Overview of SFIS/HRMS and Navigation

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SECTION 1

Preface

Objectives

This section describes Wesleyan University’s SFIS/HRMS System.

Background Information

PeopleSoft Student Administration System is the software product for Wesleyan University’s Student/Faculty Information System (SFIS) and Human Resource Management System (HRMS). It is used for student records, student financials, undergraduate and graduate admission, residential life, human resources, and payroll.

Areas Currently Served by SFIS/HRMS

SFIS/HRMS provides support to the following functional areas:

- Academic Affairs
- Dean of the College
- Financial Aid
- Financial Services
- Graduate Liberal Studies Program
- Graduate Student Services
- Human Resources
- Information Technology Services
- Institutional Research
- Office of International Studies
- Payroll
- Physical Education and Athletics
- Physical Plant – Student Life
- President’s Office
- Public Safety
- Registrar
- Residential Life
- Student Accounts
- University Relations
- Wesleyan Station
SECTION 2

Logging in and Other Access Information

Objectives

This section teaches users how to access the database. In addition, other access information, such as off-campus access, is reviewed.

Accessing SFIS/HRMS (Production Database)

The PeopleSoft production database login screen can be accessed as follows:

Click on the ELECTRONIC PORTFOLIO SIGN-IN link via the Wesleyan Home Page and sign in using your official e-mail username and password provided to you by the ITS operations department. Once in your Employee Electronic Portfolio, under the Administrative Applications section, click on SFIS/HRMS Production Database. The PeopleSoft login page will open.

This login method uses single sign-on, which bypasses a second login to the application. You only need to remember your email username and password.

In addition to the Production database, there is a Test database. The Test database contains "real" information, but data can be added and/or modified for testing purposes. Periodically, the Test database is copied over, or "refreshed," with data and technical changes from the Production database. This normally takes place bi-weekly, and key liaisons are aware of the dates via their calendar.

After opening SFIS/HRMS, there are some points to remember:

B. Time Outs

After 60 minutes of inactivity with your SFIS/HRMS window open, you may get a notice that you have been timed out (remember to save often so you don’t lose data). Return to your Employee Portfolio window, click SFIS/HRMS, and click on the appropriate link to continue working in the system.

C. Exiting

Remember to save all work. Exiting the application is similar to closing any window on your screen. Simply click on the “x” button in the upper right hand corner of the window. You must log out of your Electronic Portfolio to be completely logged out of the database.
D. **Access from Off Campus**

To access SFIS/HRMS from off campus, you must utilize VPN (virtual private network). VPN is a way of connecting a computer in a remote location to the Wesleyan network in a secure (encrypted) and authenticated (password-protected) manner.

For further information regarding VPN, please refer to your desktop support specialist or refer to the ITS Web site: http://www.wesleyan.edu/its/.
SECTION 3

System Terminology And Conventions

Objectives

This section provides an overview of the common system terminology and conventions.

Internet Architecture Terminology

PeopleSoft applications are made up of a navigational structure, menus, components (groups of pages), and pages. Using these elements, you'll be able to enter new data or change, delete, and modify the existing data in your application.

The table below defines some of the basic elements to the PeopleSoft Internet Architecture.

- **Menu**
  Area is left of window that contains menu headings and links you can click to move between the pages of your system.

- **Wesleyan Menu**
  A menu containing custom pages and reports by functional area.

- **Navigation Header**
  The header area located at the top of the window which remains static as you navigate through your pages. It contains links back to your homepage, to add a Favorite (page), and Sign Out link.

- **FAN**
  In addition to a left-hand menu listing, the menu expands into a larger Functional Area Navigation menu, allowing you to get where you're going with fewer clicks.

- **Breadcrumbs**
  A small horizontal menu of links that is normally present across the top of your page. The links show what pages, components, or menu links you used to get to the current page.
1. **Using Search**

If you cannot find a page you need to get to, you may enter words that may be contained in the menu in the Search box. Click on the search icon. You should get a list of Search Results to choose from. Click on the appropriate link to proceed to that page.

The system may also give you the opportunity to click Save Search Criteria if you commonly use the same search criteria. This is a real time saver.

