PeopleSoft 9.0
Common Changes

OBJECTIVE: Overview of common changes and new features in PeopleSoft 9.0

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NEED ADDITIONAL INFORMATION?

For additional documentation, please go to the CMS documentation page http://www.sonoma.edu/it/cms/documentation.html
For further questions please go to the CMS webpage at http://www.sonoma.edu/it/cms/contact.html to locate any CMS Functional Lead.
Lesson 1: Access MySSU

**Navigation:** [www.sonoma.edu](http://www.sonoma.edu), click Login, access online services, select MySSU

**Introduction:**

Access to MySSU will not change with the implementation of PeopleSoft 9.0.
## Access MySSU

<table>
<thead>
<tr>
<th>Step</th>
<th>Directions</th>
<th>Screenshot</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Enter <a href="http://www.sonoma.edu">www.sonoma.edu</a> into your web browser.</td>
<td><img src="image1.png" alt="Screenshot 1" /></td>
</tr>
<tr>
<td>2</td>
<td>From the header menu, click “Login”</td>
<td><img src="image2.png" alt="Screenshot 2" /></td>
</tr>
<tr>
<td>3</td>
<td>Enter your Username and Password. Then click Login.</td>
<td><img src="image3.png" alt="Screenshot 3" /></td>
</tr>
<tr>
<td>4</td>
<td>Click the MySSU link to login.</td>
<td><img src="image4.png" alt="Screenshot 4" /></td>
</tr>
</tbody>
</table>
Lesson 2: New Centers

**Navigation:** Displayed by default upon logging into MySSU

**Introduction:**

Based on your security and access privileges, you will be shown the appropriate “Centers” which contain navigation to the items you will use most commonly. Possible “Centers” you may see and use depending upon your security are:

- MySSU Advisor Center
- MySSU Faculty Center
- MySSU Employee Self Service
- MySSU Manager Self Service
- MySSU Student Center

Centers will display on the right hand side of the Main Menu. They may be displayed as “minimized” or “expanded” and can be adjusted by you as shown in the following lesson.

Centers are intended to increase the speed at which you access common items that you need on a day to day basis to perform functions in PeopleSoft.
New Functionality - Centers

<table>
<thead>
<tr>
<th>Step</th>
<th>Directions</th>
<th>Screenshot</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Expand (Open) a center by clicking the expand icon</td>
<td>![Screenshot of expanded center]</td>
</tr>
<tr>
<td>2</td>
<td>Minimize (close) a center by clicking the minimize icon</td>
<td>![Screenshot of minimized center]</td>
</tr>
<tr>
<td>3</td>
<td>Access center quick links by clicking on the blue hyperlink or the icon to the left of the hyperlink</td>
<td>![Screenshot of accessed center links]</td>
</tr>
<tr>
<td>4</td>
<td>Settings will remain. If you log out and leave the center minimized or expanded, it will stay that way for your next session.</td>
<td></td>
</tr>
</tbody>
</table>
Lesson 3: Menu Structure & Navigation

**Navigation 1: Main Menu**

**Introduction:**
The Main Menu that was available in PeopleSoft 8.9 is still available in 9.0. The Main Menu displays on the left hand side. New with 9.0 is the *top navigation* that is used once a Main Menu item has been selected, or can be used right from the outset.

The major benefit of *top navigation* is more screen real-estate for viewing your pages. No longer is the left side taken up with menu space, it now floats across the top of the page.
## New Functionality – Menu Navigation

