Overview

This document provides an overview of the Oracle Peoplesoft applications currently owned and/or in use at Central Washington University. The following chart highlights the major modules by application (system).

System	*Modules*	*Current Status*	*Future Plans*
HUMAN CAPITAL MANAGEMENT (HCM)	Human Resources	Implemented	
	Base Benefits	Implemented	
	Benefits Administration	Not Implemented	To Be Determined
	Payroll	Implemented	
	Time and Labor	Not Implemented	To Be Determined
	eBenefits	Limited Implementation	To Be Determined
	eCompensation	Not Implemented	To Be Determined
	eDevelopment	Not Implemented	To Be Determined
	ePay	Limited Implementation	To Be Determined
	eProfile	Limited Implementation	To Be Determined
	eRecruit	Not Implemented	To Be Determined
FINANCIAL MANAGEMENT SYSTEM (FMS)	General Ledger	Implemented	
	Asset Management	Limited Implementation	To Be Determined
	Inventory	Not Implemented	To Be Determined
	Payables	Implemented	
	Planning and Budgets	Not Implemented	To Be Determined
	Project Costing	Not Implemented	To Be Determined
	Purchasing	Implemented	
	Receivables	Not Implemented	To Be Determined
CAMPUS SOLUTIONS (CS Student Administration – Safari)	Student Records	Implemented	
	Academic Advisement	Implemented	
	Campus Community	Implemented	
	Campus Directory Interface	Not Implemented	*(part of ID Mgt. Project)*
	Campus Self-Service	Implemented	
	Financial Aid	Implemented	
	Recruiting and Admissions	Implemented	
	Student Financials	Implemented	
DATA WAREHOUSE (EPM – Enterprise Performance Management)	Enterprise HCM Warehouse	Not Implemented	Implement FY 08
	Enterprise Financials Warehouse (FMS)	Not Implemented	Implement FY 07-08
	Enterprise Perf. Mgt. Warehouse	Not Implemented	Implement FY 08
	Enterprise Scorecard	Not Implemented	Implement FY 08
ENTERPRISE PORTAL and WORKFLOW	Enterprise Community Portal	Not Implemented	Implement FY 07-08
	Enterprise Portal Pack	Not Implemented	Implement FY 07-08
	Workflow	Not Implemented	*(FY 07 for Purchasing)*

The following pages provide additional detail about each application and included modules features.

NOTE: In some cases, modules which are not typically implemented by education and government organizations are not listed. All information is subject to change.

HUMAN CAPITAL MANAGEMENT (HCM)

Human Resources – Core module of Human Capital Management. Used to maintain employee and person of interest information.

- Manage Positions – used to track employees within a specific position for budget and/or classification.
- Manage Workforce – includes hiring, ratings, compensation, absences, labor relations, personal data such as person's name and address, employment status, such as pay rate changes, promotions, transfers, leaves of absence, and terminations.
- Flexible Service – tracks service over time or due to events.
- Developing Your Workforce – includes administer job requisitions, manage applicant data and move applicants through the hiring process.
- Managing Competencies – includes tracking employee training, accomplishments and managing training.
- Administer Training – set up courses, enroll employees, track expenses and manage employee training.
- Manage Careers and Successions – for determining career paths, evaluating workforce capabilities.
- Tracking Faculty Events – used to Faculty event tracking helps higher education organizations manage their faculty resources by using tenure tracking, event tracking, or case review. Contract pay enables you to process payroll and benefits over a period of time that differs from the employee’s contract period.
- Planning and Administering Compensation - set up salary structures, review employees, and administer salaries with salary increase budgets and plans including employee review rating scales, conducting employee reviews, and viewing review results.
- Reporting Total Compensation – provides tools for calculating and reporting total compensation for employees including salary and health/welfare benefits.
- Administer Budgets and Requirements - budget for payroll expenses, encumber funds, and track actual payroll costs using Commitment Accounting.
- Meeting Regulatory Requirements – workforce reporting such as EEO.

Base Benefits - Manages health, life, disability, pension, tax-deferred savings, leave accruals, deductions and other employee benefits.

- Provides for setting up table driven benefit cost calculations for employee and employer match including maintaining vendor information.
- Maintains employee and dependent information.
- Provides reporting and interface to vendors and others.
- Provides FMLA management tools.
- Provides employee access to self-service benefits information.

Benefits Administration *(Not Implemented)* – Extends functionality of Base Benefits by providing rules based processing for automatically updating employee benefits enrollment and related information.