2. **FAN (Functional Area Navigation)**

Navigation can be done from either the left-hand menu list or the F.A.N. area. You may see all pages within a folder in the F.A.N. area without having to do any more navigation in the left-hand menu.

3. **Add a Favorite**

After navigating to a page you frequently use, click on the Add to Favorites link in the navigation header. You have the option to rename the name defaulted by the system.

You may also organize your favorites by clicking on Edit Favorites in the left-hand menu. The order that the Favorites appear can be changed by editing the Sequence number.

Favorites are stored on a server, so you can use them wherever you access SFIS/HRMS.

4. **Components**

Components consist of several pages within the same window. Usually, these are pages that are related and need to be completed together. As you finish with one page, click the folder tab of the next page to open it. In addition to clicking folder tabs, you can also click the links at the bottom of each page in the component to move to the next page. Alternatively, you can press the corresponding access key.

All pages in a group have the same search record, so the prompt in the initial search box is the same regardless of which page you access first—and you won't be prompted to enter new search criteria as you move from page to page in the component.

Pages in a group are treated as a single entity when you try to save data. When you click **Save**, data on all the pages are committed to the database. You may be prompted at this time to enter data in required fields, if the system has not prompted you to do so already.
**Warning!** If you click any of the navigation headings, the system will exit the page without prompting you to save any changes you may have made. You can return to the page by hitting the back button on your browser. Your data should still be there and you can then save your work.

5. **Components with Related Links**

Occasionally, you will see pages that, in addition to having links to other pages in the component, have links to related components or pages (normally located at the bottom of the page). You may click any one of these links to access that page or component for the record you currently have open. This convenience allows you to move easily to related transactions to enter data without going through the search process again.

When you click a component link, you'll notice that the new transaction contains the same component links, enabling you to return to the original transaction if desired. The component or page in which you are working appears in black text and is not underlined. Some applications may identify these related links in another way. For example, you might see the phrase "Go to:" along with the related links at the bottom of a page. You may also see a drop-down list box with the word "...More," containing several more related transaction links.

When you have finished making changes in your component, you will be prompted to save, if necessary.

6. **Opening a Page**

After entering the appropriate search criteria, the desired page or the first of several pages in a component will open.

For example, if you want to enter personal data for an individual, you would select the Bio/Demographic Data link. The search page for that component then opens, allowing you to search for the desired person. Notice how the breadcrumbs at the top of the page leave a trail for you of all the menu stops you made along the way to get to this page.

7. **New Window**

At the top of an open page, a New Window hyperlink will appear. Clicking this link will open a new browser window, duplicating your current position. From this point, you can open a new transaction to view or enter new data. It is recommended you open no more than two windows at one time.
Tips for Using New Window
There are certain rules of thumb to keep in mind when using PeopleSoft's New Window feature:

- Before opening a new window, **save any changes** made in the current window. If the session times out while you are working in a new window, you may lose any unsaved changes.
- After a certain length of inactivity in one of your windows, your new window session will timeout or expire. This does not invalidate your other, current windows, but simply means this expired window is no longer useable. Any unsaved changes will be lost. Close this window using the browser's **File, Close** feature or the X (Close Window) button. Do not use the **Return to PeopleSoft 8.xx.xx Sign In** link on the expired page. Doing so will invalidate the entire session in all open windows.
- Do **not** use your browser's **File, New > Window** feature. Doing so merely copies the current HTML from the parent window, rather than opening a new PeopleSoft maintained window session.

A. Using Internet Architecture Buttons and Links

PeopleSoft Internet Architecture provides you with a multitude of buttons and links on your page to help you process transactions in your system. In general, if the action to be performed is navigation related, it will be shown as a link, which will bring you to another page. If the action is truly an action, such as Save or Process, it will be displayed as a button on your page. You only need to click the button or link to execute the command. If a gray button appears on your page, that action is not then available to you.

Likewise, links often appear at the bottom of your page to indicate which of the component's pages you are on. You'll notice that the active page is not actually a link because it is not underlined.

