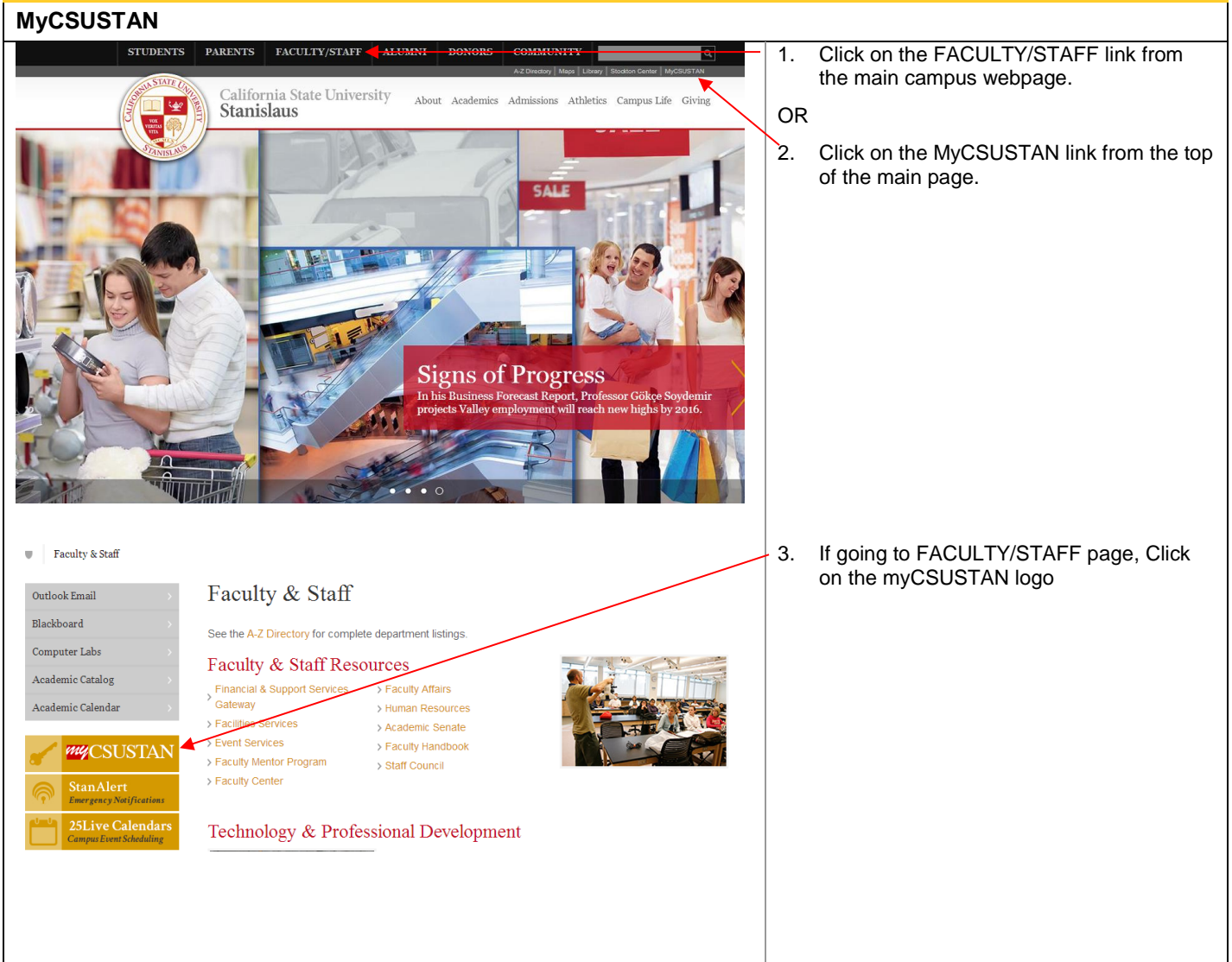


Introduction to PeopleSoft

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 FACULTY/STAFF link from the main campus webpage.
- OR
- 2. Click on the MyCSUSTAN link from the top of the main page.
- 3. If going to FACULTY/STAFF page, Click on the myCSUSTAN logo

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

CHS (Common Human Resources System):

1. Login using your UserID and password

User ID = first part of the CSUSTAN.EDU email

Password = CSUSTAN.EDU email password

2. Click Sign In

CFS (Common Finance System):

3. Click on the link at the bottom of the page for PeopleSoft Finance.

4. Select campus from drop down menu and click Login

Logging into *sharepointps.calstate.edu*

Warrior Sign In

Warrior Username
Warrior Password

Sign In

Forgot your Warrior Username or Password?

