Navigating Menus

- Overview of Drop-Down Menus
- Using Drop-Down Menus
- Navigating Breadcrumbs
- Using Processing Buttons
- Using Toolbar Buttons
- Using Popup Menus
- Navigating Through Data
- Using Navigation Buttons and Links

Overview of Drop-Down Menus

Drop-down menus are an intuitive, nonlinear way to navigate PeopleSoft applications and access your application data. Drop-down menus appear at the top of your browser, above the transaction page or content area and contain lists of menu items. The menu items are either links that provide direct access to a transaction or detail page, or are folders that provide access to submenus, which cascade to the side and contain more menu items. Folders typically organize menu items based on business processes or other relationships that exist among transactions.

Main Menu

The PeopleSoft navigation structure, located on the top of your page organizes and provides access to transaction pages, from which you can carry out actions and modify your data. The Main Menu contains menu items; some lead directly to transaction pages and some lead to submenus in a hierarchical format.

Menu Pagelet

The PeopleSoft navigation structure, located to the side of your page organizes and provides access to transaction pages, from which you can carry out actions and modify your data. The Menu pagelet contains links, some leading directly to transaction pages and some leading to other links in a hierarchical format.

Breadcrumbs

The collective set of links that appear as you navigate the menu structure; they indicate the hierarchical path to your current location. Breadcrumbs appear in the drop-down menu header and in the navigation page header

Using Drop-Down Menus

Main Menu

The PeopleSoft navigation structure, located on the top of your page is considered a "drop-down menu". It organizes and provides the main access to transaction pages. It is formatted like folders.
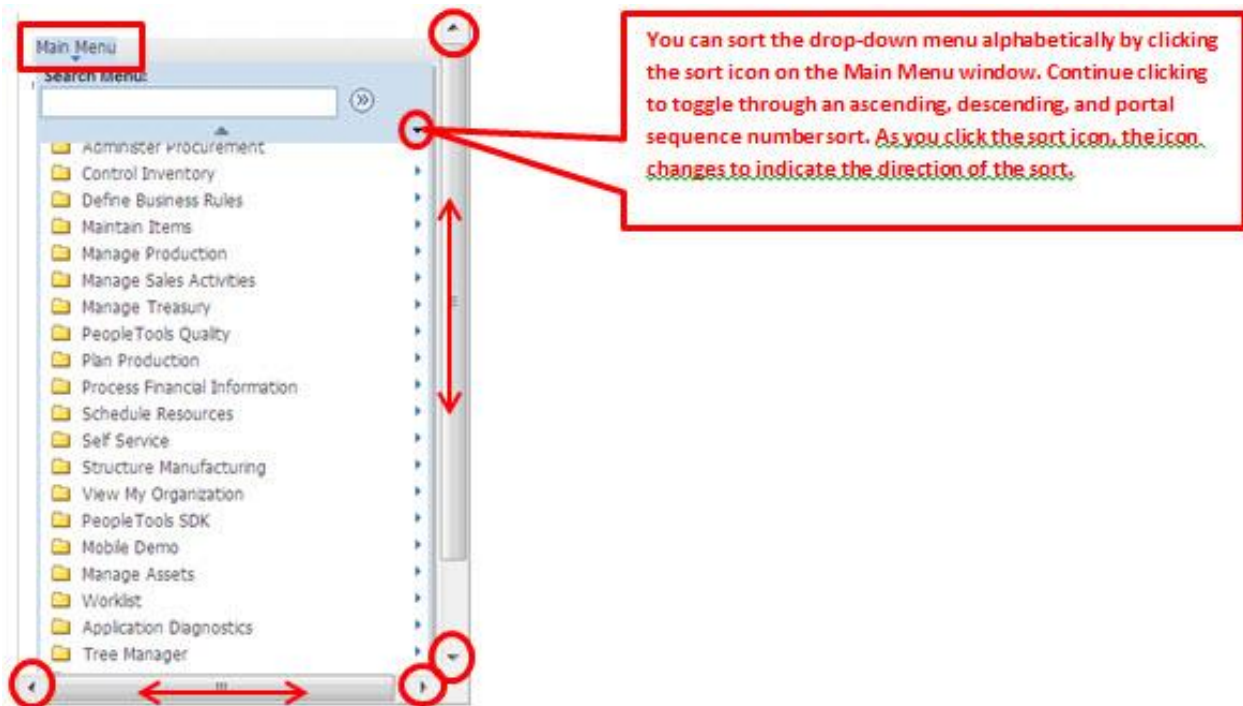

- Submenus always open in the viewable area. If the viewable area is too small to display the full list of items in a submenu, scroll indicators—up and down arrows—appear at the top and bottom of the submenu to let you know that there are more menu items in the list.
- Hover your mouse over the up or down arrow to make the menu scroll in the direction of the arrow. Click and hold the arrow to double the scrolling speed. You can also use your mouse wheel to scroll through a menu.

