



Introduction to PeopleSoft

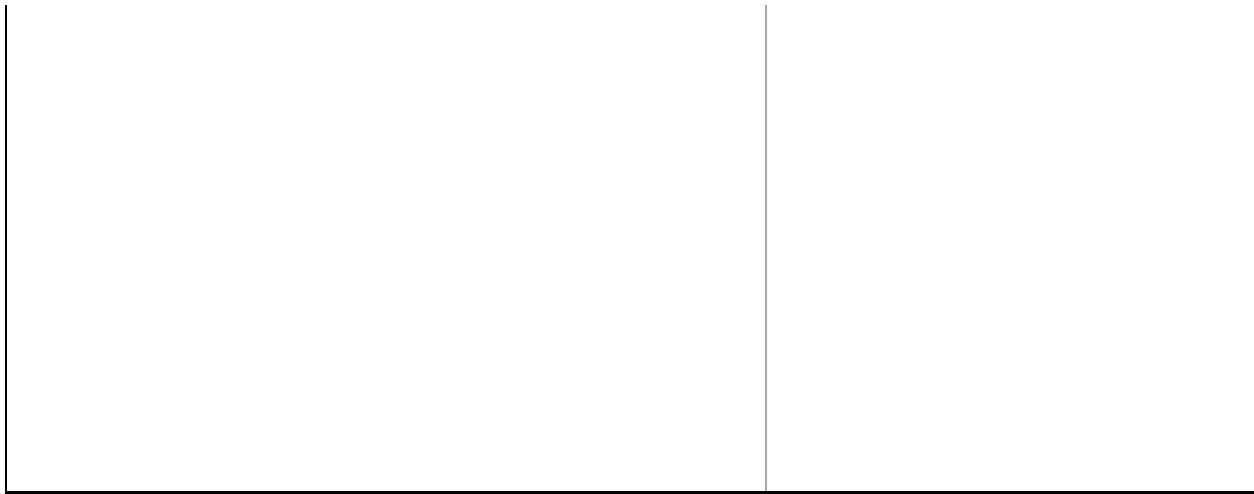
Purpose: This guide will help you navigate and learn terminology throughout the PeopleSoft modules. This reference is good for both the Finance and HR/Student modules.

MyCSUSTAN

1. Click on the MyCSUSTAN logo from the main campus webpage.

The MyCSUSTAN page is meant to be a portal for all your daily business.

2. All applications can be accessed from the left hand menu, such as Blackboard, PeopleSoft Finance, and Brio.



Signing into PeopleSoft

A-Z Directory | Calendars | Catalog | Class Schedule | Online Learning | Contact Us | Maps | FAQ

California State University Stanislaus

ADMISSIONS ACADEMICS ABOUT US STUDENT LIFE ATHLETICS ALUMNI & GIVING NEWS & EVENTS

CSUSTAN

Welcome to My CSUSTAN...

Log in

User ID:
(What is my User ID?)

Password:
(What is my Password?)

Login

Assistance
Need HELP? »
Lookup Your Student University ID
Password & Sign In Information »
What can MyCSUSTAN do for me? »
Problems or Comments

What's New

Dates & Deadlines

Spring '09 Add/Drop/Withdrawals
more information ...

Financial Aid Application
more information ...

Winter '09
Final Examinations Schedule

What's the newest & greatest on our campus?

Ben Carded?

