

UW System
**Shared Financial System
(SFS)**

**Introduction and Navigational Reference
Guide**

PeopleSoft Version 8.9



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Introduction to Shared Financial System

PeopleSoft Financials version 8.9 modules are designed to be 100% browser based, work in an internet environment, and hence called PeopleSoft Internet Architecture. It provides universal access through a web browser, and enhanced self-service web functionality. This Web-based design, menu driven structure, and intuitive user interface makes PeopleSoft Applications easy to learn and navigate.

UW-System uses the following modules of the PeopleSoft Finance Application version 8.9:

Shared Financial System (SFS)

- General Ledger
- Accounts Payable
- Procurement
- Asset Management
- Accounts Receivable

Navigation Reference Guide

This guide is designed to provide guidance and introduction in the use of the SFS. Included is basic terminology, how to navigate through the system application menu, using pages and getting online help by using PeopleBooks.

Getting Started

Signing in to SFS Database:

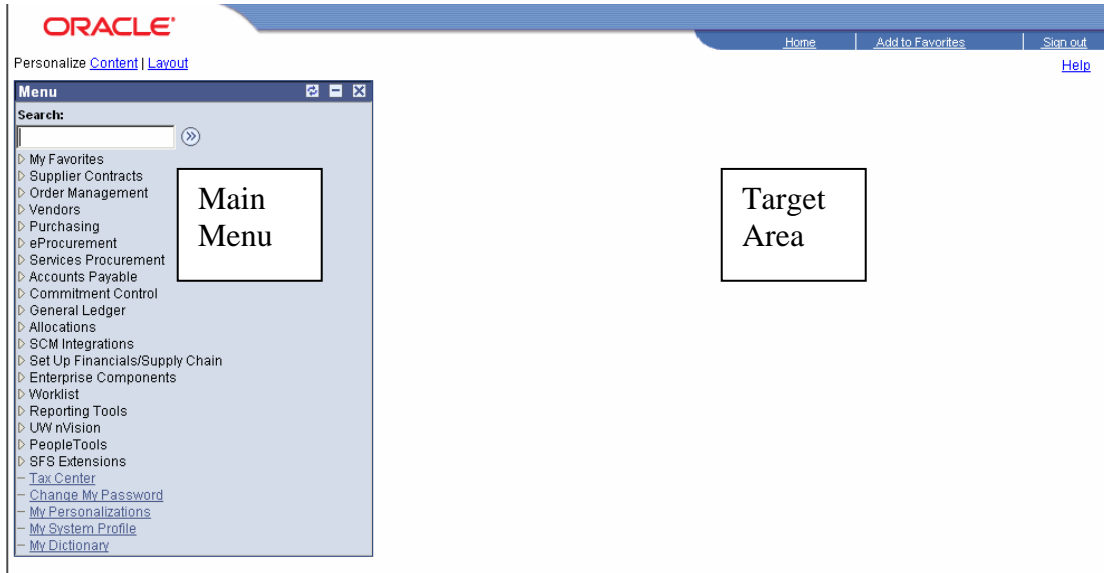
The web address to the SFS 8.9 databases can be found at <http://sfs.doit.wisc.edu/support/>. When you click on a link to an 8.9 database, the sign in page will appear.

ORACLE
PEOPLESOFT ENTERPRISE

<p>User ID: <input type="text" value="JUK"/></p> <p>Password: <input type="password"/></p> <p><input type="button" value="Sign In"/></p> <p>To set trace flags, click here</p>	<p>Select a Language:</p> <table><tr><td>English</td><td>Español</td></tr><tr><td>Dansk</td><td>Deutsch</td></tr><tr><td>Français</td><td>Français du Canada</td></tr><tr><td>Italiano</td><td>Magyar</td></tr><tr><td>Nederlands</td><td>Norsk</td></tr><tr><td>Polski</td><td>Português</td></tr><tr><td>Suomi</td><td>Svenska</td></tr><tr><td>Čeština</td><td>日本語</td></tr><tr><td>한국어</td><td>Русский</td></tr><tr><td>ไทย</td><td>简体中文</td></tr><tr><td>繁體中文</td><td>العربية</td></tr></table>	English	Español	Dansk	Deutsch	Français	Français du Canada	Italiano	Magyar	Nederlands	Norsk	Polski	Português	Suomi	Svenska	Čeština	日本語	한국어	Русский	ไทย	简体中文	繁體中文	العربية
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Français	Français du Canada																						
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Nederlands	Norsk																						
Polski	Português																						
Suomi	Svenska																						
Čeština	日本語																						
한국어	Русский																						
ไทย	简体中文																						
繁體中文	العربية																						

1. Type in your **User ID** and initial **Password** (both are case sensitive, User ID's are CAPITAL Letters, passwords are mixed-case)
2. Click the **Sign in** button to log into SFS.

The following **Home Page** is displayed providing you entered a valid user ID and password.

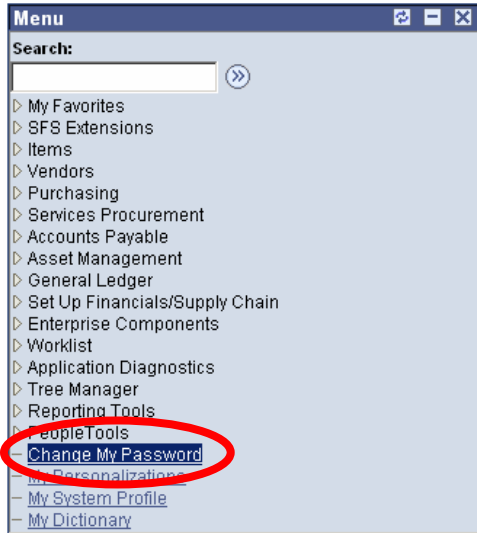


The main or home page contains the Main Menu, or the general list of areas that you can link to and also includes user specific links such as (Change My Password, My Personalizations, and My System Profile). Depending on the security level, the menu may have more or less items than the one shown above. See Chapter 2 for additional information regarding the home page.

Changing your password

Follow these steps to change your password:

Click on the “**Change My Password**” link at the bottom of the **Menu**:



The “**Change Password**” page is displayed with your user id and name. Enter your current password, your new password, then reenter your new password for confirmation, and click on the “**Change Password**” button.

Change Password

User ID: JUK1

Description: Kuhn, Jeffrey

*Current Password:

*New Password:

*Confirm Password:

Once you click on the “**Change Password**” button, the following “**Saved**” message flashes in the upper right hand side corner of the page and your new password is now in effect.

[New Window](#) | [Help](#) | [Customize Page](#) **Saved**

Password Saved



Your password has successfully been changed.



Click on OK to return to the Main Menu

Signing out from PeopleSoft Database

To terminate a user session in SFS, click the Sign Out link in the upper right hand corner. **DO NOT SIMPLY CLOSE THE BROWSER WHEN DONE**, there is a chance this can cause issues within the system.



Understanding Navigation

PeopleSoft applications are made up of navigational structure, components, and pages. (A component is simply a group of related pages.) These elements help to enter new data and change, modify or delete existing data.

Even though SFS is a **web based application it is not recommended that the web browser tool bar** be used when logged into PeopleSoft and therefore you should **never use the Back button on the web browser tool bar**. Internet Explorer is the recommended web browser when using SFS.

