TIPS AND TRICKS FOR PEOPLESOFT (EVOLVE)

This document is a summary tips and tricks guide for the general PeopleSoft (Evolve) user.

DOCUMENT INFORMATION

DOCUMENT NAME	Tips and Tricks for PeopleSoft (Evolve)
DOCUMENT VERSION NUMBER	3.0
DOCUMENT VERSION DATE	July 30, 2018

REVISION HISTORY

VERSION #	VER. DATE	REVISED BY	DESCRIPTION OF CHANGE
1.0	Aug. 1, 2013	David Baker	N/A
1.1	Aug. 8, 2014	David Baker	Yearly revisions -Language changes to screenshots
2.0	Aug. 19, 2015	David Baker	Yearly revisions
3.0	July 30, 2018	David Baker	Yearly revisions -Updated screenshots, removed dated material

OVERVIEW

Welcome to Fleming College!

This document outlines the functionality that a faculty member is authorized to perform within the Fleming College PeopleSoft (Evolve) system. There are three systems used at Fleming College: myCampus portal, PeopleSoft (aka Evolve) Enterprise Resource Planning (ERP) and Desire2Learn (D2L).

myCampus:

The myCampus Portal is a one-stop shop for all services that a student and faculty member will require. On the homepage, you will see Fleming News, Upcoming Events, and Important Dates as outlined in the Academic Schedule as well as IT Service Notices for planned outages.

You can navigate through the myCampus Portal by using the menu links on the left hand side or the tabs at the top of the page. Take a few moments to orientate yourself with the myCampus Portal by checking out the top ribbon links (Staff, Resources, Student Life, Registrars Office, Service Directory and Virtual Tour etc.).

This Portal is also your pathway into the PeopleSoft ERP (Evolve) and Desire2Learn (D2L) systems.

PeopleSoft (Evolve)

The PeopleSoft (Evolve) is Fleming College's Enterprise Resource Planning (ERP) system controlling student records and information, courses, registration, grades etc. In addition to the student side, it includes billing, payroll, human resources, and other various administrative functions.

Accessing the myCampus Portal

From the Fleming College homepage [http://flemingcollege.ca/], click on the 'myCampus' link. Alternatively, you may go directly to the myCampus Portal using the following URL: https://mycampus.flemingcollege.ca/

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FREEDOM OF INFORMATION STATEMENT
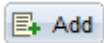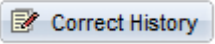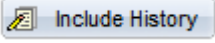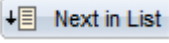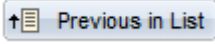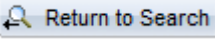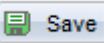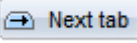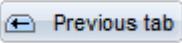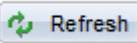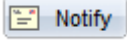
Collection, Use and Disclosure of Personal Information

Please take all-necessary precautions in safeguarding student information (unauthorized access and must not be copied or distributed). If you print any document to hard copy, it is **your responsibility** to dispose of it securely (shred) as soon as it is no longer required for the original purpose.

Fleming College's Freedom of Information Statement, as of July 2013:

The collection, use and disclosure of student information is protected by College policies and government legislation. Personal information is primarily used by the College for academic, administrative and statistical purposes. A Student's personal information (even confirming their enrolment at the College) may only be disclosed when a valid consent to release this information is obtained. In addition, there will be instances where the College will disclose personal information to government departments, co-sponsoring organizations and other educational institutions. Occasionally, information may be released, if required or authorized by a court order or other legal document. A student may request access to their personal information and may request corrections, deletions or additions of information that is not accurate, complete or up to date.

COMMON TOOLBAR BUTTONS

Button	Name	Function
Add	Add New Value	Adds a new record.
Correct History	Correction	Accesses existing rows of data in the database and displays all effective-dated rows. Enables you to update all rows, including history rows.
Include History	History	Displays all rows of data: current, future, and history.
Next in List	Next In List	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.
Previous in List	Previous in List	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.
Return to Search	Return to Search Page	Returns you to the search page.
Save	Save	Sends the information you have entered on the page to the database. You will generally save when you come to the end of a component. The Save button always updates the data for all pages in a component. When clicked, the system displays the "Saved" message in the upper-right corner of the page.
Update/Display	Update/ Display	Accesses existing rows of data in the database. If data is effective-dated, only current and future rows appear.
Next tab	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	Previous tab	Displays the previous page in the current component. If you are in the first page of the component, this button is unavailable
Refresh	Refresh	Click to force a trip to the server, validating any data that has been entered and processing any deferred PeopleCode changes.
Related Links	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	Notify	Click to open the Send Notification page, where you can specify names, email addresses, or worklists to which to send notifications.
	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.