Resources

Blackboard
E-mail »
Library

Finance System Sign In
Brio Reports Sign In
Banner (Legacy System) »

Access Hours

System is available
24 hours, 7 days a week

System Maintenance Schedule »

Emergency Information Accessibility

3. Login using your UserID and password

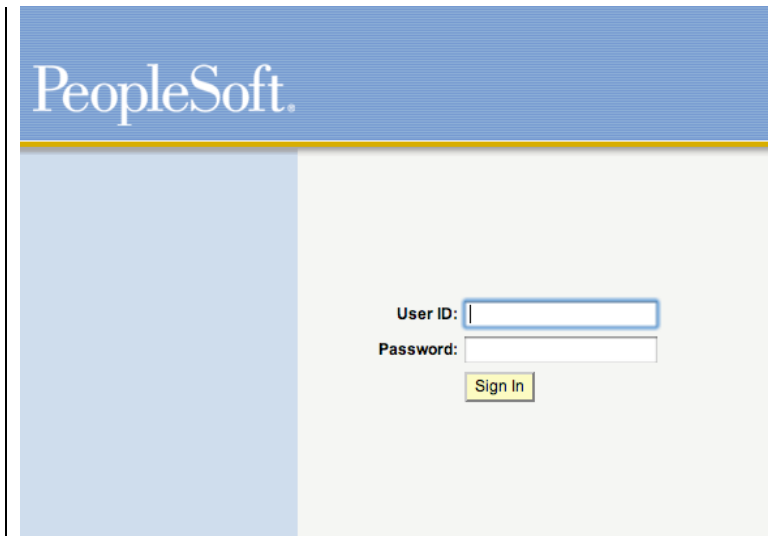
User ID = first part of the CSUSTAN.EDU email

Password = CSUSTAN.EDU email password

4. Click Login

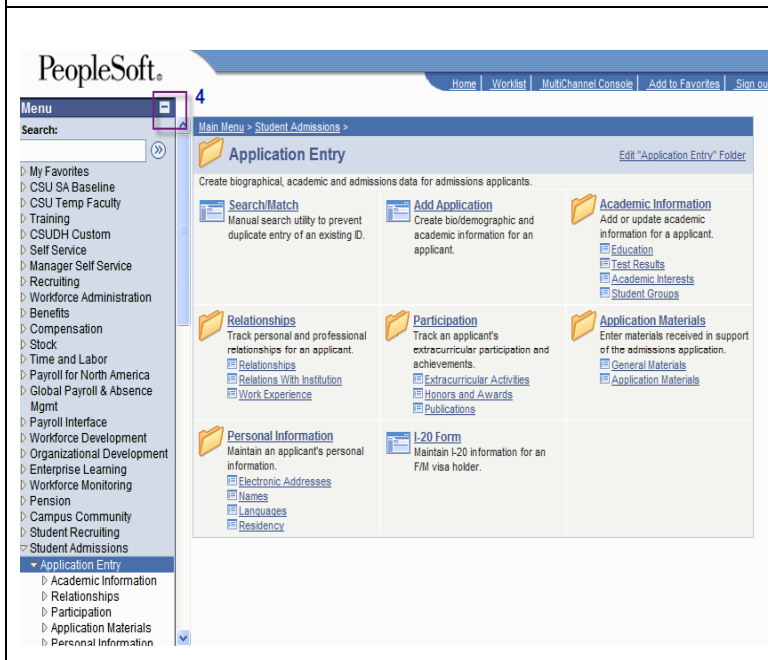
To Sign into PeopleSoft Finance:

5. Click on the Finance System Sign In link on the left hand menu




6. Enter your User ID and Password
User ID = First part of your CSUSTAN.EDU email
Password = special password provided to you by Financial Services.
7. Once logged in the first time, the system will prompt you to change your password
8. All Finance passwords expire after 90 days and a new password will need to be chosen.

Navigation



9. Menu is collapsible and expandable.
10. All items can be found on the left hand side of the screen.
11. As the user drills down the menu folders and subfolders will appear on the right hand side of the screen.
12. Default Functional Area Navigation (DFAN) pages appear as a user drills down. These pages are task driven and are focused on completing specific business processes.