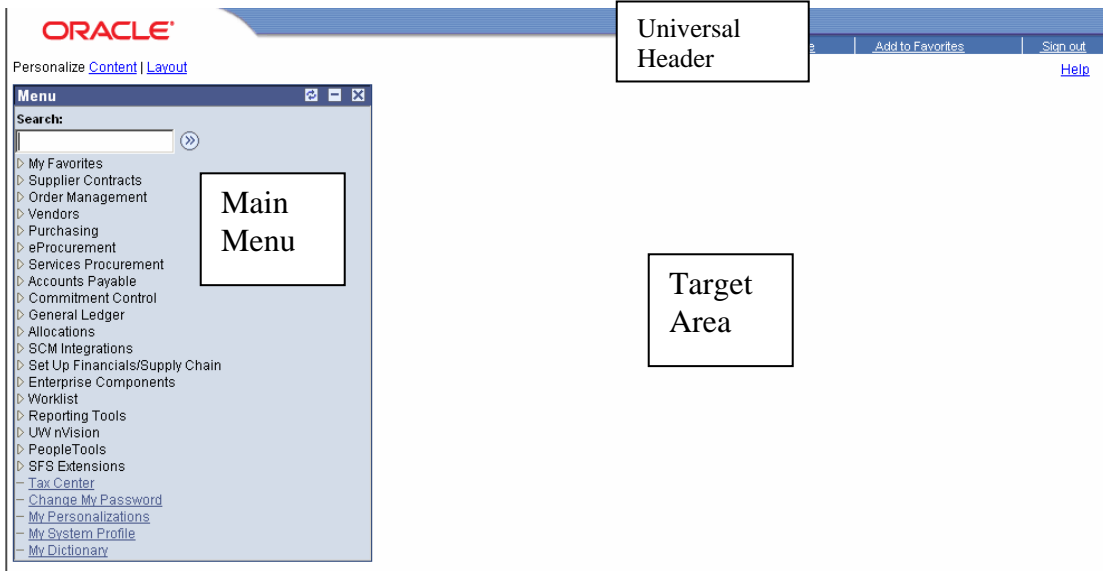
Do not use this toolbar to navigate within SFS!!




You can press the F11 key in Windows Explorer to use the full screen and see more of the entry screens in SFS.

PeopleSoft Home Page

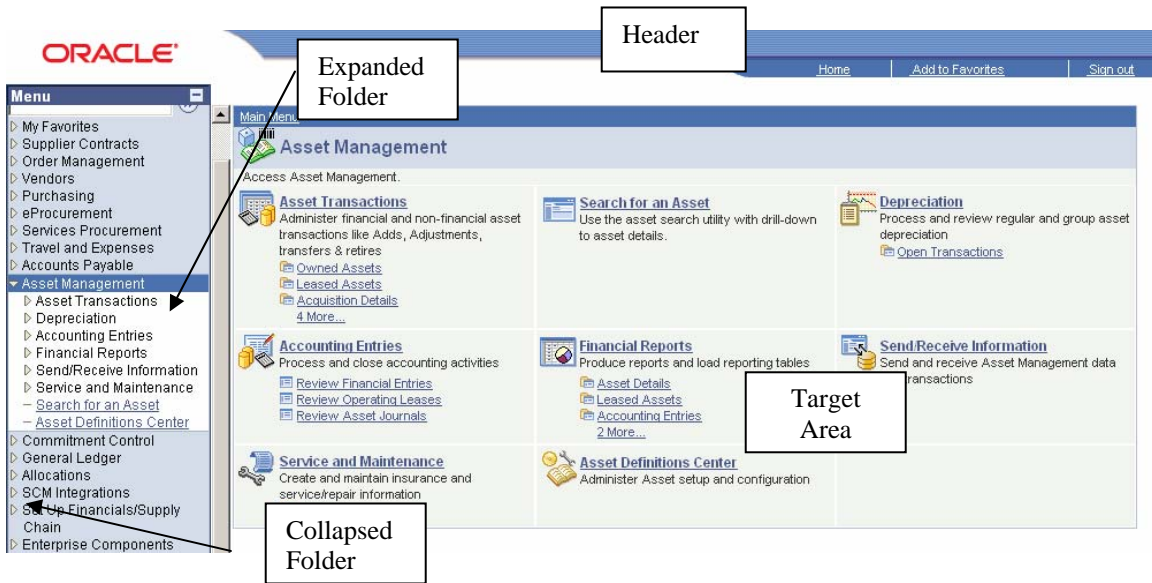
Every time you sign in to PeopleSoft, the PeopleSoft “**Home Page**” is displayed first. PeopleSoft “**Home Page**” consists of **Universal Header, Menu or Left Hand Navigation, and the Target Area**.



The Main Menu contains the folder list, user specific hyperlinks, and helps to navigate through different pages. PeopleSoft uses hierarchical type of navigation and contains a list of folder drilldowns or dropdowns. This folder drilldown structure expands and collapses based on the selection. To navigate, click on the item you want to use, the folder will expand to show additional options available. **You can collapse and expand the main menu by clicking on the  button in the upper right corner of the menu for additional screen space.**

Target Area is the area in the browser window where the Home Pages and the Components are loaded. You can navigate to components through the main menu or through the home pages in the target area. The home pages are pictorial representations of the main menu.

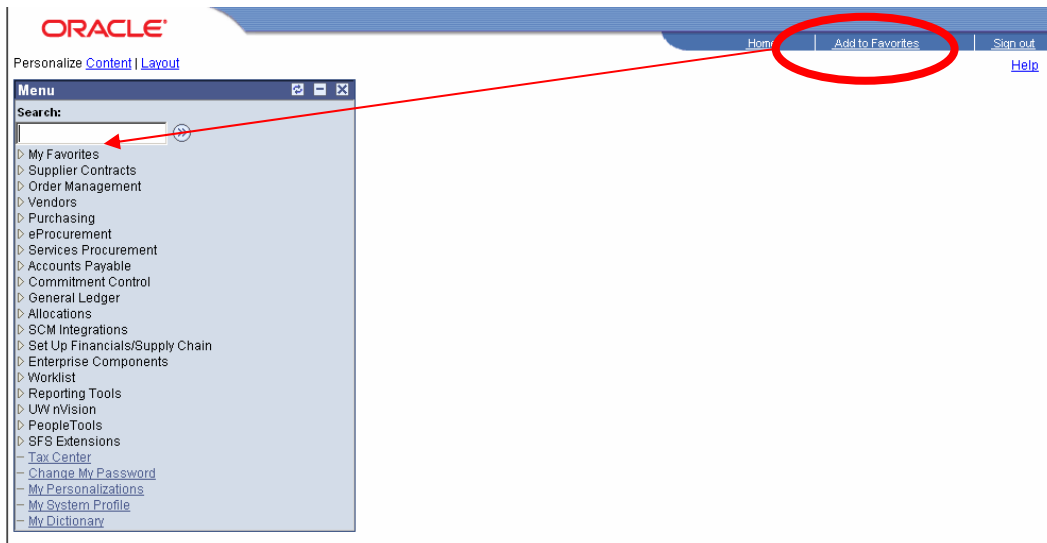
As seen here, navigating to Asset Management → Financial Management shows the available options under this folder. The target area also shows the same folders in an easy to use page. Clicking either in the Target Area or the Main Menu will take you to the same place. Only one folder will be expanded at one time, the others will automatically collapse (if opened).