1. Toolbar Buttons

At the bottom of most pages you'll find the toolbar, which changes depending on the type of page you are in. The toolbar may include search list navigation buttons, page navigation buttons, and page action buttons. Not all buttons shown below will display on every page and some buttons may be grayed out.
2. **Keyboard Shortcuts**

Working in an internet browser-based environment can often be very mouse intensive. PeopleSoft offers many keyboard alternatives to using the mouse in the internet architecture. Once you learn the keystroke combinations below, you'll find working in

<table>
<thead>
<tr>
<th>Button</th>
<th>Name</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Save](Alt 1)</td>
<td>Save</td>
<td>Sends the information you’ve entered on the page to the database. You'll generally save when you come to the end of a component. The Save command always updates the data for all pages in a group. Upon save, the system displays the &quot;Saved&quot; message in the upper right corner of the page.</td>
</tr>
<tr>
<td>![Return to Search](Alt 2)</td>
<td>Return to Search Page</td>
<td>Returns you to the search page.</td>
</tr>
<tr>
<td>![Next In List](Alt 3)</td>
<td>Next In List</td>
<td>Displays the data for the next data row in your search results grid. This button appears gray if you didn't select the data row from a search results grid, if there was only one row in the grid, or if the data displayed is the last row in the grid.</td>
</tr>
<tr>
<td>![Previous in List](Alt 4)</td>
<td>Previous in List</td>
<td>Displays the data for the previous data row in your search results grid. This button appears gray if you didn't select the data row from the search results grid, if there was only one row in the grid, or if the data displayed is the last row in the grid.</td>
</tr>
<tr>
<td>![Update/Display](Alt 5)</td>
<td>Update Mode</td>
<td>Accesses existing rows of data on the database. If data is effective-dated, displays only current and future rows.</td>
</tr>
<tr>
<td>![Include History](Alt 6)</td>
<td>Update All Mode</td>
<td>Displays all rows of data: current, future, and history.</td>
</tr>
<tr>
<td>![Correct History](Alt 7)</td>
<td>Correction Mode</td>
<td>Accesses existing rows of data in the database and displays all effective-dated rows. Allows you to update all rows, including history rows.</td>
</tr>
<tr>
<td>![Refresh](Alt 0)</td>
<td>Refresh page</td>
<td>Appears for expert users only that are in Expert Entry mode. When clicked, validates the data entered in certain fields.</td>
</tr>
</tbody>
</table>
your PeopleSoft application is a quick and painless process. You may also display this
list on your screen when you’re on a data entry page by pressing Ctrl-k (“Accessing
your application using the keyboard”).

**Hot Keys**

Hot keys perform an immediate action. For example, when focus is in a field that has a
lookup processing, Alt 5 invokes the Lookup page without having to press the Enter key.

The table below outlines the shortcuts you may use in place of clicking the equivalent
action button with your mouse. Note that some hot keys have multiple actions assigned
to them, and their usage depends on the currently active page.

When you are on a page, this list can also be viewed (and printed) by pressing Ctrl K.

<table>
<thead>
<tr>
<th>Hot Keys</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alt 1</td>
<td>Save, OK, Search, or Add on a Search or Lookup page</td>
</tr>
<tr>
<td>Alt 2</td>
<td>Return to Search</td>
</tr>
<tr>
<td>Alt 3</td>
<td>Next in List</td>
</tr>
<tr>
<td>Alt 4</td>
<td>Previous in List</td>
</tr>
<tr>
<td>Alt 5</td>
<td>Valid Lookup Values</td>
</tr>
<tr>
<td>Alt 6</td>
<td>Related Links</td>
</tr>
<tr>
<td>Alt 7</td>
<td>Insert row</td>
</tr>
<tr>
<td>Alt 8</td>
<td>Delete row</td>
</tr>
<tr>
<td>Alt 0</td>
<td>Refresh page</td>
</tr>
<tr>
<td>Alt .</td>
<td>Next set of rows</td>
</tr>
<tr>
<td>Alt /</td>
<td>Previous set of rows</td>
</tr>
<tr>
<td>Esc</td>
<td>Cancel</td>
</tr>
</tbody>
</table>

**Access Keys**

An access Key is an Alt key combination that moves focus to a specified field on the
current page. For example, Alt / moves focus to first button on the tool bar. Then,
pressing the Enter key would invoke that action. Alternatively, you may use the Tab key
to move you to the next Toolbar button.

