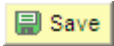
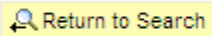
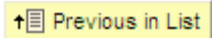
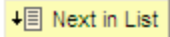
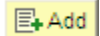
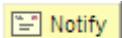
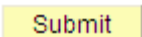
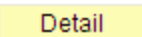



Toolbar Buttons

Button	Function
	Save Permanently saves component information (changes to all tabs or pages included in one save) to your database.
	Return to Search Returns you to the search page.
	Previous in List Use to scroll to the previous row in search results when multiple records match criteria. Button is disabled (gray) when displaying the first row in the grid.
	Next in List Use to scroll down the list of search results when multiple records match criteria. Button is disabled (gray) when displaying the first row in the grid.
	Add Mode Return to the Add a New Value page to create a new row in the data table.
	Notify Send context-sensitive emails right from the current PeopleSoft page, such as to all students on a roster.
	Submit Click to post a transaction, such as an enrollment request or department aid payment.
	Detail Click to view details about the summary data presented on the active page.
	Download Located in the scroll header of many data pages. Click to download data to Microsoft Excel. <i>Pop-up blockers may prevent the download box from being displayed. See note below.</i>




Bypass pop-up blocker

Press the Ctrl key on your keyboard while clicking on the download icon until you see the download window appear. Control [CTRL] temporarily overrides pop-up blocker settings when using the Download button or New Window link.

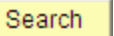
Search/Match

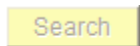
Global search used to find existing and prevent duplicate IDs.



Module:  Campus Community
Folder:  Personal Information
Page:  Search/Match

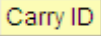
Search Criteria

1. Complete the search fields: national ID (SSN), first and last name, birth date, and/or e-mail. The more specific criteria you enter, the greater your chances of getting a match.
2. TAB away from the active field. This initiates validation of text format for each field and activates the Search button.
3. Click Search 

 The search button is disabled (or grayed-out) until sufficient criteria have been entered and validated.

Search Results

4. Review the search results. Each row displays a unique ID. Use demographic data presented in results list or click [Detail](#) to review each Add/Update a Person page to assist your selection.

ID FOUND: From the results, select  and navigate to a search page to find a row in that table that belongs to this individual. The ID *follows you* to the page.
<OR>
ID NOT FOUND: If you cannot find an existing ID that matches that personal information, try entering more Search/Match criteria. When you are confident that there is no match, navigate to Add/Update a Person and select [Add a New Value](#).

Where to Get Help

Click Help **Navigation Header**
Context-sensitive assistance, available from any data page.

Call the Help Desk..... **412-624-HELP [44357]**
Please direct support calls to the Technology Help Desk, 24/7.

E-mail the Help Desk..... **helpdesk@pitt.edu**
Send e-mail requests for assistance to the Technology Help Desk. Link available at the bottom of any my.pitt.edu page.

Visit us..... **PS Training portal community at my.pitt.edu**
We have posted several help sheets, course summaries, and job aides (such as this guide) on our Documents page.



Quick Reference Card for PeopleSoft 101



PeopleSoft Glossary

- **Campus ID:** first 10 digits of the individual's 2P number as it appears on the Pitt ID card. Includes the two, the P, and the next eight digits. Also called the University Primary Identifier (UPI). Unique in the Campus Community.
- **Component:** A group of pages (screens) containing similar data, linked together by tabs.
- **Effective Date:** Links a date with a data row, indicating when it became or will become active. Preserves history by creating *stacks* of rows in the table in ascending date order.
- **ID or PeopleSoft ID:** A system-generated number for each Add/Update a Person record. Unique by individual.
- **Field:** Boxes on a page where you can add, update, or view data. Represents the intersection of a table column and row. Fields are the smallest logical units of stored data.
- **National ID:** Displays the Social Security Number for US citizens. Unique in PeopleSoft. Not a required field.
- **Page or Data Page:** A PeopleSoft screen used to display or enter data. This is the user's view into the data tables.
- **Portal:** Your gateway to PeopleSoft and many other University resources. Visit my.pitt.edu.
- **Prompt box:** Field that is limited to a list of valid values. Displayed with a spyglass to look up the value or a drop-down box to select a value.

Add to Favorites

Bookmark favorite pages in PeopleSoft using the [Add to Favorites](#) link in the navigation header:

Edit Favorites

The **Edit Favorites** page allows you to rename, delete, and sort existing bookmarks. Remember to SAVE all changes!

Update bookmarks at:



Effective-Dated Rows

1. Use View All and or to scroll vertically or horizontally, respectively, through multiple rows.
2. Click or to **add** a new row on top of the stack. Click to **delete** a row.
3. Complete at least the **required fields** on that page (denoted by an **asterisk *** to the left of field name).
4. Click **Save** .

Data Entry Conventions

Name and address: Use title case format when entering alpha data in PeopleSoft. Adhere to standard postal and academic abbreviations, where applicable, such as:

Postal Code: Enter zip codes with all special characters or spaces as required by respective postal regulations.

USA 15260-3504 and Canada 91Z AT5

USA National IDs: Enter SSN as nine digits only, no dashes.

Calendar dates: Enter digits only for dates (mmddyy or mmddyyyy). The system will automatically format to mm/dd/yyyy format. Where two-digit year is 00-49, system assumes 21st century (2000 through 2049). Where the two-digit year entered is 50-99, PeopleSoft will format for the 20th century (1950 through 1999).

Use [My Personalizations](#) to change how dates and times display.

User Defaults

Set fields to automatically populate based on the types of data that you work with. Two defaults are activated for every new administrative user: Academic Institution = UPITT and Carry ID.



New Window

Click [New Window](#) to open an additional (child) browser window where you can view or enter data without disturbing your original session (parent) window. When finished using the new window, close that window and return to the original session.

Save your work, then use [Sign out](#) to end your original session and close the browser window.

Campus Codes

Code	Campus	Code	Campus
PIT	Pittsburgh	UPJ	Johnstown
UPB	Bradford	UPT	Titusville
UPG	Greensburg		

Academic Terms

Institution and academic career defines academic terms. Term codes are four digits in length, representing:

Digits	Represent
First	Century code 1 is for 1900 through 1999 2 is for 2000 through 2099
Second and Third	Last two digits of the academic year 08 for 2008 15 for 2015
Fourth	Term 1 for Fall 4 for Spring 7 for Summer

Example: 2081 for Fall 2007-2008, 2084 for Spring 2007-2008, and 2087 for Summer 2007-2008

Example: 2151 for Fall 2014-2015, 2154 for Spring 2014-2015, and 2157 for Summer 2014-2015

Page Actions

Page Action	Definition
Update/Display	Update/Display Default page mode. Displays only current and future records based on the effective date of the row compared to today's date. Update future but not current rows.
Include History	Include History Page mode that includes all rows, regardless of effective date. Update future but not current rows.
Correct History	Correct History Retrieves all rows and allows you to view, edit, correct any row—plus insert new rows regardless of the effective date or sequence number.

User access strictly limited.