COMMON NAVIGATION BUTTONS AND LINKS[1]

Button	Name	Function
+ Add		To insert one new row after the current row
+...		To insert multiple rows - specify the number of rows (1 to 99)
− Delete		To delete the current row of data.
▶	Show Next Row	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	To display the previous row or set of rows of data
▦▶	Show All Columns	Expand grid columns to the right so that tabs are no longer needed (in a tabbed grid only)
◀▦	Show Tabs	To return the expanded grid to its tabbed state (in a tabbed grid only)
Customize		To customization page for that grid, which enables you to sort by column and reorder, hide, and freeze columns
▦	Download	To display a new browser window, showing the contents of the grid in a spreadsheet-like format.
▣	Zoom	To display the grid in a modal window
View All		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		To find a row of data containing a specified search string
First		To find a row of data containing a specified search string. 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		To access the last row or set of rows of data.

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[1] Enterprise PeopleTools 8.50 PeopleBook

HOT KEYS

Key	Function
ALT 1	Depending on the page type: -Saves a page in a transaction. -Moves to the Search or Add button on a search or look up 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.
ALT 6	Opens the pop-up window on a page.
ALT 7	Inserts a row 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 . (ALT period)	View the next set of rows in a grid or scroll area
ALT , (ALT comma)	View a previous set of rows in a grid or scroll area.
ALT / (ALT forward slash)	Finds data in a grid or scroll area.
ALT ' (ALT prime)	View all rows of data in a grid, scroll area, or search page results list.
ALT \ (ALT backslash)	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 hierarchy 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 look up page, activates the lookup button.
ESC	Activates the Cancel button, where appropriate

SEARCH CRITERIA

Flexible search criteria allow you to specify how you want PeopleSoft (Evolve) to match the criteria you enter to the values in the field. For example, you can specify that the criteria you enter should appear at the beginning of the field value, or that it must match exactly.

Default operators are provided for each search key. Notice on the displayed search page that the defaults are **=** or **begins with**. This means that the system searches for records in which the field value equals (matches exactly) your criteria or, in the second case, begins with your criteria.

Note: that if you choose **between,** a second field will open for the end value of the range. Displayed below is a list of all the operators that are available when conducting a search.

Operator [2]	Field Use
Begins with	Character fields.
contains	Character fields.
=	All field types.
Not=	All field types.
<	All field types.
<=	All field types.
>	All field types.
>=	All field types.
between	All field types.
in	All field types.

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[2] Enterprise PeopleTools 8.50 PeopleBook

You can enter a full value or partial value for any key field. All rows of data that begin with the string of characters you have entered will be returned. However, if the results do not include the value that you have been searching for, or if you are uncertain of certain search values, you can use wildcards to expand your search options. There are three wildcard keys to aid your searches.

For example, if you enter 22 in the ID field, only those IDs that begin with 22 will appear. By placing a % before 22, you would see every row of data containing 22 anywhere in the ID.

Wildcard[3]	Function
% (percent sign)	Match one or more characters.
_ (underscore)	Match any single character.
\ (back slash)	Escape character; do not treat the next character as a wildcard.

Find an Existing Value

▼ **Search Criteria**

ID:	begins with ▼	
Campus ID:	begins with ▼	
National ID:	begins with ▼	
Last Name:	begins with ▼	%me%
First Name:	begins with ▼	

☐ **Case Sensitive**

An example of possible **Last name** results:

First name	Last Name
James	Mache**me**r
Daneiel	Feld**me**ier
Mary	Cala**me**
Jennifer	Fel**me**t
Karen	Ca**me**lo