	<ol style="list-style-type: none">13. Every user in PeopleSoft is assigned a role and is added to one or more permission lists.14. Roles and permission lists are what control the level of access a PeopleSoft user will have.15. In addition, the menu options in the main menu navigation are determined by roles and permissions. So as a User, you will only have access to selected modules and features within those modules.
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<p>PeopleSoft</p> <p>Menu - A</p> <ul style="list-style-type: none">Personal Information<ul style="list-style-type: none">BiographicalOrganizational RelationshipsPersonal RelationshipsCitizenshipDisabilityOEE Workforce SurveyCANDiversity ComplianceNLD<li style="background-color: #0056b3; color: white; padding: 2px;">- Add a Person<li style="padding: 2px;">- Modify a Person<li style="padding: 2px;">- Person Organizational Summary<li style="padding: 2px;">- Search for PeopleJob InformationCSU Workforce Admin Process<ul style="list-style-type: none">Global AssignmentsHeadcount FPSLabor AdministrationAbsence and VacationLeave Administration USFBenefit Information NLDFlexible Service EGTenure FPSCollective ProcessesSelf Service TransactionsWorkforce ReportsBenefitsCompensationStockTime and LaborPayroll for North AmericaGlobal Payroll & AbsenceMgmt<ul style="list-style-type: none">Payroll InterfaceWorkforce DevelopmentOrganizational DevelopmentEnterprise LearningWorkforce MonitoringPensionCampus CommunityStudent Recruiting <p>Done</p> <p style="text-align: right;">B</p>	<p>16. A = Expanded Menu Button</p> <p>17. B = Menu Navigation</p>
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Navigation – Menu Breadcrumbs

The screenshot shows the PeopleSoft interface with a left-hand menu and a main content area. The breadcrumb trail at the top of the main area reads: [Main Menu](#) > [Student Admissions](#) > [Application Evaluation](#) > [Evaluate Application Materials](#). The left-hand menu is expanded to show 'Evaluate Application Materials' with sub-items: Application Materials, Application Evaluator Ratings, General Materials, General Evaluator Ratings, Application Evaluation, General Evaluations, Alternate Avg Calc Messages, Early Financial Aid Offer, and Avqs for Fin Aid and Records.

18. Just above the menus are the breadcrumbs, which are underlined links that indicate where you have navigated to in the application.
19. Once you enter a search page the menu breadcrumbs will disappear

Navigation – Menu Search

The screenshot shows a 'Menu Search' window with a search input field and a search button. The search input field contains the text 'workforce'.

20. Find menu items quickly by using the search functionality.
21. Search Results will include:
 - Menu Titles
 - Descriptions
 - Navigation Guide (Breadcrumbs)
 - Direct Link

Navigation – Customize Settings

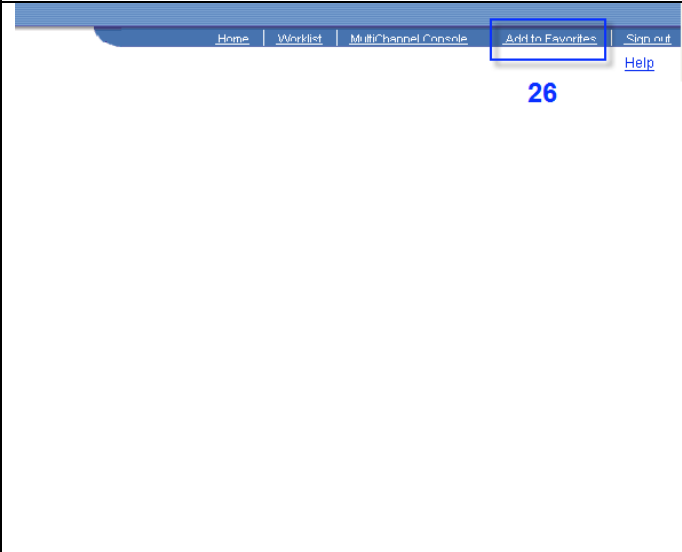
The screenshot shows the PeopleSoft Search page. The search input field contains the text 'workforce'. Below the search input field, there are radio buttons for 'New Search' (selected) and 'Search Within Results'. A 'Find' button is next to the search input field. Below the search input field, there are links for 'Customize Settings' and 'Search Tips'. Below the search input field, there is a 'Hide Summaries' link and a 'Next >>' link. Below the search input field, there is a 'Search Results' section with five results:

