# PEOPLESOFT 9.2 & CUNYfirst: Navigation Basics

New Terminology

With new performance improvements comes new terminology. The definitions below are provided to assist in understanding the PeopleSoft 9.2 upgrade to CUNYfirst.

Fluid – Fluid is a new interface where tiles are added to homepages for navigational ease instead of the Classic cascading pagelets/menus. Fluid is a modern, responsive user interface that provides the flexibility to work seamlessly from desktops, tablets and phones.

Homepage - The landing page for PeopleSoft navigation. A user can have several homepages but only one default homepage. Homepages can be customized to accommodate your personal interaction with the system. Click on the **Homepage** drop-down arrow to access other component homepages.

Tile – visual navigation component within the fluid interface.
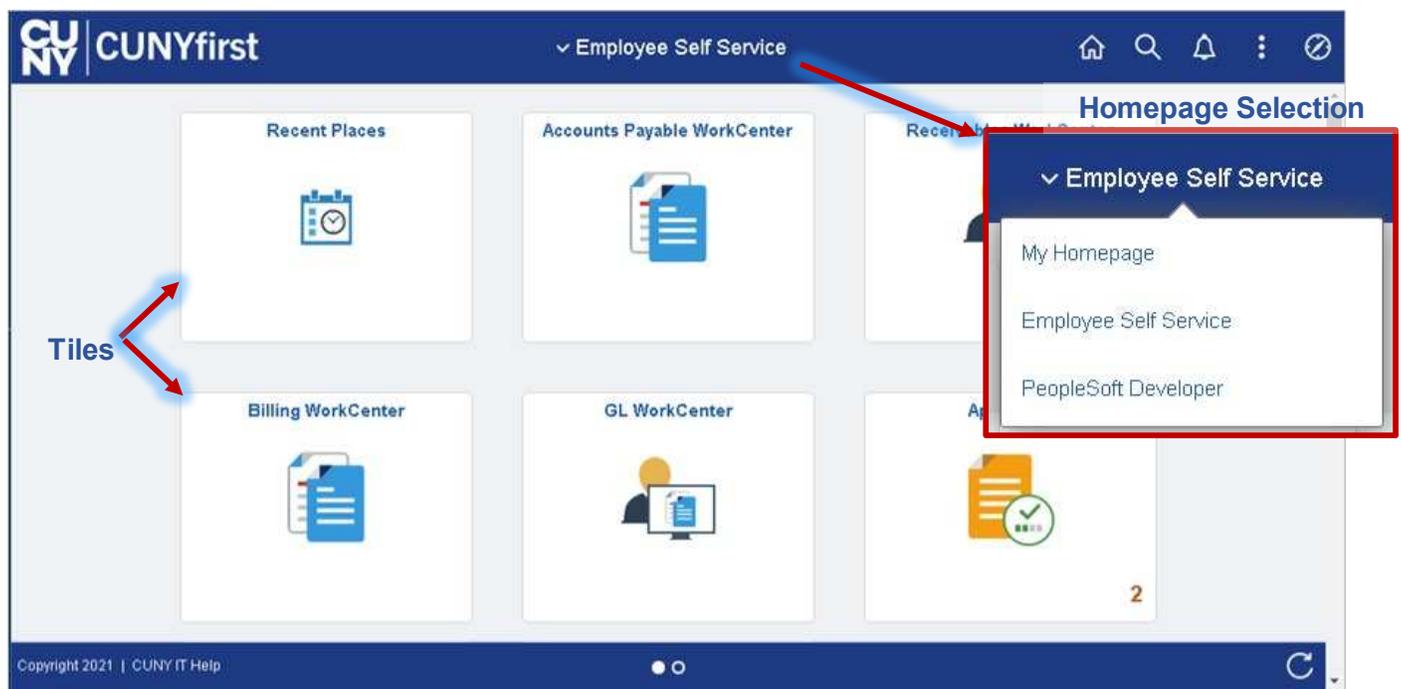
Navigation Collection – groups of similar function-related processes organized together in an accessible sidebar menu, accessed through tiles. This left panel navigation, available through the collection tiles, only provides access to standard delivered pages.