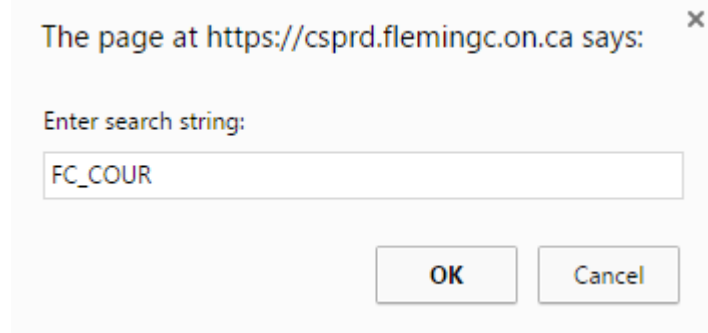[3] Enterprise PeopleTools 8.50 PeopleBook

FIND

The find feature on grids and scroll areas enables you to locate specific data, which is particularly useful if your table **contains hundreds of rows**. Note, that this feature enables you to search the data within a **specific grid or scroll area only**. It does not search for any data outside the control. The find feature looks for matches in edit boxes, display-only fields, disabled or shaded fields, dynamic links, and text in long edit boxes. It does not find column headings, field labels, text values on icons, static links, and hidden fields. Find searches from the left-most visible object of the current row down, based on the text that you enter in the search prompt.
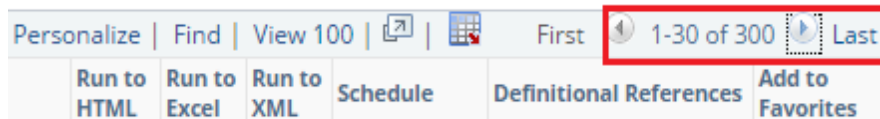
Note. Your browser may also have a find feature. This tool, however, does not search through data in the entire data buffer for the grid or scroll area. It searches the HTML code for what appears on the current open page only. Thus, it searches field headings, read-only text, and headings in grids, group boxes, and scroll areas only
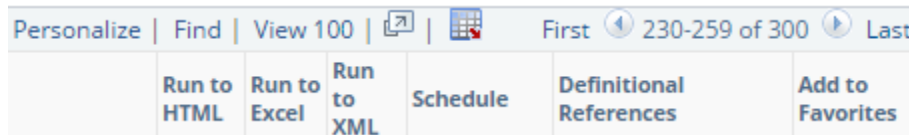
Personalize | Find | 🗗 | 🏶   First ◀ 1-11 of 11 ▶ Last

1. The '**Find**' link is located in the top line of a grid
2. Click the '**Find**' link.
3. A box will appear across the PeopleSoft (Evolve) window
4. Enter a search string (Search strings: Single or phrase words or numbers used/delivered)

The page at https://csprd.flemingc.on.ca says: ✕

Enter search string:

FC_COUR

OK   Cancel

5. Click the **OK** button

    BEFORE

Personalize | Find | View 100 | 🗗 | 🏶   First ◀ 1-30 of 300 ▶ Last

| Run to HTML | Run to Excel | Run to XML | Schedule | Definitional References | Add to Favorites |

    AFTER – Row 230 contains the first report with FC_COUR

Personalize | Find | View 100 | 🗗 | 🏶   First ◀ 230-259 of 300 ▶ Last

| Run to HTML | Run to Excel | Run to XML | Schedule | Definitional References | Add to Favorites |

PERSONALIZING GRID COLUMN APPEARANCE

When customizing the grid column appearance, you can:
- Change the column order
- Hide columns
- Freeze columns

