

HR Split & CFS Updates New IT Work Order

Business Operations Forum
February 7, 2018



California State University
MONTEREY BAY
Extraordinary Opportunity

Today's Agenda

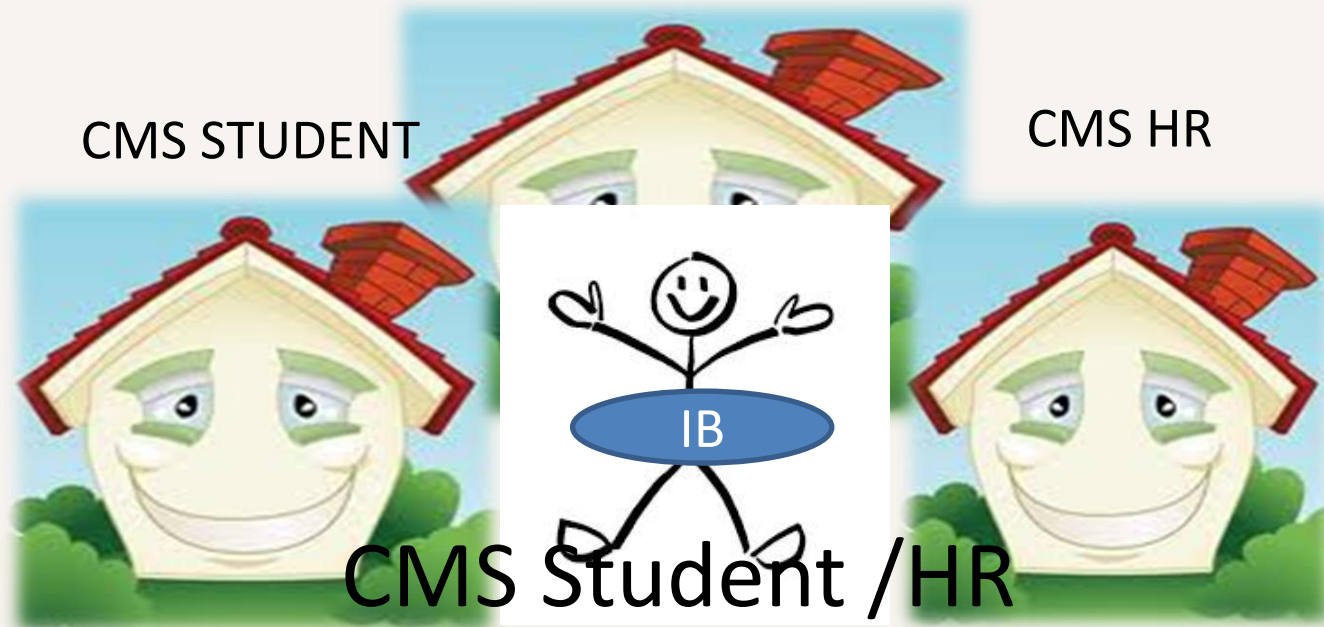
- Quick ASM Update: Kyle
- Upcoming BOF: Susan
 - March 7, 2018: Year End Training
- HR Split: Susan
- CFS Upgrade: Venkat
- New IT Work Order: Jennifer