<table>
<thead>
<tr>
<th>Access Keys</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alt 9</td>
<td>Takes you to the Help line</td>
</tr>
<tr>
<td>Alt \</td>
<td>Takes you to the Toolbar</td>
</tr>
</tbody>
</table>
3. **Entering Search Criteria**

You can enter a full value or a partial value for any key field. Based on what you enter in the dialog box, the system uses the search record to present you with a list of possible matches or, if there is only one match, the page you requested. Often, however, you don't have all the information you need. For example, if you are searching for John Smith, you may find that there is more than one person with this name in the system. You may be able to determine which individual is the correct one based on the additional information displayed in the Search Results grid. To access the data, click any of the underlined hyperlinks in the Search Results grid.

After you've finished entering or updating data for John Smith, perhaps you need to enter data for a different individual, but you're not sure how to spell the person's last name. You do know, however, that his last name begins with a Z. To locate the correct record you would type "z" as the search criterion in the **Last Name** field (note that this field is not case-sensitive). The system retrieves a list of all IDs that begin with Z and displays the valid values in the **Search Results** grid below the search buttons.

The search function can retrieve up to 300 entries from the database, displaying a number of results at a time in the Search Results list. Use your browser's scroll bar to view all listings on the current page.

If your search retrieves more than the maximum 300 listings, you should then attempt to narrow your search in another way if you are not able to retrieve the data you need on the first attempt.

4. **Page Action Options and Effective Dates**

The types of actions you can perform on rows of data depend on the data row type. When you retrieve, modify, or insert rows in a table, the **Update/Display**, **Include History**, and **Correct History** actions apply specific rules based on the effective date:

- **Update/Display** Retrieves only current and future rows. You can change future rows but not current rows. You can also add a new current row.

- **Include History** Retrieves all rows. However, you can make changes to future rows only. You can also add a new current row.

- **Correct History** Retrieves all rows and allows you to change or correct any row and insert new rows regardless of
the effective date or sequence number.

To see how these actions work together, let's take a look at three possible events in the address history of Tom Sawyer, listed by effective dates. Assume today is September 1, 2001.

<table>
<thead>
<tr>
<th>Effective Date</th>
<th>Address</th>
<th>History</th>
<th>Current</th>
<th>Future</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/1/1996</td>
<td>265 Church Street</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8/1/2001</td>
<td>237 High Street</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>1/1/2002</td>
<td>229 High Street</td>
<td></td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

The action type that you select will dictate whether you can access certain fields and what you can do with each type of row.

<table>
<thead>
<tr>
<th>Action Mode Button</th>
<th>View</th>
<th>Change</th>
<th>Insert New Rows</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update/Display</td>
<td>Current, Future</td>
<td>Future only</td>
<td>Effective date greater than or equal to current row</td>
</tr>
<tr>
<td>Include History</td>
<td>History, Current, Future</td>
<td>Future only</td>
<td>Effective date greater than or equal to current row</td>
</tr>
<tr>
<td>Correct History</td>
<td>Designated Users Only</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The page action buttons are located in the toolbar at the bottom right of each page on which they are applicable. You can toggle between these buttons by using the Tab key and then pressing Enter to activate the selected mode. A grayed out button indicates the page is currently in that mode.

**Update/Display Mode**

With **Update/Display**, you can access only current and future rows; you can't access history. In Tom's case, you can view only the current data, effective-dated August 1, 2001, and the future data, effective-dated January 1, 2002.

- You can insert new rows with an effective date later than the date on the current row—after August 1, 2001.
- You can change the future-dated row, effective-dated January 1, 2002, and you'll also be able to change any additional rows you insert with a date later than today, September 1, 2001.
If you insert rows with effective dates between August 1, 2001, and September 1, 2001, you won't be able to change them if you return to the page in Update/Display mode.

**Include History Mode**

Select **Include History** and you can view any of Tom's address data, dating back to first address, as well as forward to the day we expect he will be relocating. But, as with Update/Display, you can update only future-dated rows, effective-dated September 2, 2001, and so on. You can also insert new rows with an effective date later than the current row—any date after August 1, 2001.

