this page to your favorites.

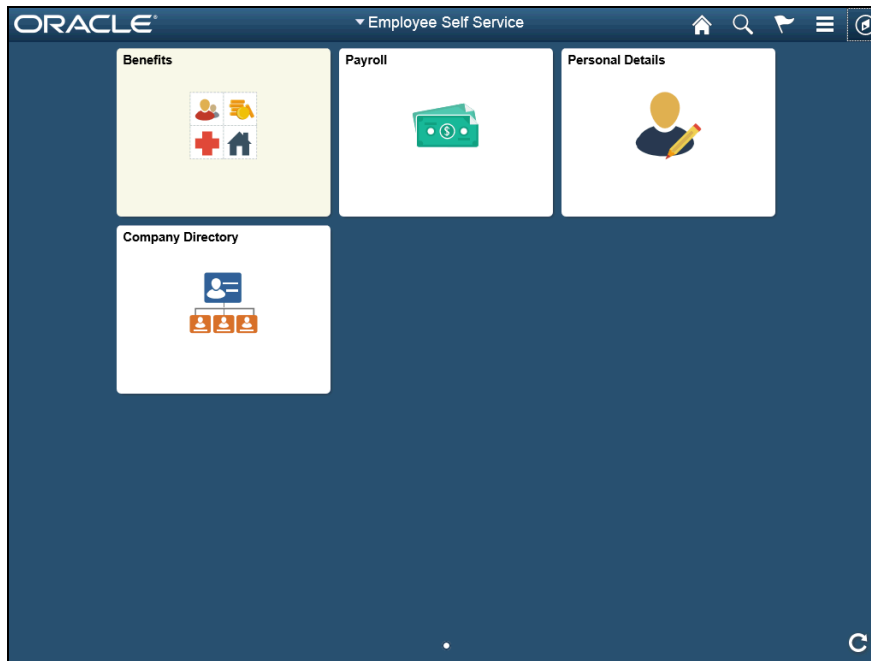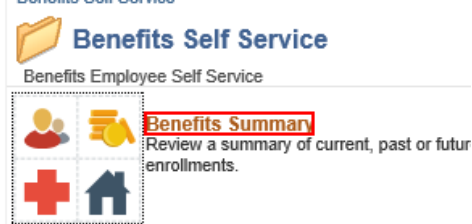| Step	Action
22.	Click the **Actions List** button.
23.	Click the **Add to Favorites** link. Add to Homepage... Add to NavBar Add to Favorites Sign Out
24.	Click the **OK** button. Added 'Contact Details' to Favorites OK
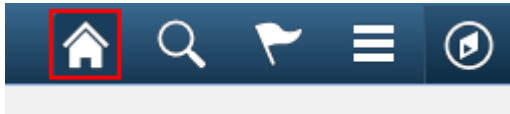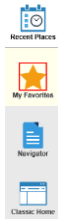
Step	Action
25.	Next you will navigate back to the **Employee Self Service Home Page** and confirm that the **Contact Details** page has been added to your favorites. Note: You could also use the **NavBar** on this page to navigate to your favorites.
26.	Click the **Home** button.
27.	Click the **NavBar** button.
28.	Click the **My Favorites** button.
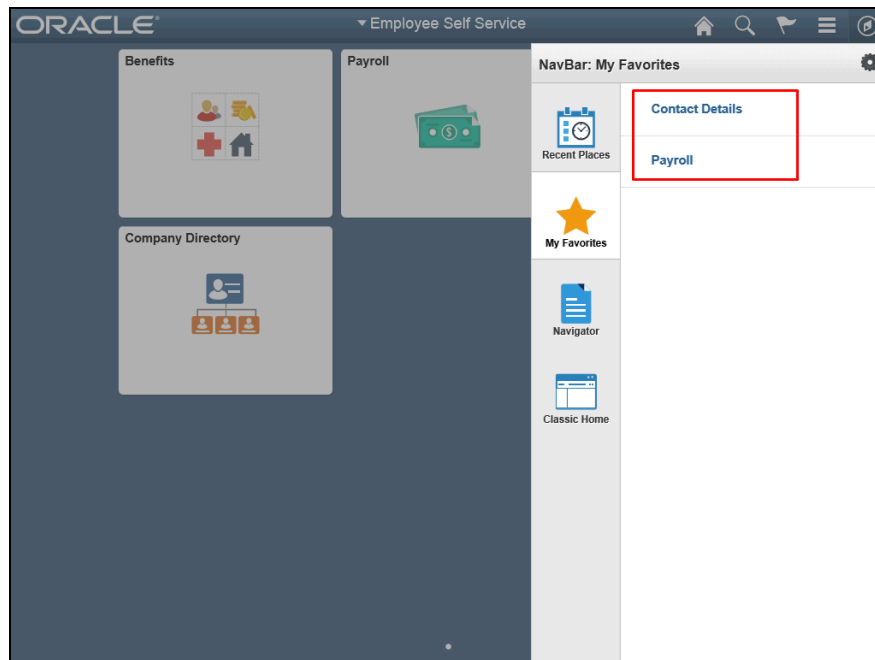
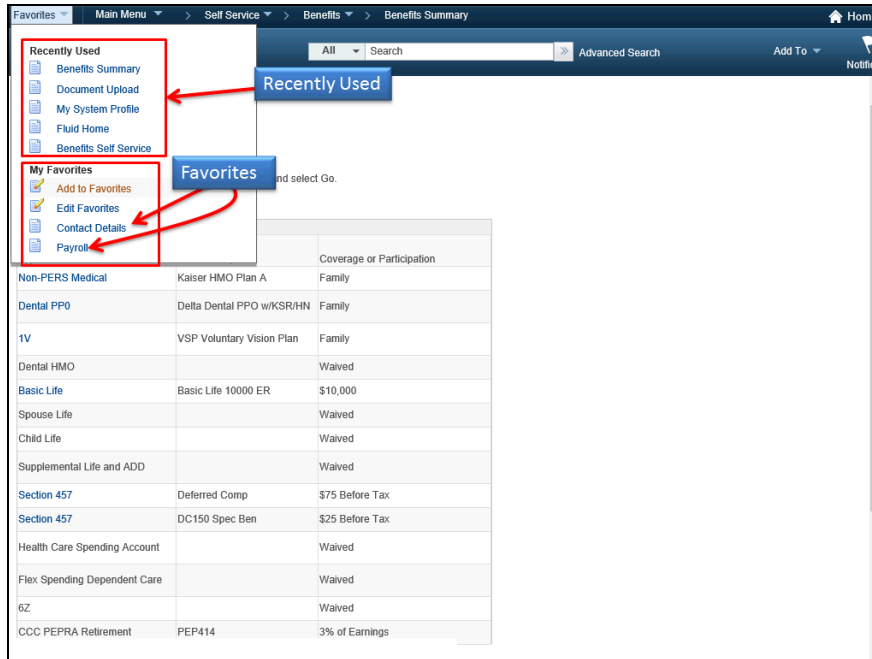| Step	Action
29.	Notice the **Contact Details** page now displays in the **My Favorites** section on the **NavBar** as well as the **Payroll** page you added previously.
30.	Click outside the **NavBar** and the **Tiles** to close the **NavBar**.

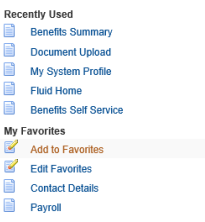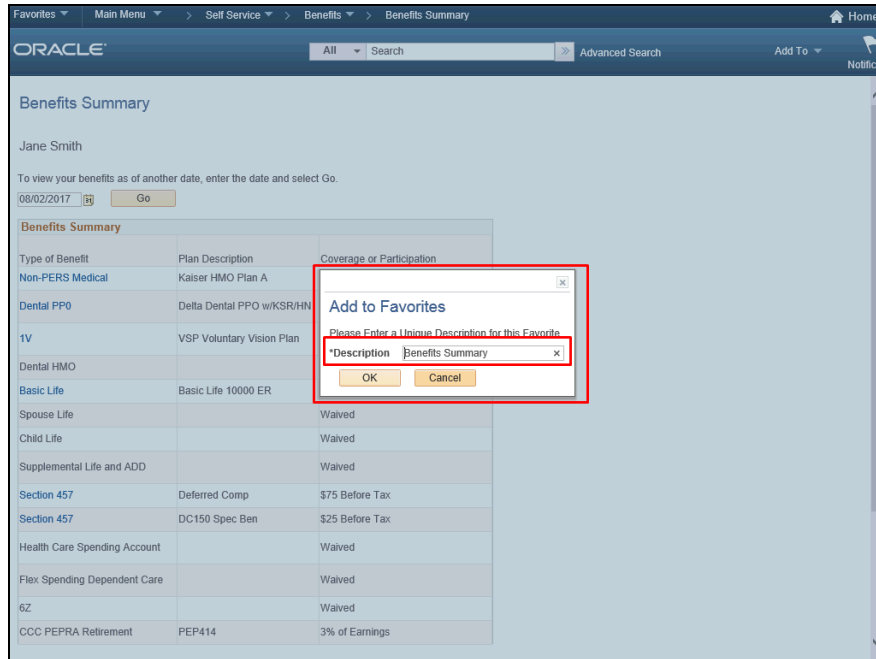| Step	Action
31.	Next you will add the **Benefits Summary** page (a classic page) to your favorites. This page is found under the **Benefits** tile.
32.	Click the **Benefits** object.
33.	Click the **Benefits Summary** link.

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Step	Action
34.	The **Benefits Summary** page displays. You can add this page to your favorites in two ways: -- Using the **Favorites** link on the **Menu Bar** --Using the **Add To** button on the **Banner** We will explore both in this topic. First, the **Favorites** link
35.	Click the **Favorites** button.

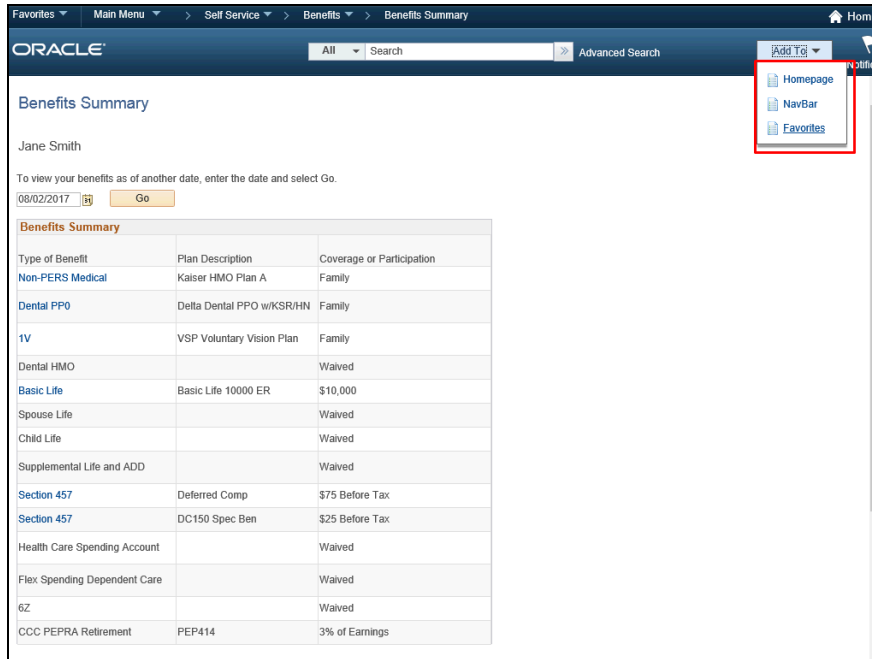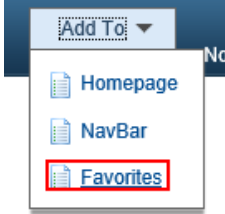| Step	Action
36.	The **Favorites** menu displays. This menu has two sections: **Recently** used: This section contains links to pages that you recently visited. **My Favorites**: This section has two links that allow you to manage your favorites--**Add to Favorites** and **Edit Favorites**. It also has links to the two favorites you created in this topic. Editing Favorites is covered in another topic. For this topic, you will use the **Add to Favorites** link.
37.	Click the **Add to Favorites** menu.

