PeopleSoft Overview

PeopleSoft is an enterprise resource planning (ERP) application that has been implemented CSU system-wide that seeks to streamline the availability of human resources, finance, and student administration information.

Who Uses PeopleSoft?
All staff, faculty, and students at CSUF use PeopleSoft whether they are aware of it or not. Students use PeopleSoft to register for their classes. Faculty use PeopleSoft to enter student grades. Staff use PeopleSoft to check their available leave balance. Some users on campus have more advanced access to PeopleSoft that allows them to do more advanced transactions such as create purchase orders, hire student workers, or remove a hold on a student’s registration.

How do I get access to PeopleSoft?
If you need access to advanced features in PeopleSoft, you will need to fill out the necessary Access Request Form(s). Information on the Access Request Forms and how to fill them out can be found at: http://www.fullerton.edu/iso/erp/

What access do I need?
You will need to work with your department and/or division to determine what access you need to PeopleSoft. There is also information on determining what access you need at the CSUF ISO website: http://www.fullerton.edu/iso/erp/

How do I attend PeopleSoft classes?
Most PeopleSoft classes are available online. Once you have submitted an Access Request Form, you will receive an email with the class(es) you need to attend. There will also be instructions on how to enroll in the classes via the campus portal.

PeopleSoft was initially released as CMS (Common Management Systems). Another name for it is Enterprise Resource Planning (ERP).
There are a total of 188 Smart Classrooms and lecture halls on campus. All 8 colleges have access to these General Use Smart Classrooms.

PEOPLESOF T FINANCE OVERVIEW

PeopleSoft Finance is the application that handles all of the financial transactions and reports on campus. This includes general ledger, purchasing, accounts payable, asset management, receivables, billing, and distributed financial reports. The current version is referred to as Common Financial Systems (CFS).

PEOPLESOF T FINANCE CLASSES

Some of the following courses are available online; others are available on a monthly basis as in-person courses. Users must have completed a Finance Access Request Form in order to attend any of these classes.

Requisition Data Entry and Approval (CMSCFS1)
This course covers how to enter purchase requisitions and approve them through the Peoplesoft CFS system.

Budget Transfer Data Entry and Approval (CMSCFS2)
This course covers how to complete a budget transfer and approve it via the Budget Transfer Form.

Finance Approval (CMSCFS3)
For department finance approvers to receive access to PeopleSoft, they must attend this course that covers: requisition approval and budget transfer approval.

Data Warehouse: Purchasing Dashboard (CMSCFS4A)
This course covers accessing and running the Purchasing reports available in the campus Data Warehouse.

Data Warehouse: Revenue/Expense Report Dashboard (CMSCFS5)
This course covers accessing and running the Revenue/Expense Reports available in the campus Data Warehouse.

The campus fiscal year runs from June through July.

Fiscal year closing often starts as early as May due to the amount of work that is required.
PeopleSoft Human Resources Overview

PeopleSoft Human Resources is the application that handles all of the human resources transactions and reports on campus. This includes absence management, part-time faculty hiring, student worker, and employee self-service.

PeopleSoft Human Resources Classes

All of the following courses are available online. Users must have completed a Human Resources Access Request Form in order to attend any of these classes.

Pre-Requisite: CMS Basics (CMSHR17)
All users must take this course before attending any of the classes below. This class covers the basics of navigating the PeopleSoft system.

Absence Management for Employees (CMSHR27A)
This course covers how campus employees report their absences/fill out their timesheet. The course is open to all employees and can be accessed here: http://csufconnect.fullerton.edu/amemployee.

Absence Management for Timekeepers (CMSHR25A)
This course covers how timekeepers review and validate employee absences, view employee leave balances, and run Absence Management reports.

Absence Management for Managers (CMSHR26)
This course covers how managers and department chairs approve absences for the employees who report to them.

Student Worker (CMSHR14A)
This course will cover the processes and procedures for the employment of work study and student assistants on campus.

Temp Faculty Baseline (CMSHR24A)
This course will cover the processes to hire temp faculty (also known as part-time faculty) and graduate assistants via the PeopleSoft temp faculty process.

Labor Cost Distribution (LCD) (CMSHR21A)
This course reviews Labor Cost Distribution which is the link between the Finance system and the HR system. It covers information on LCD Rosters and Reports which house information such as: position, funding, benefits, and salaries.

Roster, CWID Search, and Query (CMSHR06A)
This course covers job rosters, CWID Search, and Query functions. Employee Job Roster provides appointment information for staff management, faculty, and/or student workers. CWID Search provides basic appointment information for state paid employees within the PeopleSoft system. Query enables the user to execute various pre-built 'queries' within PeopleSoft and export the results to MS Excel.

There are additional steps that are required to designate a person as the department timekeeper. Contact Payroll to get more information.

IT Training & Support

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PeopleSoft

**PeopleSoft Campus Solutions Overview**

PeopleSoft Campus Solutions is the application that handles all of the student-related transactions and records. This includes admissions, records (class schedule, registration, grading, transcripts), student financials, and financial aid.

**PeopleSoft Campus Solutions Classes**

All of the following courses are available online. You must have completed a Campus Solutions Access Request Form in order to attend any of these classes with the exception of FERPA and Basics.

**Pre-Requisites: Campus Solutions FERPA and Campus Solutions Basics (CMSSA0/CMSSA1)**

All users must attend both of these courses before attending any other Campus Solutions classes. FERPA covers the Family Education Rights and Privacy Act which governs the privacy of student records. Basics covers the basics of navigating in PeopleSoft Campus Solutions.

**Class Schedule Overview (CMSSA3A)**
This course covers viewing the course catalog, viewing the schedule of classes, updating sections of a class, adjusting class associations, and class search.

**Applicant Inquiry View Only (CMSSA4A)**
This course is designed for all people who need to view student applicant information. It is an introductory class as well as a prerequisite for all other applicant-related classes.

**Permissions U (CMSSA70A)**
This course covers how to assign student specific permissions which allow a particular student to enroll in a course despite a lack of pre-requisites or the class being full.

**Enrollment Verification (CMSSA84A)**
This course covers how to look up a student’s current enrollment, reviewing a student’s major/minor or concentration, reviewing service indicators, and how to view a student’s enrollment appointment.

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