- Establish and manage multiple benefits programs, including plans for leave, health and life insurance, savings, and dependent care reimbursement.
- Define providers, rates, and beneficiaries, and calculate coverage and premiums for employees who have multiple jobs.
- Automatically enroll participants and dependents in a variety of benefit options.
- Manage and administer flexible spending accounts for health care and dependent care.
- Generate reports for frequently requested information and create customized, ad hoc reports for agency-specific requirements. Analyze trends in workforce and study the enterprise wide impact of programs and policies, including various benefit-expense ratios.

HUMAN CAPITAL MANAGEMENT (HCM)
Payroll - Integrated with PeopleSoft HR, Time and Labor, General Ledger, Projects, Recruiting, and Compensation applications to coordinate a wide range of salary, reward, and expense payments. ▪ PeopleSoft Payroll for North America calculates gross to net earnings and deductions and related taxes. ▪ Supports U.S. and Canadian rules, regulations, and processing requirements with regularly scheduled tax updates to stay in sync with new regulations including taxation of foreign nationals. ▪ Manage year-end; begin processing the next year before closing out the books on the current year. ▪ Create unlimited earnings and deductions types and codes. ▪ Use direct deposit functionality; check printing capabilities and the complementary PeopleSoft ePay product to display online check advice. ▪ Maintain tax filing and record keeping; calculate federal, state, provincial, and local tax requirements. ▪ Use standard or custom payroll reports such as deduction registers, tax reports, and deductions in arrears, employee earnings, etc.
Time and Labor *(Not Implemented)* - Online time reporting using pre-populated timesheets. ▪ Enter time and time-related data from any web browser attributed to an individual employee and expressed in hours or punch-in and punch-out times. ▪ Create flexible schedules for fixed, rotating, or dynamic shifts. ▪ Employees can view balances and report and submit time. Managers view, edit, and approve time and manage schedules. ▪ Managers can view, approve and commit time collection with ease for one person or all their direct reports, capturing a myriad of work details in the process.
eBenefits *(Limited Implementation)* **-** Provides employees with online access to all of their benefits programs. ▪ Provides access to complete benefits information and transactions from a single page and with a single sign on. ▪ Enable users to view benefits information on summary-level pages and then navigate to more detailed information by clicking the appropriate plan links. ▪ Enables employees to communicate their benefit choices online, including elections, validations, confirmation statements, and other related content ensuring rules-based elections and changes.
eCompensation *(Not Implemented)* – a component of Web Self-Service for employees. ▪ Provides employees a comprehensive view of their cash and non-cash earnings via web self-service.

HUMAN CAPITAL MANAGEMENT (HCM)
eDevelopment *(Not Implemented)* - is comprised of 22 self-service Web applications that enable employees to review, add, update, and delete (as appropriate) their professional development information including the following: ▪ Competencies enable employees to review or modify their current competency self-evaluation. They can also view evaluations from past review dates or create a new evaluation. ▪ Professional Education enables employees and faculty members to review, add, update, or delete information about their professional education. ▪ Honors and Awards – Faculty/Staff enables employees to review, add, update, or delete records of honors or awards. ▪ Licenses and Certificates – Faculty/Staff enables employees to review, add, update, or delete licenses and certifications. ▪ Languages enable employees to review, add, update, or delete records of their proficiency in a language. ▪ Memberships enables faculty to review, add, update, or delete membership records. ▪ Professional Training - Faculty enables faculty members to review, add, update, or delete records about professional training. ▪ Professional Training - Employees enables employees to review, add, update, or delete records about professional training. ▪ Activities enable faculty members to review, add, update, or delete records of their academic activities. ▪ Administrative Posts enables faculty members to review, add, update, or delete Administrative Post records. ▪ Committees enable faculty members to review their committee membership information. ▪ Presentations enable faculty members to review, add, update, or delete records of their presentations. ▪ Significant Special Project enables faculty members to review, add, update, or delete records of special projects. ▪ Student Advising enables faculty members to review, add, update, or delete student advisee records. ▪ Teaching Responsibilities enables faculty members to review, add, update, or delete Teaching Responsibilities records. ▪ Review Training Summary enables employees to view their training history, which includes both internal courses administered by their organization (using the Administer Training module) and other external training courses they have completed. Managers use the Review Training Summary to access training history for their direct reports. ▪ Request Training Enrollment enables employees to submit a training request to their manager. Managers use the transaction to submit a training request for one of their direct reports. ▪ Approve Training Request enables managers to approve/decline training requests from their employees. ▪ View Training Enrollment Approval Status enables managers to see status of each request submitted. ▪ Employee Performance Review/Evaluate Employee Performance enables managers to select an employee from their direct reports and view any performance reviews for the employee, update the most current one, or create a new performance review.
ePay *(Limited Implementation)* **-** allows employees to review, add, update, and delete (where appropriate) their payroll information. ▪ Direct Deposit allows employees to display, add, change, or discontinue direct deposit instructions. ▪ View Paycheck allows employees to review paycheck information for earnings, taxes, deductions, and net pay distribution. ▪ Voluntary Deductions allows employees to add, change, or stop (delete) voluntary deductions. ▪ W-2 Reissue Request allows employees to request a duplicate W2 to be sent to either their work or home address. ▪ W-4 Tax Information allows employees to change tax withholding data.