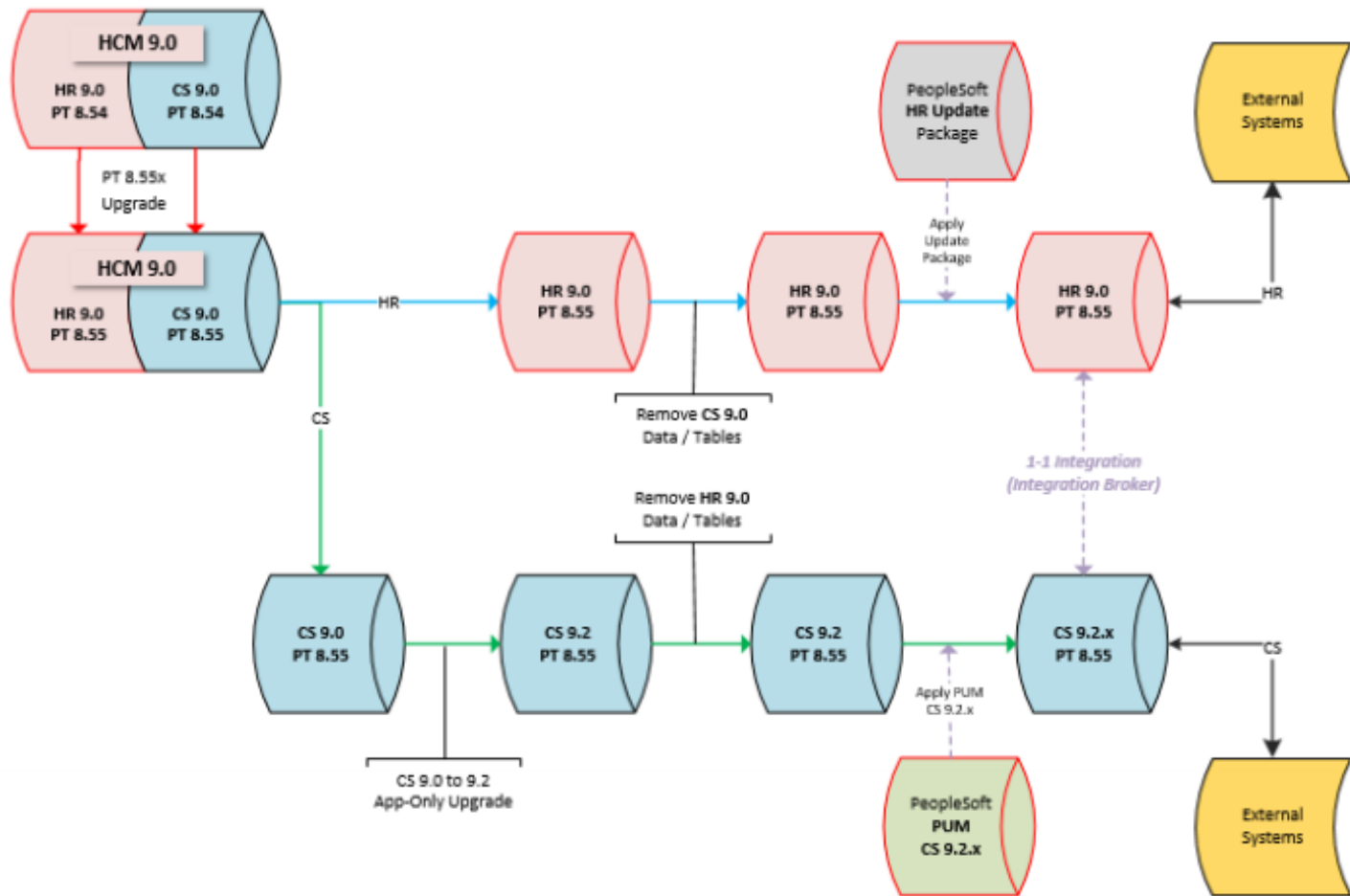
Update on ECommerce



CMS Student / HR Split



CS 9.2 Upgrade/Split Process



CS/HR Split

- Systemwide Guiding Principles:
 - Maintain CS (Campus Solutions) support
 - Advance Academic & Student Affairs Initiatives
 - Split HR & CS – Independent future paths
 - Limit scope to accelerate timeline
 - Minimize impact to campuses
 - No new or changed functionality
 - Prepare for CHRS - forward thinking



CS/HR Split

What does this mean for CSUMB?

- Split will happen **April 5-9**
- HR Functionality remains the same!
- On April 9, we will have 2 logins:
 - 1 for CMS HR
 - 1 for CS (naming campaign underway)
- If you work in both systems (faculty or student assistant) you will toggle between applications.
- IT is working on a link to help you toggle back and forth from within the individual applications.



CS/HR Split

Where to go for more info

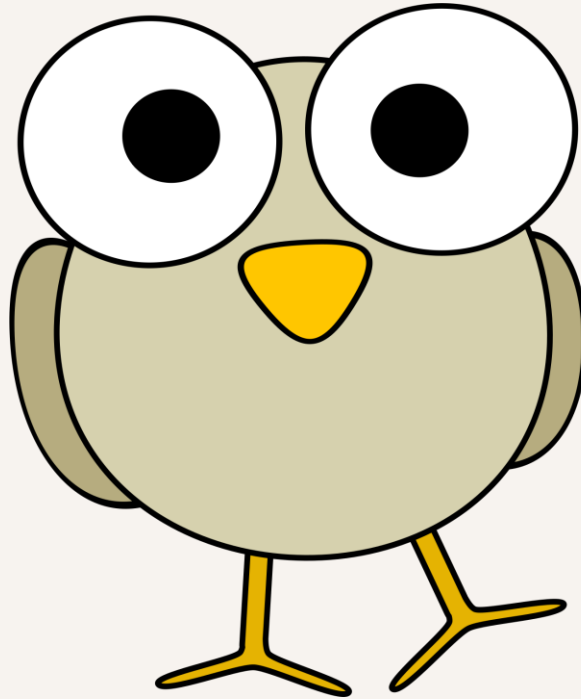
- As we get closer to cutover:



