

CFS Finance Login Instructions

Log into the Portal as usual via <https://my.calpoly.edu/cas/login>

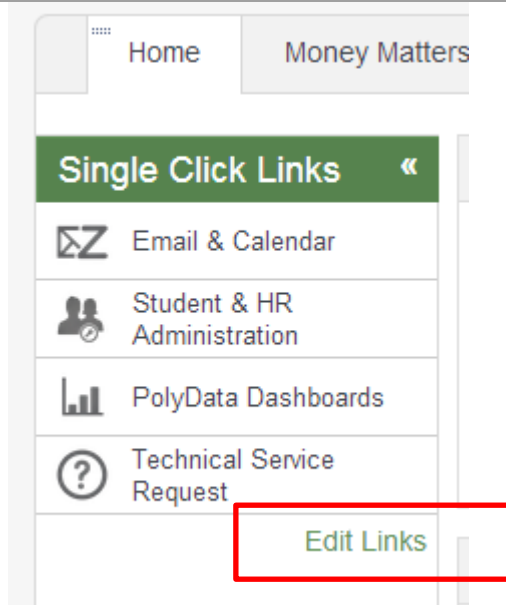
Enter your Cal Poly User Name and password.

Click on Sign In



The screenshot shows the Cal Poly login interface. At the top, the text 'CAL POLY' is displayed in a large green serif font, with 'SAN LUIS OBISPO' in a smaller green sans-serif font below it. Underneath, there are two input fields: 'Username' and 'Password'. Below the 'Username' field is a link for 'Account Help', and below the 'Password' field is a link for 'Forgot Password?'. At the bottom center, there is a 'Sign In' button.

On the Home tab, Under Single Click Links, click on Edit Links (first log-in only).



The screenshot shows a navigation menu with two tabs: 'Home' and 'Money Matters'. Below the tabs is a section titled 'Single Click Links' with a left-pointing arrow. This section contains four items, each with an icon and text: 'Email & Calendar' (envelope icon), 'Student & HR Administration' (people icon), 'PolyData Dashboards' (bar chart icon), and 'Technical Service Request' (question mark icon). At the bottom of this list is a button labeled 'Edit Links', which is highlighted with a red rectangular box.

Check the box for CSU Portal –
Financial Administration, then Save.

Single Click Access

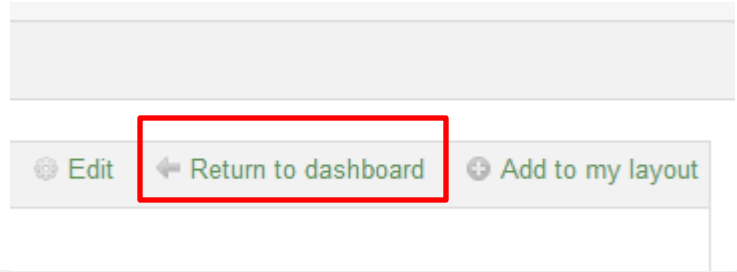
Un-check the links you wish to hide

- Email & Calendar
- Student & HR Administration
- PolyData Dashboards
- Technical Service Request
- PASS (Plan A Student Schedule)
- CSU Portal- Financial Administration
- Student Assistant Management
- MustangJOBS: Job Listings for Students
- Electronic Workflow
- List Class Books
- Facilities Requests
- TK20 School of Education
- LearnerWeb Online Training
- PolyCard Services
- Email Distribution Lists
- CSYou Portal

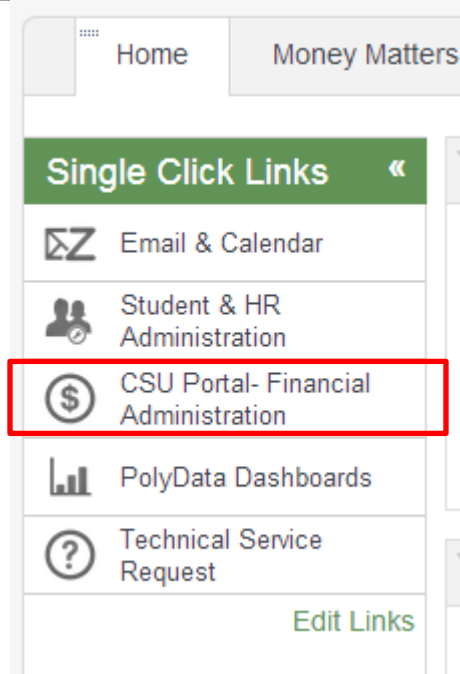
Save

Cancel

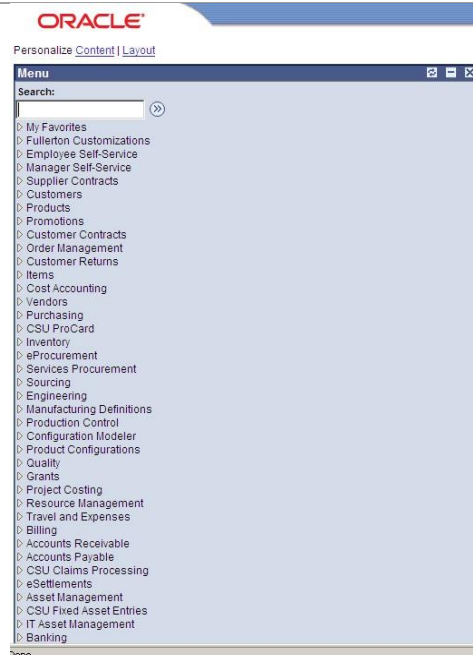
Click on the Return to dashboard link in the upper-right corner of your screen.



Click on CSU Portal – Financial Administration.

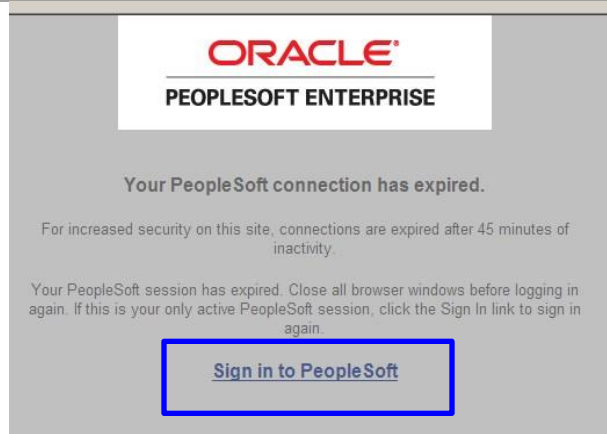


You are now logged into PeopleSoft Financials.



If your session times out due to inactivity, you will need to log back in at the Portal.

The “Sign in to PeopleSoft” hyperlink will not work.



Issues with the Portal or CSU Portal login should be directed to the Help Desk at x67000.

Issues with security access should be directed to Val Maijala, vmajjala@calpoly.edu.