<table>
<thead>
<tr>
<th>Tip</th>
<th>Directions</th>
<th>Screenshot</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>You can still begin your navigation using the old Main Menu pagelet on the left.</td>
<td><img src="image1.png" alt="Screenshot" /></td>
</tr>
<tr>
<td>2</td>
<td>OR you can start right out using the Main Menu TOP navigation. Each navigation requires a single left mouse click to display the underlying folder options.</td>
<td><img src="image2.png" alt="Screenshot" /></td>
</tr>
<tr>
<td>3</td>
<td>If you choose to begin your navigation using the old Main Menu on the left, once a selection is made, the Main Menu will hide and you can use in-page selection or the new top navigation.</td>
<td><img src="image3.png" alt="Screenshot" /></td>
</tr>
<tr>
<td>4</td>
<td>You can always click the “Home” link to return to the Main Menu start page.</td>
<td><img src="image4.png" alt="Screenshot" /></td>
</tr>
<tr>
<td>Tip</td>
<td>Directions</td>
<td>Screenshot</td>
</tr>
<tr>
<td>-----</td>
<td>------------</td>
<td>-----------</td>
</tr>
<tr>
<td>5</td>
<td>You can now sort the menu alphabetically by using the Top Navigation and clicking the Sort icon.</td>
<td><img src="https://example.com/sort_icon.png" alt="Sort Icon" /></td>
</tr>
</tbody>
</table>
| 6   | Navigate the Menu  
By hovering the mouse over the up or down arrows in the New menu bar, you can navigate up and down the options available to you. | ![Menu Navigation](https://example.com/menu_navigation.png) |
| 7   | You can search in either the old menu bar or the new one. | ![Search Menu](https://example.com/search_menu.png) |
| 8   | Quick Search  
If you use the NEW search menu, it will auto-search if you pause after typing. You can review the list and navigate to the area of interest by clicking on the item. | ![Quick Search](https://example.com/quick_search.png) |
<table>
<thead>
<tr>
<th>Tip</th>
<th>Directions</th>
<th>Screenshot</th>
</tr>
</thead>
<tbody>
<tr>
<td>9</td>
<td>The new Favorites link will display recently used navigations on top and My Favorites below.</td>
<td><img src="image1.png" alt="Screenshot" /></td>
</tr>
<tr>
<td>10</td>
<td>The word “Processing” has been replaced by the spinning icon to indicate that the page is being loaded.</td>
<td><img src="image2.png" alt="Screenshot" /></td>
</tr>
<tr>
<td>11</td>
<td>Pop-up windows now occur when using the look-up feature (anytime the magnifying glass is clicked).</td>
<td><img src="image3.png" alt="Screenshot" /></td>
</tr>
<tr>
<td>Tip</td>
<td>Directions</td>
<td>Screenshot</td>
</tr>
<tr>
<td>-----</td>
<td>------------</td>
<td>------------</td>
</tr>
<tr>
<td>12</td>
<td>The rest of the screen will grey out and the pop-up window will be displayed.</td>
<td><img src="image" alt="Screenshot" /></td>
</tr>
<tr>
<td>13</td>
<td>Limit Search Results: To <strong>speed up</strong> searches, you can limit the results that display when searching.</td>
<td><img src="image" alt="Screenshot" /></td>
</tr>
<tr>
<td>14</td>
<td>The system will notify you of the number of additional potential matches</td>
<td><img src="image" alt="Screenshot" /></td>
</tr>
</tbody>
</table>
### Tip 15
**Directions**

Set to “=”

To speed up searches when you know the value (such as an ID or last name) set the search parameter to “=”

**Screenshot**

![Find an Existing Value](image)

- Limit the number of results to (up to 300): 300
- ID: 
- Campus ID: 
- Local Campus ID: 
- National ID: 
- Last Name: = SMITH
- First Name: begins with 3
- Include History
- Correct History
- Case Sensitive

[Search] [Clear] [Basic Search] [Save Search Criteria]

### Tip 16
**Directions**

Zoom to Data Feature

You can zoom to just the data of interest in many screens. Look for the Zoom icon and click it to Zoom to only the data.

The rest of the screen will grey out and you will have a data only navigational screen.

**Screenshot**

![Zoom to Data Feature](image)
Lesson 4: New Academic Requirements report (ARR) formerly known as the DPR

**Navigation 1: Main Menu**

**Introduction:**
The ARR is a report that tracks completion of all degree requirements in one place. This report replaces the DPR. It has a similar look and feel, but navigation to it has changed slightly.

<table>
<thead>
<tr>
<th>Step</th>
<th>Directions</th>
<th>Screenshot</th>
</tr>
</thead>
</table>
| 1    | **STAFF NAVIGATION:**  
      Campus Community > Student Services Ctr (Student)  
      Click on “Academic Requirements Report” in the other academic drop-down menu | ![Screenshot 1](image1.png) |
| 2    | **ADVISOR & FACULTY NAVIGATION:**  
      Click on “My Advisees /Drop-In Advisees” in the Advisor Center | ![Screenshot 2](image2.png) |
### PeopleSoft Student Administration 9.0

<table>
<thead>
<tr>
<th>3</th>
<th>For a drop in student that is not assigned to you on your My Advisees page, click on “View data for other students”</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>Search for the student by name or Student Id (Emplid)</td>
</tr>
</tbody>
</table>

[Image of a screenshot showing the view data for other students feature in PeopleSoft.]