The screenshot shows the 'Employee Resources' page on the CSUMB website. The page has a dark blue header with the title 'Employee Resources' in white. Below the header is a navigation bar with several menu items: 'Campus Life', 'Faculty Resources', 'Human Resources', 'Payroll', 'Admin & Finance', 'Tools & Databases', and 'Submit a Ticket'. The 'Tools & Databases' menu is expanded, showing a sub-menu with items: 'CMS Student (for Employees)', 'CMS Human Resources', 'CMS Finance (CFS)', 'CSUMB Reporting', 'OnBase ECM', 'Security Training', and 'Master Calendar (25Live)'. The 'CMS Human Resources' item is highlighted in green. Below the navigation bar is a breadcrumb trail: 'CSUMB Home > For Employees > Tools & Databases'. The main content area has a white background. On the left, there is a sidebar with the text 'Student Employees'. The main content area features a large green heading 'CMS Human Resources' with a settings icon to its right. Below the heading is a paragraph of text: 'Use CMS Human Resources to manage your personal information. This includes training history, W-2 information, managing student assistants, and reporting absences.' Below this text is a green button that says 'Log into CMS Human Resources'. Underneath the button is another paragraph of text: 'To get access to CMS beyond what you get as a regular employee, you must complete a Data Access Request form, a confidentiality statement, and security training. To complete security training, contact informationsecuritytraining@csumb.edu.' At the bottom of the main content area is a download icon followed by the text 'CMS HR Data Access Request Form (HR DAR)'.



CS/HR Split



CFS Upgrade

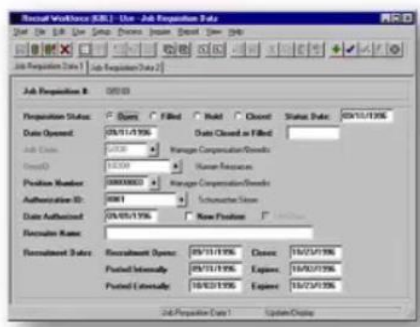
- Go Live : 04/30/2018
- Downtime : CFS and CFS Data Warehouse will be unavailable 5:00pm April 26 through 8:00am April 30.
- What's Changing
 - New user interface (Fluid Technology)
 - No major impact to the functionality anticipated



CFS Road to Fluid

PeopleSoft Mobile

Evolution Of PeopleTools



Windows Client



100% Internet



Fluid UI/ Responsive Web Design



CFS Upgrade Fluid Interface

- Access PeopleSoft application across multiple form factors
- Several different paths for users to access functionality
- Users can personalize navigation to accommodate organization
- Significantly improves efficiency over Class User Interface
- Reduces new users navigation learning curve



CFS Upgrade

Current Sample AP Navigation

The screenshot displays the Oracle CFS Upgrade navigation interface. The 'Main Menu' is expanded to show a 'Search Menu' field and a list of folders. The 'Accounts Payable' folder is highlighted, and its sub-menu is open, showing 'Vouchers', 'Control Groups', 'Payments', 'Batch Processes', 'Review Accounts Payable Info', 'Reports', 'Accounts Payable WorkCenter', 'AP Operational Dashboard', and 'Accounts Payable Center'. The 'Vouchers' folder is further expanded to show 'Add/Update', 'Maintain', and 'Approve'. The 'Add/Update' folder is expanded to show a list of actions: 'Regular Entry', 'Voucher Search', 'Quick Invoice Entry', 'Summary Invoice Entry', 'Complete Register Voucher', 'Close Voucher', 'Delete Voucher', 'Update Open Item', 'UnPost Voucher', and 'CSU Open Item Reconciliation'. A mouse cursor is pointing at 'Voucher Search'.

