1.0 Introduction

PeopleSoft 7.5

The upgrade to version 7.5 is the first major upgrade of PeopleSoft for the University since the implementation of the system in January 1999. Periodic upgrades are necessary to keep the University up-to-date with current technology and to maintain support from PeopleSoft. Users will notice some cosmetic changes from PeopleSoft 6.0; however the functionality has not changed significantly. The majority of the changes and improvements are to behind-the-scenes processes in this release.

Training & Installation

PeopleSoft training is conducted by the Controller’s Office and is available to permanent staff members of CWRU only. Users must complete the training sessions before access to the system is granted. Once training has been completed, a member of Administrative Information Services (AIS) will contact each user to schedule an appointment for installation.

Users can sign up for training at:

http://www.cwru.edu/finadmin/controller/pstrain/pshome.htm

Announcements & Communications

All announcements and communications regarding PeopleSoft are made via email. Once users have completed training, their names are automatically added to the mailing list. Announcements include information on the availability of the system, completion of month-end and year-end processes and updates or upgrades to the system.

Contact the PeopleSoft trainer at pstrainer@po.cwru.edu for questions concerning the use of the system.
About this Manual

This manual was designed as a supplement to the on-line portion of CWRU’s PeopleSoft training program. The topics covered within this manual represent the most commonly used features, as customized for Case Western Reserve University. The revision of this manual will be an ongoing process as features change or upgrades are made to the general ledger system. Updates to this user manual will be posted on the CWRU PeopleSoft web site at:

http://www.cwru.edu/finadmin/controller/pstrain/pshome.htm

Comments and questions regarding the material in this manual should be directed to the PeopleSoft trainer at:

pstrainer@po.cwru.edu