The **Header** area is located at the top upper right hand side of a page and remains static as you navigate through different pages. The Navigation Header contains the following navigation links/tools: **Home, Add to Favorites, and Sign out.**

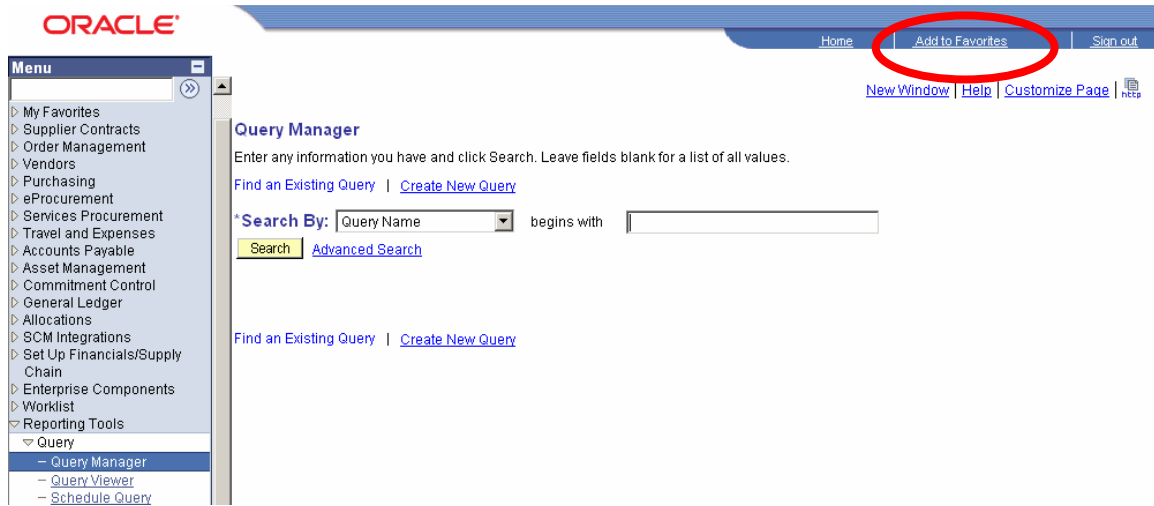
Favorites

‘Add to Favorites’ allows you to create a list of book marks to your most frequently used folders/pages. Once you add a favorite page, it is maintained in the **“My Favorites”** folder in the menu. This link is found at the top of the main menu.



To add to your **“Favorites”** go to the menu and click on the folder, (drilling down to the component) then click on the sub folder and click on the selected component that you’d like included as a **“Favorite”**. Once the component that you want is displayed, click **“Add to Favorites”** from the Header located in the upper right hand corner of the screen. For example, say you wanted to add Query Manager to your list of favorites. Navigate to

this component (Reporting Tools → Query → Query Manager). When Query Manager loads, press the ‘Add to Favorites’ link from the header.



A new screen will appear. You can change the name of the link if you desire, or else press OK.

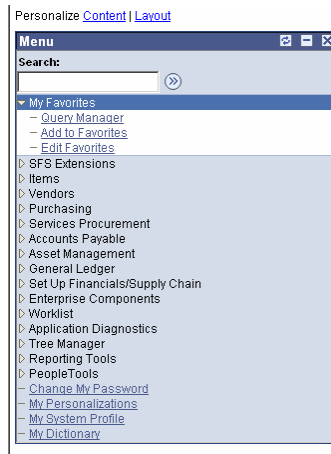
Add to Favorites

Please Enter a Unique Description for this Favorite

'Description:

Press the OK button to save the favorite

Back on the main menu, under the ‘My Favorites’ section, there is now a link for Query Manager. The customization of ‘My Favorites’ is specific to each user.



Since the navigation can be complex for some pages, it is a good idea to set up favorites for frequently used items to simplify using the system.

Navigation through the system

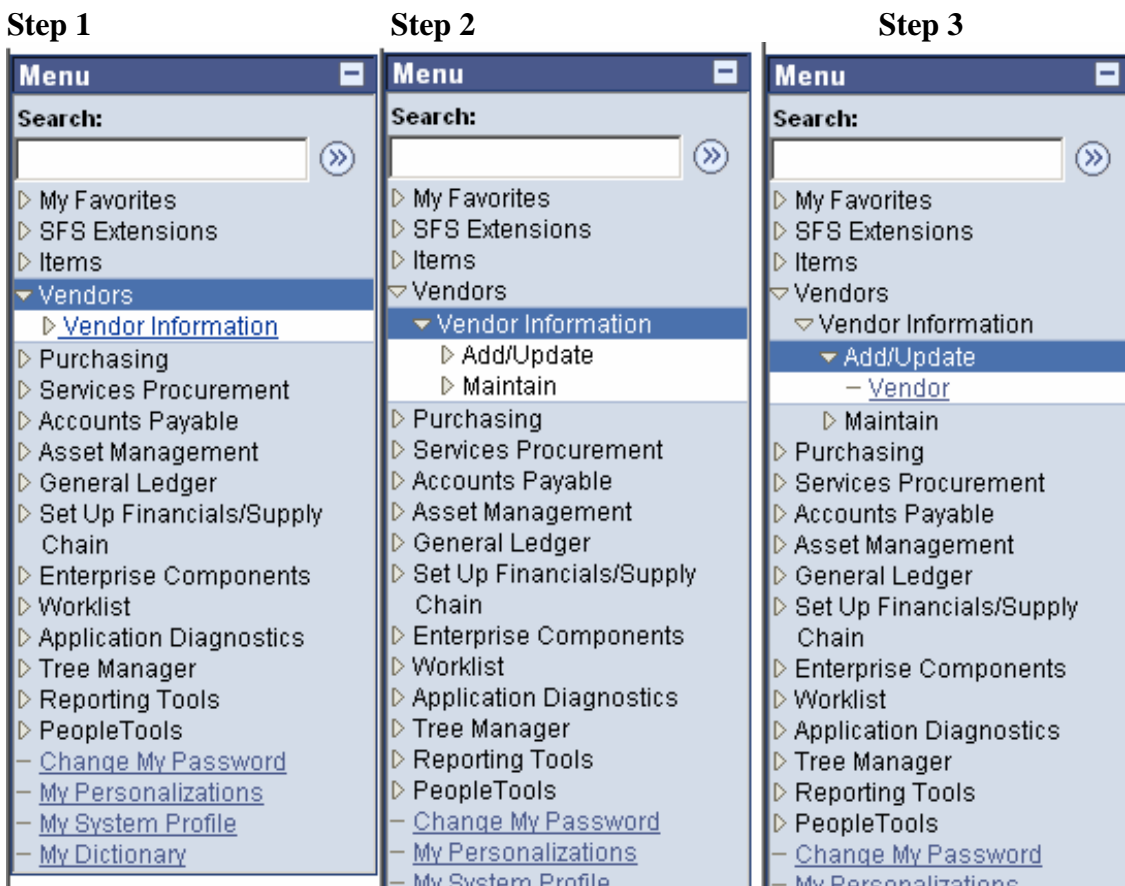
Accessing information stored in SFS through pages is called **Navigation**. As mentioned in Chapter 2, you navigate through the Menu to select the component (page) you want to use. You can also use the target area to navigate to pages.

To begin navigation using the menu:

Step 1 – Click on a selected folder from the menu column. *For example you want to see what vendors are in SFS for your Business Unit.* Click on “**Vendors**” folder. This action expands and displays the contents of this folder.

Step 2 – Clicking on “Vendor Information” sub folder displays its contents or hyper links to components (pages).

Step 3 – Clicking on “Add/Update” hyperlink displays the corresponding page. When you click on the Vendor Hyperlink, the page will load in the target area.



(While navigating through the menu, you will notice the target area is changing based on the selection made.)

Working with Pages in SFS

Pages are the method to enter data into the SFS Database.



Keys and Search Pages

A field, or combination of fields, uniquely identifies every record within a table in SFS. For example, in the Asset Management Module, Business Unit and Asset ID uniquely identifies asset records.

These display-only fields that uniquely identify data are called keys. To display a page, you need to enter the keys to search for on the Search Page so the system can return the correct data. A search record is the list of defined search keys that help locate data.

