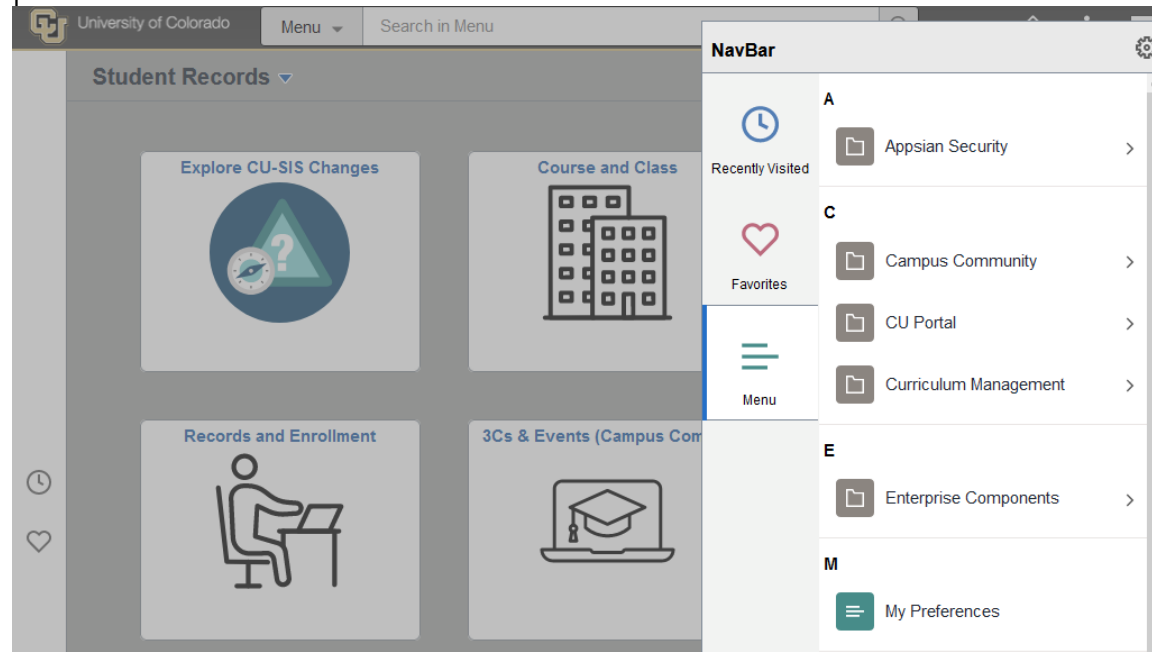


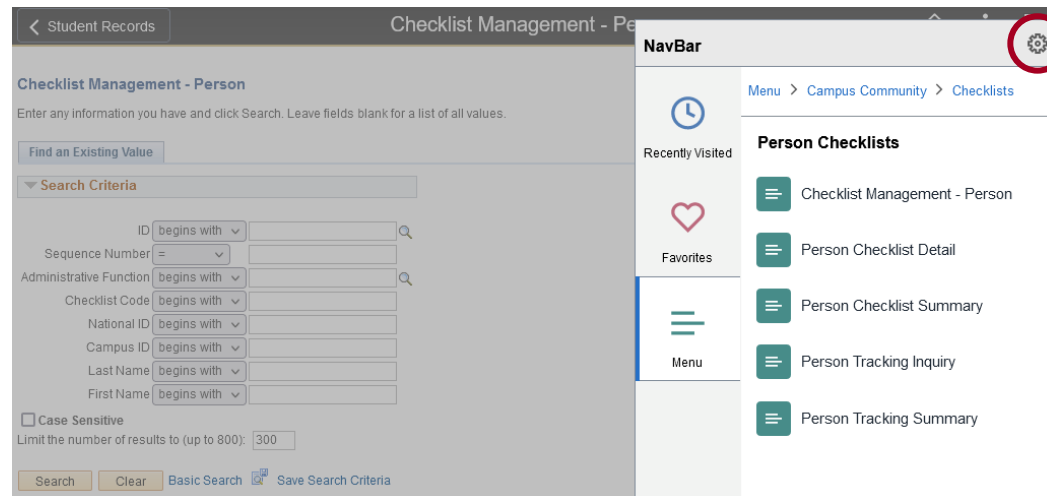
PeopleTools | Personalization Options

PeopleTools 8.59 offers the ability to personalize your menu folders and menu items to display in alphabetical order.