To navigate by using drop-down menus:
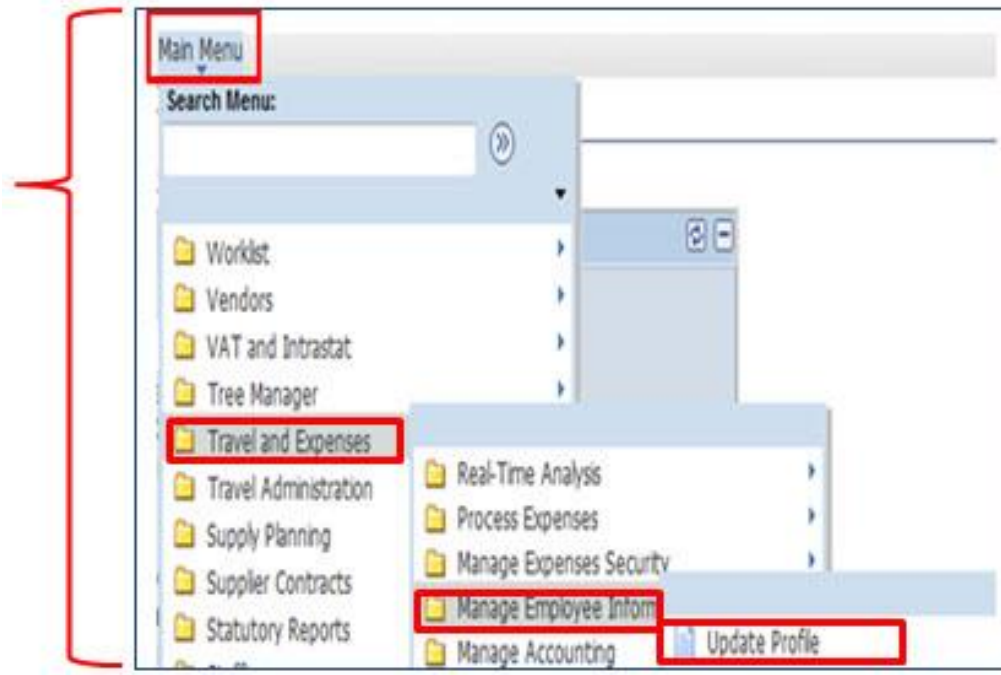
- Click Main Menu to start. The Main Menu and all subsequent menus display only menu items that you are authorized to access.
- Click a folder *label* to open its submenu.
- Click a link to open the resource in the data entry page.
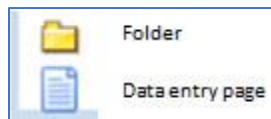
Menu Pagelets

The PeopleSoft navigation structure, located to the side of your page essentially provides the same information as the "Main Menu" only in a different look. It also organizes and provides access to transaction pages.
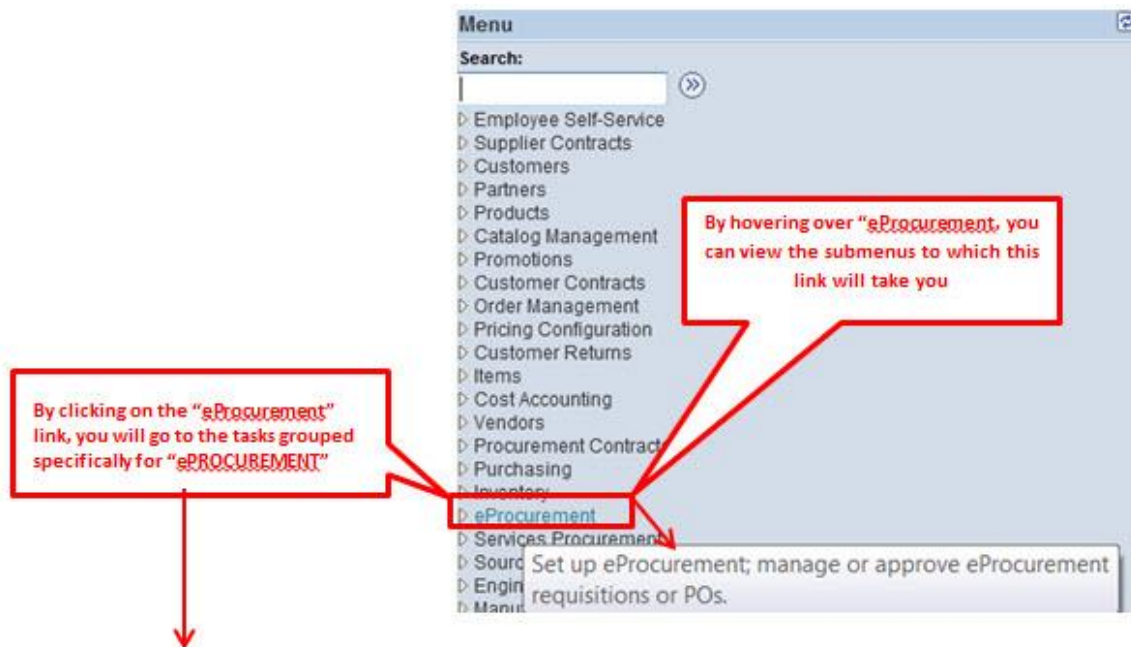
Navigating Breadcrumbs