These are the fields that are prompted on a search page. Every transaction page has a search record associated with it. If you select other pages that have a common search record (such as pages within a component), you will not be prompted to enter the search criteria again. You will only need to enter new search keys when you select a new page outside a component that has a different search record.

The following buttons are located on Search pages of all types.

	Processes the search once you have entered search criteria in the key fields above the Search button.
	Clears entered text from all fields on the page so you can enter new criteria.

Search Pages

There are two types of search pages: the basic search page and the advanced search page. Typically, the advanced search page is shown, as seen below. The advanced search page generally offers several keys to search for your record. It allows you to enter multiple criteria to narrow down the returned results.

Advanced Search for Journal Entry

Basic Search for Journal Entry

Create Journal Entry

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Search by: =

[Advanced Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

Notice in the basic search here, you can only search by equals to (=).

There is a drop-down list in the Search By. You can select the key field to search with on the most basic searches by changing the criteria. In this example, each field that is available on the Advanced Search can be used in the basic search. However, you can only use one field in the basic search, as seen here.

Create Journal Entry

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Search by: =

[Advanced Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

- Budget Checking Header Status
- Business Unit
- Document Sequence Number
- Journal Date
- Journal Header Status
- Journal ID
- Line Business Unit
- Source

Entering Search Criteria

The search page will bring back records based on what you enter in the dialog box(es). If there is only one match, the page will load with the one record that matches. For example, in the Vendor search above, if we enter SMITH in the Vendor Name field, a list of all vendors that begin with SMITH will be returned. Click on one of the results to load the page.

Vendor Information

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value **Add a New Value**

SetID: [=]

Vendor ID: [begins with]

Persistence: [=]

Short Vendor Name: [begins with]

Our Customer Number: [begins with]

Name 1: [begins with]

Include History Correct History Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

Search Results

[View All](#)

First 1-14 of 14 Last

SetID	Vendor ID	Short Vendor Name	Our Customer Number	Name 1	Persistence
UWADM0000002524	SMITHBUFFY-001	(blank)		SMITH, BUFFY	One Time
UWADM0000002614	SMITHCANDA-001	(blank)		SMITH, CANDACE S	One Time
UWADM0000001016	SMITHGARYS-001	(blank)		SMITH, GARY S	Regular
UWADM0000001043	SMITHGARYS-002	(blank)		SMITH, GARY S	Regular
UWADM0000002084	SMITHGREG-001	(blank)		SMITH, GREG	Regular
UWADM0000001399	SMITHJAYL-001	(blank)		SMITH, JAY L	Regular
UWADM0000001505	SMITHJENNI-001	(blank)		SMITH, JENNIFER A	Regular
UWADM0000003443	SMITHJULIA-001	(blank)		SMITH, JULIA A	One Time
UWADM0000001810	SMITHLAMON-001	(blank)		SMITH, LAMONT	One Time
UWADM0000002563	SMITHLAURE-001	(blank)		SMITH, LAUREN B	One Time
UWADM0000003303	SMITHPEGGY-001	(blank)		SMITH, PEGGY S	One Time
UWADM0000003494	SMITHSECQU-001	(blank)		SMITH, SECQUOYAH JR	One Time
UWADM0000001841	SMITHSHARA-001	(blank)		SMITH, SHARAINA	One Time
UWADM0000003256	SMITHVIRGI-001	(blank)		SMITH, VIRGINIA L	One Time

The search function will display up to 300 entries from the database in the Search Results list. If your search retrieves more than the maximum of 300 entries, the Search Results will indicate 1-100 of 300. You should attempt to narrow your search in another way, if you are not able to retrieve the data you need on the first attempt.

Search Results

Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.

[View All](#)

First 1-100 of 300 Last

To display all the records that have been retrieved, click on the 'View All' link.

Include History and Correct History

Depending on your level of security, you may see the 'Include History' and 'Correct History' check boxes as options. You can select what type of action you want to perform for your record before retrieving that record by selecting the appropriate checkbox. The Vendor Search page seen here is an example of this feature.

Vendor Information

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

SetID: [=] UWADM 🔍

Vendor ID: [begins with] 🔍

Persistence: [=] 🔍

Short Vendor Name: [begins with] 🔍

Our Customer Number: [begins with] 🔍

Name 1: [begins with] 🔍

Include History Correct History Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

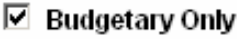

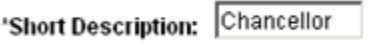
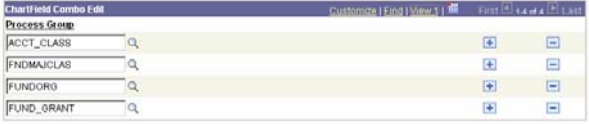
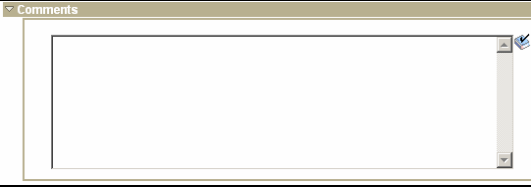

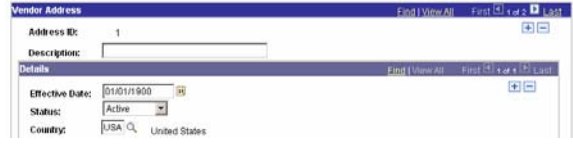
Include History	Includes future, current, and historical dated rows.
Correct History	Allows a user to make a correction without creating an effective dated row. This function should be available to authorized personnel only.

Working with pages

Pages are the primary window by which you view or alter data in SFS. Pages are representations of rows of data in the SFS database. Each page provides features such as buttons or links to help navigate to other pages in the system. These features are discussed in more detail in Chapter 4.

It is helpful to be familiar with the types of page elements that are encountered and how they work. The different kinds of data-entry fields are available to provide a simple way to enter and update data within SFS.

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

Check Box		<p>Small, square box that enables or disables an option. Typically, you <i>select</i> the check box by clicking within it; this adds a check mark and the option becomes enabled. Click it again to <i>clear</i> the check box and the option is disabled.</p>
Drop-down list box		<p>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.</p>
Edit Box		<p>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.</p>
Grid		<p>Entry fields arranged like a spreadsheet with a navigation bar or footer and (Add) and/or (Delete) buttons for each row.</p>
Long Edit Box		<p>Long rectangular box into which you enter long text items such as comments.</p>
Radio Button		<p>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).</p>
Scroll Areas		<p>An area where entry fields are arranged in a framed area with a navigation bar or footer. Each row of data may contain (Add) and/or (Delete) buttons.</p>

Required Fields

In most applications, an asterisk next to a field indicates it is a required field. Unless the page has deferred processing, you will need to enter data in the field in order to navigate

to the next field or save the page. Deferred processing is a feature in PeopleSoft that waits for a specific action (such as pressing save) before validating fields. If you attempt to save the page before entering all required data, the first required field that isn't completed will turn red and an error message will appear. Click 'OK' on the error message and enter correct data in the field. Often, required fields have drop-down lists or prompt buttons to assist in entering the correct data. Make use of these prompts to help find the correct data.

The screenshot shows a PeopleSoft interface for a Vendor Address form. At the top, there are tabs: Summary, Identifying Information, Address, Contacts, and Location. A callout box points to these tabs with the text: "Tabs on a page, click to navigate".

Below the tabs, the form displays vendor information: SetID: UWADM, Vendor: 0000000047, Short Vendor Name: CAMBRIDGET-001, Name: CAMBRIDGE TECHNOLOGY PARTNERS. A callout box points to the "View All" button in the "Vendor Address" section with the text: "Press 'View All' to see all 7 records here, or press [arrow] to navigate through records".