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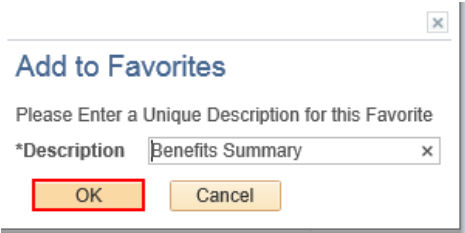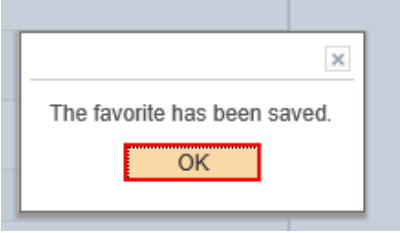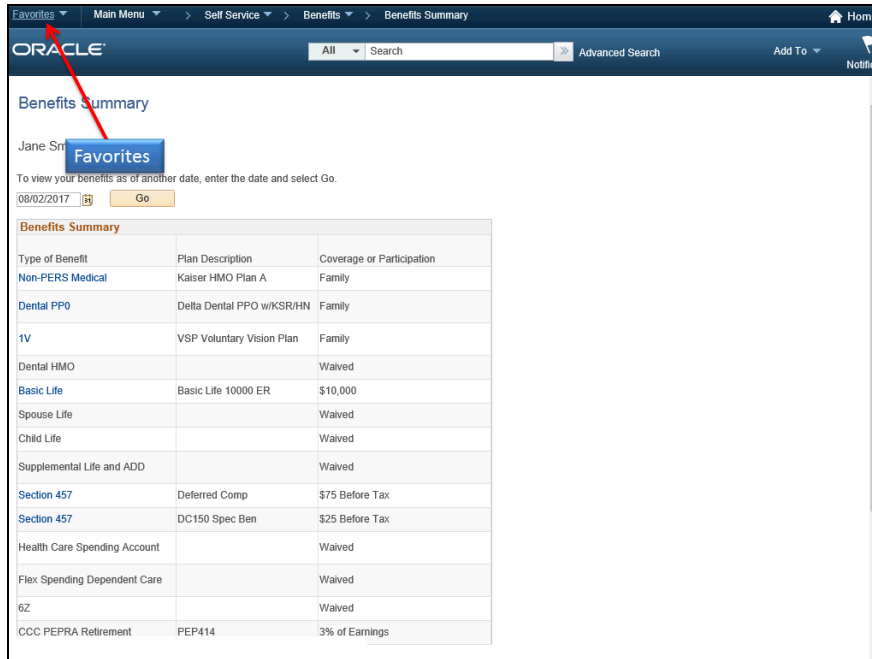| Step	Action
38.	The **Add to Favorites** dialog box displays. You can edit the value in the **Description** field, if you want or you can accept the default value--the name of the page you are adding to your favorites. To add the page to your favorites, click the **OK** button. A confirmation page will display. Click **OK** on that page. For this topic, however, you will use the second way to add the page to your favorites--using the **Add To** button on the banner. Click **Cancel** to close this dialog box.
39.	Click the **Cancel** button.
40.	Click the **Add To** link.

Step	Action
41.	**Add To** menu displays. You will use the **Favorites** link.
42.	Click the **Favorites** menu.
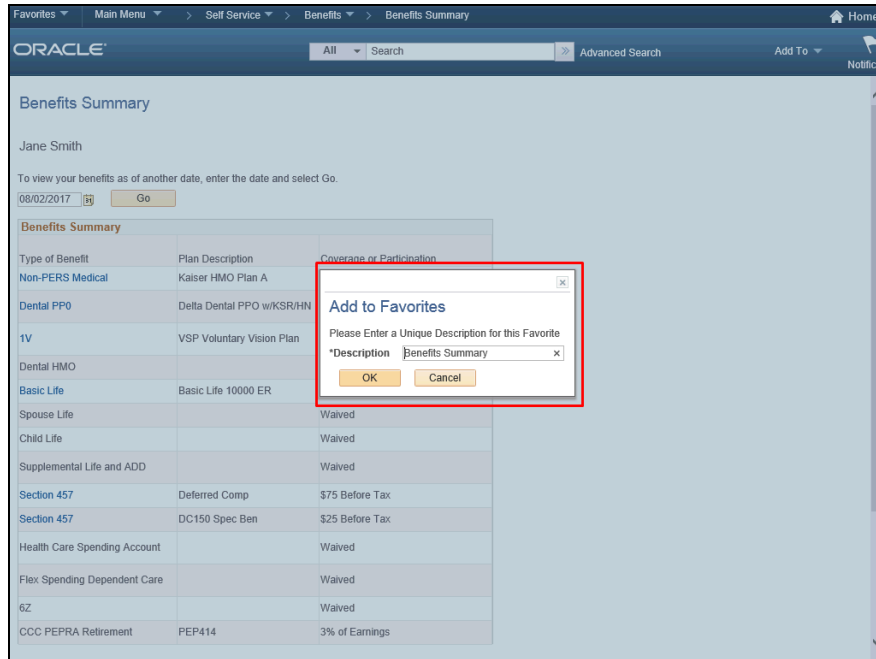
Step	Action
43.	The **Add to Favorites** dialog box displays. For this example, you will accept the default value in the **Description** field.
44.	Click the **OK** button.
45.	Click the **OK** button.

Step	Action
46.	Now, you will check to be sure that the page has been added to your favorites. You will start by looking at the **Favorites** menu.
47.	Click the **Favorites** button.
48.	Notice, **Benefits Summary** now displays in the **My Favorites** section along with the two pages that you added previously--**Contact Details** and **Payroll**.
49.	Click outside the menu to close it.

Step	Action
50.	Now you will navigate to the **Employee Self Service** home to confirm that the **Benefits Summary** page appears on the **My Favorites** section on the NavBar. You will use the **Home** link on the **Menu Bar**. **Note**: depending on the screen resolution used on your computer, the **NavBar** may not be visible on your screen from a classic page.
51.	Click the **Home** link.
52.	Click the **NavBar** button.

Step	Action
53.	Click the **My Favorites** button.
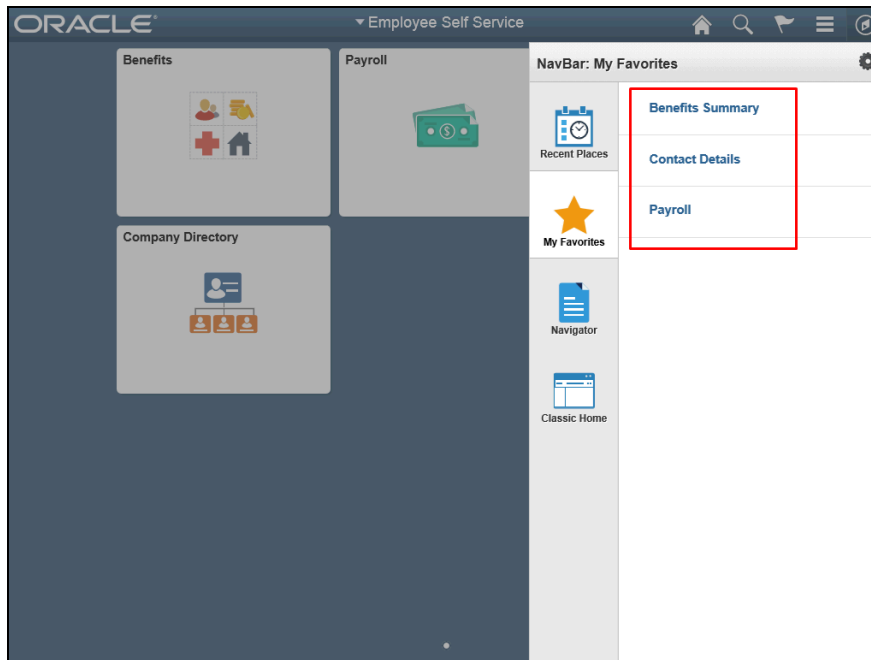
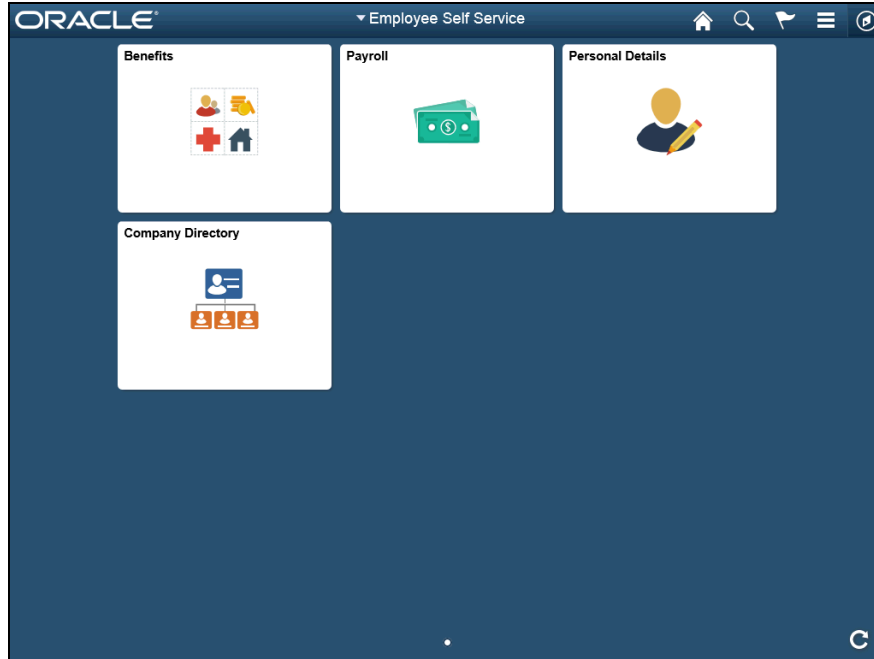| Step	Action
54.	Notice, the **My Favorites** section of the **NavBar** now lists all three of the pages that you added to your favorites.
55.	Click outside the **NavBar** and the **Tiles** to close the **NavBar**.
56.	**End of Procedure.**

Navigating with Favorites

This topic covers how to use favorites to navigate.

Procedure

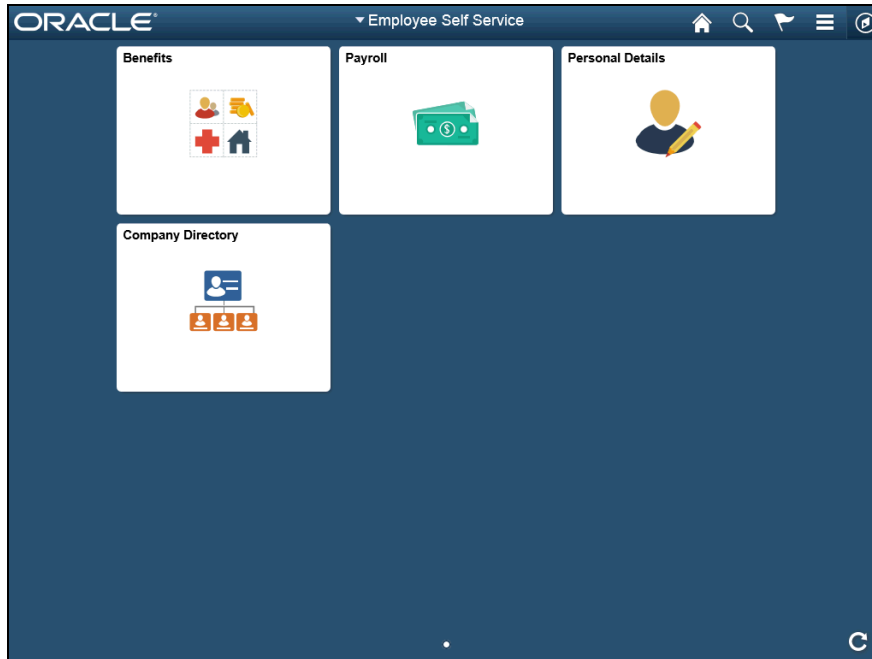In this topic you will use the **My Favorites** section of the NavBar and the **Favorites** menu on a classic page to navigate to each of the favorites you created in the previous topic:

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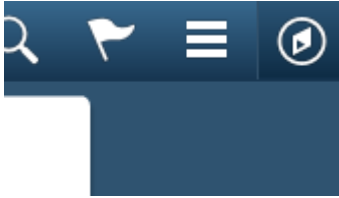PeopleSoft Training
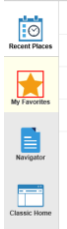
-- Benefits Summary
-- Contact Details
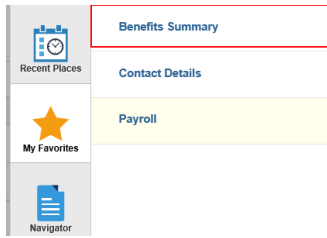-- Payroll

Step	Action
1.	First you will use the **NavBar** to view your favorites and then navigate to the **Benefit Summary** page.