Navigating the Fluid Homepage

The ribbon at the top of the screen is referred to as the banner, which contains the main elements utilized to navigate the system. The header Menu contains five icons located in the top right corner of the banner: Home, Search, Notifications, Actions List and NavBar.


Home

Takes the user back to the default homepage (e.g., Employee Self Service or Manager Self Service), no matter where they are in the system.

Search

The **Global Search** option allows you to search the entire **system** for keywords related to a function or task.


The search results display in a two-panel window. To modify the search, expand the arrow next to **New Search** and the search window displays without navigating back to the prior page.
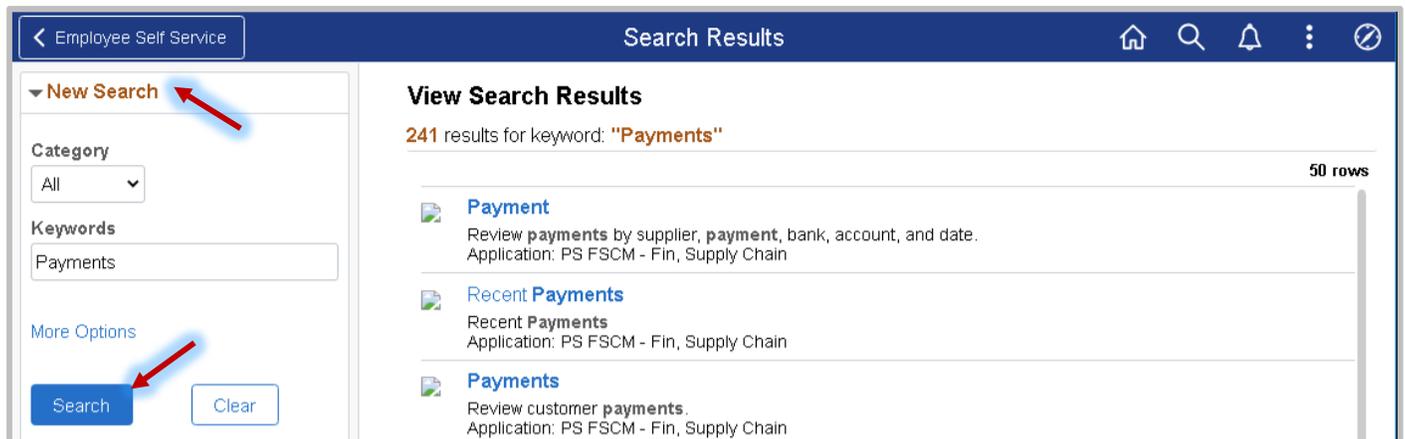

Notifications

The **Notifications** icon displays a badge with a number count on the bell icon in the banner to notify the user of any new actions or alerts. These notifications include links that allow users to navigate directly to an item that needs attention.


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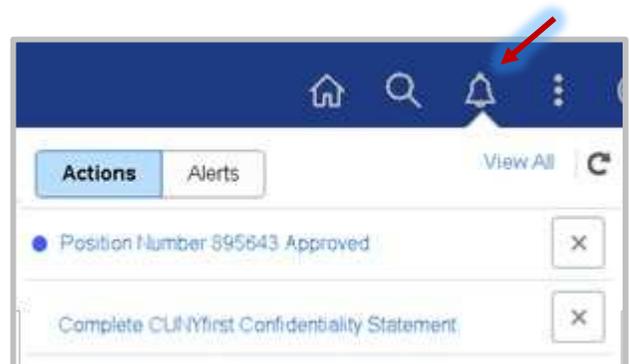
Actions List

These actions allow users to perform certain actions while on the homepage, such as opening a new CUNYfirst window or changing your preferences, and additional actions when on a transaction page within CUNYfirst, such as adding the transaction page to Homepage, Favorites, or the NavBar.