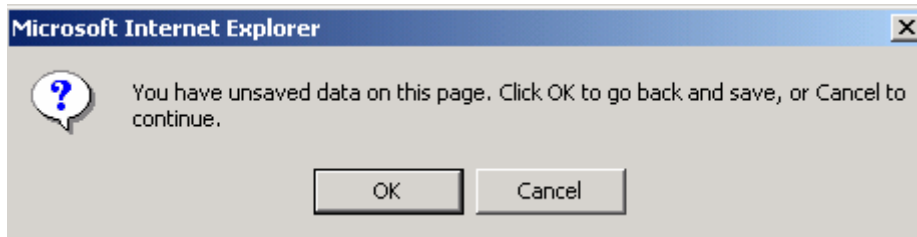
The "Details" section contains various fields: Address ID (1), Description, Effective Date (01/01/1900), Status (Active), Country (USA), Address 1 (5470 SPRUCE STREET), Address 2, Address 3, City (MINNEAPOLIS), Postal (55446), and State (MN). A callout box points to the "Country" field with the text: "Look up value".

Below the details is a "Phone Information" table with columns for Type, Prefix, Telephone, and Extension. A callout box points to the "+" and "-" buttons in the table with the text: "Insert or Delete a Row of data".

At the bottom, there is a toolbar with buttons: Save, Return to Search, Next in List, Previous in List, Notify, Refresh, Add, and Update/Display. Below the toolbar are navigation links: Summary | Identifying Information | Address | Contacts | Location.

A component is a group of related pages. Simply select a tab on a component to access that page.

Message when navigating to another page



This message will be displayed when there is unsaved information on the current page and you attempt to navigate to another component (group of pages). If you do not wish to save the information, select “Cancel”. Selecting OK will return you to the current page so that the new information can be saved. This may be the opposite of what is expected. Previously we selected “Cancel” to return to the panel we were working on and “OK” to move to the next panel without saving the changes.

Timeouts

For increased security on SFS, connections are expired after 60 minutes of inactivity. This means that if you have an open connection to SFS, after 60 minutes, this connection will automatically log off. **When you log back in, you will not return to the page you were working on, you will be back at the main menu. If you time out, any data you entered without saving will be lost.**

Using Keyboard Shortcuts

PeopleSoft Pure Internet Architecture provides buttons and links to help you process transactions within SFS. In general, if the action to be performed is related to navigation, it appears as a link, which you can click to move to another page. If the action is truly an action, such as *save* or *process*, it appears as a button. Click the button or link to carry out the command.

If a grayed out button appears on your page, that action is currently not available to you or is inactive. For example, when working in a transaction for the first dataset from a search list, you might see the following:



Your only option in this instance is to click the Next in List button.

Similarly, links often appear at the bottom of your page to indicate which of the components' pages you are on. This example shows the Journal Entry Component. The Header is not actually a link, as it is not underlined, because that is the page you are currently on. You could navigate to the other pages by clicking on the link. You can also use the folder tabs on the top of the component.

[Header](#) | [Lines](#) | [Totals](#) | [Errors](#) | [Approval](#)

Unit: UWADM **Journal ID:** NEXT **Date:** 12/20/2004

Long Description:

***Ledger Group:** ACTUALS **Auto Generate Lines**

Ledger: **Adjusting Entry:** Non-Adjusting Entry

***Source:** ADM **Fiscal Year:** 2005

Reference Number: **Period:** 6

SJE Type: **ADB Date:** 12/20/2004

Journal Class: **Save Journal Incomplete Status**

Transaction Code: GENERAL

[Currency Defaults: USD / CRRNT / 1](#)
[Reversal: Do Not Generate Reversal](#) [Commitment Control](#)

[Header](#) | [Lines](#) | [Totals](#) | [Errors](#) | [Approval](#)

Page links in a component

Most buttons and links in the system are self-explanatory; however, in this section, we provide details about some processing buttons, toolbar buttons, and pop-up menus.

Tool Tips

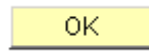
Tool tips are pop-up text messages that appear on your page when your mouse hovers over a button or link. Sometimes called hover text, tool tips display additional information about the action that the button or link performs. Prompt buttons, for example, display what the system will look up for you. Toolbar and search buttons display text describing the button and the hot key to access it.

Using Toolbar Buttons

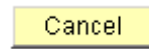
The toolbar appears at the bottom of most pages. The toolbar may include search list navigation buttons, page navigation buttons, and page action buttons, but the toolbar changes depending on the type of page that's active or the settings that the developer has set for a particular transaction. Not all buttons shown in the following table appear on every page.



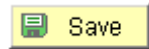
Click to apply the data input without returning to the main page, in case you want to perform additional searches. Usually found on a page that you opened by clicking a prompt button.



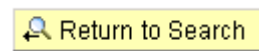
Click to accept the data input made on an auxiliary page and return to the main page.



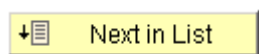
Click to clear the page and any data that you may have entered or changed without saving. When you click Cancel, the system doesn't warn you to save changes. Click Cancel if you entered data incorrectly and want to begin again.



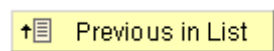
Click to send the information that you've entered on the page to the database. You generally save when you come to the end of a component. The Save button updates the data for all pages in a component. When activated, the system displays the saved message in the upper-right corner of the page.



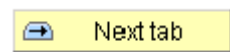
Click to return to the search page.



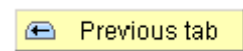
Displays the information for the next data row in your search results grid. This button is unavailable if you didn't select the data row from a search results grid, if there was only one row in the grid, or if the data that appears is the last row in the grid.



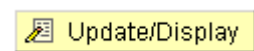
Displays the data for the previous data row in your search results grid. This button is unavailable if you didn't select the data row from the search results grid, if there was only one row in the grid, or if the data that appears is the first row in the grid.



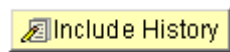
Displays the next page in the current component. If you are in the last page of the component, this button is unavailable.



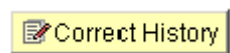
Displays the previous page in the current component. If you're in the first page of the component, this button is unavailable.



Click to access existing rows of data in the database. If data is effective-dated, only current and future rows appear.

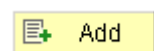


Displays all rows of data: current, future, and history.

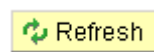


Click to access existing rows of data in the database and display all effective-dated rows. Enables you to update all rows, including history rows.

Note. This button is available only if you have the proper permission.

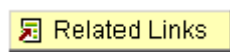


Click to add a row of data to the database for the current transaction.

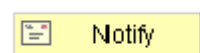


Click to force a transmission to the application server to validate all data entered on the page.

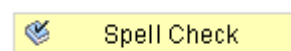
Note. This button is displayed only for components that are enabled for Deferred Mode Processing.



Displays when there are several pages that are related to the current page. Click to access a new page containing a list of related page links.



Click to access the Send Notification page, where you can specify names, email addresses, or worklists to send notifications (currently not used in SFS).



Click to activate spell check for all spell check enabled fields on the page. Each field is checked individually. As each field is checked, processing continues to the next field, displaying the spell check page if there are errors. If there are no errors, the No Errors message appears.

Using Access Keys

Access keys move the focus of your cursor to a particular button on a page. Press enter to carry out the command; this is the equivalent of clicking the appropriate button.

The following table outlines the shortcuts that you may use in place of clicking the equivalent action button. After pressing the desired key combination, you must then press the enter key to carry out the action. For example, to save a page press alt+1 followed by enter. Note that some access keys have multiple actions assigned to them, and the usage depends on the currently active page.

You can also use access keys for page tabs to help you move between pages in a component. Identify these access keys by noting the letter in the page tab name that is underlined. To access a page, press alt and the underlined letter, and then press enter to carry out the action.