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Step	Action
2.	Click the **NavBar** button.
3.	Click the **My Favorites** button.
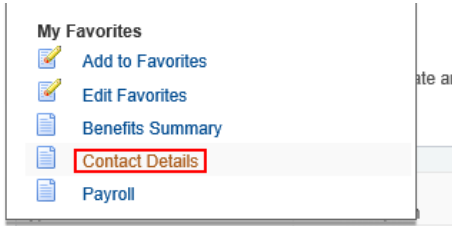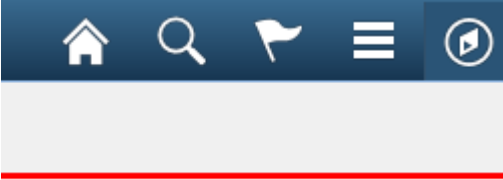
Step	Action
4.	Notice the **My Favorites** section displays the three favorites you previously created. They are displayed in alphabetical order: -- **Benefits Summary** -- **Contact Details** -- **Payroll** Click on each to navigate directly to the **Benefit Summary** page, or the **Contact Details** page, or the **Payroll** page. You will start with **Benefits Summary**.
5.	Click the **Benefits Summary** link.

Step	Action
6.	The **Benefits Summary** page displays. Next you will use the **Favorites** menu to navigate to the **Contact Details** page. You could also use the **NavBar** which is off screen on this screen shot. Depending on the resolution of your monitor, a classic page may resize and allow you to view the **NavBar** or you may have to scroll to the right to view it.
7.	Click the **Favorites** button.
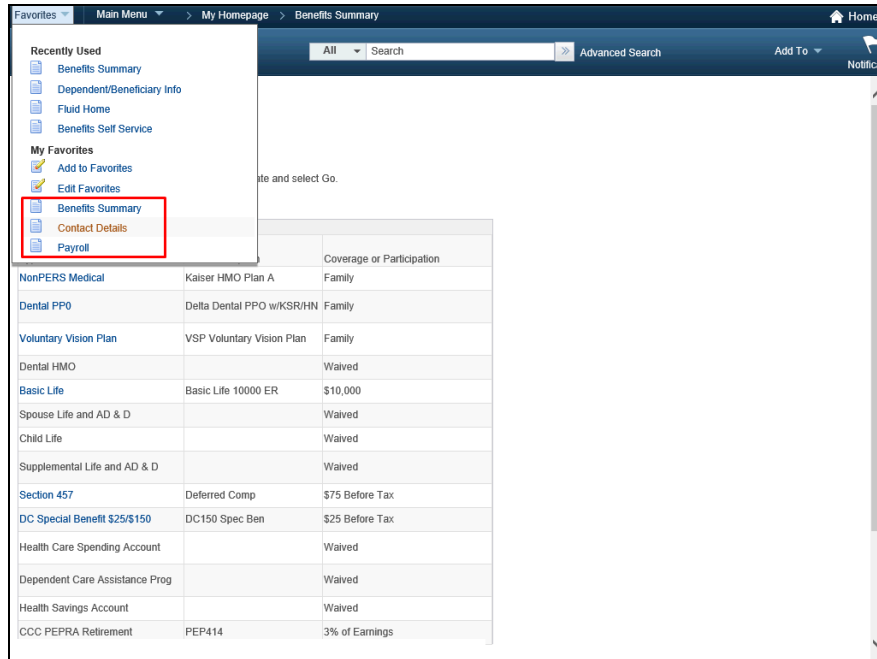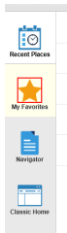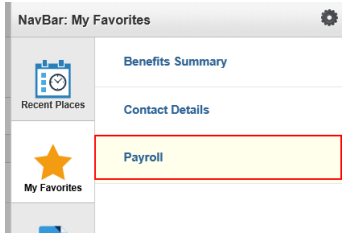
Step	Action
8.	Notice, the **My Favorites** section lists the three favorites you previously added. For this example, you will view the **Contact Details** page next.
9.	Click the **Contact Details** link.
10.	Click the **NavBar** button.
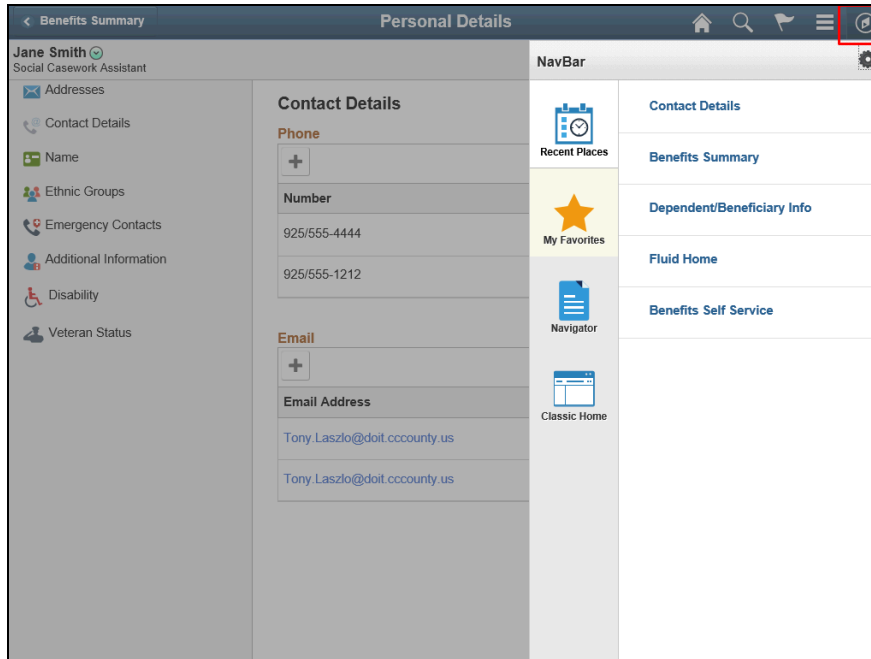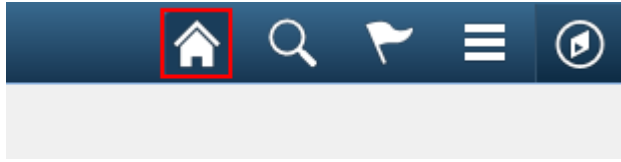
Step	Action
11.	The **Contact Details** page now displays. Next, you will use the NavBar to navigate to the **Payroll** page.
12.	Click the **My Favorites** button.
13.	Click the **Payroll** link.
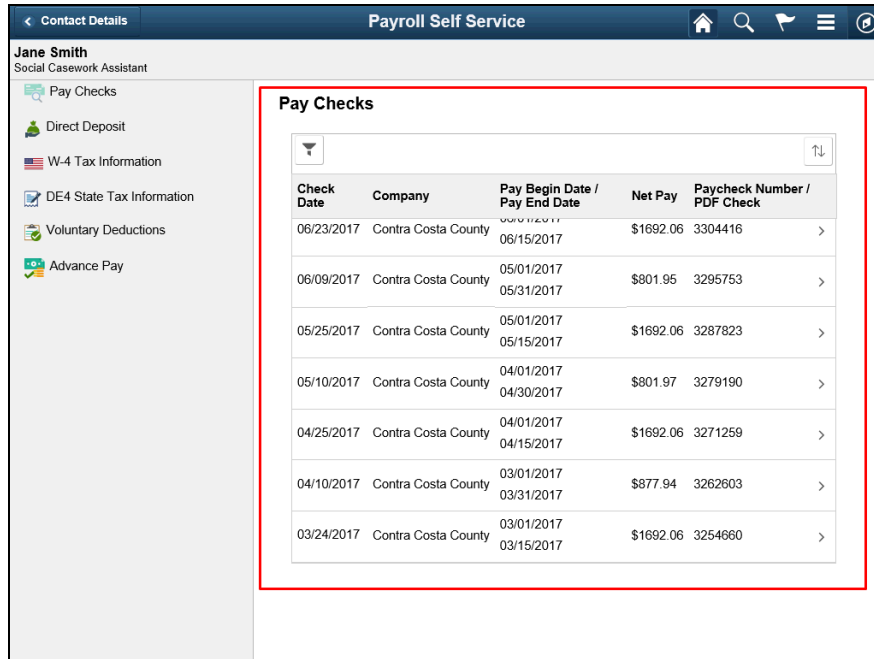
Step	Action
14.	The **Payroll** page displays. You have finished using **My Favorites t**o navigate to each of your favorites.
15.	Click the **Home** button.
16.	**End of Procedure.**

Editing Favorites on a Classic Page

This topic covers how to edit favorites from a classic page.

Procedure

In this topic, you will edit two of the favorites you created in the previous topic.

You will rename one and delete the other.
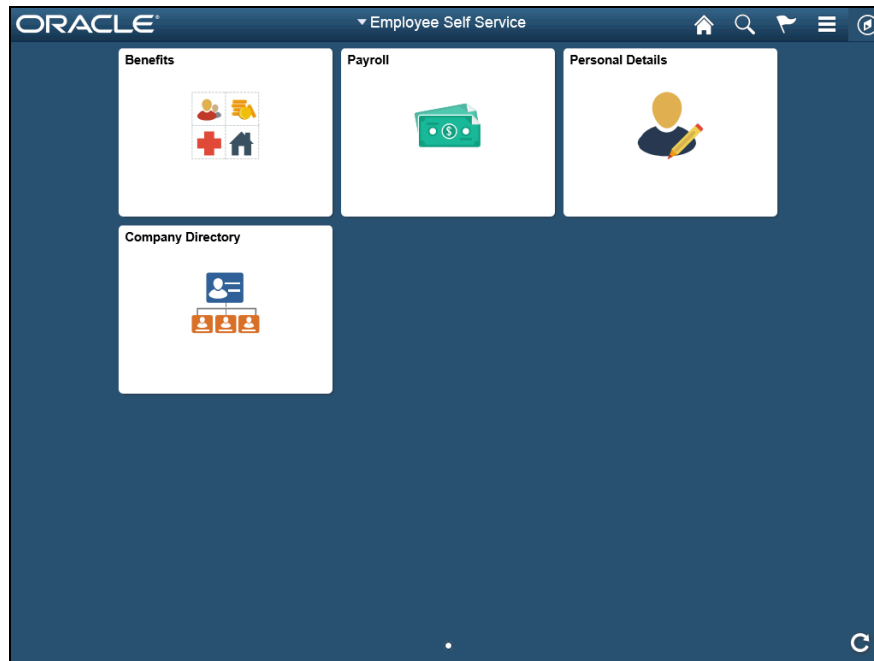
Step	Action
1.	You will use the **NavBar** and then **Classic Home** to navigate to a classic page.
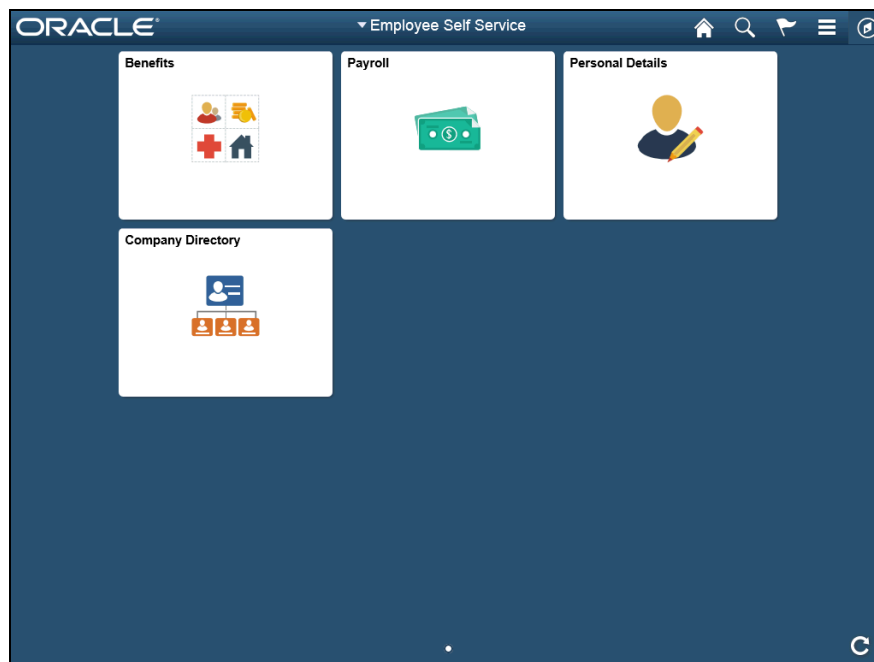
Step	Action
2.	Click the **NavBar** button.
3.	Click the **Classic Home** button.
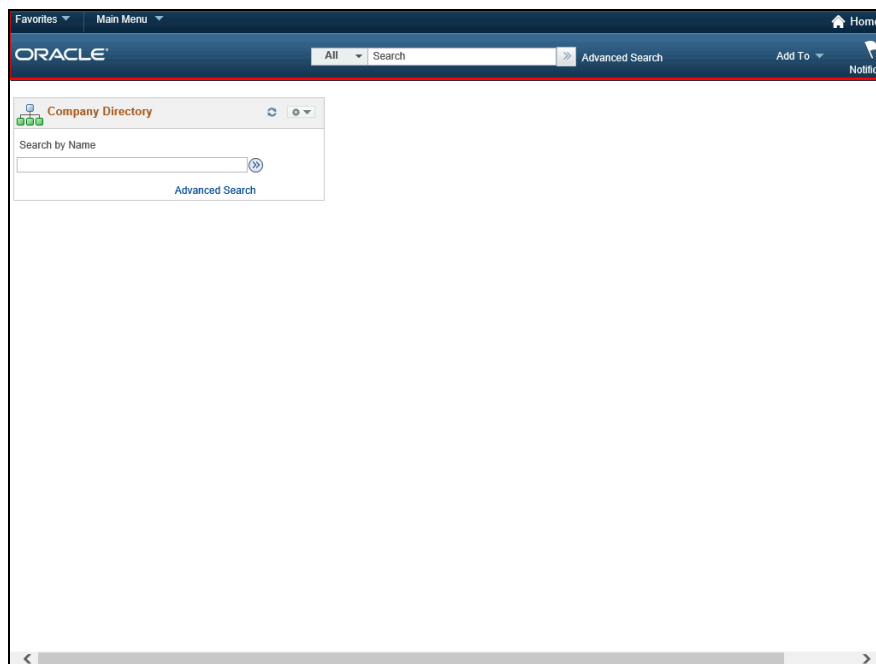
Step	Action
4.	The **Classic Home** page displays. You will use the **Favorites** link to edit your favorites.

