Overview
This guide outlines the necessary steps to add Person of Interest data in PeopleSoft. Steps include searching for and viewing existing data, updating personal information, creating new persons of interest and adding POI relationships (types) to existing people in the system.

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Notice about the new version of PeopleSoft
All page shots used in this guide are from the previous version of PeopleSoft (HCM 8.9). Please be advised that from the fourth week of February 2012, we are using the new version of PeopleSoft (HCM 9.0) and you may experience a difference in the way the new pages look and feel.

In the new version of PeopleSoft (HCM 9.0), the format of how the **Main Menu** expands has changed, but the actual navigation path and functionality has **not** changed. See the sample page shot.

Other minor changes include the following:

- Improved color scheme
- New look for Processing and Save indicators
- Pop-up Search Window and Edit Boxes
- Number of Search Results Option
- Type Ahead Matching
**CSU ID Search**

Use the CSU ID Search to find information about a person of interest (POI).

**Navigate to CSU ID Search**

1. Click CSU ID Search in the main menu

   ![Oracle Menu]

   **The CSU ID Search page displays.**

2. Enter the EmplID, National ID or First and Last Name of the POI you are looking for

3. Push the Search button

   ![Oracle CSU ID Search]

   **Note:** It is recommended that you enter only partial First and Last Name in order to ensure you retrieve the best information.
An example of searching by First Name and Last Name is shown.

The results are displayed.

In this example, no results are found. It is recommended that you do multiple searches to ensure the data is or is not in the system.

If the POI you are looking for is not in the system, you must create them. See the Add a New Person of Interest section (page 10) of this guide for step-by-step instructions.

The results are displayed.

In this example, results are displayed and show that one person exists that matches the criteria entered.

If the POI you are looking for is in the system, but not connected to the correct department, you must add a POI relationship for that person. See the Add a Person of Interest Relationship section (page 17) of this guide for step-by-step instructions.

If the person exists as the correct POI, view their Personal and POI data to
ensure they are up-to-date and active. See the Modify Personal data section (page 5) and navigate to Workforce Administration > Personal Information > Organizational Relationship > Maintain a Person’s POI Relationship.
Modify Personal Data
Navigate to the Personal Data pages if you need to make updates to existing information. If your CSU ID Search results indicate that this person is also an employee and/or a student, do **not** make changes. Those should be made by the person via MyCSUEB self service or by Student Services or Human Resources, as applicable. Only make changes if the person exists **only** exists as a POI.

Navigate to Workforce Administration > Personal Information > Modify a Person

1. Enter the EmpID or Name (first name) and Last Name of the person
2. Click Search

The Biographical Details page is displayed.

The only data that should be updated here is the person’s name.

3. Click the Plus sign to insert a new Effective Dated row

*Note: The birth date and SSN should be correct since the person already exists. If they are not, you may override them. No new effective dated rows are necessary.*
A new row is displayed.

4. Enter the Effective Date for the name change

5. Click the Edit Name hyperlink

The Edit Name page displays.

6. Make the appropriate name changes

7. Click the OK button once all changes have been made

You are returned to the Biographical Details page.

8. If you have no other changes to make, click the Save button at the bottom of the page

9. Click the Contact Information tab to update address, email or phone information
The Contact Information page displays.

10. To update the current address, click the View Address Detail hyperlink.

The Address History page displays.

11. Click the Plus button to insert a new Effective Dated address row.

A new row is displayed.

12. Update the Effective Date as appropriate.

13. Click the Add Address hyperlink.
The Edit Address page is displayed.

14. Update the address fields as appropriate

15. Click OK

You are returned to the Address History page.

16. Click OK

You are returned to the Contact Information page.

The most current address is displayed. If your update was future dated, it will not appear until that date arrives.

17. If you have no additional changes to make, click Save

18. If you need to update Phone or Email information, either override the existing information for the Type or insert a new row to add a new Type
19. Make sure one of the Phones and one of the Emails is marked as preferred.

20. Once all data is updated, click Save.
Add a New Person of Interest

If the person of interest does not exist in PeopleSoft in any capacity, use these steps to enter their Personal Data in PeopleSoft and create a new POI.

Navigate to Workforce Administration > Personal Information > Add a Person

The Add Person page displays.