5. **Data-Entry Fields**

On pages, you'll see several types of data-entry fields, each designed to offer different ways to enter and maintain information. The different kinds of data-entry fields serve a common purpose—to provide you with a simple way to enter and update data in your tables. You'll type data directly into some fields, such as edit boxes and long edit boxes. Other data-entry fields (such as radio buttons and drop-down list boxes) present you with a list of choices. Understanding how to use each type of data-entry element will help you use the system more efficiently.

Data-entry elements, which are always associated with specific database fields, include the following:

- **Check box** Small, square box that enables or disables an option. Typically, you select the check box by clicking within it; this adds a check mark and the option becomes enabled. Click it again to clear the check box and the option is disabled.

- **Drop-down list box** Rectangular box similar to an edit box with a prompt button within the box. Clicking the prompt button expands the box to display a list of valid values from which you can select a single option.

- **Edit box** Rectangular box into which you enter data. The size of the edit box—the number of characters you can enter—is determined by the length of the database field. Edit boxes for fields with prompt tables have a prompt button to the right.

- **Long edit box** Long rectangular box into which you enter long text items such as comments.

- **Radio button** 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 (by clicking it).

**American Flag/USA** Opens other fields specifically related to US regulatory requirements.
**Required Fields**

* In most applications, an asterisk next to a data-entry field on a page indicates a required field. Data must be entered in that field if you want to continue on to the next field or to save the page. If you save the page before entering data, the field will turn red and an error message dialog will display on your page. Click OK on the error message and enter the correct data in that field. Required fields are often drop-down lists or are accompanied by a prompt button to assist you in entering the correct data.

**Prompts**

The small buttons with a magnifying glass to the right of various edit boxes (such as **Country**) are **prompt buttons**. Clicking the prompt button, or pressing Alt+5 while in the field containing the prompt, will open a separate page that allows you to search the database for the data you need. After locating the correct data, the system automatically returns you to the original page.

6. **Navigating Through Data**

Grids and scroll areas contain the same type of navigation structure. Instead of a traditional scroll bar to scroll through the rows of data, we use navigation buttons and links. The table below shows the action options and their function. You will find these buttons or links in the navigation header, within the row itself, or to the right of the tabs in a tabbed grid as appropriate.

<table>
<thead>
<tr>
<th>Button or Link</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>+</td>
<td>Inserts a new row</td>
</tr>
<tr>
<td>-</td>
<td>Deletes the current row of data</td>
</tr>
<tr>
<td>❯</td>
<td>Displays the next row of data</td>
</tr>
<tr>
<td>◯</td>
<td>Displays the previous row</td>
</tr>
<tr>
<td>☉</td>
<td>In tabbed grid only, expands grid columns to the right so tabs are no longer needed.</td>
</tr>
<tr>
<td>☉</td>
<td>In tabbed grid only, expanded grid is returned to tabbed state.</td>
</tr>
<tr>
<td>View All</td>
<td>Displays all rows of data on a page. When this feature is enabled, the link morphs to read View 1 so that you can return to the original setting.</td>
</tr>
<tr>
<td>Find</td>
<td>Enables you to find a specific row of data.</td>
</tr>
<tr>
<td>First</td>
<td>Takes you to the first row of data</td>
</tr>
<tr>
<td>Last</td>
<td>Takes you to the last row of data</td>
</tr>
</tbody>
</table>

In addition to these links and buttons, you will notice a numbering system for the rows. If a grid with five rows is set to view only one row at a time, the navigation header will read "1 of 5." If a grid is set to view three rows of data at a time, it will read "1-3 of 5." Click the arrows to view the next series of rows. Click **View All** to view the entire list.
B. Term Codes

Terms (semesters) are designated by a 4-digit numeric code:

1119 = Fall, 2011

1

1st digit is century
0 = 20th
1 = 21st

Two middle digits are last 2 digits of calendar year
“99” = 1999
“11” = 2011

Last digit is the month in which the term begins
1 = Jan (Spring)
6 = June (Summer)
9 = Sept (Fall)