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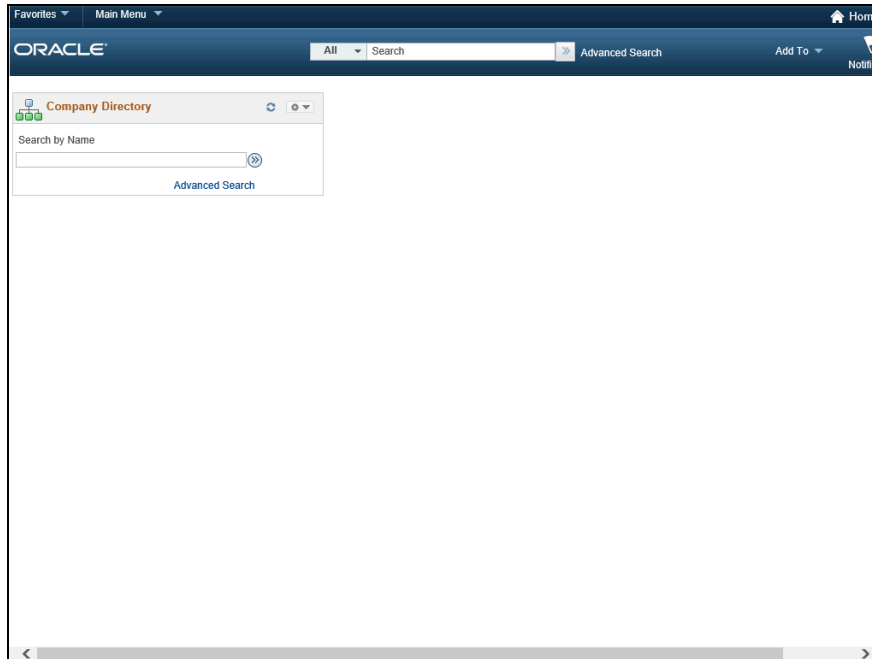
Step	Action
5.	Click the **Favorites** button.
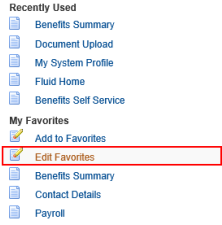
Step	Action
6.	The **Favorites Menu** displays.
	The **Recently Used** section displays pages you have recently visited.
	The **My Favorites** section has two links that allow you to **Add to Favorites** and **Edit Favorites**. In this topic you will use the **Edit Favorites** link.
	This section also lists your current favorites, the ones you created in the previous topic:
	-- Benefits Summary -- Contact Details -- Payroll

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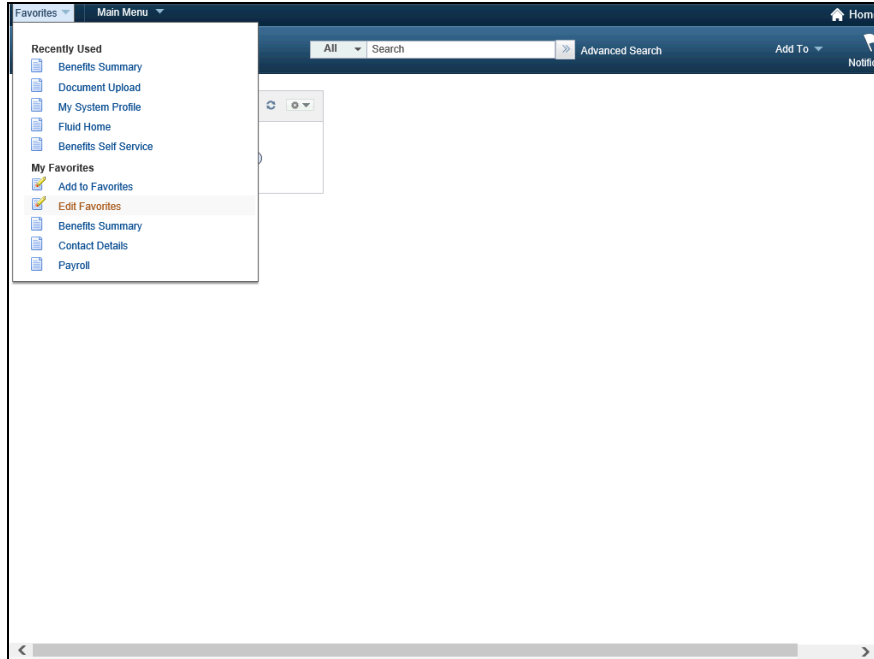
Step	Action
7.	In this topic, you will rename **Payroll** to **Pay Check** and you will delete the **Contact Details** favorite.
8.	Click the **Edit Favorites** menu.

Step	Action
9.	The **Edit Favorites** page displays.

You can use this page to:

Change the name of a favorite (edit the value in the **Favorite** field--this is a required field.)

Change the order in which favorites are listed (enter numbers in the **Sequence number** field to represent the order in which you want the favorites lists. The default order is alphabetical, in ascending order)

Delete a Favorite (Use the minus or delete button) |

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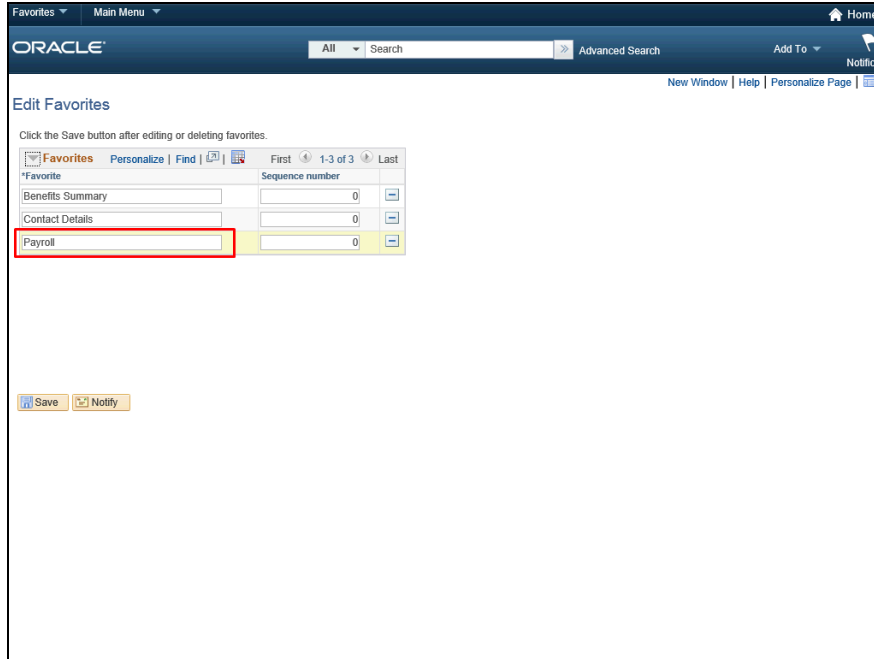
Step	Action
10.	First, you will edit Payroll. You will change it to Pay Check.
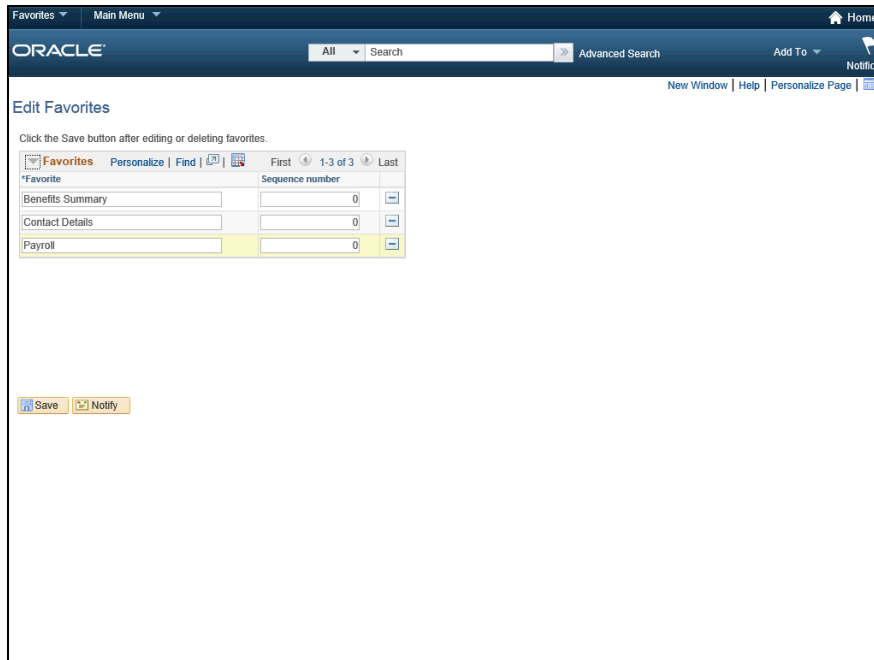
Step	Action
11.	Click in the **Favorite** field.
12.	Enter the desired information into the **Favorite** field. Enter "**Pay Check**".

Step	Action
13.	Next, you will delete **Contact Details**.