HUMAN CAPITAL MANAGEMENT (HCM)
eProfile (*Limited Implementation)* ▪ Enables employees to maintain name, address, phone number, marital status, date of birth, and more via web self-service. ▪ Permits workflow notifications of actions. ▪ Publish user identity information throughout the enterprise, automating security administration. ▪ Create dynamic organizational charts, email distribution lists, locator maps, or custom reports.
eRecruit *(Not Implemented)* - Candidate Gateway enables applicants and employees to use intuitive, role-based home pages to search and apply for open positions and collaborate with recruiters in real time. ▪ Post job descriptions and requirements online. ▪ Enable applicants to create, review, and update resumes online. ▪ Keep candidates informed of their applicant status. ▪ Submit and confirm employee referrals, view awards, and view eligibility status via easy-to-use self-service transactions for employees and external applicants. ▪ Collect interview results online.

FINANCIAL MANAGEMENT SYSTEM (FMS)
General Ledger – provides a flexible accounting structure that includes support for education and government (fund) accounting. Supports: ▪ Actuals, budgets, statistics, and forecasts. ▪ Import of high-volume journals from spreadsheets. ▪ Creation of templates for recurring transactions. ▪ Recording of transactions within business units and between multiple independent business units. ▪ Acceptance of accounting entries from other PeopleSoft applications or third-party systems. ▪ Organization changes with trees where changes are dynamically reflected throughout the system. ▪ Standard accounting and control reports as well as query and reporting tools that enables you to create any type of financial or management inquiry or report. ▪ Automating allocating any type of information in the financial accounting system. Create rules to distribute amounts while maintaining database integrity and producing a complete audit trail. ▪ Consolidation and reporting the financial results of any number of related legal entities or operating units. ▪ Manage commitments and expenditures automatically by checking them against predefined, authorized budgets through Commitment Control.
Asset Management *(Limited Implementation)* – provides for recording and tracking physical assets including value and attributes. Supports: ▪ Tracking University owned assets and other assets. ▪ Tracking value of asset, applying depreciation and consolidation with financial reports. ▪ Integration with Purchasing and Inventory. ▪ Updates and adjustments to assets including retirement and surplus. ▪ Also provides for maintenance and service information for assets.
Inventory *(Not Implemented)* **–** provides a tracking system that can be integrated with Purchasing and other modules. Features includes: ▪ Putaway – provides a standard plan for maintaining inventory by location, bin, etc. ▪ Replenishment – provides different methods for calculating and reordering inventory. ▪ Order fulfillment – processes fulfilling orders from inventory including shipping. ▪ Material usage and reconciliation – provides means of managing utilization of goods. ▪ Physical inventory and location – maintains quantity on hand, by location and on-order. Supports bar coding for inventory tracking and control.
Payables – manages disbursements with controls over matching, approval processes, and payments. Supports: ▪ Manages transaction processing and maintain vendor relationships from invoice to payment, ▪ Provides for Online vouchers, and quick payments. ▪ Batch payment cycle or online cycle. ▪ Budget checking prior to payment. ▪ Matching controls as determined by organization. ▪ Payments by warrant and/or direct deposit.

FINANCIAL MANAGEMENT SYSTEM (FMS)

Planning and Budgeting (formerly Budgets) *(Not Implemented)* – provides for preparation of budgets and plans in without having to move data between applications. Supports:

- Comparing strategic plans with detailed budgets by using online variance analyses and reports over time.
- Creating dynamic relationships between target and budget scenarios for tightly interrelated modeling.
- Creating summary-level strategic targets as well as detailed bottom-up budgets, all within a single model, using detailed budgets based on prior years' historical data, current-year actuals, previous budgets, higher-level strategic plans, or zero-based methodologies.
- Creating formulas with delivered methods such as economic drivers, head count, and detailed itemizations.
- Dynamically recalculating plans as underlying assumptions and supporting details vary during the planning cycle.
- Automatically generating personalized work lists and grant secure data access to provide users with visibility into budget status. Streamline the planning and budgeting process with e-mail notifications and online notations.
- Spreadsheet applications to upload new data into PeopleSoft Planning and Budgeting or edit existing data.