You can sign out of CUNYfirst at any time by going to the **Actions List** icon and clicking **Sign Out**.
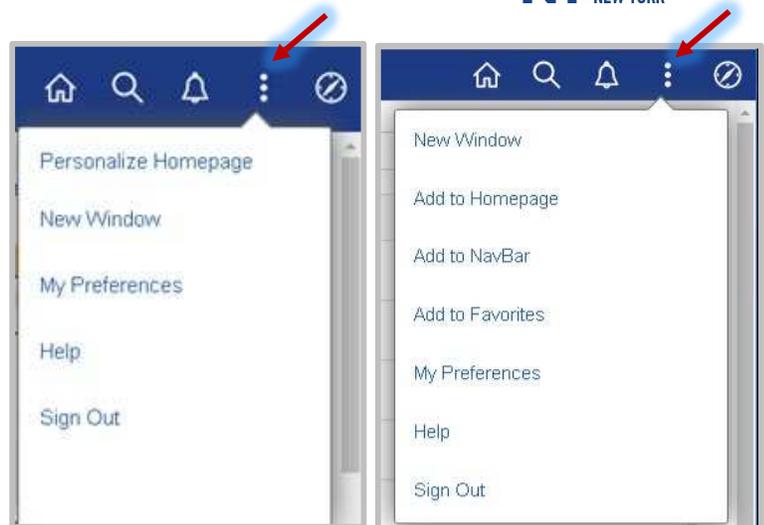
My Preferences

My Preferences page contains customizable