- 1 [Workforce Survey Result](#)
View results of workforce surveys required for the OEE Commission.
Home>Workforce Administration>Personal Information>OEE Workforce Survey CAN>Workforce Survey Result
- 2 [Request Ad hoc Process](#)
Initiate generation of several workforce reports at the same time.
Home>Workforce Administration>Workforce Reports>Request Ad hoc Process
- 3 [Create As-of-Date Request](#)
Initiate generation of several workforce reports for the same as-of date.
Home>Workforce Administration>Workforce Reports>Create As-of-Date Request
- 4 [Create Calendar Year Request](#)
Initiate generation of workforce reports for the calendar year specified.
Home>Workforce Administration>Workforce Reports>Create Calendar Year Request
- 5 [Create From/Thru Dates Request](#)
Initiate generation of several workforce reports for the date range specified.
Home>Workforce Administration>Workforce Reports>Create From/Thru Dates Request

22. Use Customize Settings to decide whether to show or hide search summaries.

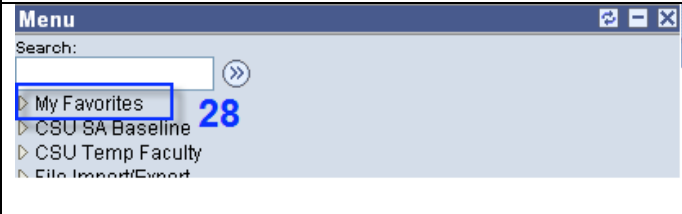


Navigation – My Favorites



23. Add your most used and visited business processes to “My Favorites.”
24. The Toolbar on the right side of the page features several options: Home, Worklist, MultiChannel Console, Add to Favorites, Sign out, and Help which will access the information about any page you have open and the fields that are related to that page.
25. Click “Add to Favorites” in the upper right of your browser in the Universal Navigation Header.
26. Type a description for the favorite and click OK.

Navigation – My Favorites



27. My Favorites is your personal list of navigation shortcuts.
28. Once a new favorite is added, click on the My Favorites menu option to see that your new favorite is stored.