Alt+9 Accesses the Help line.

**Alt+ ** Toggles between Update/Display, Include History, and Correct History action modes on the toolbar on a transaction page.

Ctrl+ Z Accesses the menu search box.

Using Hot Keys

Hot keys perform immediate actions. When pressed, the designated actions occur. Notice that several hot keys perform different functions depending on the page that you are on, such as a transaction page or a search page.

ALT+1 Saves a page in a transaction.
 Moves to the Search or Add button on a search or lookup page.
 Moves to the OK button on a secondary page.

ALT+2 Returns to the search page from the transaction page.

ALT+3 View the next row in the list when the button is active.

ALT+4 View the previous row the in list when the button is active.

ALT+5 Accesses the Look Up page.
 Opens the calendar prompt.

ALT+6 Opens the pop-up window on a page.

ALT+7 Inserts one or more rows in a grid or scroll area.

ALT+8 Deletes a row in a grid or scroll area.

ALT+0 When in Expert Entry mode, activates the Refresh button, which validates the data entered on the page.

ALT+ . View the next set of rows in a grid or scroll area.

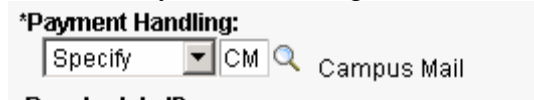
- ALT+ ,** View a previous set of rows in a grid or scroll area.
- ALT+ /** Finds data in a grid or scroll area.
- ALT+ ‘** View all rows of data in a grid, scroll area, or search page results list.
- ALT+ ** Toggles between Add a New Value and Find an Existing Value on a search page.
- CTRL+ J** Displays the system information page.
- CTRL+ K** When on a search or transaction page, accesses a page with a list of keyboard navigation shortcuts using hot keys and access keys.
- CTRL+ Y** Toggles the menu pagelet between collapse and expand.
- CTRL+ TAB** Toggles the focus through the frame set.
- ENTER** Activates the OK button, where appropriate.
On a search page, activates the Search button.
On a lookup page, activates the Look Up button.
- ESC** Activates the Cancel button, where appropriate.

Using Scroll Wheel on Mouse

Use caution with the “scroll” wheel on your mouse. Until you become comfortable with the web navigation and moving from field to field, be aware that when you are in a particular field “scrolling” can result in a different value being selected. You must be sure to click out of a field after selecting the appropriate value. Some panels default into a field that can be scrolled.

For Example:

Here the Payment Handling code is set to Specify



With the scroll wheel still in the field, the Default can be selected by mistake:



After clicking on OK at the bottom of the page – the wrong value has been selected.



Selecting OK at the bottom of the panel saved this vendor as a “Default” Payment Handling rather than the Campus Mail code because the user scrolled to “Default” using the wheel to move around the page. After selecting a value, click onto another part of the page – not necessarily another field. Roll the cursor out of the field and click. Try this a

few times as you are getting started so that you know how to properly get out of a field. You can also “tab” to the next field.

Data Entry: Field Formats

Upper Case vs. Lower Case – Many data fields in SFS are case sensitive. SFS will not convert data to one case or another unless the field requires the entry to be all capitalized (i.e. State). In these cases, the system will convert the entry into the proper format.

Names – Names are stored in SFS in the following format: Last Name,(no space)First name (space with no punctuation) middle initial.

Dates – Type dates as MMDDYY. SFS will automatically place the slashes and complete the year to four places after you tab out of the field (i.e. 020504 becomes 02/05/2004 when you leave the field). Enter a lower case t for today’s date.

Dollar Amounts – Type in the dollars with the decimals if there are cents to enter. The system will insert commas into larger numbers.

Social Security Numbers – Type SSN nine digits without dashes. SFS will insert the dashes after leaving the field (i.e 444556666 becomes 444-55-6666).

ZIP CODE – Type ZIP CODES as either five or nine digits. SFS will insert the dash if needed after leaving the field (i.e. 537150484 becomes 53715-0484).

Phone Numbers – Type phone numbers with ten digits. SFS will insert a slash and dash after leaving the field (i.e. 7154234222 becomes 715/423-4222).

Customize PeopleSoft

Near the bottom of the Main Menu, there is a hyperlink called 'My Personalizations'. This will allow you to set specific personalizations to aid in using SFS.



The following four options are available. The 'Navigation Personalizations' aid in page navigation.

Changes to Personalization settings require you to log off and log back on in order to take effect.

Personalization Categories	
Description	Personalize Option
General Options	<input type="button" value="Personalize Option"/>
Regional Settings	<input type="button" value="Personalize Option"/>
System & Application Messages	<input type="button" value="Personalize Option"/>
Navigation Personalizations	<input type="button" value="Personalize Option"/>

Option Category: Navigation Personalizations

Personalizations			Find	First	1-10 of 10	Last
Personalization Option	Default Value	Override Value				
Automatic menu collapse	No	<input type="text" value=""/>				Explain
Tab over Calendar Button	No	Yes				Explain
Tab over Grid Tabs	No	<input type="text" value=""/>				Explain
Tab over Header Icons	No	<input type="text" value=""/>				Explain
Tab over Lookup Button	No	<input type="text" value=""/>				Explain
Tab over Navigation Bar	No	<input type="text" value=""/>				Explain
Tab over Browser Elements	No	<input type="text" value=""/>				Explain
Tab over Page Links	No	<input type="text" value=""/>				Explain
Tab over Related Page Links	No	<input type="text" value=""/>				Explain
Tab over Toolbar	No	<input type="text" value=""/>				Explain

There is a blue hyperlink called 'Explain' that describes what each personalization does. Tab over means your cursor skips over the icons when you are entering data and using the tab key instead of your mouse to move to the next field. In the above example, the 'Tab over Calendar Button' is changed to yes, so when you are tabbing on a page, it will not stop on the calendar button.

Getting Help

Finding Functionality in SFS

On the top of the main menu, there is a search box. This search is used to find pages within SFS.



To find functionality in SFS, type in a word or phrase in the search box that describes what you are trying to do, such as review vendor. The results will bring back best matches to your search, as seen here:

Search

Enter search keywords separated by a space. Use quotes for any phrases. For example: Cities Countries 'United States'

New Search **Search Within Results**

 [Customize Settings](#) [Search Tips](#)

[Hide Summaries](#)

Search Results

- [Review Vendors](#)
Search for existing vendors based on search criteria.
Home>Vendors>Vendor Information>Add/Update>Review Vendors
- [Review Vendor Payments](#)
Review payments made to a particular vendor
Home>Travel and Expenses>Audit>Review Payments>Review Vendor Payments
- [Approve Vendor](#)
Review vendor data for approval such as address, contacts, and locations.
Home>Vendors>Vendor Information>Approve>Approve Vendor

Click on one of the blue hyperlink to go directly to the page. The navigation is also shown for reference.

Page help

In the upper right hand corner there is a 'Help' hyperlink. When you are in a page, and press help, a new window will open PeopleBooks specifically to the page you are working on, if available.

The following screenshot is the Journal Entry page. As you can see, the 'Help' hyperlink is available in the upper left hand corner.

New Window | **Help** | Customize Page |

Header | Lines | Totals | Errors | Approval

Unit: UWADM Journal ID: NEXT Date: 12/02/2004

Long Description:

'Ledger Group: ACTUALS Auto Generate Lines

Ledger: Adjusting Entry: Non-Adjusting Entry

'Source: Fiscal Year: 2005

Reference Number: Period: 6

SJE Type: ADB Date: 12/02/2004

Journal Class: Save Journal Incomplete Status

Transaction Code: GENERAL

[Currency Defaults: USD / CRRNT / 1](#)
[Reversal: Do Not Generate Reversal](#) [Commitment Control](#)

[Header](#) | [Lines](#) | [Totals](#) | [Errors](#) | [Approval](#)

Pressing this hyperlink in this case will open a new window with all the available help for this page.

