

**PeopleSoft Student Administration (PS/SA)**  
**Helpful Hints, Reminders and Frequently Asked Questions**  
(Documented by F. Nakaguchi)

**REMINDER to SAVE:**

1. SAVE your data. There may NOT always be a reminder or request to save data as you leave the page group you are on.
2. When you do get a reminder, asking about saving data, it does NOT save it for you. Click OK, and you have a chance to go back and click on SAVE. Click Cancel if you do NOT want to SAVE.

**Coding for Term.**

1. The codes for Term in PS/SA are different from SIMS/R. The code is limited to 4 characters or numbers.
2. The definition is explained below.
  - a. The first three characters are the year - the “2” for century 2000 and the next two characters for the year. Therefore, “202” stands for 2002.
  - b. The last character is the semester – 1, winter; 3, spring; 5, summer; 7, fall. Only odd numbers are used at this time.

**TAB and Processing.**

1. This step is especially important in Search/Match. Be sure you use Tab after entering each data field. You will have to wait until the word **Processing** stops flashing before you enter the next field. (If you don’t wait, the screen will be “repainted” and data will not be there.)
2. The Tab registers the data with the PS software. That is, if you do not use Tab, PS will not know that you entered the data. For example, in Search/Match, Tab after the Last Name – if you don’t, PS will try to do the Search without using the Last Name.

**Can’t find in Search/Match.**

1. Enter data again. Click on Clear. [You may have inadvertently entered a space at the end or beginning of a line.] Use the Tab key after each field. Wait for **Processing** to end, then click on Search.
2. Check the Search Order. At least one of the Search Order buttons should be highlighted. If not, there is not enough information or the system has not recognized your entry – i.e. you did not TAB after entering data.
3. Put in less data. For example, enter just the first few letters of Last Name. This is just in case, the data was entered previously was different.
4. Take care in input, especially with hyphenated names or foreign names. Use variations of spelling. Enter part of a name. Exchange last name, first name and/or middle name.

**How to Lookup in a Prompt Table.**

1. Click on “Magnifying Glass” Symbol.
2. Click on “Lookup” button.
3. If the list is too long, enter an extra data field to filter (shorten) the list. [You may have to use the Lookup button for some of these.]
4. Click on “Advanced Search” to bring up more fields for input.
5. Click on “Lookup” button.
6. Click on the desired row. You should be returned to the window where you started.

**Can’t find in Lookup or “Find an Existing Value” or Search.**

1. Make sure that there is not an ID, an Application No., a Course ID, etc. that belongs to the last record that you looked at.
2. Make sure that the ALL of the fields that you entered is what you want now.
3. Use a wildcard (%) to search for a string of characters anywhere in the field. For example, the name of the school contains “Joseph”. Use “%JOSEPH” to look in Search Name or use “%Joseph” in the description.
4. Look above the top righthand corner of the list. There is a number of the rows being shown. See whether there are more rows to view. Either click View All or the Right Arrow to bring up more rows to view.

**How to shorten a list in “Find an Existing Value” or a Lookup.**

1. Click on “Advanced Search”, if there are not enough or any fields to use to shorten the list.
2. Enter only fields that will still give you a complete list.

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3. Enter the first part of a code to shorten the list. For example, you know the code you are interested in begins with a "01". Put "01" in the code field for the Search.
4. Remember that once the row is on the List of Existing Values, you can get the Next or Previous in a List by using the appropriate buttons to the right of the SAVE button.

**Lookup Schedule of Classes.**

1. For any lookup for Course information, include at least two parameters. Otherwise the Search may take too long.
2. Include one of the following sets:
  - a. Subject (Course Abbreviation) and Catalog Number (course number and suffix)] or
  - b. Catalog Number and the beginning of the description.
3. Remember that once the class is on the List of Existing Values, you can get the Next or Previous in a List by using the buttons to the right of the SAVE button.

**How to turn on/off Checkboxes.**

1. Click to turn on, if there is no check and one is to be added.
2. Click to turn off, if there is a check and one to be removed.

**White Screen of Death (or Page Does Not Exist).**

Increasing the cache in Internet Explorer seems to improve the situation. Here is how.

1. Navigate in Internet Explorer to Tools, Internet Options.
2. In the Internet Options window, select "Delete Files" in the Temporary Internet Files group box. This action will delete temporary files.
3. In the Internet Options window, select Settings in the Temporary Internet Files group box.
4. In the Settings window, move the bar on the meter in the Temporary Internet file folder group box to increase the cache space to about the middle of the meter.
5. Click OK to exit Settings. Click OK to exit Internet Options.

**How to Change Password.**

1. Navigation: Home > SA Self Service > Personal Portfolio > Tasks > Password and Personalization
2. Click on Change Password.
3. Enter fields as shown: Current Password, New Password, Confirm Password.
4. Click OK.
5. Click Save.

**How to input a Date or use the Calendar Dropdown**

1. Type in the date mmddyyyy and TAB or follow the steps below.
2. Click on Current Date at bottom of the dropdown to get today's date.
3. To go to the prior month or following month, click on the appropriate arrow on either side of "Current Date".
4. To select a month or year, use the dropdown tab at the right of each, at the top of the dropdown window.
5. Once the month and year at the top are correct, click on the Day to select and return to the original window.

**Common Symbols – what and where.**

1. Save (diskette icon) – save data in page group to database, at bottom left.
2. Search/prompt table (magnifying glass icon), to right of field.
3. Calendar dropdown (calendar – 31 – icon), to right of field.
4. Plus Sign (+) – insert a new row of data, to the right, just below blue bar.
5. Minus Sign (-) – delete this row of data, to the right, just below the blue bar.
6. Communications (phone/letter icon) – add a communication, to the right, just below the blue bar.
7. Checklists (notepad icon with checkmark) – add a checklist, to the right, just below the blue bar.
8. Comments (dialogue balloon icon) – add a comment, to the right, just below the blue bar.
9. Dropdown window (up/down arrow icon) – displays valid values, to the right of the field.

**Favorites**

1. Save in Internet Explorer, by using its "Add to Favorites" function.

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2. If you get an error message that it already exists, it is speaking about the name, which it will use to put into the Favorites list. You can put in another name, but look first whether you might have already saved this page.
3. When we begin using a Production database, as opposed to the Training database, you will have to re-save your Favorites. The reason is because the database name is part of the saved page.
4. When a Favorite exits you totally get out of a database and it brings you to a login page, the Favorite you selected was saved in another database than the one that you were just in. Check which database you are in, by looking at the Address above (URL).

**User Defaults.**

1. Navigation: Design Student Administration > Specify User Defaults > Use > User Defaults.
2. This page group is where you can set default values for PS/SA.
3. Available fields include Academic Institution, Academic Career, Term, Academic Program, Academic Group, etc.
4. Be sure to SAVE.

**Toggle the Internet Explorer Toolbar.**

1. Use F11 and toggle on/off the Internet Explorer toolbar(s).
2. This action gives you more room for your window.

**Search causes system to time out.**

1. If a search takes too long, the system can time out or get hung up in "Processing".
2. Enter more than one parameter. Make sure that you have entered enough parameters to find your data. That is, that you are not asking for too much data.
3. Select specific data whenever possible. Enter National ID or (system) ID, when known.