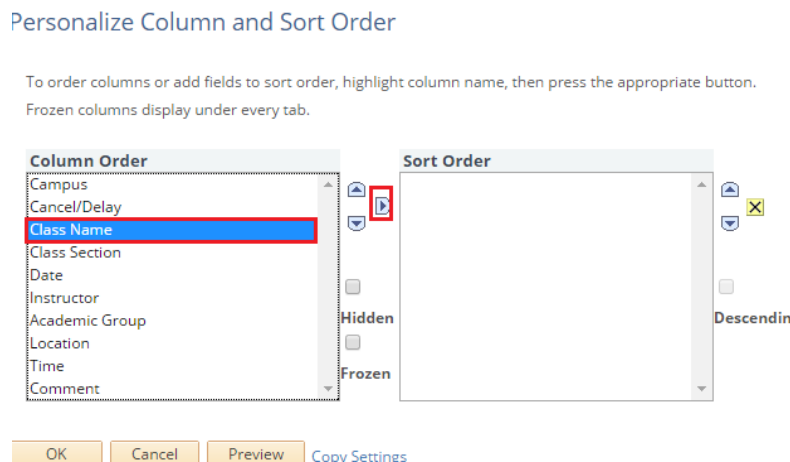The '**Personalize**' link is located in the top line of a grid
1. Click the '**Personalize**' link.
2. The following box will appear in the center of the Evolve window
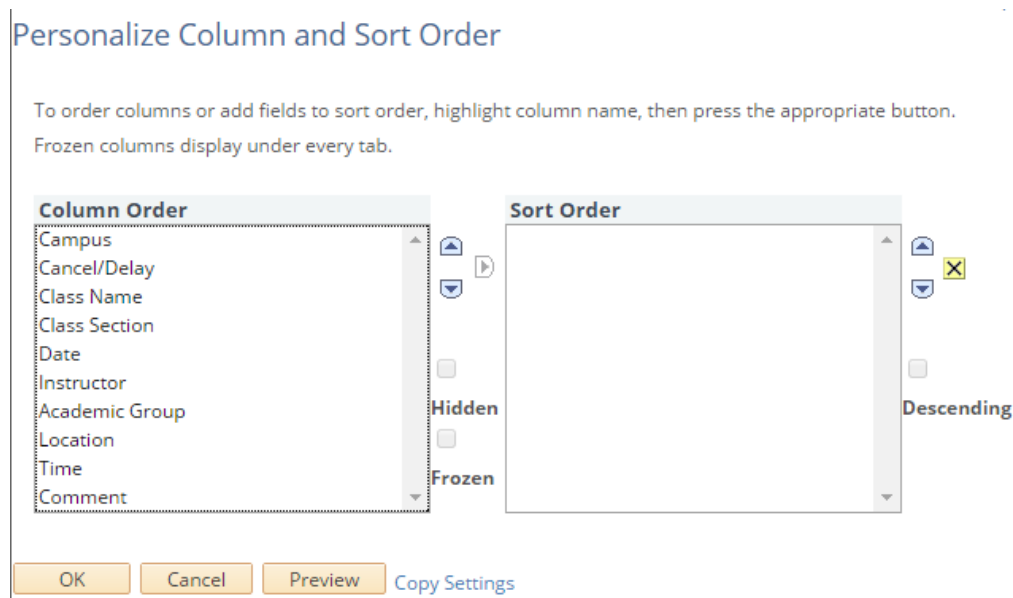
3. The '**Column Order**' column displays all columns appearing in the current grid

OPTIONAL – SORT OPTION
- **Select** the columns that are require to be sorted in a specific order by clicking the '**add to sort**' button
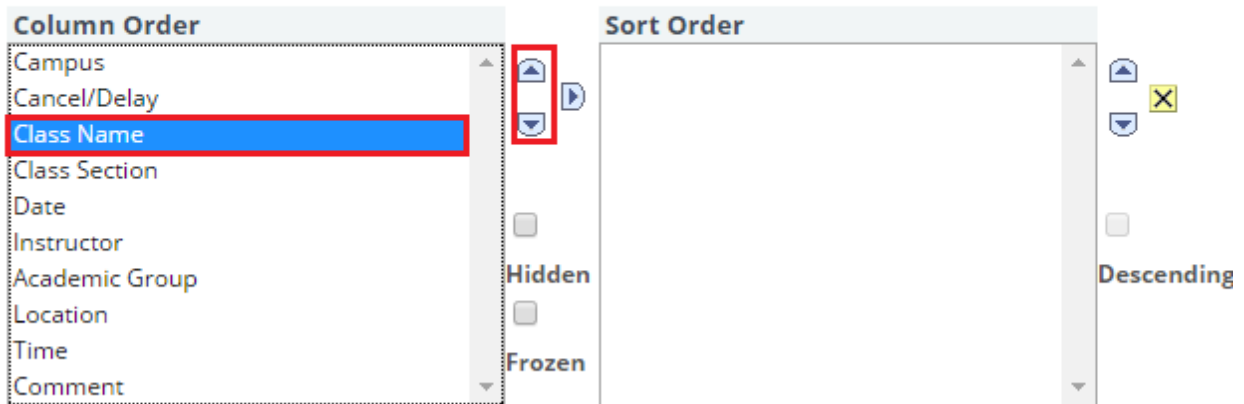
OPTIONAL – COLUMN ORDER
- Use the **move up** or **move down** buttons to change the column order