Multiple help topics found. Click on the topic you want.

PeopleBooks

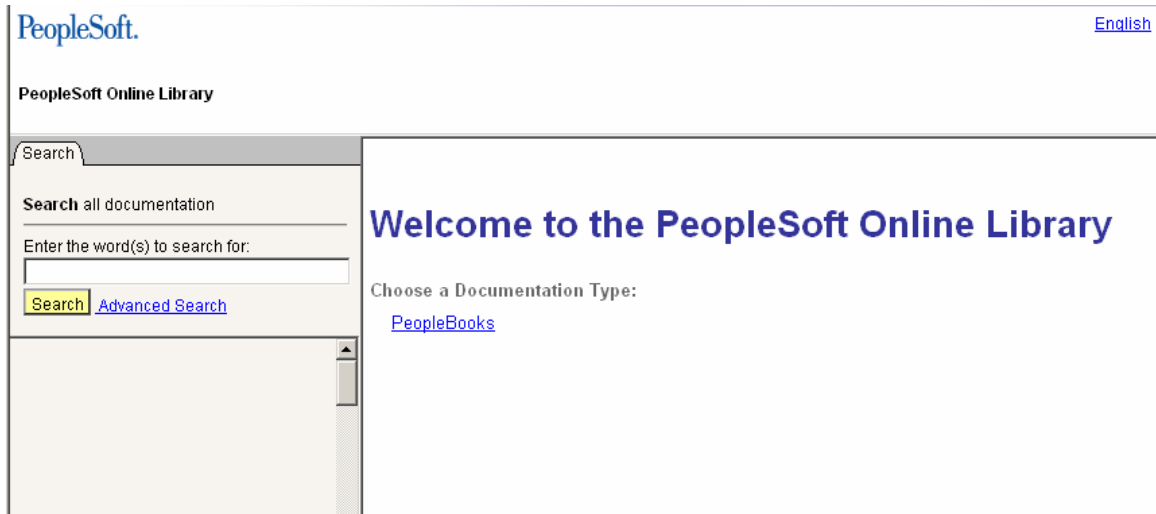
- [PeopleSoft Enterprise General Ledger 8.9 PeopleBook: Making General Ledger Journal Entries](#)
- [PeopleSoft Enterprise General Ledger 8.9 PeopleBook: Using Open Item Accounting](#)
- [PeopleSoft Enterprise General Ledger 8.9 PeopleBook: Processing Value Added Tax \(VAT\) Transactions in General Ledger](#)
- [PeopleSoft Enterprise General Ledger 8.9 PeopleBook: Using Commitment Control in General Ledger](#)
- [PeopleSoft Enterprise General Ledger 8.9 PeopleBook: Using Entry Events in General Ledger](#)
- [PeopleSoft Enterprise Global Options and Reports 8.9 PeopleBook: Managing Multiple GAAPs and Prior Period Adjustments](#)
- [PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook: Setting Up Ledgers](#)

Select a link to open the associated PeopleBook.

PeopleBooks

PeopleBooks are available on the internet for reference. When you click on the help link on any PeopleSoft page, you will be taken to PeopleBooks.

The PeopleBook main page looks like the following:



The left hand side allows you to enter a word or phrase and search through PeopleBooks for the word or phrase. You can also open a specific PeopleBook by pressing the PeopleBooks hyperlink in the target area and navigating from there.

Appendix A Clearing Cache and Cookies

Internet Explorer is the recommended browser for logging in, navigating, entering and accessing data in SFS. There may occur a time when you will receive an Application Exception message, or Application Level Service Failure, or another similar type of message. This will likely result in not being able to continue using SFS until the issue is resolved. The first thing to try before calling SFS Support is to Clear the browser cache and cookies.

What is Cache?

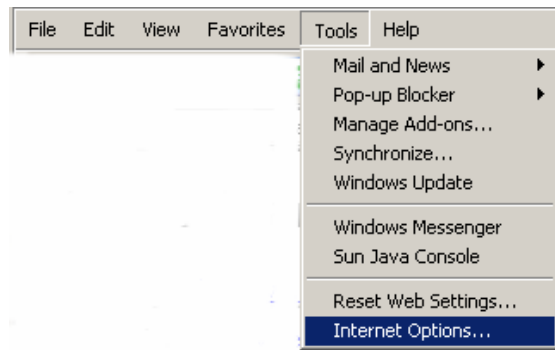
Cache is the computer's memory. The most recent web pages visited are stored in your browser's cache memory. The next time you visit the page, it is retrieved from cache memory rather than downloaded to save time. Caching problems can occur when pages change since the last time you visited it.

What is a Cookie?

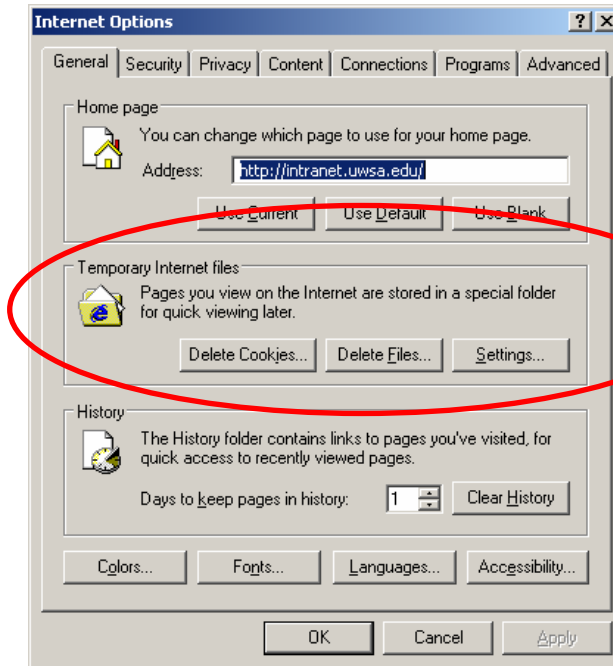
A cookie typically records preferences when using a particular web site. It put information into a file (called a cookie) on your computer so it can be referenced the next time you visit the website. You may not want these preferences applied to the current visit.

How to clear Cache and Cookies Immediately in Internet Explorer

When in Internet Explorer, select Tools → Internet Options

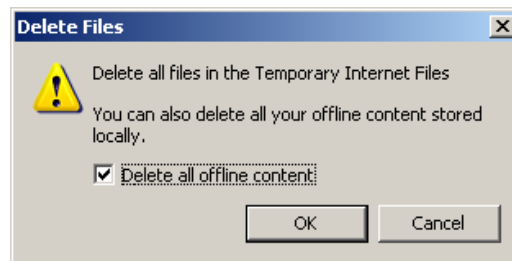


Click on the General Tab in the Internet Options window, and look at the middle of the page, in the Temporary Internet files section

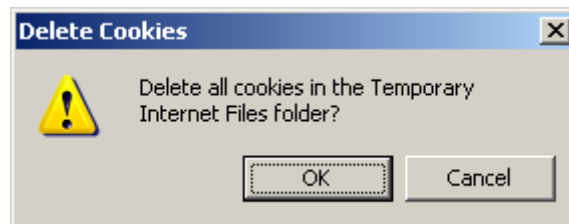


Click on the Delete Files... button to delete the cache.

Click the 'Delete all offline content' checkbox. Click the 'OK' button to delete all files in the Temporary Internet Files and all Web page content that you have made available offline.