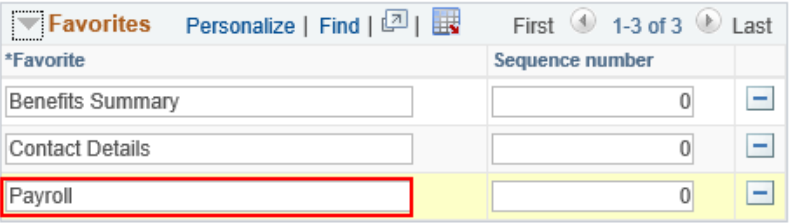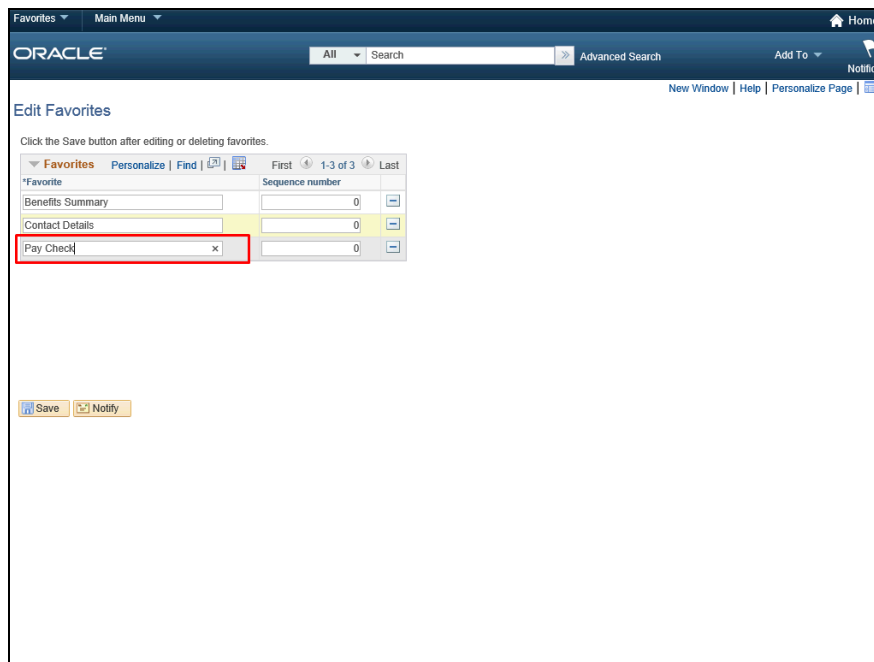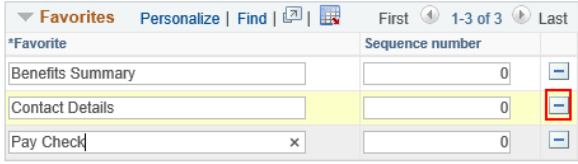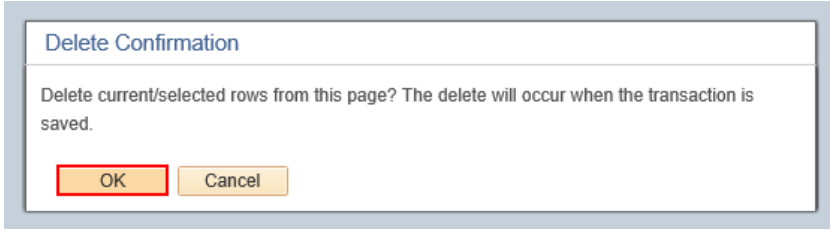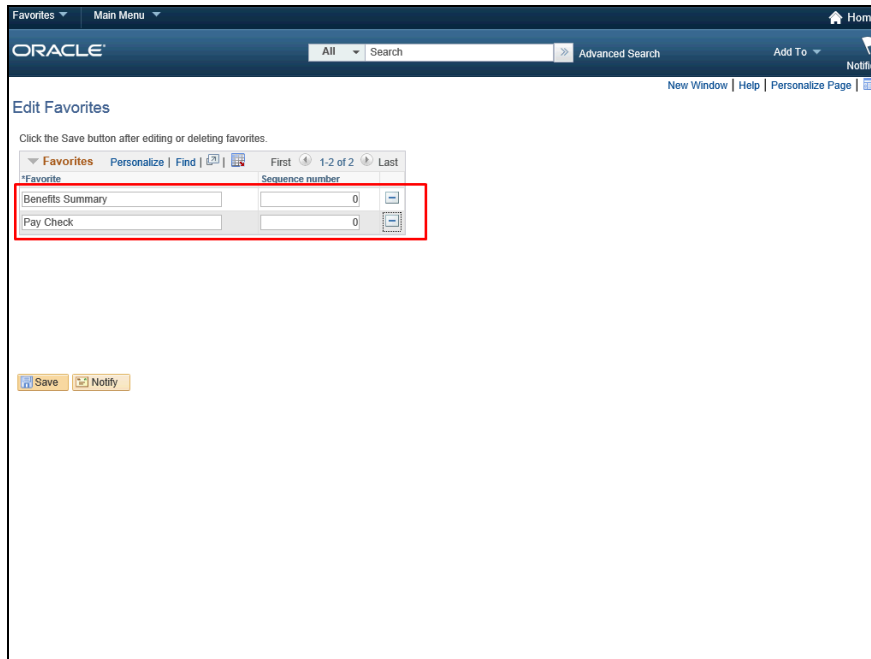| Step	Action
14.	Click the **Delete row 2** link.
	Click the Save button after editing or deleting favorites.
	Favorites Personalize | Find | 📷 | 🔢 First ◄ 1-3 of 3 ► Last
	*Favorite — Sequence number
	Benefits Summary — 0 — ⊟
	Contact Details — 0 — ⊟
	Pay Check ✕ — 0 — ⊟
15.	Click the **OK** button.
	Delete Confirmation
	Delete current/selected rows from this page? The delete will occur when the transaction is saved.
	OK Cancel

Favorites ▼   Main Menu ▼   🏠 Home

ORACLE'   All ▼ Search » Advanced Search   Add To ▼   Notificat

New Window \| Help \| Personalize Page \| 🔲

Edit Favorites

Click the Save button after editing or deleting favorites.

Favorites Personalize \| Find \| 📷 \| 🔢   First ◄ 1-2 of 2 ► Last
*Favorite — Sequence number
Benefits Summary — 0 — ⊟
Pay Check — 0 — ⊟

💾 Save   ✉ Notify

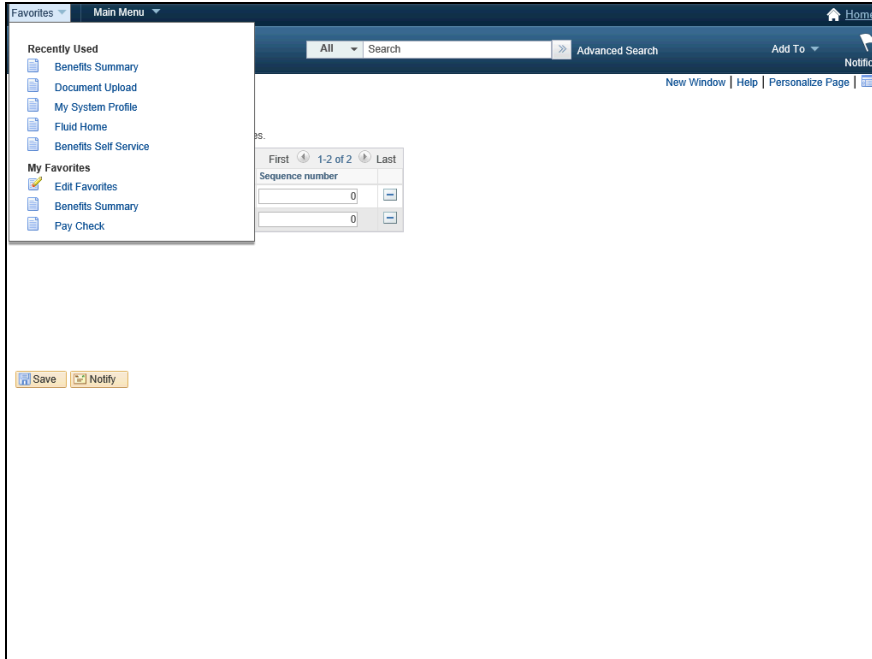| Step	Action
16.	Notice the **Favorites** grid now contains only two favorites. **Contact Details** is no longer there and **Pay Check** rather than **Payroll** displays in the last row.
	Be sure to save your changes

Step	Action
17.	Click the **Save** button.
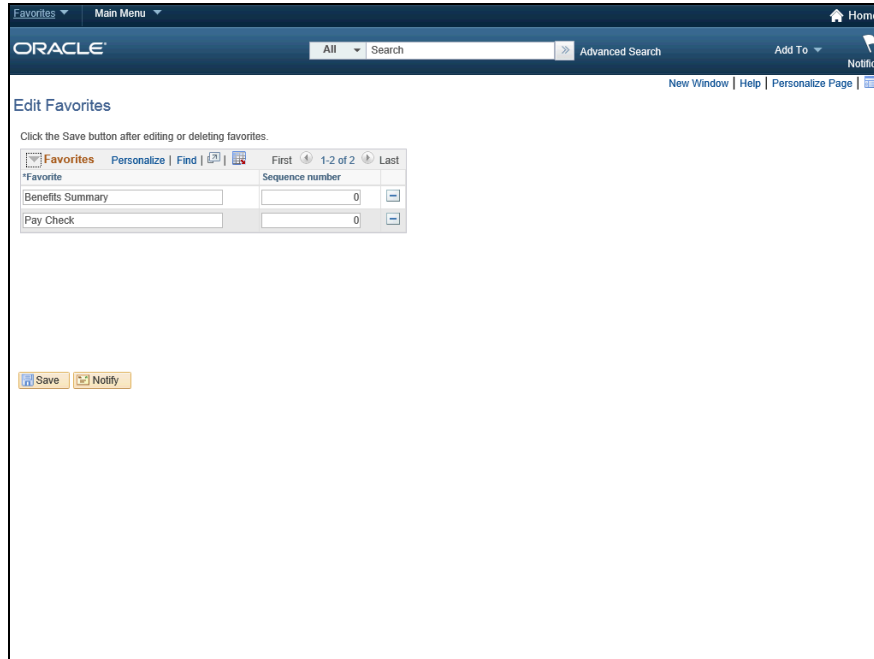
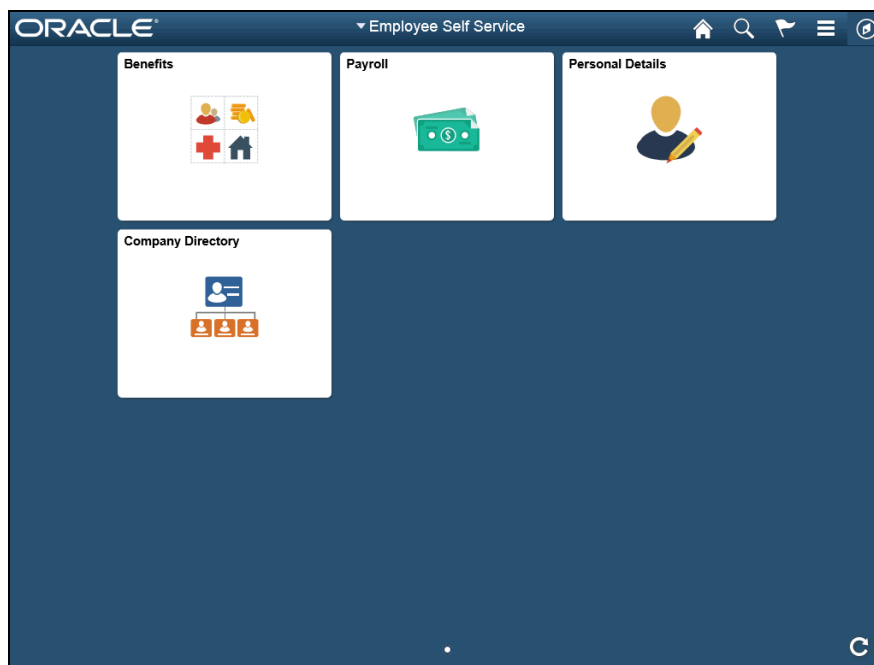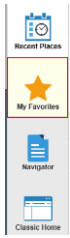| Step	Action
18.	Next, you will confirm that the changes you made are reflected on the **Favorites** menu accessed from the **Favorites** link.
19.	Click the **Favorites** button.