settings to modify your experience with CUNYfirst. The selections made here will apply to all pages to which the user has access within the system.
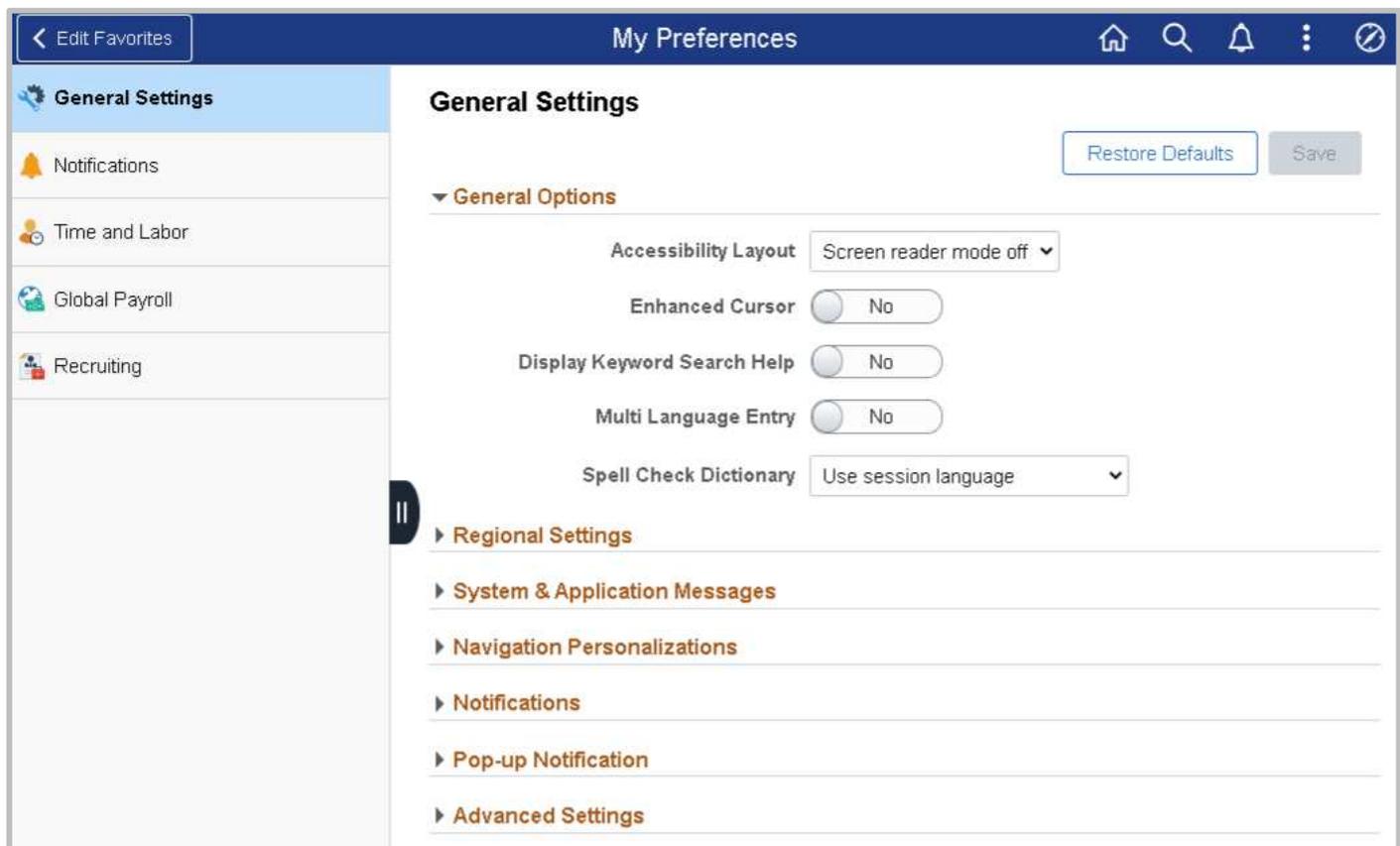
NavBar