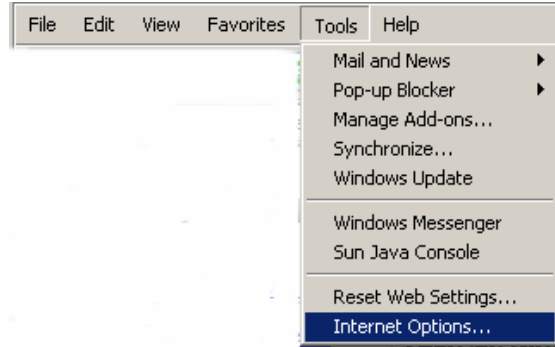
Next, click on the 'Delete Cookies' button. Press OK.



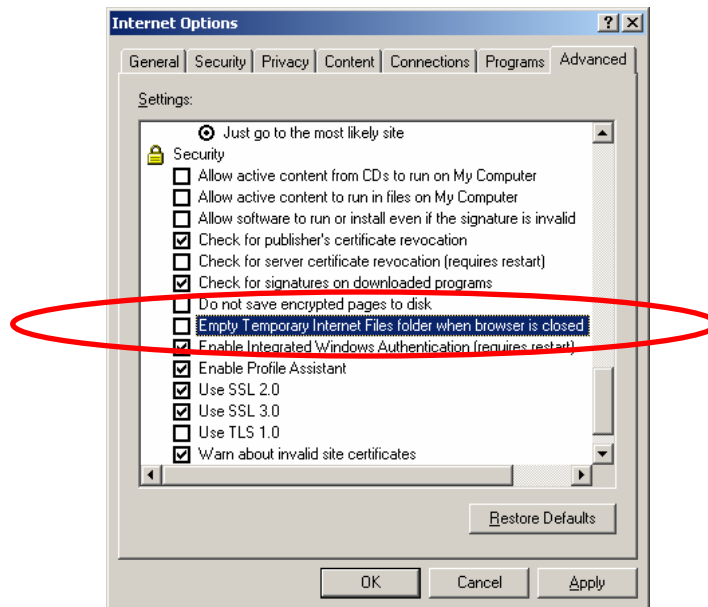
Click 'OK' in the Internet Options window to close the window and return to your browser.

There is also an option in Internet Explorer to always clear your cache when you close the browser. To turn this feature on, follow the following directions:

When in Internet Explorer, select Tools → Internet Options



Click on the Advanced Tab and scroll down to the Security section.



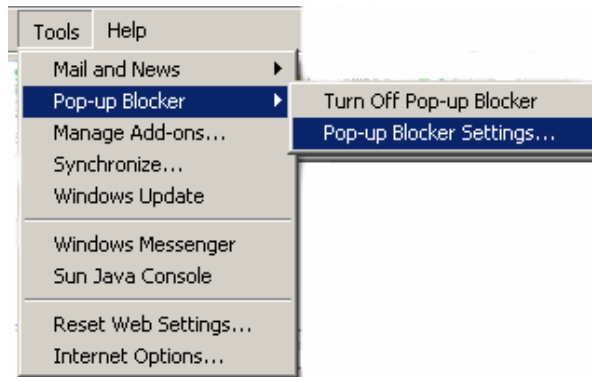
Find the Entry 'Empty Temporary Internet Files folder when browser is closed' and check the box. Click on the 'OK' button to save the setting and close the Internet Options window. **SFS Support recommends turning this feature on in Internet Explorer to reduce the number of cache-related issues that may arise.**

Appendix B – Configuring Pop-up Blockers

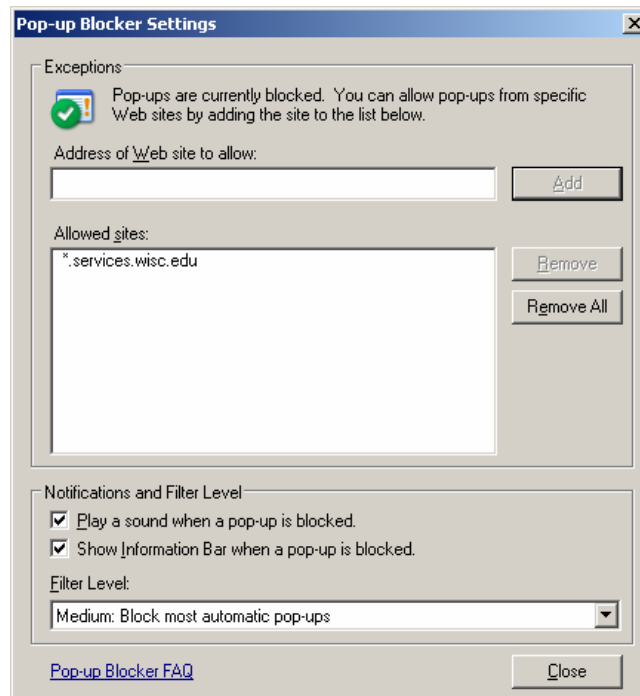
If you are using a web browser that has a pop-up blocker, such as Internet Explorer 6.0, you may have issues when using SFS version 8.9. This document will show how to set up the pop up blocker in Internet Explorer so it will not be a problem in SFS.

Pop-up blockers are unique to each user. Before logging into a certain computer for the first time, you may want to check this setup before logging onto SFS on the web. If the pop-up blocker is not set up correctly, you will be unable to see certain features, such as reports that open a new window.

To view the pop-up blocker settings, navigate to Tools → Pop-up Blocker → Pop-up Blocker Settings... from the Internet Explorer menu.

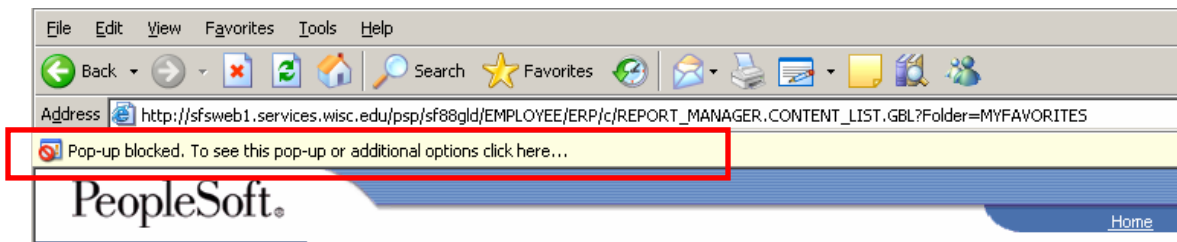


You will see a window similar to the following:

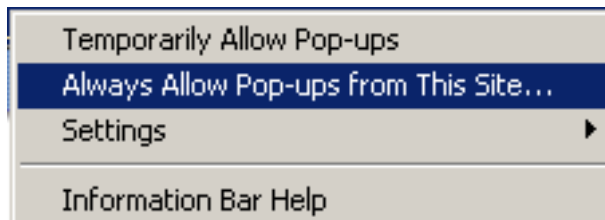


The address we are concerned with is the *.services.wisc.edu. In the example above, the site is already set up, as you can see this in the Allowed sites section. If this is not in the listing on your computer, click in the box entitled “Address of Web site to allow.” Type in the “*.services.wisc.edu” (without the quotes), then click on Add. Ensure it is in the “Allowed sites” section. When you go to SFS 8.9, (which has the .services.wisc.edu extension in the web address) Internet Explorer will allow pop-up windows.

You can also set up access to pop-up windows while you are in the system. You may notice a line that shows up under the address bar that looks like the following:



Click once on the pop-up message, and the following menu appears:



Click on the “Always Allow Pop-ups from This Site...”, and this will place the entry in the Allowed Sites that we did above.

Please refer to the Help section of other third-party pop-up blockers that may be installed on your computer on how to allow pop-ups from specific sites.