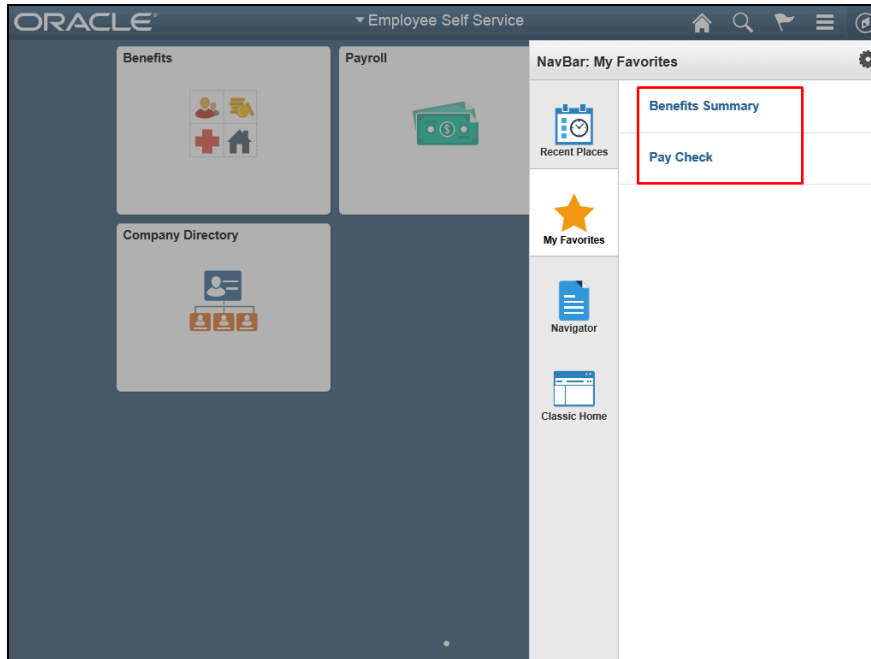| Step	Action
20.	Notice, the **My Favorites** section now displays two favorites: -- **Benefits Summary** -- **Pay Check** The edits you made are reflected on the menu.
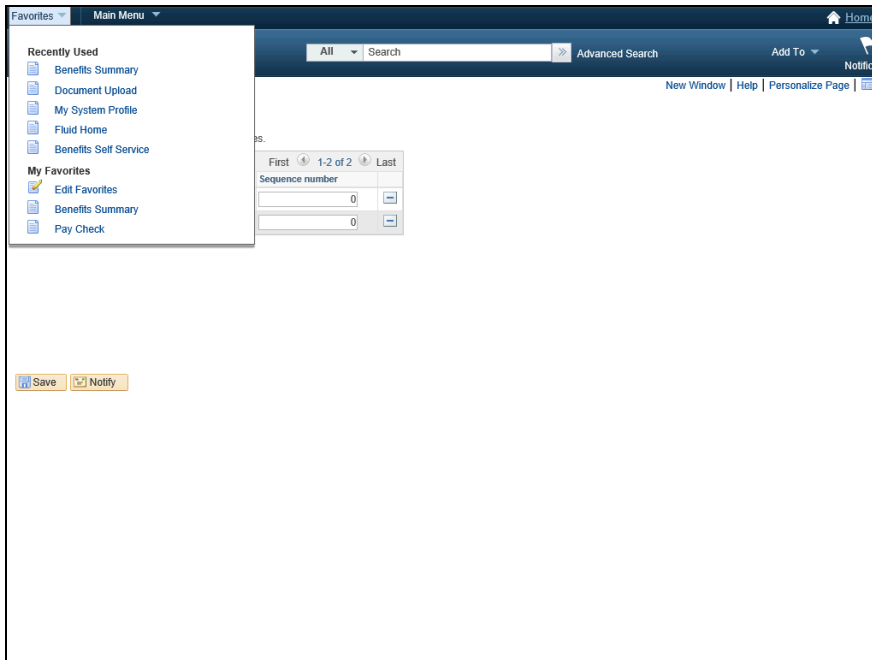
Step	Action
21.	Next you will return to the **Employee Self Service Home Page** and confirm that the changes you made display in the **My Favorites** section on the **NavBar**.
22.	Click the **Home** link.

Step	Action
23.	Click the **NavBar** button.
24.	Click the **My Favorites** object.

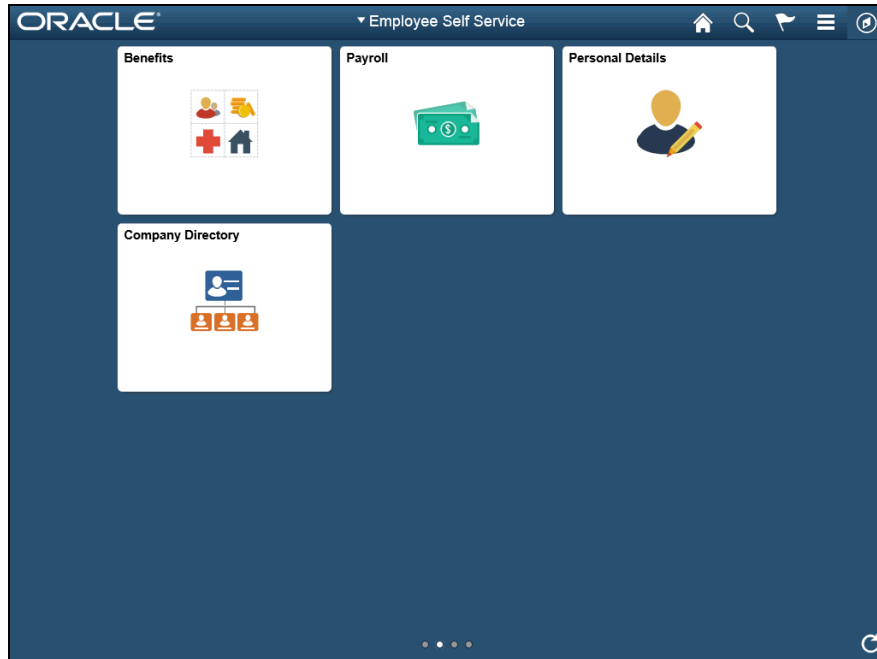| Step	Action
25.	Notice the changes you made are reflected in the **My Favorites** section. This section lists two favorites: -- **Benefits Summary** -- **Pay Check**
26.	Click outside the **NavBar** and the Tiles to close the **NavBar**.
27.	**End of Procedure.**

Editing Favorites from the NavBar

This topic covers how to edit favorites from the NavBar.

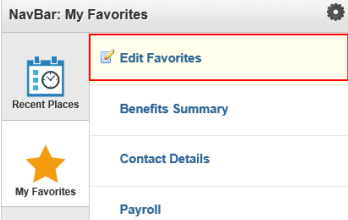
Procedure

In this topic, you will edit your favorites using the **Edit Favorites** option on the **NavBar** on Fluid pages. Editing favorites from a classic page is covered in another topic.

You will

-- Delete a favorite
-- Re-order the sequence in which favorites display
-- Rename a favorite

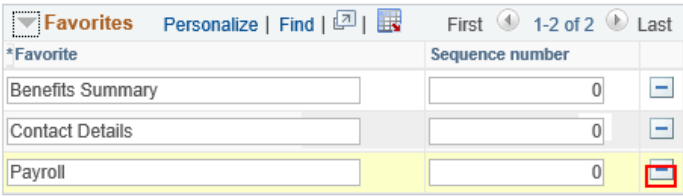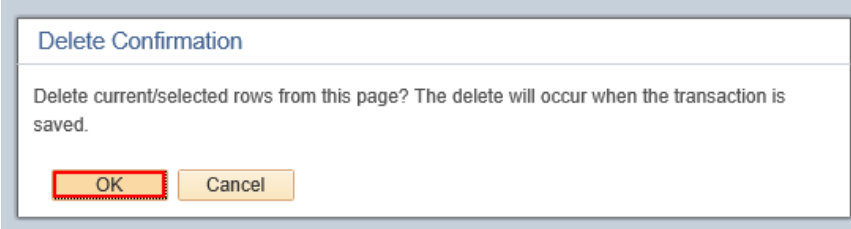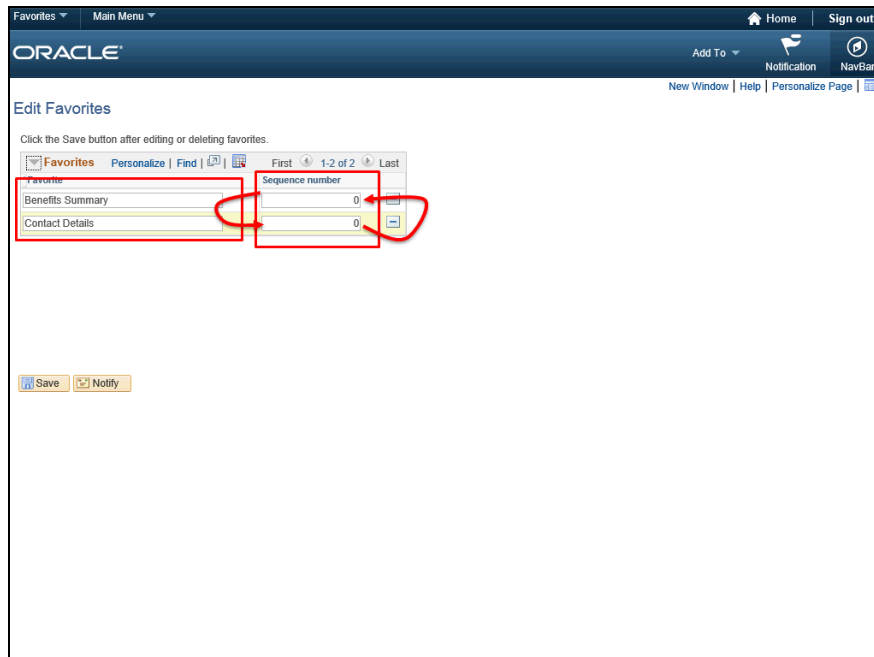| Step	Action
1.	Click the **NavBar** button.
2.	Click the **My Favorites** button.
3.	Click the **Edit Favorites** menu.
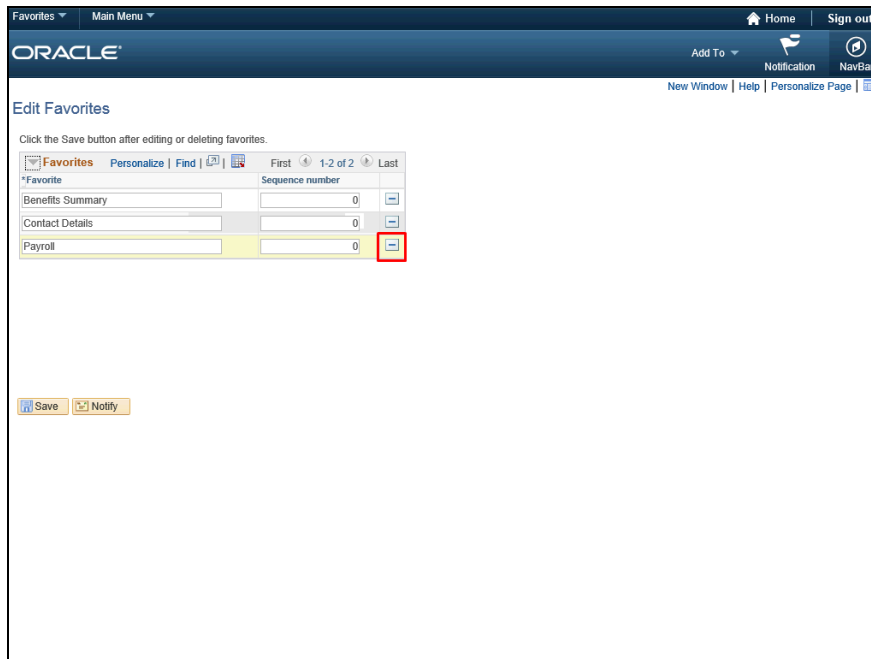
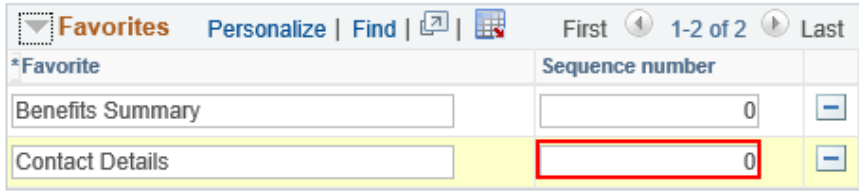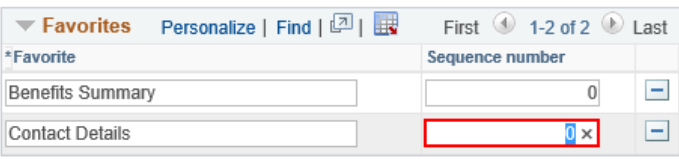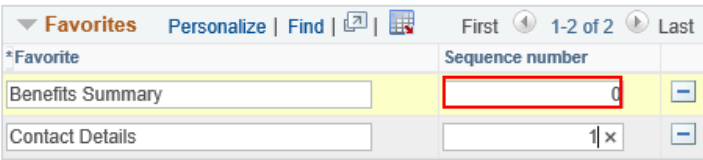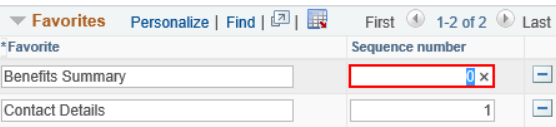| Step	Action
4.	The **Edit Favorites** page displays. This page is a classic page. You will use the minus button to delete the Payroll favorite.
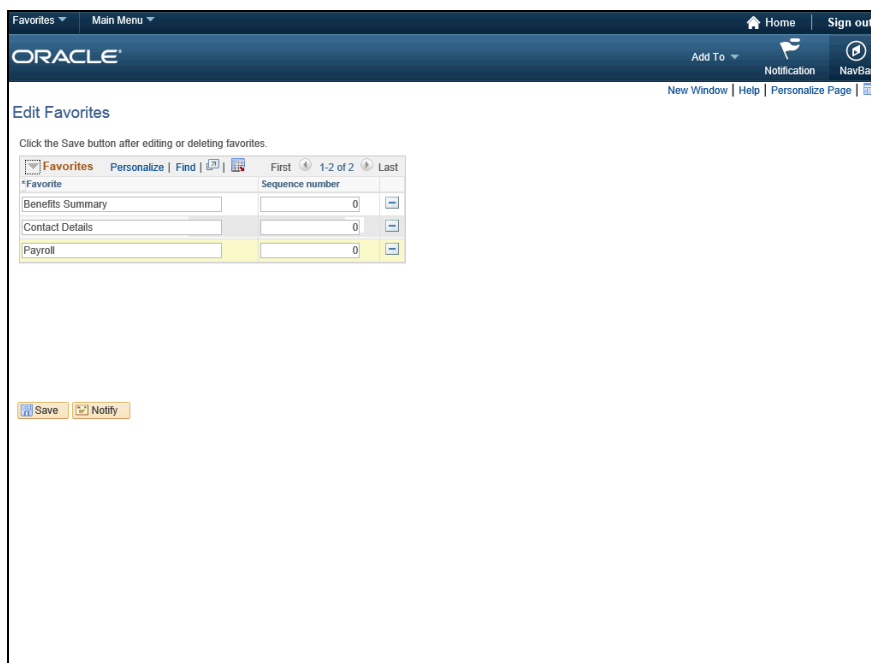
Step	Action
5.	Click the **Delete row** button.
	Click the Save button after editing or deleting favorites.
6.	Click the **OK** button.
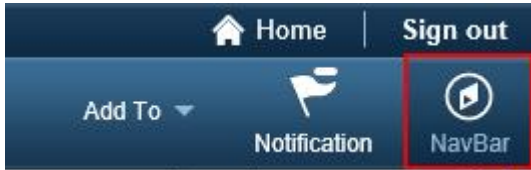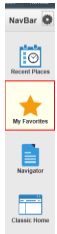
Step	Action
7.	Noticed the **Payroll** favorite no longer appears. You still have two favorites: **Benefits Summary** and **Contact Details**. These display by default in alphabetical order. You will change the display order so that **Contact Details** displays above **Benefits Summary**. To do so you will change the values in the **Sequence number** field of each favorite. You will assign 1 to **Contact Details** and 2 to **Benefits Summary**.
8.	Click in the **Sequence number** field.
9.	Enter the desired information into the **Sequence number** field. Enter "**1**".
10.	Click in the **Sequence number** field.
11.	Enter the desired information into the **Sequence number** field. Enter "**2**".