Warrior Identity Information

Your Warrior Username is the first part of your University e-mail address, up to the '@' symbol. (ie: for JBond@csustan.edu, the Warrior Username is "JBOND").

Your Password is initially set at the "Initial" Sign In page that you received from Admissions, or you can reset your Password.

Need Help?

Documentation for Students, Faculty, or Staff.
You can also contact the OIT Help Desk for assistance, 667-3687

Additional Resources

[Blackboard](#) [Data Warehouse](#) [Digital Measures](#) [Student E-mail](#) [Faculty/Staff E-mail](#) [Finance System](#) [Lynda.com](#) [Qualtrics](#)

5. Login using your UserID and password
User ID = first part of the CSUSTAN.EDU email
Password = CSUSTAN.EDU email password
6. Click Sign In

NAVIGATION

Student/HR

ORACLE

myCSUSTAN | Employee Page | Security Admin | Guests

Personalize Content | Layout

Menu Search: **8**

Academics **9**

Class	Schedule
PADM 5006-002 SEM (43449)	We 6:00PM - 8:40PM Dorothy & Bill Bizzini 233
PADM 5110-002 SEM (41381)	Tu 6:00PM - 8:40PM Dorothy & Bill Bizzini 234

My Account

You have no outstanding charges at this time.

MAKE A PAYMENT / VIEW E-BILL

7. Main Menu = All items can be found on the left hand side of the screen.

The Main Menu consists of Folders and Subfolders.

Components are the pages that load into the Default Functional Area Navigation (DFAN).

8. Default Functional Area Navigation (DFAN) pages appear in the right hand of the screen as a user drills down into the folders and subfolders within the main menu. These pages are task driven and are focused on completing specific business processes.

Every user in PeopleSoft is assigned a role and is added to one or more permission lists.

Roles and permission lists are what control the level of access a PeopleSoft user will have.

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.

Finance

ORACLE

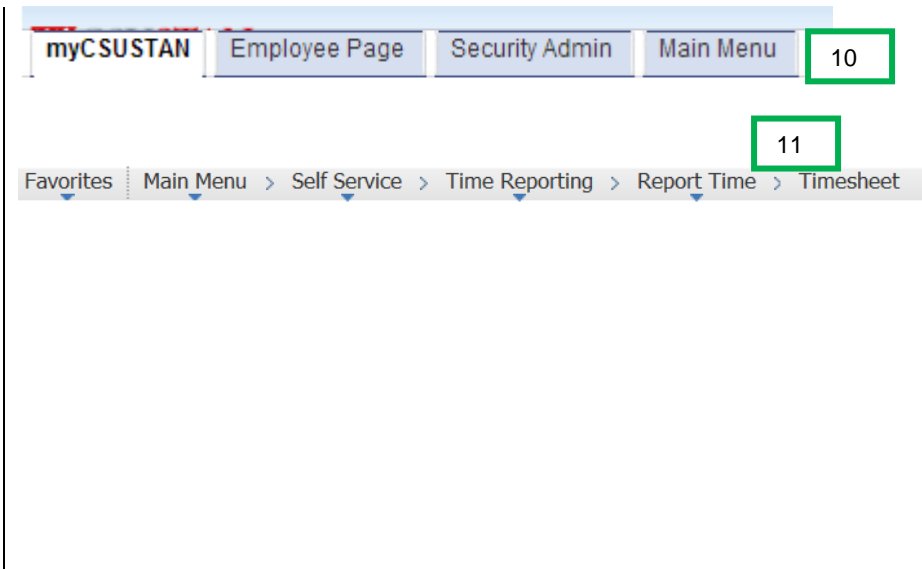
Home | Add to Favorites | Sign out | Help

Personalize Content | Layout

Menu Search: **8**

9

- My Favorites
- Supplier Contracts
- Vendors
- Purchasing
- eProcurement
- Accounts Payable
- General Ledger
- CSU Administer Integration
- Set Up Financials/Supply Chain
- Reporting Tools
- PeopleTools
- My Personalizations



9. Roles are given at the top of the screen. The number of roles a user has depends on their roles on campus.
10. At the top of the page are breadcrumbs, which are links that indicate where you have navigated to in the application.