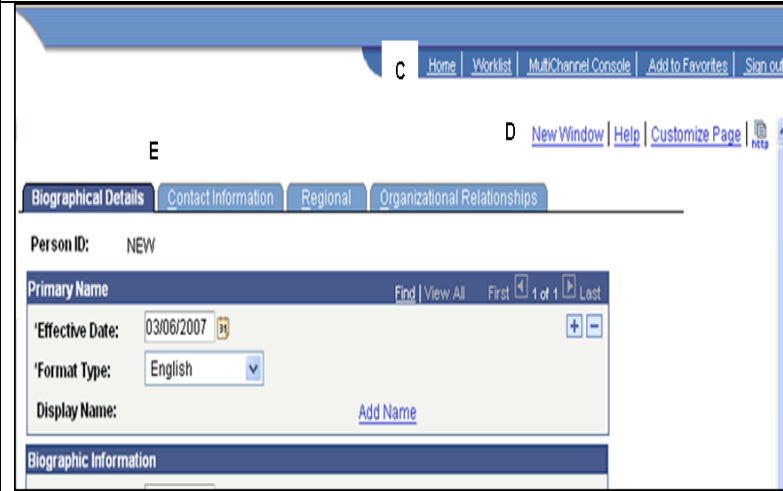
Navigation – My Favorites



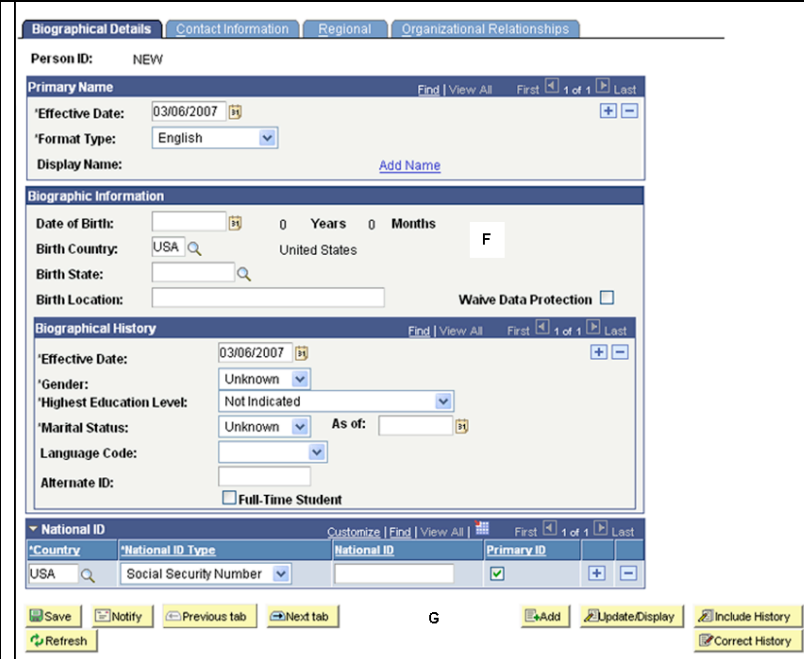
29. Collapsed Favorites list.
30. You may edit/delete favorites by clicking “Edit Favorites.”



Page Layout



- 31. C = Universal Navigation Header
- 32. D = Page Bar
- 33. E = Page Tabs



- 34. F = Content
- 35. G = Buttons Toolbar



- 36. Save Button - When navigating between pages you do not have to save your entered data. You must save it prior to leaving a component.



CSU ID Search	
<ul style="list-style-type: none">▷ Student Admissions▷ Records and Enrollment▷ Curriculum Management▷ Financial Aid▷ Student Financials▷ Academic Advising▷ Contributor Relations▷ Set Up HRMS▷ Set Up SACR▷ Enterprise Components▷ Worklist▷ Application Diagnostics▷ Tree Manager▷ Reporting Tools▷ CSU Security Reports▷ PeopleTools– CSU ID Search– Careers– Change My Password– My Personalizations– My System Profile– My Dictionary	<p>37. The CSU ID Search is the first step prior to any data entry. This is done to determine if a person already exists in the PeopleSoft Database.</p>

CSU ID Search – This feature is only available on the HR/Student module.	
<div style="border: 1px solid black; padding: 5px;"><h3>CSU ID Search</h3><p>▼ CSU ID Search</p><p><input type="button" value="Search"/> <input type="button" value="Reset"/></p><p>EmpID: <input type="text"/></p><p>National ID: <input type="text"/></p><p>Applicant ID: <input type="text"/></p><p>First Name: <input type="text" value="JAMES"/></p><p>Last Name: <input type="text"/></p><p><input type="button" value="Search"/> <input type="button" value="Reset"/></p></div>	<p>38. Enter the appropriate information and click Search.</p>



Detail	Name	EmplID	Halt ID (Last 4)	Assignment ID	DOB (mm/dd)	Orga. Rel.	Classification	ROI Type	HR Status	Empl Rcd Nbr	Job Code	Job Code Des
1 Detail	Ad	CC8000050	1737		10/09			Campus Solution Person				
2 Detail	Ba	SR2000213	0397		06/03			Campus Solution Person				
3 Detail	Ba	SR2000320	2525		03/27			Campus Solution Person				
4 Detail	Bo	004359613	4578		02/08	Employee	Regular		Active	0	3312	Administrator
5 Detail	Ci		2145		5/02/05	Applicant						
6 Detail	En Fr	CC8000072	3557		06/03			Campus Solution Person				
7 Detail	Fr	CC0000004	6544		07/05			Campus Solution Person				
8 Detail	Kv	FE8700004	0000		04/06			Campus Solution				