Step	Action
12.	Click the **Save** button.
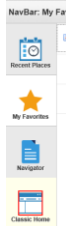
Step	Action
13.	Notice the order in which the favorites display has changed. **Contact Details** appears at the top and **Benefits Summary** at the bottom.
14.	Now you will navigate back to **My Favorites** on the **NavBar** to see the effects of these changes. Click the **NavBar** button.

Step	Action
15.	Click the **My Favorites** object.
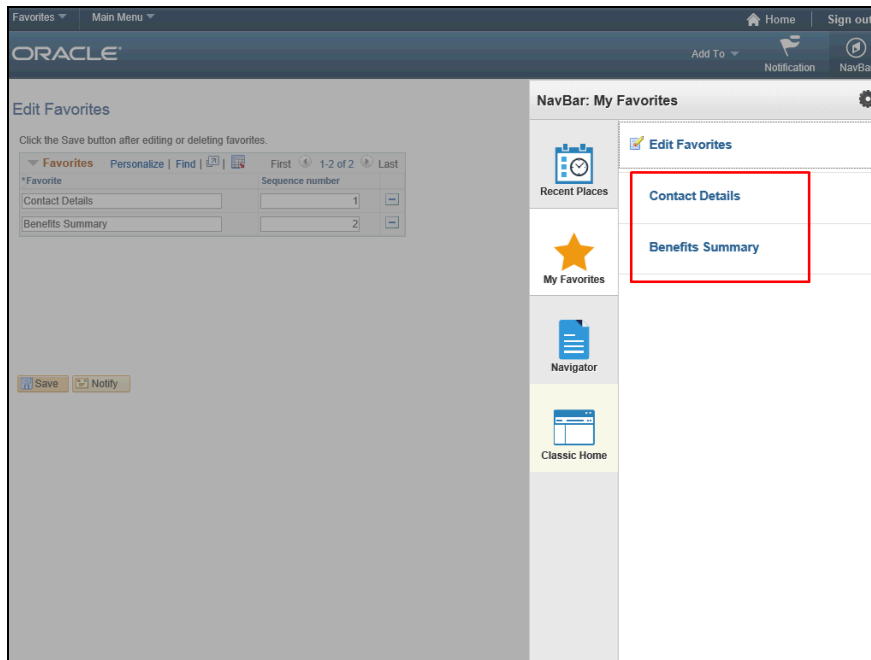
Step	Action
16.	Notice the **My Favorites** section now displays just two favorites and **Contact Details** displays above **Benefits Summary**.
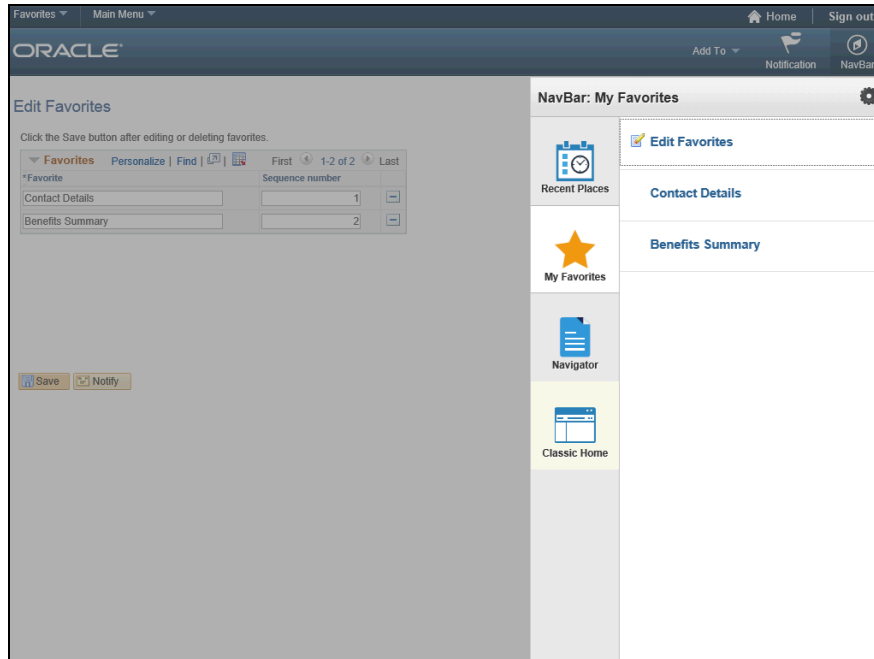
Step	Action
17.	Next you will navigate to the **Classic Home** page and review how favorites display.
18.	Click the **Classic Home** button.

Step	Action
19.	Click the **Favorites** button.
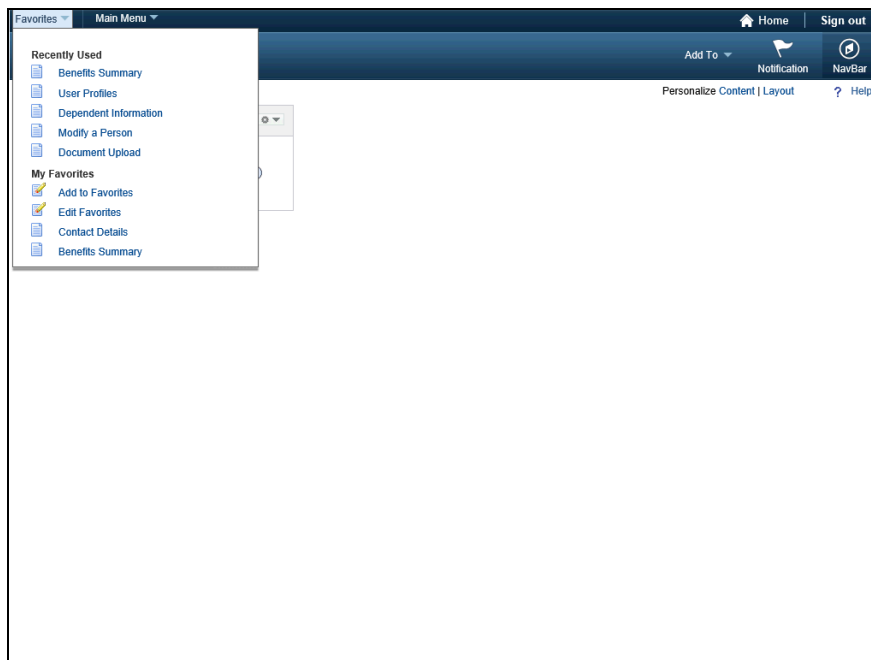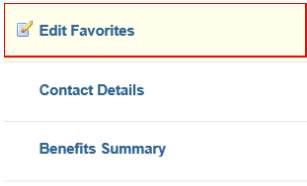
Step	Action
20.	Notice, only two favorites display and **Contact Details** displays above **Benefits Summary**. Next you will navigate back to the **Edit Favorites** page using the **NavBar**. Then you will rename **Contact Details** to **Email and Phone.**
21.	Click the **Home** link.
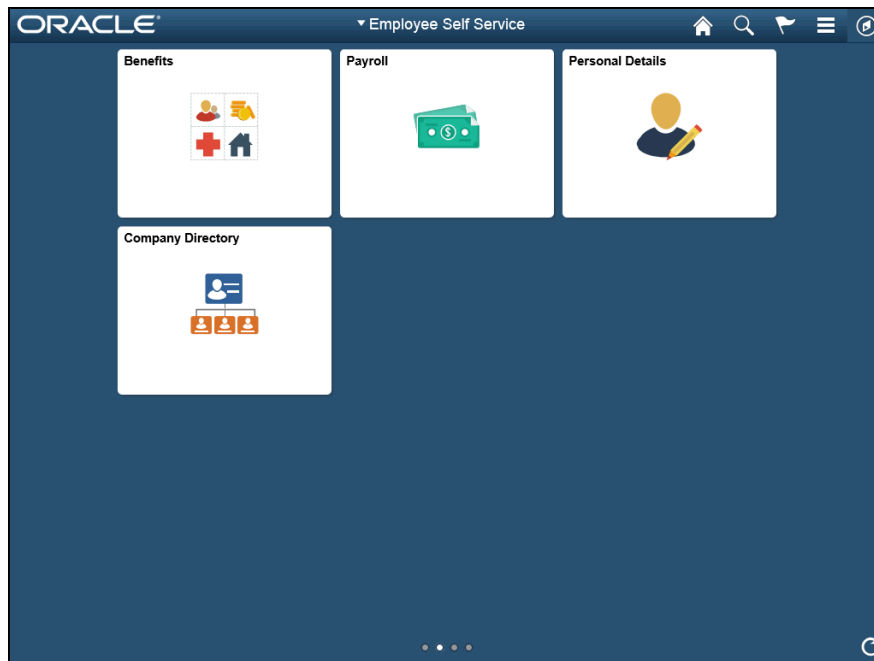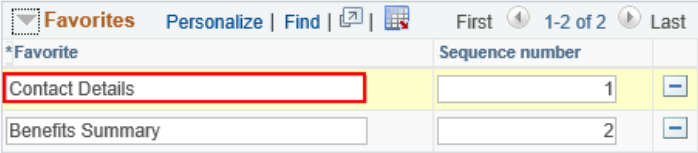
Step	Action
22.	Click the **NavBar** button.
23.	Click the **My Favorites** button.
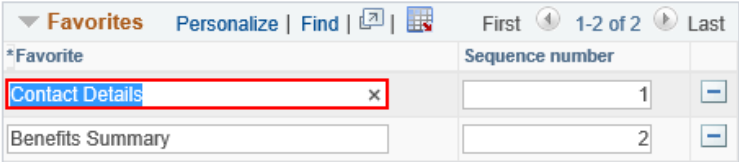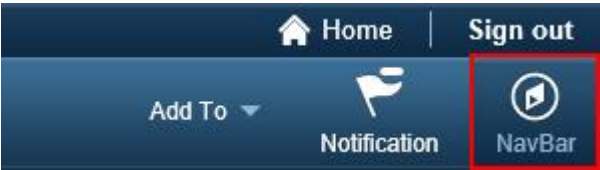
Step	Action
24.	Click the **Edit Favorites** menu.
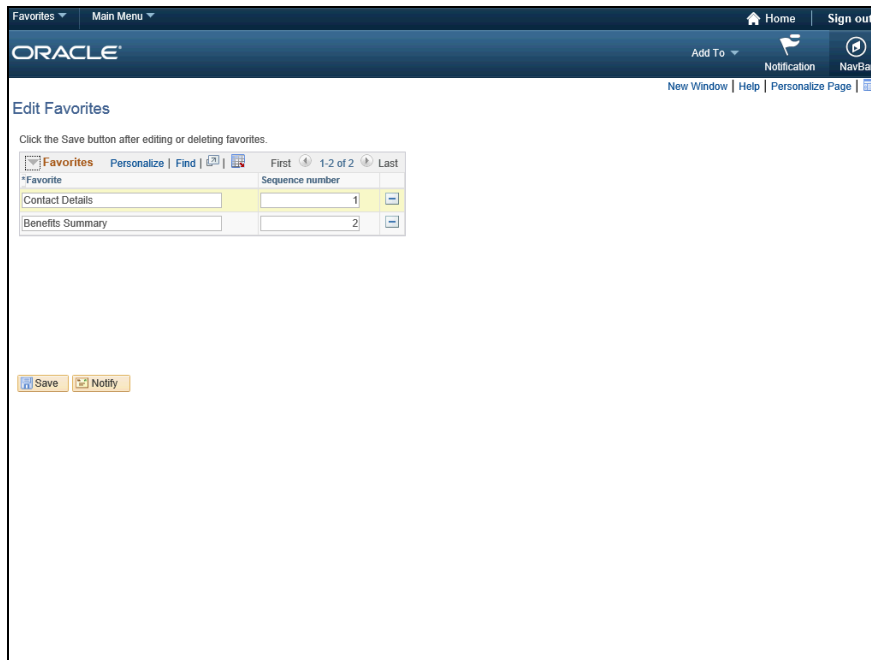
Step	Action
25.	Click in the **Favorite** field.