Menu Breadcrumbs are used to get back to a previous page.

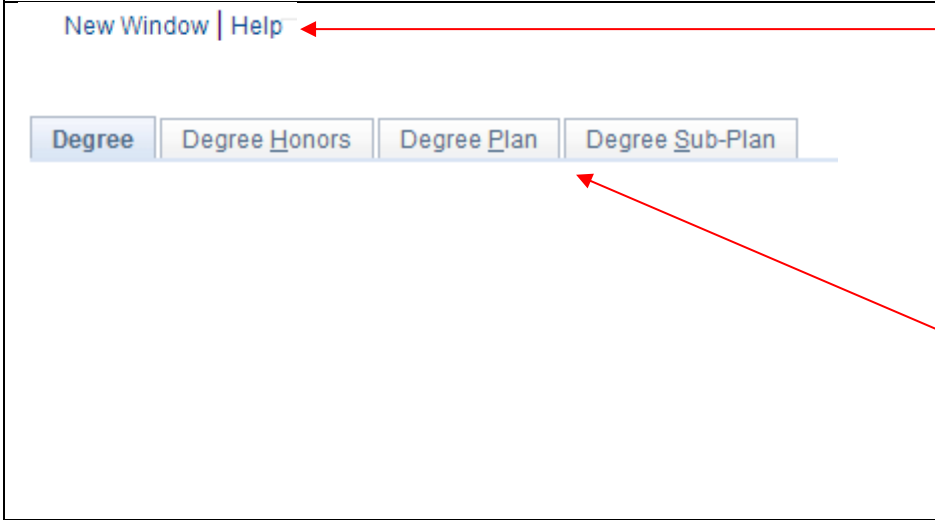
Once a user enters into a Component, the DFAN and Menu Breadcrumbs go away.

To return to a previous area, use the drop down menus at the top of the page to navigate.

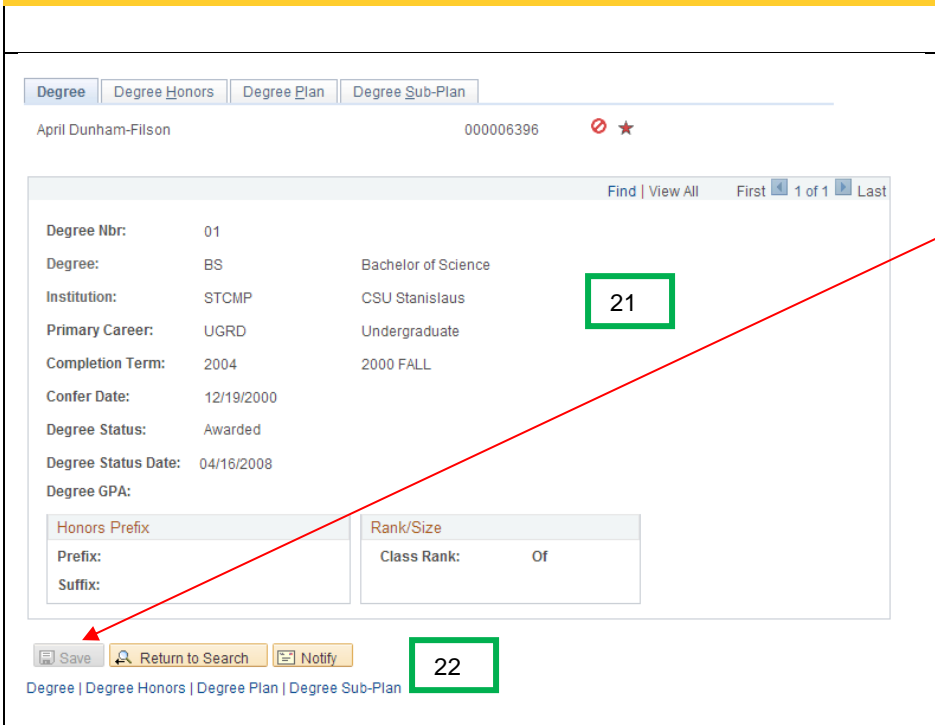
MAIN MENU	
<div style="border: 1px solid #000; padding: 5px;"> <div style="background-color: #4F81BD; color: white; padding: 2px 5px; font-weight: bold;">Menu</div> <div style="border: 1px solid #ccc; padding: 2px;"> Search: <input style="width: 100%; border: none;" type="text"/> 12 </div> <ul style="list-style-type: none"> ▷ My Favorites ▷ CSU Faculty Reports ▷ CSU SA Baseline ▷ CSU Temp Faculty ▷ Self Service ▷ Manager Self Service ▷ Workforce Administration ▷ Workforce Development ▷ Organizational Development ▷ Enterprise Learning ▷ Campus Community ▷ Student Recruiting ▷ Student Admissions ▷ Records and Enrollment ▷ Curriculum Management ▷ Financial Aid ▷ Student Financials ▷ Academic Advisement ▷ Contributor Relations ▷ Set Up HRMS ▷ Set Up SACR ▷ Tree Manager ▷ Reporting Tools ▷ Stanislaus HR Custom ▷ Stanislaus SA Custom ▷ PeopleTools – CSU ID Search – My Personalizations – My System Profile </div>	<ol style="list-style-type: none"> 11. Find menu items quickly by using the search functionality. Search Results will include: Menu Titles Descriptions Navigation Guide (Breadcrumbs) Direct Link