Letters serve as alphabetical section dividers at the root of the menu only. Icons differentiate between menu folders and menu items. Similarly, the contents of all menu folders are displayed in alphabetical order by default.



Menu Personalization: To change the sort order of the NavBar menu from the standard sequence number order, which is the default, to alphabetical order, click **Settings** (gears icon) at the top of the NavBar to go to **Personalize**.



The preferred setting will be highlighted blue. The default setting is Standard.

To change to Alphabetical, click **Alphabetical** and then click **Save**.

This screenshot shows the 'Personalize' dialog box for 'Checklist Management - Person'. The 'Menu Order' section has two buttons: 'Alphabetical' and 'Standard'. The 'Standard' button is highlighted with a blue background and is enclosed in a red rectangular box. The 'Save' button in the top right corner is also highlighted with a red box. The background shows a search criteria form with fields for ID, Sequence Number, Administrative Function, Checklist Code, National ID, Campus ID, Last Name, and First Name.

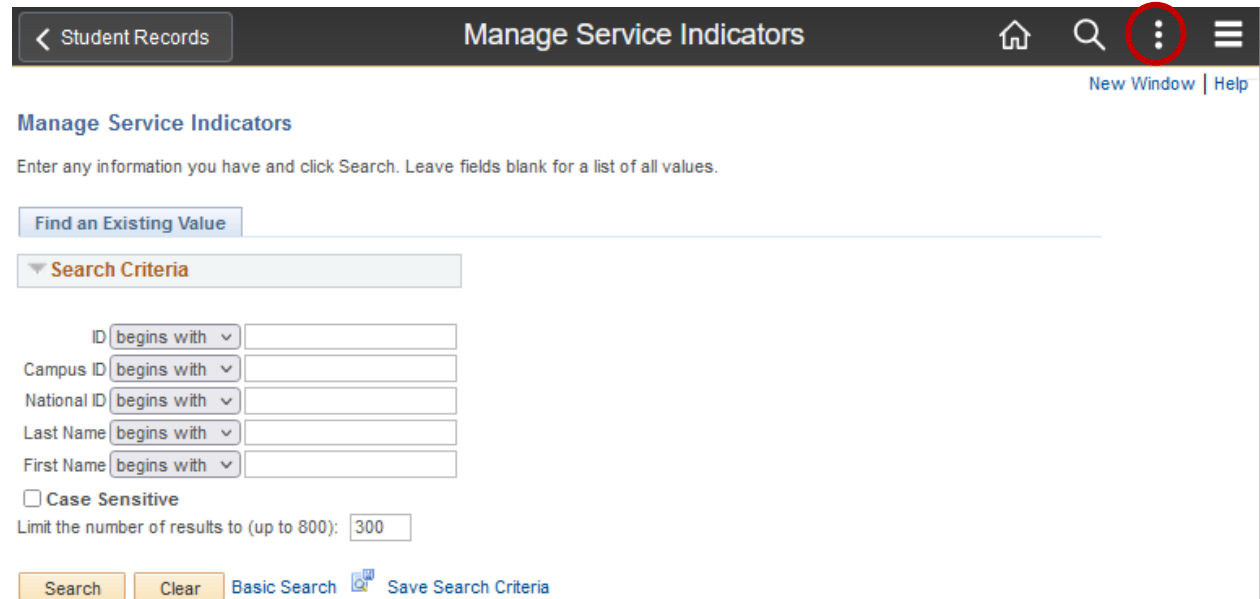
This screenshot shows the 'Personalize' dialog box for 'Checklist Management - Person' after the 'Alphabetical' button has been selected. The 'Alphabetical' button is now highlighted with a blue background and is enclosed in a red rectangular box. The 'Save' button in the top right corner is also highlighted with a red box. The background shows the same search criteria form as the previous screenshot.