1. Leave the Person ID as NEW
2. Click the Add the Person hyperlink

Note: To avoid creating duplicate records/IDs, this should only be done after an exhaustive CSU ID Search has been done and no results have been found.
The Biographical Details page displays.

The Effective Date defaults to the current date and should not be changed.

3. Click the Add Name hyperlink to add the person’s name

The Edit Name page is displayed.

4. Enter the First, Middle and Last Name (and suffix if applicable)

5. Click OK
You are returned to the Biographical Details page.

6. Enter the Date of Birth and the Social Security Number.

7. Click the Contact Information tab to enter Address, Phone and Email information.

You are returned to the Biographical Details page.

The Contact Information page displays.

8. Click the Add Address Detail hyperlink.

The Address History page displays.

9. Click the Add Address hyperlink.
The Edit Address page displays.

10. Complete the address information and click OK

You are returned to the Address History page.

11. Click OK

You are returned to the Contact Information page.

12. If you have no additional changes to make, click Save

13. If you need to add Phone or Email information, select the appropriate Type and enter the information. Make sure one phone and one email are marked as preferred

An updated Phone and Email section might look something like this.

14. Click the Organizational Relationships tab to continue the process
The Organizational Relationships page is displayed.

15. Check the Person of Interest box

A list of valid POI types is displayed.

16. Select the appropriate POI type for the person you are adding

The POI type populates the Person of Interest box.

17. Click the Add the Relationship button to continue the process

The Add Person of Interest page is displayed.

You will see that a Person ID has been assigned, but the process is not complete.

18. Click the Get Enabled Security Types button (the Effective Date defaults and should not be changed)
Four valid security types are displayed.

19. Update the values appropriately:
   - **Business Unit:** Value 1 = HW001
   - **Location:** Value 1 = HW001, Value 2 = Location Code provided by the department or click the lookup button to search for available location codes to select from
   - **Institution:** Value 1 = HW001
   - **POI Department:** Value 1 = HW001, Value 2 = DeptID provided by the department

20. In the **Person of Interest History** section, Change the Effective Date to the date provided by the department

21. The Status should be A (active) if adding a new POI

22. In the More Information box, key the job title provided by the department, if any.

   *Note: The Job Title can be no more than 30 characters in length, but the text box will allow you to key more. Additional characters will be truncated.
A completed page might look something like this.

23. When all data has been keyed, click OK

You are returned to the Organizational Relationships page.

24. Click Save
Add a Person of Interest Relationship
If the person of interest already exists in PeopleSoft, but is not listed as a POI in the appropriate department, you must add a new POI relationship (type) to their record.

Navigate to Workforce Administration > Personal Information > Organizational Relationships > Add a POI Relationship

The Add new POI TYPE page displays.

1. Enter the EmplID and the Person of Interest Type
2. If you do not know the code for the POI Type, click the lookup button to select it from a list
The Look Up Person of Interest Type page is displayed.

3. Select the appropriate value by clicking the hyperlink

You are returned to the Add new POI TYPE page.

4. Once all data is entered, click the Add button
The Add Person of Interest page is displayed.

The Effective Date defaults to the current date and should not be changed.

5. Click the Get Enabled Security Types button.

Four valid security types are displayed.

6. Update the values appropriately:
   - Business Unit: Value 1 = HW001
   - Location: Value 1 = HW001, Value 2 = Location Code provided by the department or click the lookup button to search for available location codes to select from
   - Institution: Value 1 = HW001
   - POI Department: Value 1 = HW001, Value 2 = DeptID provided by the department

7. In the Person of Interest History section, Change the Effective Date to the date provided by the department. The Status should be A (active) if adding a new POI. In the More Information box, key the job title provided by the department, if any.

   Note: The Job Title can be no more than 30 characters in length, but the text box will allow you to key more. Additional characters will be truncated.
A completed page might look something like this.

8. Once all data has been entered, click Save.

To view all relationships of a campus person, navigate to the Person Organizational Summary > Workforce Administration > Personal Information > Person Organizational Summary.

The Person Org Summary is displayed.

In this example, the person’s two POI instances are shown. Other individuals may have a student POI or a regular job as well.

Whom to Contact for Help?
For additional help or to report problems with this functionality, please log a ticket via the Service Desk (http://www.csueastbay.edu/servicedesk).