NAVIGATION – MY FAVORITES	
	<p>12. In the upper right hand corner of the screen is the Universal Navigational Header. This header will remain constant throughout navigation.</p>
	<p>13. Once you have arrived at a component that will be used often, you can add it to your favorites list by clicking on Add to Favorites.</p> <p>14. Add a Description or rename the link.</p>
	<p>15. Click OK</p> <p>In the upper left hand corner, Favorites is your personal list of navigation shortcuts.</p> <p>16. Once a new favorite is added, click on the Favorites menu option to see that your new favorite is stored.</p> <p>17. You can add or edit/delete favorites by clicking the Add to Favorites or Edit Favorites links in the Favorites menu.</p>

PAGE LAYOUT



- 18. The Page Bar is just below the Universal Navigational Header on the right hand side.
- It appears when you are in a component and gives the option of opening a new window in order to navigate to another location without losing your original location.
- 19. Page Tabs appear on certain pages that have multiple functions.



- 20. Content is the information that loads into a page
 - 21. The Buttons Toolbar is located at the bottom of a page
 - 22. Save Button – The save button will become active when you have the ability to make changes to information within a page.
- When navigating between tabs within a main page, you do not have to save your entered data.
- You must save it prior to leaving a component.




FIND AN EXISTING VALUE – SEARCH FEATURE

Class Roster

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

Find an Existing Value

Search Criteria

Academic Institution:	begins with ▼	STCMP	
Term:	begins with ▼	2134	
Subject Area:	begins with ▼		
Catalog Nbr:	begins with ▼		
Class Nbr:	= ▼		
Class Section:	begins with ▼		
Session:	= ▼		
Course ID:	begins with ▼		
Course Offering Nbr:	= ▼		

Search

Clear

Basic Search



Save Search Criteria

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

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

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

_ (underscore sign) = Match any single character.

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

23. Enter as little or as much information in the search fields to define your search results
24. Use the magnifying glass to look up specific information for that search field
25. Click Search.

SAVING SEARCH

Student Degrees

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

Find an Existing Value

Search Criteria

ID:

Campus ID:

Local Campus ID:

National ID:

Last Name:

First Name:

Case Sensitive

[Basic Search](#)

Student Degrees

Save Search As

Name the search and then click Save.

Name of Search:

The saved search will contain these values:

ID: begins with 000006396
 Campus ID: begins with
 Local Campus ID: begins with
 National ID: begins with
 Last Name: begins with
 First Name: begins with

[Return to Advanced Search](#)

- 26. Enter Search Criteria.
- 27. Click Save Search Criteria.