The NavBar is an alternative way to access all component pages within CUNYfirst. It contains several default tiles, as well as the **Personalize NavBar** icon that allows you to personalize the tiles that appear within your NavBar in addition to the default tiles.

The default tiles include:

- **Recent Places** – This item shows the last 5 pages you've visited via the NavBar Navigator and allows you to quickly revisit them.
- **My Favorites** – This items shows you all of the CUNYfirst pages you have added to your favorites. You can change the order in which your favorites appear within this item or delete favorites by clicking on **Edit Favorites**.
- **Navigator** – provides access to all components page for which the user has security access.
  You can click into expandable menu items within Navigator to view the menu items and pages within. There are two buttons next to the menu item selected. The "Back to…" button to the left of the menu item name returns the user to the previous menu. The "Back to Root" button on the right returns the user to the main **Navigator** menu.

**Back to previous folder**

Back to the top
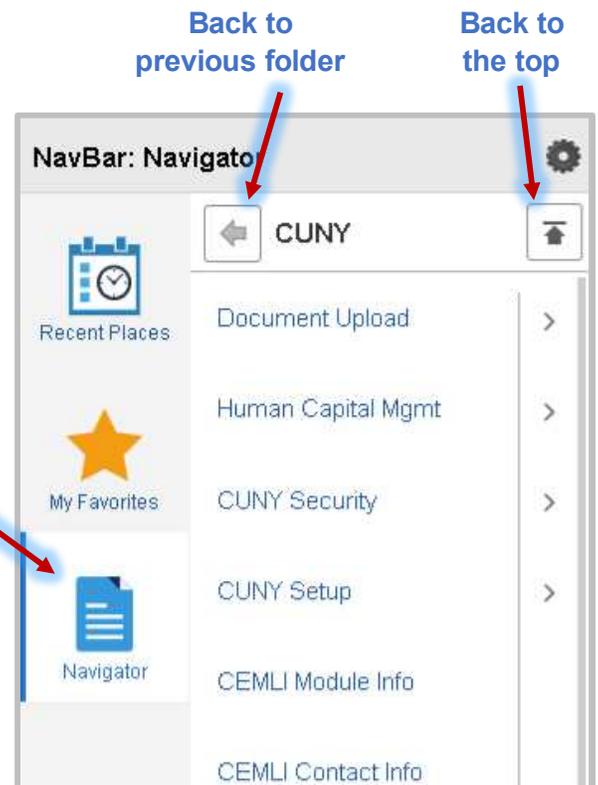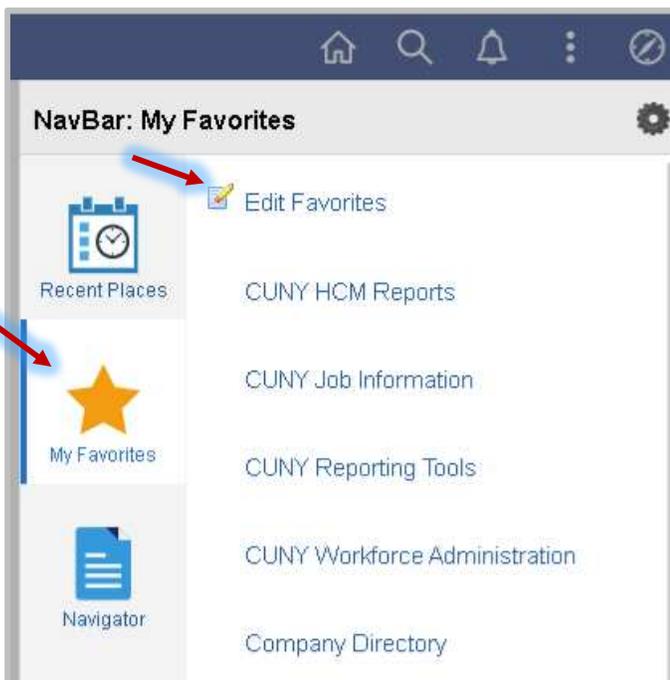
Personalizing the homepage

Personalization options allow users to configure navigation based on their personal preferences and usage of CUNYfirst. You can personalize your homepages by clicking on the **Actions List** icon and selecting **Personalize Homepage** from the menu. You can customize and create homepages within the **Personalize Homepage** page. Remember to click the **Save** button to save any changes you make!
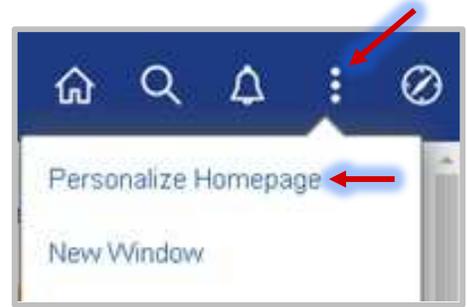
Additional homepages can be created to organize tasks.