Managing Favorites

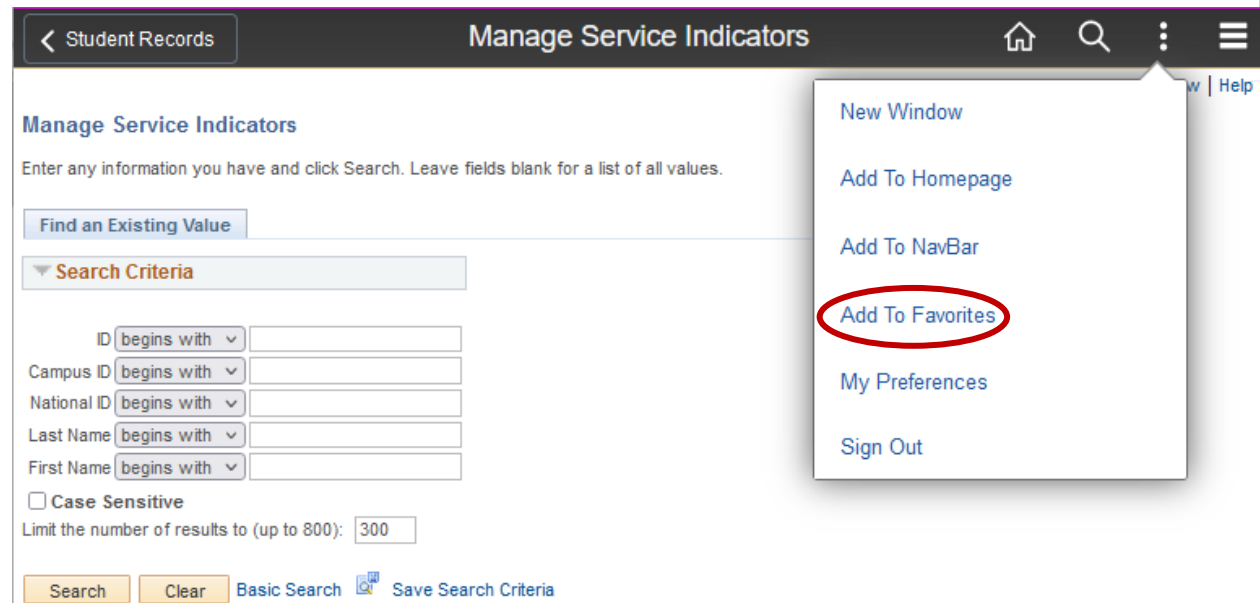
Two additional, albeit not new, ways to personalize your PeopleSoft experience include adding and editing Favorites and customizing your homepages.

Adding Favorites: To add a favorite, first navigate to the component you want to add as a favorite. You can navigate through Global Search, a fluid homepage, or the Menu.

From the page, click the **Actions** menu, and select **Add to Favorites**.

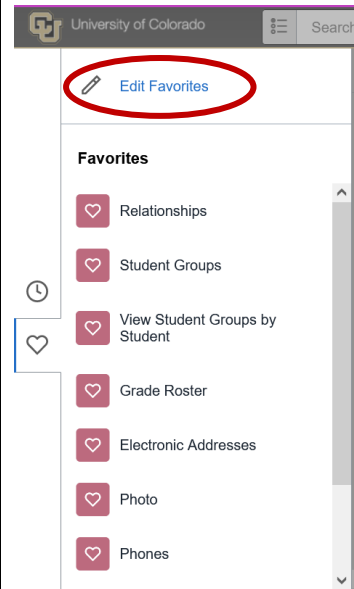


The screenshot shows the top navigation bar of the 'Manage Service Indicators' page. The page title is 'Manage Service Indicators' and the breadcrumb is 'Student Records'. The navigation bar includes a home icon, a search icon, and an Actions menu icon (three vertical dots) which is circled in red. Below the navigation bar, the page content includes a search instruction, a 'Find an Existing Value' button, a 'Search Criteria' section with dropdown menus for ID, Campus ID, National ID, Last Name, and First Name, a 'Case Sensitive' checkbox, and a 'Limit the number of results to (up to 800): 300' input field. At the bottom of the search section are 'Search' and 'Clear' buttons, and links for 'Basic Search' and 'Save Search Criteria'.



This screenshot is identical to the one above, but with the Actions menu open. The menu is located in the top right corner and contains the following options: 'New Window', 'Add To Homepage', 'Add To NavBar', 'Add To Favorites' (circled in red), 'My Preferences', and 'Sign Out'. The rest of the page content remains the same.

Editing Favorites: You can update your favorites when you access favorites from either the NavBar or (as in the screenshot) the Quick Access Bar.



You can delete favorites or change the label wording. You can also update the order you prefer by changing the sequence number.