39. Depending on the type of record the following pages will be displayed when detail is selected.

Employees/ Person of Interest:
Main Menu > Workforce Administration > Personal Information > Biographical > Modify a Person

Campus Solutions Person: Main Menu > Campus Community > Personal Information > Add/Update a Person

HR Recruiting: Main Menu > Recruiting > Add New Applicant

Find an Existing Value – Search Feature

CSU Faculty Assignment
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

EmplID:

Empl Rcd Nbr:

Name:

Last Name:

Second Name:

Alternate Character Name:

Middle Name:

Include History Correct History Case Sensitive

[Basic Search](#)

40. Extensive, user-defined operators allow for flexible searches. Enter appropriate search criteria.

41. You can use three different wildcard features to assist in searching for data.

42. % (percent sign) = Match one or more characters.

43. _ (underscore sign) = Match any single character.

44. \ (back slash) = Escape character – don't treat next character as a wildcard.

45. Click Search.



Saving Search

CSU Faculty Assignment

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Use Saved Search: Faculty Temp 1

EmplID:
 Empl Rcd Nbr:
 Name:
 Last Name:
 Second Name:
 Alternate Character Name: and
 Middle Name:

Include History
 Correct History
 Case Sensitive

[Basic Search](#)

[Delete Saved Search](#)

46. Enter Search Criteria.
47. Click Save Search Criteria.
48. Name Search Criteria.
49. Click Save.
50. You are returned to the search page where you are now given the option of using your saved search.

Sorting Search Results

Search Results

ID	Name	Gender	Date of Birth	Campus ID	National ID	National ID Country	NID Short Description	Last Name	First Name
AD6224	Thorn Art	Male	****	(blank)	*****	USA	SSN	THORN	ART
FA0081	Thorp Allison	Unknown	****	(blank)	*****	USA	SSN	THORP	ALLISON
FADJCD0088	Thorp Rumba O	Female	****	(blank)	*****	USA	SSN	THORP	RUMBA
FAPK0353	Thorp Jack C	Male	****	(blank)	*****	USA	SSN	THORPE	JACK
FAPK0354	Thorton Rafael F	Male	****	(blank)	*****	USA	SSN	THORTON	RAFAEL
FASS0189	Thorsedron Gilly C	Unknown	****	(blank)	*****	USA	SSN	THORSEDRON	GILLY
KJ0098	Thorn Anson	Male	****	(blank)	*****	USA	SSN	THORP	ANSON
KJUT2508	Thorn Janelle	Female	****	(blank)	*****	USA	SSN	THORTON	JANELLE
REY0499	Thorp Anson	Male	****	(blank)	*****	USA	SSN	THORP	ANSON
SFCY001	THORENT Yann	Male	****	(blank)	*****	FRA	SSN	THORENT	YANN
SETC03141	Thorse Joanna	Female	****	(blank)	*****	USA	SSN	THORSEN	JOANNA
BRN117	THORENAAR FRANK	Male	****	(blank)	*****	NLD	SFI	THORENAAR	FRANK

51. Search results can be sorted in both ascending and descending order. To change the order, simply click on a column header, and it will re-sort the list.

Grid Functionality

Checklist Table

Academic Institution: PSUNV PeopleSoft University

Checklist Code: LAWAPP Law Application Requirements

Detail

*Effective Date: 01/01/1900 *Status: Active

*Description: Law Application Requirements

Short Description: Law Applic

*Function: ADMA Admissions Application

Due Date: 02/01/1997

Checklist Type: Requirements List

Tracking Group:

Item List	Item Code	Description	Default Due Date	Due Days	Comm Key
100	APFEE	App Fee	02/01/1997		
200	DEAN	Dean's Rpt	02/01/1997		
300	LSAT	LSAT	02/01/1997		
400	TRANS	Transpts	02/01/1997		
500	PERSTA	Pers State	02/01/1997		

52. Many pages that contain lists of data are structured as editable grids.
53. Like Search Results, data found in grids can be sorted in ascending or descending order by clicking on the column heading.