1. Click on the **Add Homepage** button from the upper left corner of the screen.
2. In the **Add New Homepage** field, enter the desired name of the new homepage.
3. Select the **Add** button.
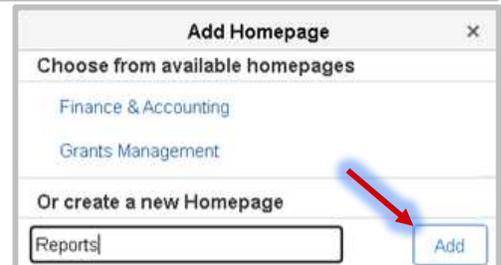
Additional tiles can be added to any of your homepages.
1. Select a homepage to which to add a tile then click **Add Tile**.
2. Select the tile to be added to the homepage.
3. Select the **Save** button in the upper right corner of the screen.
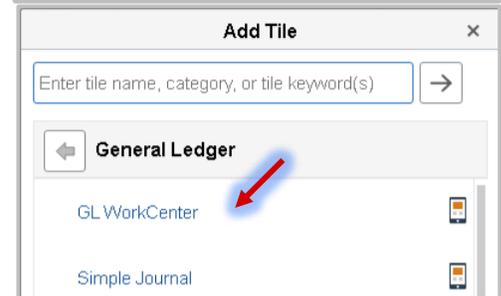
Tiles can be rearranged within the homepage by using the drag-and-drop method. Select and hold the tile icon – then drag it to the desired position and release.
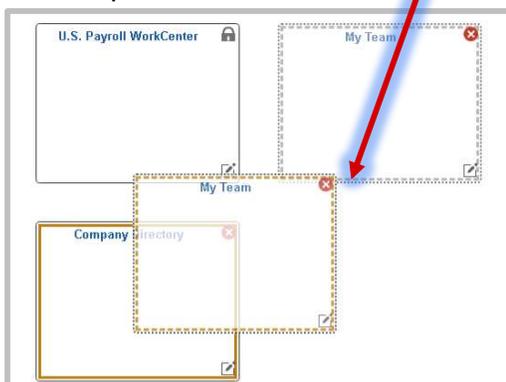
Tiles can be copied from one homepage to another by clicking the **Move or Copy Tile** icon within the tile and selecting a homepage to move it to.

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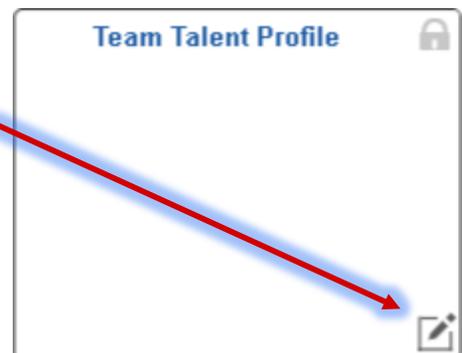
Using Keyboard Shortcuts in PeopleSoft

A *keyboard shortcut* is a combination of keys that performs an immediate action, without pressing the Enter key.

From any PeopleSoft page, except for a menu page, you can hold down the **Ctrl** and **K** key combination to display a list of Mac & PC compatible PeopleSoft keyboard shortcuts. You can print the page by clicking the Print link. These keyboard shortcuts allow you to navigate using the keyboard rather than the mouse.

For example, if focus is on a field (you type a partial value in a field, tab to the field, or click in the field input area) and the field has a Lookup button, you can press the **Alt** and **5** key combination to display the Lookup page.

List of Keyboard Shortcuts

Alt/Option and **1**   Executes different buttons depending on the page type
- Save button on the Toolbar in a page
- OK button on a secondary page
- Search or Add button on a Search or Lookup page

Alt/Option and **2**   Return to Search

Alt/Option and **3**   Next in List

Alt/Option and **4**   Previous in List

Alt/Option and **5**   Valid Lookup Values

Alt/Option and **7**   Insert Row in grid or scroll area

Alt/Option and **8**   Delete Row in grid or scroll area

Alt/Option and **9**   Takes you to the New Window link

Alt/Option and **0**   Refreshes the page by invoking the Refresh button on the Toolbar

Alt/Option and **.**   Next set of rows in grid or scroll area [e.g., Alt period]

Alt/Option and **,**   Previous set of rows in grid or scroll area [e.g., Alt comma]

Alt/Option and **/**   Find in grid or scroll area [e.g., Alt forward slash]

Alt/Option and **'**   View All in grid or scroll area [e.g., Alt prime]

Alt/Option and ****   Toggle between Add and Update on the Search page [e.g., Alt backslash]

Ctrl and **J**   System Information

Ctrl and **K**   Keyboard Information

Ctrl and **Y**   Takes you to the Search box of the Menu

Ctrl and **Z**   Takes you to the Search box of the Menu. From there, you can:
- Perform your search
- Use your tab key to navigate through the menu hierarchy.

Enter   Invokes the following buttons where present: OK, Search and Lookup

Esc   Cancel