Student Records Edit Favorites

Select the Save button after editing or deleting favorites to apply your changes. Save

Favorites 9 rows

Delete Selected

<input type="checkbox"/> *Favorite	Sequence number
<input type="checkbox"/> Relationships	1
<input type="checkbox"/> Student Groups	3
<input type="checkbox"/> View Student Groups by Student	5
<input type="checkbox"/> Grade Roster	7
<input type="checkbox"/> Electronic Addresses	9
<input type="checkbox"/> Photo	11
<input type="checkbox"/> Phones	13
<input type="checkbox"/> Student Records incl Holds	17

When finished editing favorites, be sure to click the blue **Save** button.

Student Records

Edit Favorites

Select the Save button after editing or deleting favorites to apply your changes.

Save

Favorites 9 rows

Delete Selected

<input type="checkbox"/> *Favorite	Sequence number
<input type="checkbox"/> Relationships	1
<input type="checkbox"/> Student Groups	3
<input type="checkbox"/> View Student Groups by Student	5
<input type="checkbox"/> Grade Roster	7
<input type="checkbox"/> Electronic Addresses	9
<input type="checkbox"/> Photo	11
<input type="checkbox"/> Phones	13
<input type="checkbox"/> Student Records incl Holds	17

Then use the **Back Button (<)** to close the quick access bar and return to the homepage.

Student Records

Edit Favorites

Select the Save button after editing or deleting favorites to apply your changes. [Save](#)

Favorites 9 rows

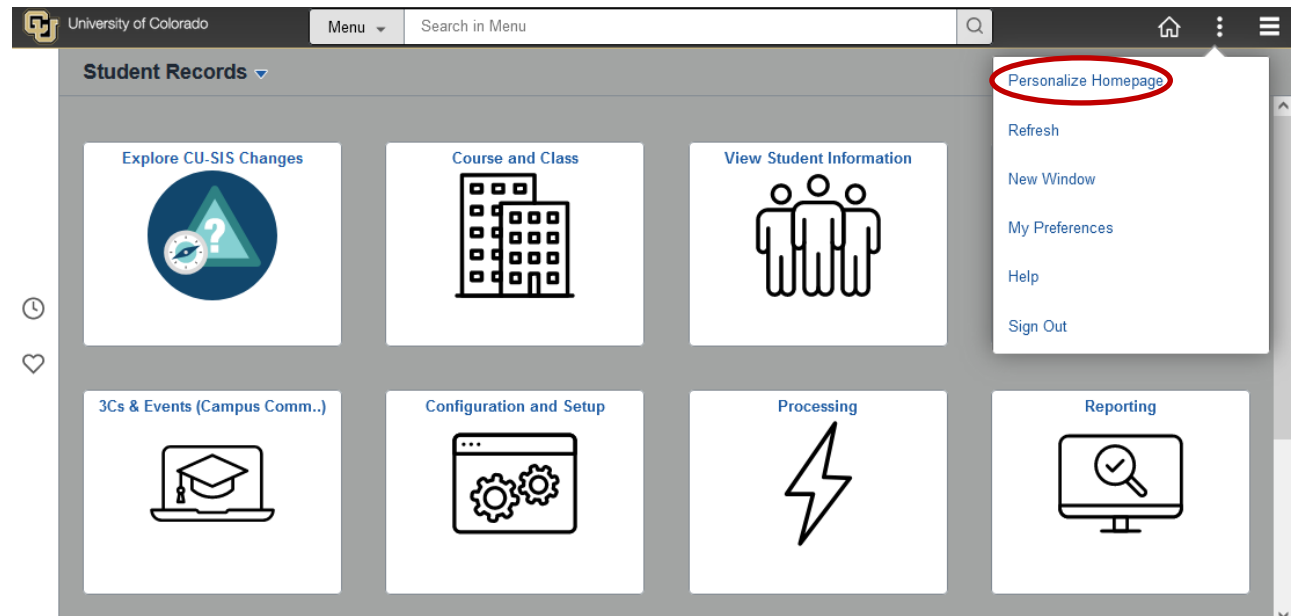
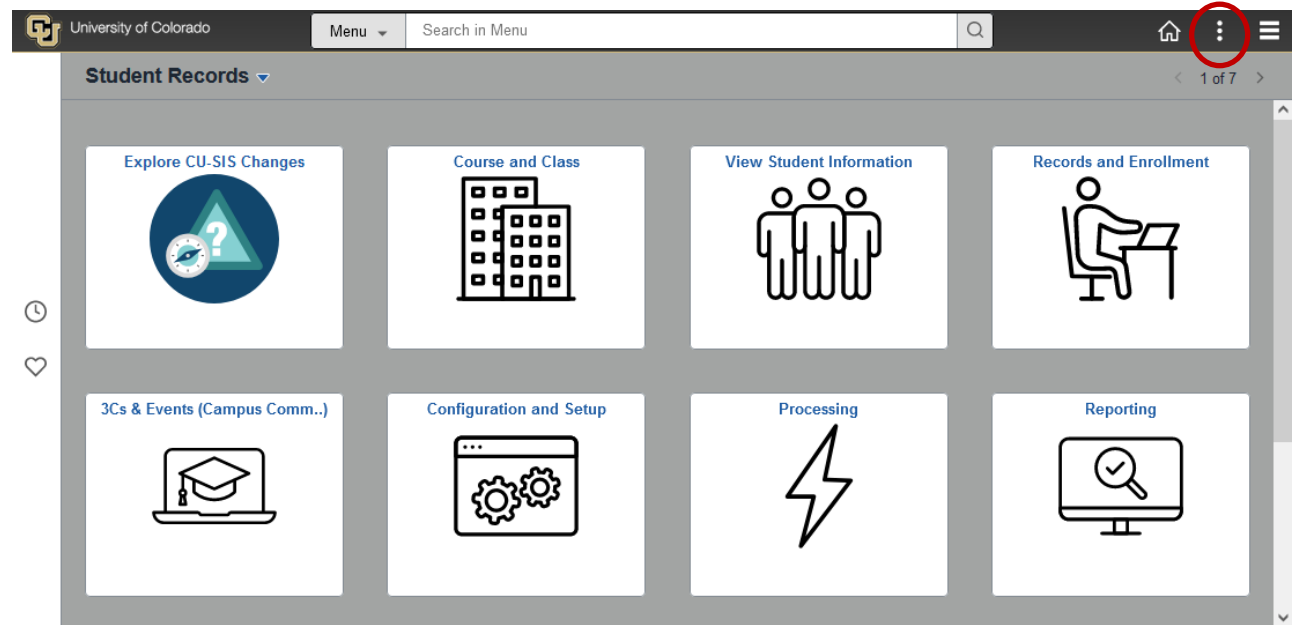
Delete Selected

