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

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.

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.
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.
16. A = Expanded Menu Button
17. B = Menu Navigation
### Navigation – Menu Breadcrumbs

| 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

| 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

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

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**PeopleSoft**

**Menu**

- Evaluate Application Materials
  - Application Materials
  - Application Materials Ratings
  - General Materials
  - General Materials Ratings
- General Evaluation
  - Application Evaluation
  - General Evaluations
  - Alternate Avg Calc Messages
  - Early Financial Aid Offer
  - Ave for Fin Aid and Records

**Menu**

- Evaluate Application Materials
  - Assignment evaluation codes and rate an application.
  - Application Materials
    - Manually link academic data to an evaluation.
  - General Evaluation Ratings
    - Maintain evaluator ratings for general materials.

**Search**

- Enter search keywords separated by a space. Use quotes for any phrases. For example: Cities Countries United States
- New Search Search Within Results
- Workforce

**Search Results**

1. Workforce Survey Result
   - View results of workforce surveys required for the OEE Commission.
   - Home>Workforce Administration>Workforce Survey>Workforce Survey Result
2. Request Ad Hoc Process
   - Initiate generation of several workforce reports at the same time.
   - Home>Workforce Administration>Workforce Report>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 Report>Create>As-Of Date Request
4. Create Calendar Year Request
   - Initiate generation of workforce reports for the calendar year specified.
   - Home>Workforce Administration>Workforce Report>Calendar Year Request
5. Create From/Thru Dates Request
   - Initiate generation of several workforce reports for the date range specified.
   - Home>Workforce Administration>Workforce Report>Calendar Year>Request
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.

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.

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.
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.

38. Enter the appropriate information and click Search.
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

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### 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**
  - Enter information here:
    - **Employee ID:**
    - **Employee Name:**
    - **Last Name:**
    - **Second Name:**
    - **Alternate Character Name:**
    - **Middle Name:**
  - Options:
    - **Case Sensitive**
    - **Include History**

- **Search**
- **Clear**
- **Basic Search**
- **Save Search Criteria**

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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

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

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 reorder the list.

Grid Functionality

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.
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

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

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

<table>
<thead>
<tr>
<th>Addresses</th>
<th>Find an Existing Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID:</td>
<td>begins with</td>
</tr>
<tr>
<td>Academic Career:</td>
<td></td>
</tr>
<tr>
<td>National ID:</td>
<td>begins with</td>
</tr>
<tr>
<td>Campus ID:</td>
<td>begins with</td>
</tr>
<tr>
<td>Last Name:</td>
<td>begins with</td>
</tr>
<tr>
<td>First Name:</td>
<td>begins with</td>
</tr>
<tr>
<td>Include History</td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Biographical Details</th>
<th>Addresses</th>
<th>Regional</th>
</tr>
</thead>
<tbody>
<tr>
<td>Degree Base</td>
<td>MER00018</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Person Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date of Birth</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Biographical History</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Effective Date:</td>
</tr>
<tr>
<td>*Marital Status:</td>
</tr>
<tr>
<td>*Gender:</td>
</tr>
</tbody>
</table>

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.

![Spell Check Functionality](image)

## E-mail Notifications

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

![E-mail Notifications](image)

## 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.

![Signing off PeopleSoft](image)
Changing your 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.