- 28. Name Search Criteria.
- 29. Click Save.

Student Degrees

Save Search As

Search saved as Degree .

[Return to Advanced Search](#)

Student Degrees

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

Find an Existing Value

Search Criteria

Use Saved Search: Degree

ID:

Campus ID:

Local Campus ID:

National ID:

Last Name:

First Name:

Case Sensitive

Search Clear Basic Search Save Search Criteria Delete Saved Search

The system will tell you that the search has been saved.

32. Click on Return to Advanced search

33. You will return to the main Find an Existing Value page with a Use Saved Search drop down menu. There is no limit to the number of saved searches that can be created. This allows for the search information to default to your specifications.

SORTING SEARCH RESULTS

Search Results

ID	Name	Gender	Date of Birth	Campus ID	Local Campus ID	National ID	National ID Country	NID Short Description	Last Name	First Name
002855060	Milani, Arannia Gloria	Female	06/17	(blank)	980381120	0209 USA	SSN		MILANI	ARANNIA
002167867	Milano, Alyssa Michelle	Female	02/01	(blank)	980327237	****9456 USA	SSN		MILANO	ALYSSA
001762943	Milanos, Andrea Christine	Female	04/21	(blank)	980227376	****5254 USA	SSN		MILANOS	ANDREA
000407316	Miley, Andrea Jane	Female	11/04	(blank)	980022887	****2497 USA	SSN		MILEY	ANDREA
002002728	Mililan, Ana Cristina	Female	05/11	(blank)	980314090	****5239 USA	SSN		MILLAN	ANA
001079546	Mililan, Angelica	Female	07/29	(blank)	980090601	****1557 USA	SSN		MILLAN	ANGELICA
001466140	Mililan, Aracely	Female	05/12	(blank)	980160193	****1276 USA	SSN		MILLAN	ARACELY
002596256	Mililan, Hernandez, Alberto Jovani	Male	03/20	(blank)	980361209	****6067 USA	SSN		MILLANHERNANDEZ	ALBERTO
000361660	Millard, Andrew Scott	Male	08/05	(blank)	980019593	****3138 USA	SSN		MILLARD	ANDREW
001354054	Miller, Adam D	Male	09/25	(blank)	980133020	****6937 USA	SSN		MILLER	ADAM
002642536	Miller, Aimee Leigh	Female	08/28	(blank)	980364790	****4756 USA	SSN		MILLER	AIMEE
000201071	Miller, Alan	Male	10/30	(blank)	980005094	****9522 USA	SSN		MILLER	ALAN

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

GRID FUNCTIONALITY

Display: Effect All Institution CSU Stanislaus Refresh

[+](#) Add Service Indicator

Service Indicator Summary [Personalize](#) | [Find](#) | [View All](#) | | First 1-3 of 3 Last

Code	Code Description	Reason Description	Institution	Start Term	Start Term Description	End Term	End Term Description	Start Date	End Date
B05	Balance Past Due 31-60 Days	Balance Past Due 31-60 Days	STCMP	0000	Begin Term			06/30/2014	
RAA	Converted "Active" Record	Converted "Active" Record	STCMP	0000	Begin Term			01/01/1901	
RTV	Records Being Verified	Records Being Verified	STCMP					03/17/2014	

[+](#) Add Service Indicator

[Return to Search](#) [Notify](#)

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

Display: Effect All Institution CSU Stanislaus Refresh

[+](#) Add Service Indicator

Service Indicator Summary [Personalize](#) | [Find](#) | [View All](#) | | First 1-3 of 3 Last

Code	Code Description	Reason Description	Institution	Start Term	Start Term Description	End Term	End Term Description	Start Date	End Date
B05	Balance Past Due 31-60 Days	Balance Past Due 31-60 Days	STCMP	0000	Begin Term			06/30/2014	
RAA	Converted "Active" Record	Converted "Active" Record	STCMP	0000	Begin Term			01/01/1901	
RTV	Records Being Verified	Records Being Verified	STCMP					03/17/2014	

[+](#) Add Service Indicator

[Return to Search](#) [Notify](#)

- 33. Click on the Personalize hyperlink to customize the information that is seen in the grid.