Breadcrumbs refer to the collective sequence of menus and menu items that appear above the content area when you navigate to transaction pages or navigation pages. In drop-down navigation, each individual item in the breadcrumb string is a drop-down menu and represents a level in the overall menu hierarchy.

1. The first item in the sequence is always the Main Menu.
2. The last item in the sequence is:
   - The component name, when you access a transaction page.
   - The folder name, when you access a navigation page.
3. The intermediate items in the sequence are the names of each menu item that you click to access the resource; menu items appear in the order that you click them.

The breadcrumbs reveal both the navigational path to your current location and the hierarchical or parent child relationships that exist among the items in the breadcrumb sequence.
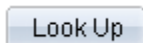
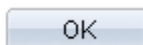*Note. Breadcrumbs appear only when you click a link to access a component or when you click a folder icon.*
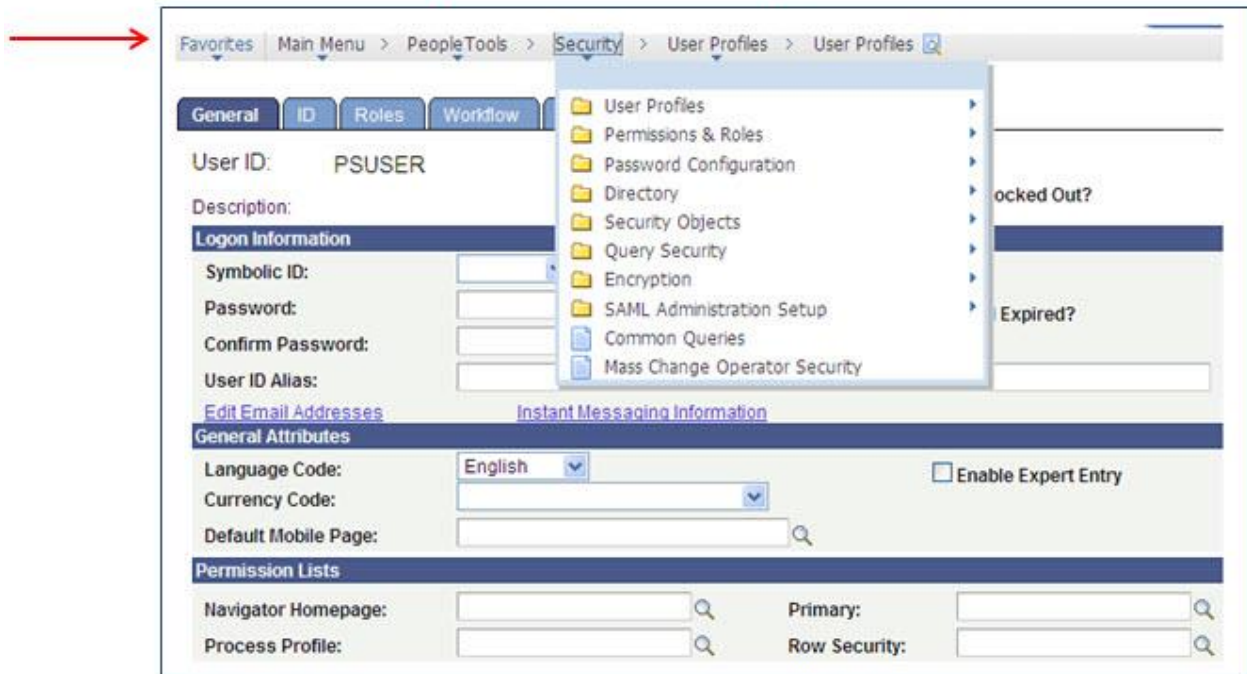
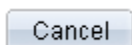## Using Processing Buttons

The following buttons process transactions.