Project Costing (formerly Projects) (*Not Implemented)* – For higher education, typically used to assist with management of grants and contracts, and capital projects.

- Creating and maintaining projects, activities and budgets
- Tracks procurement costs, time and labor and other project expenses.
- Tracks funding distribution and allocation of costs.
- Tracks project revenue, assets, and costs.
- Provides project reporting.

Purchasing - supports the entire procure-to-pay cycle including requisitioning, purchasing to payment. Supports:

- Requests for quotes.
- Procurement cards.
- Procurement contracts.
- Online and batch requisition creation, Requisition change orders, Requisition reconciliation.
- Online and batch purchase order creation, Purchase order change orders, Purchase order reconciliation.
- Receiving, Inspections and Returns to vendors.
- Procurement Analysis.
- Speed receiving and settlement with procure-to-pay integration.
- Centralize supplier information with vendor master, item master, and item/supplier relationships.
- Drive compliance with consistent, enterprise-wide policy enforcement.

Receivables (formerly Billing) *(Not Implemented)* – Integrates credit and collection management into the receivables process, including grants and contracts. Supports:

- Online billing.
- Direct invoicing.
- Interunit billing.
- Installment billing.
- Billing documents.
- Integration with General Ledger, Purchasing, Payables, Projects and other modules.

CAMPUS SOLUTIONS (CS Student Administration – Safari)
Student Records – manages aspects of enrollment, including catalog and class schedule maintenance, transfer credits, requisite restrictions, class start and end dates, wait lists, academic programs, transcripts, and analysis. Supports: ▪ Expediting enrollment by processing all permission, deadline, and other course requirements online. ▪ Administering enrollment by creating and assigning enrollment appointments to customized student populations. ▪ Building dynamic academic calendars for self-paced classes to calculate significant dates, such as drop and withdrawal deadlines. ▪ Evaluating course credit transfers and makes adjustments to present the best-case scenario. ▪ Calculating academic statistics and report results. ▪ Customizing transcript production and process multiple requests. ▪ Establishing customized grading guidelines. ▪ Maintaining course catalog, enrollment, and grading information in a single database.
Academic Advisement – provides key assistance to students and advisors for academic planning and tracking of progress. ▪ Customize course and non-course degree requirements. ▪ Establish and track degree requirements for each student. ▪ Customize academic programs for individual students. ▪ Create degree audit reports to summarize progress. ▪ Compare student academic records to program requirements.
Campus Community - common source of campus data for coordinating all forms of communication for prospects, applicants, students, alumni, and organizational data. Supports: ▪ Rules or events to trigger automatic assignment of sets of communication-oriented records throughout Student Administration. ▪ Tracking all incoming and outgoing communication. ▪ Creating event templates identify staffing needs, track attendance, and review results. ▪ Creating degree audit reports to summarize progress. ▪ Defining committees, identify members, and maintain history. ▪ Defining reciprocal relationships and manage joint communications. ▪ Maintaining multiple names and addresses with effective dates, email addresses, and URLs. ▪ Managing other demographic data—residency, medical and emergency contacts, and extracurricular activities. ▪ Enabling constituents to maintain their own data via the web.
Campus Directory Interface *(Not Implemented)* ▪ Directory Interface for user access.

CAMPUS SOLUTIONS (CS Student Administration – Safari)

Campus Self Service – includes Community Directory, Learner Services, Learning Management, Personal Portfolio, Outreach and Community Access. The following is included:

From Campus Self Service's personalized Student Center page, students can:

- Access a secure 360-degree view of their relationship with institution on a single web page.
- Apply for admission as well as federal financial aid.
- View class and exam schedules, check enrollment appointments, and enroll or change enrollment.
- Request transcripts, view course and grade history, and evaluate transfer credit.
- Generate what-if degree progress scenarios.
- Manage their student accounts for charges, payments, financial aid, and admission deposit activity.
- Make online credit card and eCheck payments.
- View financial aid details, including the cost of attendance, expected family contribution, accepted and net loan amounts, and loan fees.

From Campus Self Service's Faculty Center page, faculty can:

- See a complete calendar of their classes.
- View a list of students who are enrolled or wait-listed for a class, plus those who dropped.
- Send email to one student, a select group, or all students in a class—with just one click.
- Access class information, such as start and end date, days and times, and location.
- Enter midterm and final grades for each student.
- Write notes to be displayed on a student's transcript.