Service Indicator Summary Help

Personalize Column and Sort Order

To order columns or add fields to sort order, highlight column name, then press the appropriate button. Frozen columns display under every tab.

Column Order

- Code
- Code Description
- Reason Description
- Institution
- Start Term
- Start Term Description
- End Term
- End Term Description
- Start Date
- End Date

Hidden
 Frozen

Sort Order

Descending

OK
Cancel
Preview
Copy Settings

34. Define the order in which your columns are displayed
 35. Show or hide columns
 36. Create an automatic sort sequence
 37. Click OK
- Personalization will take effect immediately and will not change unless an upgrade happens.

Display: Effect All Institution CSU Stanislaus Refresh

[+](#) Add Service Indicator

Service Indicator Summary									
Code	Code Description	Reason Description	Institution	Start Term	Start Term Description	End Term	End Term Description	Start Date	End Date
B05	Balance Past Due 31-60 Days	Balance Past Due 31-60 Days	STCMP	0000	Begin Term			06/30/2014	
RAA	Converted "Active" Record	Converted "Active" Record	STCMP	0000	Begin Term			01/01/1901	
RTV	Records Being Verified	Records Being Verified	STCMP					03/17/2014	

[+](#) Add Service Indicator

Return to Search
 Notify

38. By clicking on the download icon you can export your grid data to Excel.

Display: Effect All Institution CSU Stanislaus Refresh

[+](#) Add Service Indicator

Service Indicator Summary									
Code	Code Description	Reason Description	Institution	Start Term	Start Term Description	End Term	End Term Description	Start Date	End Date
B05	Balance Past Due 31-60 Days	Balance Past Due 31-60 Days	STCMP	0000	Begin Term			06/30/2014	
RAA	Converted "Active" Record	Converted "Active" Record	STCMP	0000	Begin Term			01/01/1901	
RTV	Records Being Verified	Records Being Verified	STCMP					03/17/2014	

[+](#) Add Service Indicator

[Return to Search](#) [Notify](#)

39. You may add multiple rows by clicking on the plus symbol

40. Additionally, you may delete rows of data by clicking on the minus symbol where indicated

EFFECTIVE DATING - Effective dating allows users to maintain a chronological record of historical, current and future data.

Edit Home Address

Country: United States [Change Country](#)

Address 1:

Address 2:

Address 3:

City: State: [California](#) Postal:

County:

On this date: (example: 01/31/2000)

[Save](#) [Cancel](#)

When entering effective dated information current information is not overwritten.

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.

When the date of a future row arrives, it becomes the current row. What was the current row then becomes history

Example of Future Dating

History - All rows with an effective date less than the effective date on the current row.

SPELL CHECK FUNCTIONALITY

Message Text:

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

E-MAIL NOTIFICATIONS	
<div style="border: 1px solid black; padding: 5px;"> <p>Select All Clear All</p> <p style="background-color: #D3D3D3; padding: 2px; text-align: center; border: 1px solid black;">notify selected students</p> <p>Send Notification</p> <p>Type e-mail addresses in the To, CC or BCC fields using a comma as a separator.</p> <p style="background-color: #4682B4; color: white; padding: 2px;">Notification from April Dunham-Filson</p> <p>From: _____</p> <p>To: <input type="text"/></p> <p>CC: <input type="text"/></p> <p>BCC: <input type="text"/></p> <hr/> <p>Subject: <input type="text"/></p> <p>Message Text: <input type="text"/></p> <p style="text-align: center; background-color: #90EE90; padding: 5px; border: 1px solid black;">SEND NOTIFICATION</p> </div>	<p>42. E-mail notifications allow users to notify others of particular transactions.</p> <p>Using Notify can come in different forms such as the one here.</p> <p>43. Notify button can also be located at the bottom of the page. When clicked the user is taken to this screen.</p>

SIGNING OFF PEOPLESFT	
<div style="border: 1px solid black; padding: 5px;"> <p style="background-color: #ADD8E6; padding: 5px; border: 1px solid black;"> Home Add to Favorites Sign out </p> </div>	<p>44. When finished 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.</p>