Step	Action
26.	Enter the desired information into the **Favorite** field. Enter "**Email and Phone**". Click the Save button after editing or deleting favorites. ▼ Favorites Personalize | Find | 🔲 | 🔳 First ◀ 1-2 of 2 ▶ Last *Favorite Sequence number Contact Details ✕ 1 ➖ Benefits Summary 2 ➖
27.	Click the **Save** button. 💾 Save
28.	Click the **NavBar** button. 🏠 Home | Sign out Add To ▼ Notification NavBar
29.	Click the **My Favorites** button. NavBar ⚙ Recent Places My Favorites Navigator Classic Home
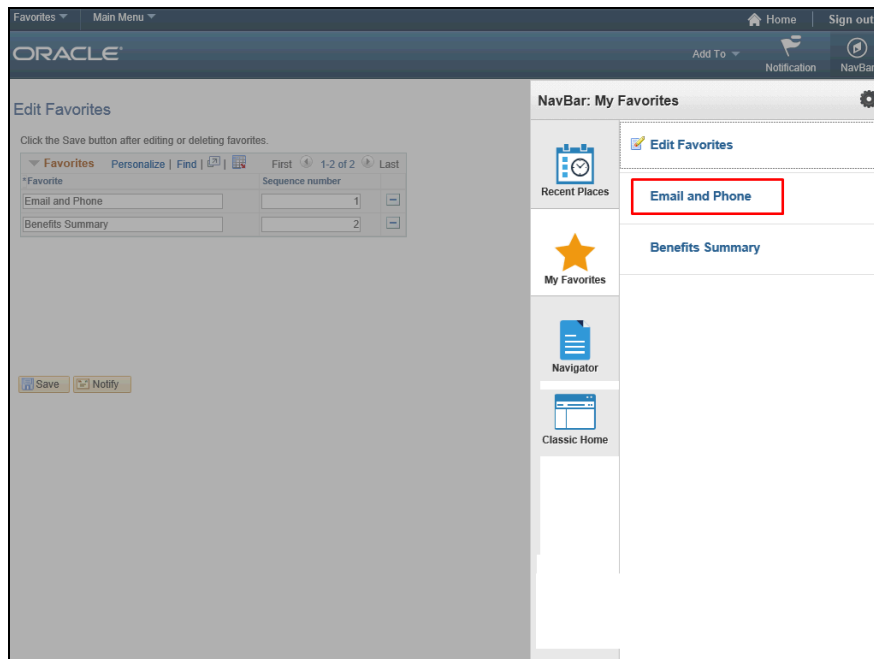
Step	Action
30.	Notice, **Contact Details** has been replaced by **Email and Phone**.
31.	Click away from the **NavBar** to close it.
32.	Click the **Home** link.
33.	**End of Procedure.**

Using Classic Page Elements
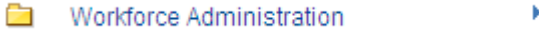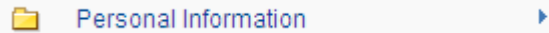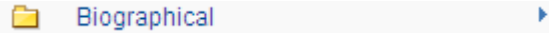
The single topic in this lesson, borrowed from Oracle pre-built training material presents an overview of common page elements found on classic pages.
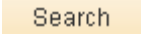
Recognizing Page Controls
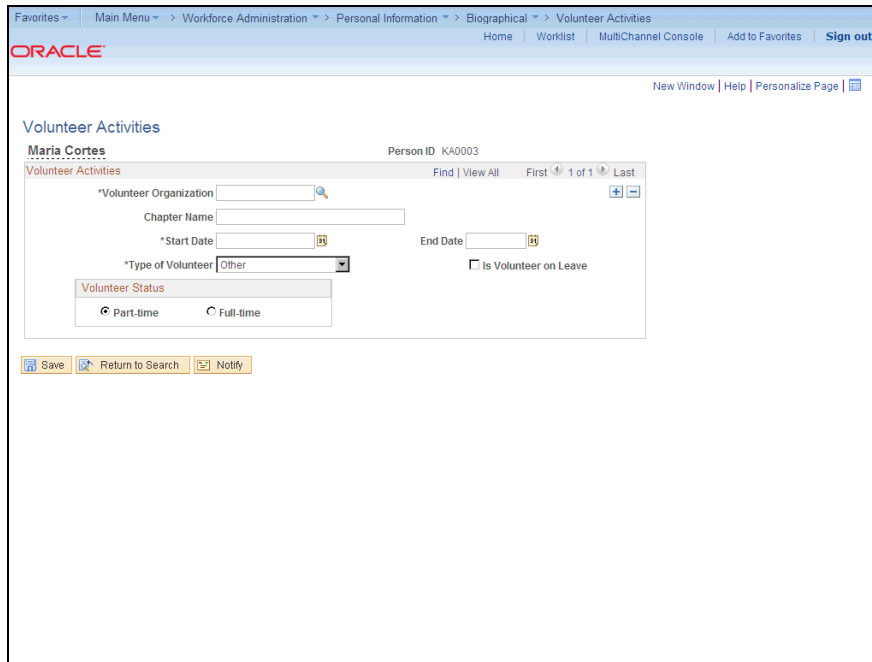
This topic covers the use of page controls on classic pages. The content of this topic was borrowed from Oracle's pre-built training materials.

Procedure

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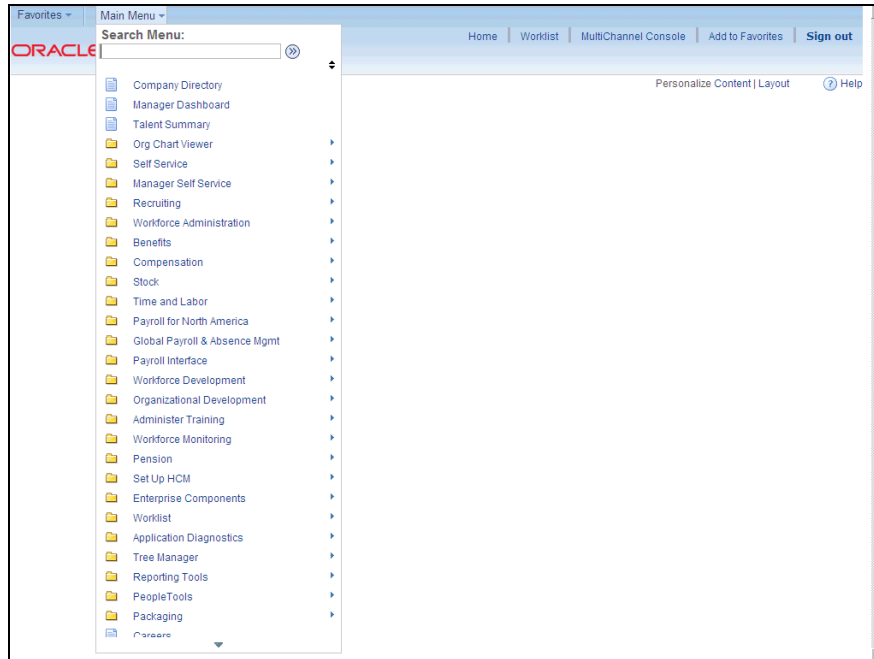| Step	Action
1.	Begin by navigating to the **Volunteer Activities** page. Click the **Workforce Administration** menu. 📁 Workforce Administration ▶
2.	Click the **Personal Information** menu. 📁 Personal Information ▶
3.	Click the **Biographical** menu. 📁 Biographical ▶
4.	Click the **Volunteer Activities** menu. 📄 Volunteer Activities
5.	Click in the **Empl ID** field.
6.	Enter the desired information into the **Empl ID** field. Enter "**KA3**".
7.	When the **Autocomplete** function is enabled (**My Personalizations**), the system provides a list of **Empl IDs** based on the text you enter in the **Empl ID** field.
8.	Click the **KA0003** link. **KA**0003

Step	Action
9.	The system enter the selected item in the field for you. Click the **Search** button. Search
10.	Some fields on a page are required, meaning that you must enter a value in the field before you can save the page. The **asterisks** next to the **Volunteer Organization**, **Start Date**, and **Type of Volunteer** fields indicate that these are required fields.
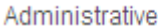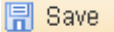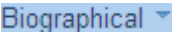
Step	Action
11.	An **edit box with prompt button** uses a **Lookup** button, which looks like a magnifying glass, and can be used to look up a valid value for the field. It opens a separate page that enables you to search the database for the data you need. Click the **Look up** button.

Step	Action
12.	A **modal prompt** is a child window that requires you to interact with it before you can return to operating the parent application. An example of this is the **Look Up** page. The **Look Up** page displays a list of all the valid values for the field. In this example, the page displays a list of all the volunteer organizations in the database. Choose the **Make a Wish Foundation** in the table. Click the **Make a Wish Foundation** link. Make a Wish Foundation
13.	After you select a value, the system automatically returns you to the original page and inserts the information in the field.
14.	An **edit box** is a rectangular box into which you enter data. The number of characters you can enter is determined by the length of the database field.
15.	Click in the **Chapter Name** field.
16.	For this example, you need to add the chapter name for the organization. Enter the desired information into the **Chapter Name** field. Enter "**Belmont County**".

Step	Action
17.	When entering information in a date field, you can use the **date prompt** button. Clicking the button opens a small calendar that displays the current month and day. Alternatively, you can press **Alt+5** while in a date prompt field to open the calendar. You may also enter the current day's date by typing the word "today" in a date field. When you exit the field, the system converts the word "today" to the current date in correct date format.
18.	Click the **Choose Date** button.
19.	For this exercise, you want to enter a start date of **July 2, 2013**. Click the **Month** list. June
20.	Click the **July** list item. July
21.	Click the **2** list item. 2
22.	Notice that when you selected the day, the system exited the calendar, and entered and formatted the date that you selected.
23.	A **list box** is a field similar to an edit box, but with a down arrow within the box. Click the down arrow to display a list of values from which you can select a single option.
24.	For this example, the type of volunteer work is administrative. Click the **Type of Volunteer** list.
25.	Click the **Administrative** list item. Administrative
26.	A **check box** is a small square box that turns an option on or off. Select the box to add a check mark and the option is on. Remove the check and the option is off. In this example, the **Is Volunteer on Leave** check box option is off and you want to turn it on. Click the **Is Volunteer on Leave** option.

Step	Action
27.	A **radio button** is a small round button that represents one option in a group of mutually exclusive options. Only one radio button in a group can be selected at one time. For this example, you want to change the volunteer status to full-time. Click the **Full-time** option.
28.	Click the **Save** button. 💾 Save
29.	You successfully used several page controls to update a record in a PeopleSoft application. You have not yet used a **long edit box**. Navigate to the **General Comments** page, for example, to see a long edit box. In the navigation path at the top of the page, find the name of the desired menu and click to display the cascade. Click the **Biographical** link. Biographical ▼
30.	Click the **General Comments** menu. 📄 General Comments
31.	A **Comment** is a field into which you enter lengthy custom text, such as comments. These boxes store free-form text. Notice that when the edit box is empty, no scroll bar appears.
32.	When you enter more lines than can be displayed at the same time in the default size of the box, the system adds a vertical scroll bar and allows you to continue entering text. Use the scroll bar to move through the text.
33.	You have successfully used data entry fields that provide you with a simple way to enter and update data in your tables. **End of Procedure.**