HUMBOLDT STATE UNIVERSITY

CMS Project Management Office

Introduction to PeopleSoft HCM 8.9 for APS
Activity Guide

Activities Included

Using Menu Search

Adding Favorites

CSU ID Search

My Personalizations

Save and Sort Searches

Exporting Data to Excel

Add/Delete Rows of Data

Add Notes

E-mail Notifications

Activity #1 – Using and Customizing the Menu Search

1. Log into PeopleSoft.
2. In the menu search type in "Contract."
3. Click "Customize Settings"
4. Customize Settings to Hide Summaries and set your results to 50 per page.
5. Save your settings.
6. You will need to logout and log back in for the changes to take effect. Please do this now.
7. Conduct the same search "Contract" and notice the difference.

Activity #2- Adding Favorites

1. Log into PeopleSoft.
2. Navigate to: **Main Menu > CSU Temp Faculty > CSU Contract Data.**
3. Click on "Add to Favorites" located in the upper right corner of your browser in the Universal Navigation Header.
4. Type a unique description for the favorite. The official name of the component or page will be the default entry.
5. Click OK
6. Now expand the "My Favorites" menu option. As you will notice your favorite is now stored.
7. You may edit/delete these favorites by clicking "Edit Favorites." Once in the edit mode you can alter the display order of you favorites by adding a number sequence. E.G. 10,20,30,40, etc…
8. Now go ahead and add CSU ID search to your favorites.

Activity #3- CSU ID Search

1. Before beginning this task please check your volume.
2. Navigate to the following URL: http://www.humboldt.edu/~cms/Training%20HCM.html
3. Click on the CSU ID Search Flash animation
4. Watch the demonstration.
5. Log into PeopleSoft and conduct your own CSU ID Search.
6. Conduct your CSU ID Search by National Id first.

Activity #4- My Personalizations

1. Log into PeopleSoft
2. Click on My Personalizations
3. Open up General Options
    a. Enable the Excel 97 grid download (Change it to yes).

   b. Click OK

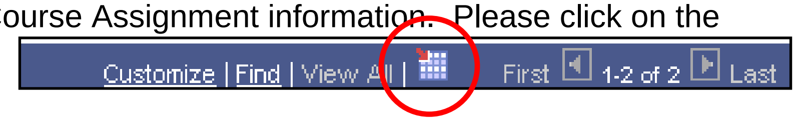
Note: If you are not sure what a particular personalization does you can click on the “explain” link located to the right of each option.

Activity #5 – Saving Searches

1. Log into PeopleSoft
2. Navigate to: **Main Menu > CSU Temp Faculty > CSU Contract Data.**
   Hint: You can also just go to your favorites and click the link.
   a. Enter the Last Name of a lecturer in your department.
3. Click Search
4. Now click “Save Search Criteria.”
5. Name your search
6. Click Save
7. Click on “Return to Advanced Search.”
8. You will now notice that every time you are on this search page you will be given the option to use your saved search.
9. Using your saved search please click on the column header “CSU Contract Number.” Notice how the order of the search results changes from Ascending to Descending order. You can sort your search results in any column by clicking on the appropriate column header.

Activity #6 – Exporting Data to Excel

1. Log into PeopleSoft
2. Navigate to: **Main Menu > CSU Temp Faculty > CSU Contract Data.**
   Hint: You can also just go to your favorites and click the link.
3. Click Search (Do not use your saved search for this)
4. Scroll down and click on a contract.
5. The “Contract Status/Content” page will now appear.
6. Click on the “TF Contract Courses” tab.
7. Locate the “Course Assignments” grid.
8. Let’s download Course Assignment information. Please click on the following icon.



9. A dialogue box will appear asking you to open or save the document. Click “open.”
10. Note: In order for this to work you must enable the feature in “My Personalizations.” You did this in a previous activity. You must also disable any popup blockers in your browser.

Activity #7 – Add a new row of data

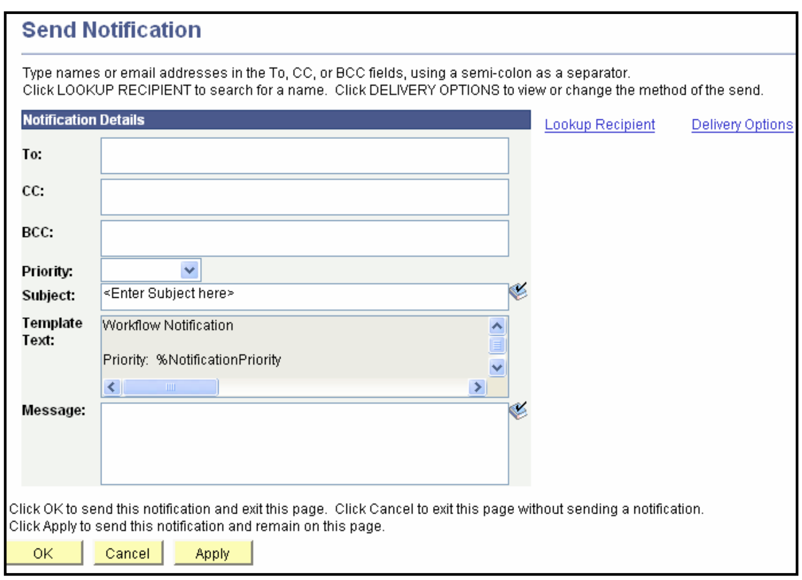
1. While still in the TF Contract Courses tab let's add a new "Course Assignment."
    a. Click the "add a new row" icon next to the last course assignment..
    b. Enter Subject Area, Catalog Nbr, Section, K/S, Units, and WTU.
    c. Click Save
2. Please delete the row of information that you just added by clicking on the Delete row icon.

Activity #8 – Add Notes

1. Log into PeopleSoft
2. Navigate to: **Main Menu > CSU Temp Faculty > CSU Contract Data**
3. Select any active contract. To do this just click the search button. Locate the active contracts in the "Contract Status" column.
4. The "Contract Status/Content" page appears. Next to the Dept ID: click on the notes icon .
5. Click "Add a New Note."
6. Please fill in the Subject and Note Text. Notice that the Spell Check icon is located next to the Note Text field. Once you have type in the note text click on the Spell Check icon.

Activity #9 – E-mail Notifications

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



2. Test out E-mail Notification by navigating to the “CSU Contract” page.
    a. Search for a contract; go to the first page “Contract Status/Detail”
    b. Click on the Notify button at the bottom of your page
    c. Fill out the Notification Details page. Be sure to e-mail the notification to yourself.
    d. Check your e-mail.