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**STUDENT ADMINISTRATION**

STAFF - [http://www.sonoma.edu/it/cms/documentation/](http://www.sonoma.edu/it/cms/documentation/)

Last Updated: 6/26/12
<table>
<thead>
<tr>
<th></th>
<th><strong>Select “Academic Requirements” from the other academic drop down menu</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>5</strong></td>
<td><strong>Click the ✔️ Symbol to run the report</strong></td>
</tr>
</tbody>
</table>

**Amanda McGowan**

- Faculty Center
- Advisor Center
- my advisees
- student center
- general info
- transfer

**Advisee Student Center**

**Sally Sonoma**

**Academics**

- My Class Schedule
- Shopping Cart
- You are not enrolled in classes.

**Other academic...**

- Advisor Notes
- Course History
- Grades
- Transcript: View Unofficial
- Transfer Credit: Report
- What-if Report
- Withdrawals/Repeats
- other academic...

**Contact Information**

- My Home Address
- 1784 East 83rd St
- 1900 Forest Hill

**Adviser Requirements**

<table>
<thead>
<tr>
<th>Current Academic Objective</th>
<th>Current Academic Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Requirement/Graduation Term</strong></td>
<td><strong>Last Term Registered</strong></td>
</tr>
<tr>
<td>Career: Undergraduate</td>
<td>Spring 2013</td>
</tr>
<tr>
<td>Program: Undergraduate</td>
<td>Fall 2011</td>
</tr>
<tr>
<td>Plan: Computer Science (BS)</td>
<td>Spring 2013</td>
</tr>
<tr>
<td>Expected Grad Term: Spring 2014</td>
<td></td>
</tr>
<tr>
<td>Graduation Status: Not Applied</td>
<td></td>
</tr>
</tbody>
</table>

**Sherrie Sonoma**

- ID: 060256713

**My Mailing Address**

- 1900 Forest Hill

**Print Report**

See the CMS documentation website at [www.sonoma.edu/it/cms](http://www.sonoma.edu/it/cms) to see more details about the Advisor Center and the ARR.
Lesson 5: My Favorites Changes

Introduction:
Favorites you had saved in the 8.9 version of MySSU will still be available to you in the new 9.0 version.

Please note- some navigations have changed or no longer exist in 9.0. If you have these saved as favorites they will be available for you to click but they will NOT take you to the favorite item. Instead they will take you to the nearest favorite item on your list. If you encounter this and want to clean up your favorites, please follow the steps below in the lesson on how to delete favorite items that are unnecessary. A clean (and shorter) favorites list will speed up your access to items you use on a daily basis.

Navigations that have changed:

- **Service Indicators**
  - Batch Service Indicator Assign
    - Campus Community > Service Indicators (Student) > Mass Assign
  - Batch Service Indicator Release
    - Campus Community > Service Indicators (Student) > Mass Release
  - Service Indicator Audits
    - Campus Community > Service Indicators (Student) > Audit Service Indicators
  - Service Indicator Data
    - Campus Community > Service Indicators (Student) > Manage Service Indicators

- **Student Groups**
  - Student Group Load
    - Records and Enrollment > Career and Program Information > Process Student Groups
  - Student Group Data
    - Records and Enrollment > Career and Program Information > Student Groups
  - Student Group Reports
    - Records and Enrollment > Career and Program Information > View Student Groups

- **Degree Progress** (Now Academic Requirements Report; see Lesson 4)
  - Academic Requirement Report
    - Campus Community > Student Service Center (Stdnt) > Other Academic > (Drop down)
    - Advisor Center > My Advisees/Drop-In Advisees > Other Academic > (Drop down)
## My Favorites: Rename, Sort, Delete

<table>
<thead>
<tr>
<th>Step</th>
<th>Directions</th>
<th>Screenshot</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>From your Favorites menu find the <strong>Edit Favorites</strong> link and click.</td>
<td><img src="image1.png" alt="Screenshot" /></td>
</tr>
</tbody>
</table>
| 2    | **Edit Favorites - Rename**  
   On the edit page, you can re-name a favorite to whatever you prefer.  
   Highlight the existing text and type in your new text.  
   Click SAVE at the bottom of the screen. | ![Screenshot](image2.png) |
<table>
<thead>
<tr>
<th>Step</th>
<th>Directions</th>
<th>Screenshot</th>
</tr>
</thead>
</table>
| 3    | Edit Favorites – **Sort**  
From the edit page you can sort your favorites. Leaving the Sequence number set to 0 will sort them alphabetically. Entering in numeric values will sort them lowest first. ie 1 will show at the top.  
When done, SAVE. |
| 4    | Edit Favorites – **Delete**  
To remove a favorite click the Delete button.  
When done, SAVE. |