<input type="checkbox"/> *Favorite	Sequence number
<input type="checkbox"/> Relationships	1
<input type="checkbox"/> Student Groups	3
<input type="checkbox"/> View Student Groups by Student	5
<input type="checkbox"/> Grade Roster	7
<input type="checkbox"/> Electronic Addresses	9
<input type="checkbox"/> Photo	11
<input type="checkbox"/> Phones	13
<input type="checkbox"/> Student Records incl Holds	17

Customizing Homepages

You can change the order of your homepages and even set a new default homepage.

To do so, click on the **Actions** menu and select **Personalize Homepage**.



Navigate to the page you would like to add. Click and drag it where you wish, then click **Save**.

To change the default homepage, click the homepage you would like to be the default, drag it into the top slot, then click **Save**.

The image displays two screenshots of the 'Personalize Homepage' interface, illustrating how to change the default homepage.

Top Screenshot: The 'Personalize Homepage' window shows a list of homepage options on the left. 'Financial Aid' is highlighted in green. The 'Common Settings' section shows 'Show Notifications Panel' set to 'No'. The 'Selected Homepage Settings' section shows 'Homepage' set to 'Financial Aid'. Below this, there are four tiles: 'Explore CU-SIS Changes', 'FA Advising', 'Operations - Batch Processing', and 'Scholarships'. The 'Save' button is visible in the top right corner.

Bottom Screenshot: The 'Personalize Homepage' window shows the same list of homepage options. 'Student Records' is now highlighted in green. The 'Common Settings' section remains the same. The 'Selected Homepage Settings' section shows 'Homepage' set to 'Student Records'. Below this, there are four tiles: 'Explore CU-SIS Changes', 'Course and Class', 'View Student Information', and 'Records and Enrollment'. The 'Save' button in the top right corner is circled in red.

A red arrow points from the 'Financial Aid' option in the top screenshot to the 'Student Records' option in the bottom screenshot, indicating the change. The 'Save' button in the bottom screenshot is circled in red, indicating the final step to save the changes.