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

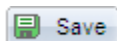Click to accept the data input made on an auxiliary page and return to the main page.

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

Using Toolbar Buttons

The toolbar appears at the bottom of most pages. It can include search list navigation buttons, page navigation buttons, and page action buttons; it changes depending on the type of page that is active or the settings that the developer has put into place for a particular transaction. Not all buttons shown in the following table appear on every page. Likewise, some buttons may be unavailable for selection.

Note. In some cases, you may see different representations of a button, but the action is the same.
Click to send the information that you have entered on the page to the database. You generally save when you come to the end of data entry. The "Save" button updates the data for all pages. When activated, the system displays the saved message in the upper-right corner of the page.

Save

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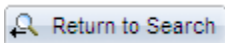
Return to Search

Click to return to the search page.

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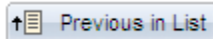
Displays the data for the previous data row in your search results grid. This button is unavailable if you did not select the data row from the search results grid, if there was only one row in the grid, or if the data that appears is the first row in the grid.

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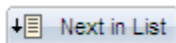
Displays the information for the next data row in your search results grid. This button is unavailable if you did not select the data row from a search results grid, if there was only one row in the grid, or if the data that appears is the last row in the grid.

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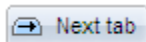
Displays the next page in the current component. If you are in the last page of the component, this button is unavailable.
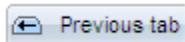
Previous tab

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

Update/Display
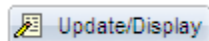
Click to access existing rows of data in the database. If data is effective-dated, only current and future rows appear.
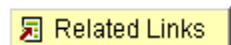
Add
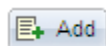
Click to add a high-level key row of data to the database for the current transaction.

Refresh
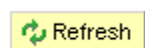
Click to force a trip to the server, validating any data that has been entered and processing any deferred changes.

Note. This button is displayed only for components that are enabled for deferred mode processing.

Related Links

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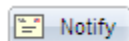
Notify

Click to open the Send Notification page, where you can specify names, email addresses, or worklists to which to send notifications.*(Option is pending…no actions are currently associated with this button)*
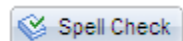
Spell Check

Click to activate the 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 misspellings found* message appears.

Using Popup Menus

Popup menu buttons appear next to fields on a page.

Click to access a new page to select among the menu items listed. Appears if the popup menu contains more than one item.

Click to access the new transaction page directly. Appears if the popup menu contains only one menu item.

Navigating Through Data

This section discusses how to:
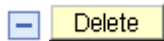
- Use navigation buttons and links.
- Add rows.
- Delete rows.
- Select rows.
- Find data.

Using Navigation Buttons and Links

You can view data in grids and scroll area by using navigation buttons and links. The following table describes the buttons and links that might appear on your grid or scroll area.

Click to insert one new row after the current row.

Click to delete the current row of data.

(Show Next Row) Click to display the next row or set of rows of data.

Note. The Show Next Row and Show Previous Row buttons are disabled if you are viewing all rows of data.

(Show Previous Row) Click to display the previous row or set of rows of data.

(Show All Columns) In a tabbed grid only, click to expand grid columns to the right so that tabs are no longer needed.

(Show Tabs) In a tabbed grid only, click to return the expanded grid to its tabbed state.

(Download) Click to display a new browser window, showing the contents of the grid in a spreadsheet-like format.

(Zoom) Click to display the grid in a modal window.

View All

Click to display the maximum number of rows available to be viewed at once on a page. When this feature is enabled, the link morphs to read View x so that you can return to the original setting. The value of x can change, and is set by the application developer.

Find

Click to find a row of data containing a specified search string.

First

Click to access the first row or set of rows of data.

Note. The First and Last links are not available if you are viewing all rows at once, in which case you scroll to see your data.
Last

Click to access the last row or set of rows of data.

Sign Out

Click to sign out of the application and return to the Sign In page.

Important! For security purposes it is important that you sign out when you are finished with your PeopleSoft session rather than simply closing the browser window. Other users could potentially access your cached homepage from another portal if you do not sign out properly.