Navigation –



Sequence	Item Code	Description	Default Due Date	Due Days	Comm Key		
500	PERSTA	Pers State	02/01/1997	15			+ -
400	TRANS	Transcripts	02/01/1997	15			+ -
300	LSAT	LSAT	02/01/1997	15			+ -
200	DEAN	Dean's Rpt	02/01/1997	15			+ -
100	APFEE	App Fee	02/01/1997	15			+ -

54. Click on the Customize hyperlink

55. Define the order in which your columns are displayed

56. Show or hide columns


57. Create an automatic sort sequence


Sequence	Item Code	Description	Default Due Date	Due Days	Comm Key		
500	PERSTA	Pers State	02/01/1997	15			+ -
400	TRANS	Transcripts	02/01/1997	15			+ -
300	LSAT	LSAT	02/01/1997	15			+ -
200	DEAN	Dean's Rpt	02/01/1997	15			+ -
100	APFEE	App Fee	02/01/1997	15			+ -

58. By clicking on the download icon you can export your grid data in Excel. The download feature must be enabled in "My Personalizations" prior to downloading. To enable, navigate to

My Personalizations > General Options > Excel 97 grid download

Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent		
1 CSUMTH	0	4.200 000000	USD	M				+ -
2	0							+ -

59. You may add multiple rows by clicking on the plus symbol  located to the right of the grid data.

60. Additionally, you may delete rows of data by clicking on the minus symbol  located next to the plus symbol.



Effective Dating

Addresses
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

ID:

Academic Career:

National ID:

Campus ID:

Last Name:

First Name:

Include History Correct History Case Sensitive

[Basic Search](#)

61. Effective dating allows users to maintain a chronological record of historical, current and future data.
62. When entering effective dated information current information is not overwritten.
63. There are three categories of effective-dated records:
 Future - All rows that have an effective date greater than the system date.
 Current - The row with the effective date closest to, but not greater than the system date. It is this row of data that the system recognizes as the "current active" row.
 History - All rows with an effective date less than the effective date on the current row.
64. When the date of a future row arrives, it becomes the current row. What was the current row then becomes history

Service Indicators – This functionality is only available for the HR/Student module

Biographical Details | **Addresses** | **Regional**

Benito Baez AAER00019 ★

Person Information

Date of Birth: [Birth Information](#) Campus ID:

Biographical History

*Effective Date:

*Marital Status: As of:

*Gender:

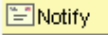
65. Service Indicators allow or deny access to different services for individuals.
66. There are both positive and negative indicators.
67. Positive Service Indicators:
 Special privileges
 Contributions
 Early Registration
68. Negative Service Indicators:
 No transcript privileges
 Cannot use library
 No Enrollment privileges



Spell Check Functionality

69. Many text fields now have spell check ability. Look for the icon.

E-mail Notifications

70. E-mail notifications allow users to notify others of particular transactions. If enabled, the  button is located at the bottom of the page. When clicked the user is taken to this screen.

Signing off PeopleSoft

71. When you are finished entering data please remember to click the “sign out” link located in the Universal Navigation Header. If you were to exit the browser first you are still technically signed in. This is a potential security risk.



Changing your Password

Change Password

User ID: PS

Description: PS

*Current Password:

*New Password:

*Confirm Password:

- 72. Click on Change My Password found near the bottom of the Main Menu.
- 73. Type in your current password.
- 74. Type in your new password.
- 75. Confirm your new password.
- 76. Click the Change Password button.