Financial Aid – provides comprehensive financial aid support including applications, packaging, awards, disbursement tracking and compliance. Supports:

- Tailoring financial aid management to CWU business rules and practices.
- Tracking applications, control of Institutional Student Information Record (ISIR) loads, and maintaining an ISIR audit trail.
- Designing a cost-of-attendance assessment, creating student budgets, and calculating needs analysis.
- Automatically generating aid awards and packages.
- Ensuring that an award complies with eligibility, and then disburse it to the student's account.
- Processing and track federal, state, university, and alternative loans.

Recruiting and Admissions – manages and tracks recruitment and admissions activities. Supports:

- Comprehensive and flexible data collection, processing, and controls to enhance institution's academic service and goals.
- Planning and coordinating independent recruitment programs targeted to specific student populations.
- Matching recruiters to prospective students based on region or special interest and monitor progress toward enrollment targets.
- Loading transcripts, tests, and applications from external agencies and central application services.
- Capturing and analyzing student recruiting information from multiple sources, including test loads.
- Setting up admissions system according to institution's varied requirements and evaluation practices.
- Enabling students to apply, track application status, accept or decline admission, and pay deposit fees—all online.
- Setting and monitoring enrollment targets, track progress toward recruiting efforts, and analyze admissions decisions and patterns.

CAMPUS SOLUTIONS (CS Student Administration – Safari)
Student Financials – provides management of student and external organization accounts. Supports: ▪ Management and calculation of all student financial information, including tuition, fees, receivables, billing, payment plans, and refunds. ▪ Monitoring and updating student and third-party accounts. ▪ Calculation of tuition and fees on an individual or group level. ▪ Checking account balances and post transactions. ▪ Generating unique bills for students and third-party sponsors—by department, cycle, and "account past-due" messages. ▪ Automating receivables management and monitoring of delinquent accounts.

DATA WAREHOUSE (EPM – Enterprise Performance Management)

Enterprise HCM Warehouse *(Not Implemented***)** – maintains human resources and related data for query, reporting and analytics.

- Captures detailed workforce-related information into a single environment, and combines it with complex analysis of recruiting, compensation, benefits, and training initiatives.
- Compensation Mart provides information about benefit and compensation programs.
- Learning and Development Mart provides information about workforce skills and competencies, training programs, and performance.
- Recruiting Mart provides insight into recruiting process such as whether positions are filled in a timely manner, which recruiting methods are the most effective, and which candidate sources provide the best talent.
- PeopleSoft Workforce Profile Mart turns workforce data into actionable intelligence to determine where you are over- or understaffed, examine workforce churn across various business units, and assess injury or illness levels on a per location basis.

Enterprise Financials Warehouse (FMS) *(Not Implemented)* – maintains financial data from various Peoplesoft and third-party applications.

- Maintain transaction level, derived or rolled up data.
- Integrates with Peoplesoft security for individual access.
- Provides tools for ad hoc and time-based analysis.
- May be used for standard reporting.

Enterprise Performance Management Warehouse *(Not Implemented)* – repository for warehouse data.

- Note: Originally the CS Data Warehouse mappings were not available. CWU planned to develop our own. However, the data mappings were recently released.

Enterprise Scorecard *(not installed)* – predefined analytics and reports.

ENTERPRISE PORTAL and WORKFLOW
Enterprise Community Portal *(Not Implemented)* – provides one point of access via the Web for faculty, staff and students to access his/her information. ▪ Portal facilitates one-step logon to all systems/information based on a student's or employee's security profile. ▪ Based on Permissions (access), Portal provides immediate display of student or employee personal data, access to calendar and email, and access to administrative data such as financials, human resources or student administration. ▪ The Portal also is useful to provide a "Dashboard" for managers with data from the various data warehouses. Data can be rolled up or transaction specific depending on defined access. ▪ Provides easy one location access to information students and employees need to conduct academic and business activities.
Enterprise Portal Pak *(Not Implemented)* – provides predefined templates and structure for installing and setting up Enterprise Community Portal.
Workflow *(Not Implemented)* – provides means of creating pre-defined transaction and message routings based on business process flows. ▪ Workflow is a technology built into all Peoplesoft applications including Human Capital Management, Financial Management System, Campus Solutions and other applications. ▪ Some applications have delivered workflow based on best practice. ▪ Workflow can be custom developed based on business process. ▪ Generally, Workflow combines email and other electronic messaging to route transactions for review and/or approval. ▪ Delivered Workflow includes pre-defined transaction routings, triggers and reports. Custom Workflow can be programmed by modifying delivered code/objects. ▪ Use of Workflow requires clearly defined and articulated business processes.