OPTIONAL – HIDDEN/FROZEN
- Click the **hidden** checkbox to hide the column from the grid
- Click the **frozen** checkbox to freeze the cloumn. When a column is frozen, the column appears in all tabs within the grid

PREVIEW
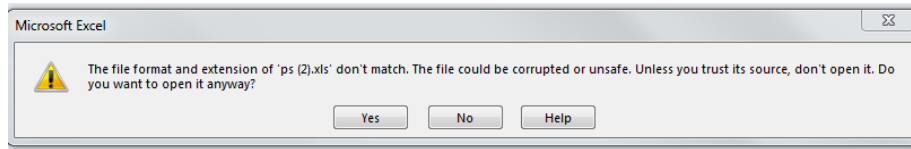4. Click the '**Preview**' button to preview any personalizations setting.

EXCEL DOWNLOAD

The feature downloads information displayed in the grid into a spreadsheet format (Microsoft Excel). Only information visiable in the columns will be downloaded.
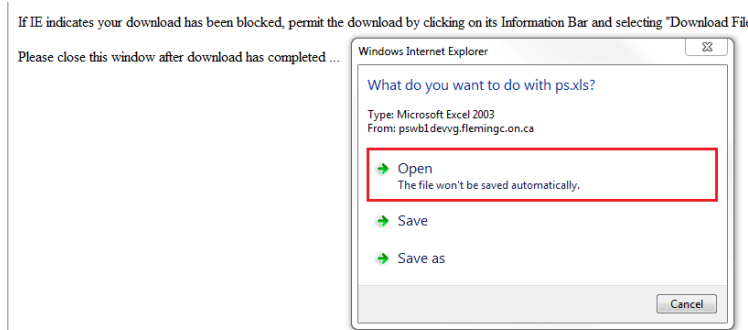
1. The '**Download**' link is located in the top line of a grid
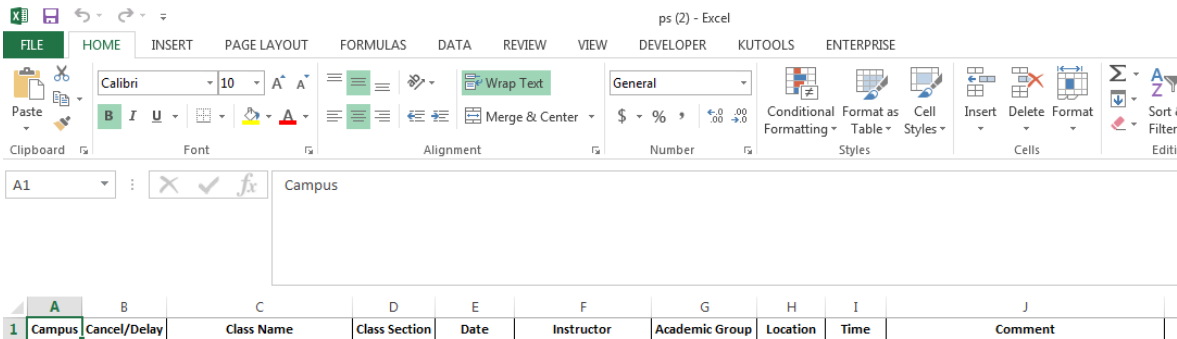2. Click the '**Download**' link.

Personalize | Find | ⤢ | ▦ | First ◀ 1-16 of 16 ▶ Last

3. Click '**Yes**' if this message appears.

Microsoft Excel

⚠ The file format and extension of 'ps (2).xls' don't match. The file could be corrupted or unsafe. Unless you trust its source, don't open it. Do you want to open it anyway?

[Yes] [No] [Help]

4. Click the '**Open**' button if this message appears. NOTE: Opening the files still results in the file being downloaded to your locate machine.

If IE indicates your download has been blocked, permit the download by clicking on its Information Bar and selecting "Download File

Please close this window after download has completed ...

Windows Internet Explorer

What do you want to do with ps.xls?

Type: Microsoft Excel 2003
From: pswb1devvg.flemingc.on.ca

➜ Open
The file won't be saved automatically.

➜ Save

➜ Save as

[Cancel]

5. Save the spreadsheet to a desired file located.

	A	B	C	D	E	F	G	H	I	J	
1	Campus	Cancel/Delay	Class Name	Class Section	Date	Instructor	Academic Group	Location	Time	Comment	

[END OF DOCUMENT]