Search Menu:

Advanced Search

Accounts Payable

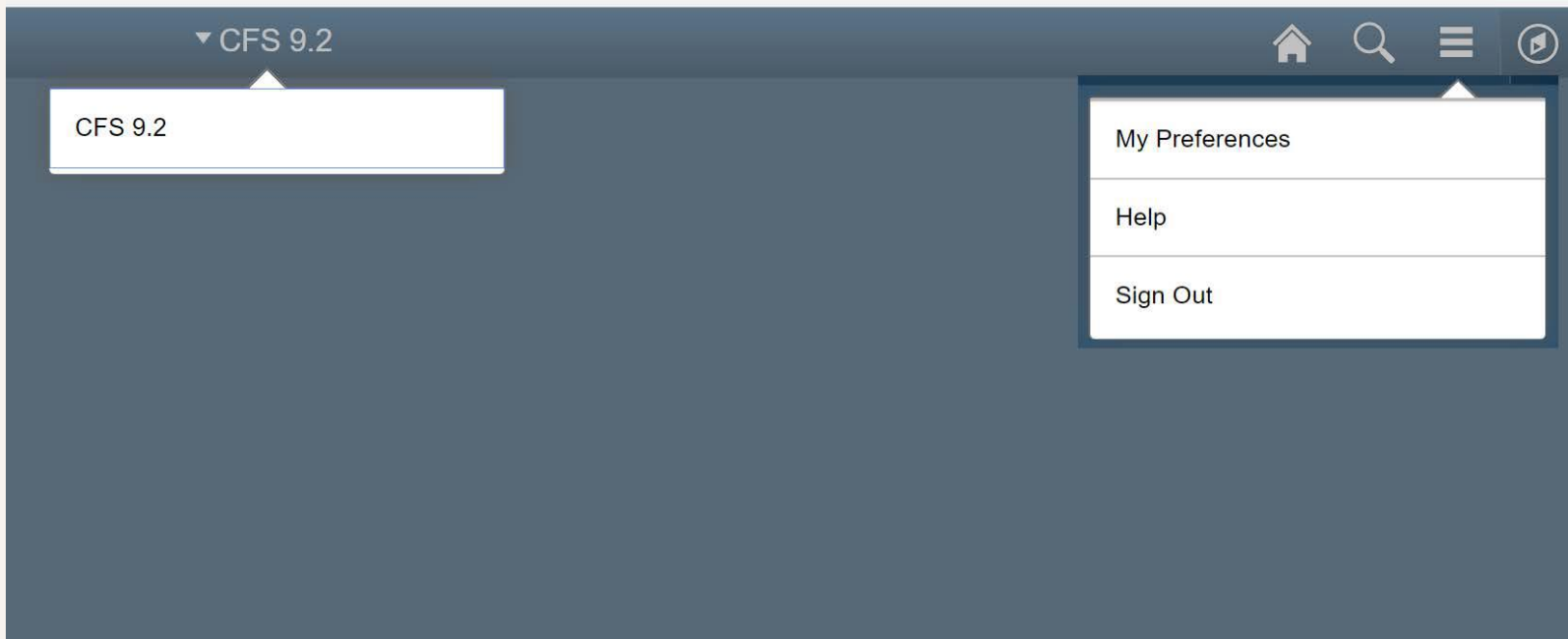
- CSU DB Spread Sheet
- CSU Issue Log
- CSU Mod Change Control
- Accounts Payable**
 - Vouchers**
 - Add/Update**
 - Regular Entry
 - Voucher Search
 - Quick Invoice Entry
 - Summary Invoice Entry
 - Complete Register Voucher
 - Close Voucher
 - Delete Voucher
 - Update Open Item
 - UnPost Voucher
 - CSU Open Item Reconciliation
 - Maintain
 - Approve
 - Control Groups
 - Payments
 - Batch Processes
 - Review Accounts Payable Info
 - Reports
 - Accounts Payable WorkCenter
 - AP Operational Dashboard
 - Accounts Payable Center
- Accounts Receivable
- Asset Management
- Billing
- General Ledger
- Purchasing
- Suppliers
- Customers
- Set Up Financials/Supp
- Reporting Tools
- PeopleTools



CFS Upgrade

Fluid User Interface Structure


- CFS 9.2 Fluid Homepage








CFS Upgrade

Fluid: Banner/Icons - Homepage

- A standard banner appears at the top of every Fluid page that includes the page title and some standard icons.



Icon	Description	Action
	Home Icon	Takes you to your home page
	Search Icon	Enables you to Search
	Alerts Icon	Notifications window to view actions and alerts
	Action Icon	Tap to see a list of Actions available for the current window: My Preferences, Help, Sign Out
	NavBar Icon	Tap to expand NavBar window. Options available: Navigator, Recent Places, My Favorites, My Preferences, Classic Home



CFS Upgrade

Fluid User Interface Structure

- Tiles - Adding Tiles to CFS 9.2 Homepage



ASM Contact Information

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