

Case Western Reserve University

EST. 1826

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Employee Self Service

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CWRU Exception Timesheet

Careers

Wellness

Rave Alerts

Payroll

Last Pay Date 07/31/2019

CWRU Directory

Personal Details

Benefit Details

# PeopleSoft Fluid Info Session

2020

# Agenda

- Introductions
- Project Summary
- HCM Overview
- FIN Overview
- Time Line
- Questions

# Introductions

- Introductions



# Project Summary

## Goal:

- Implement PeopleSoft Fluid
  - Enhanced Interface
  - 2 Clicks to access
- Improved User Interface
- Improved Mobile access -- Setup for future enhancements

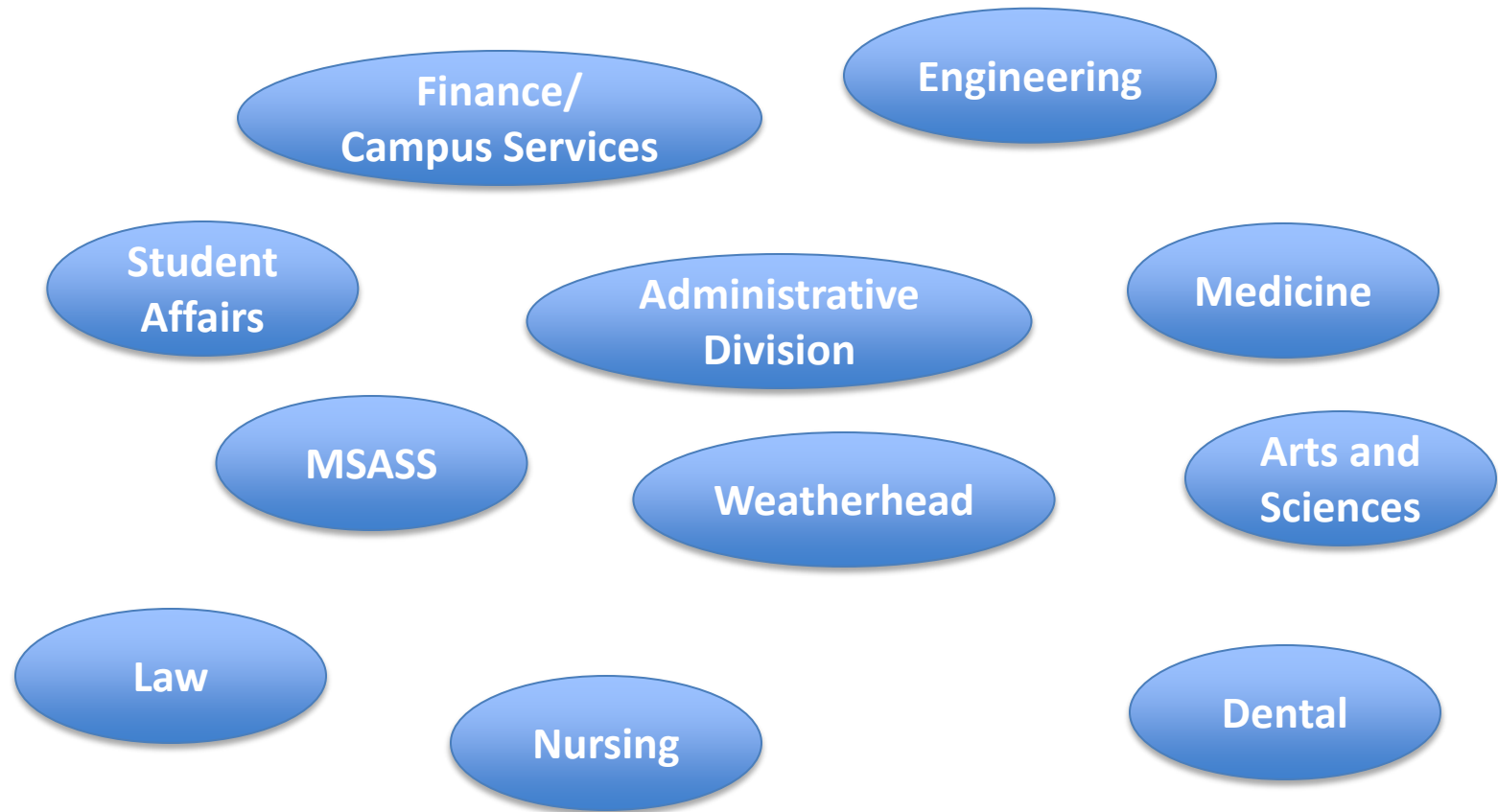
# Project Summary

- No Changes to existing Business Processes
- No Changes to access

# Team Structure

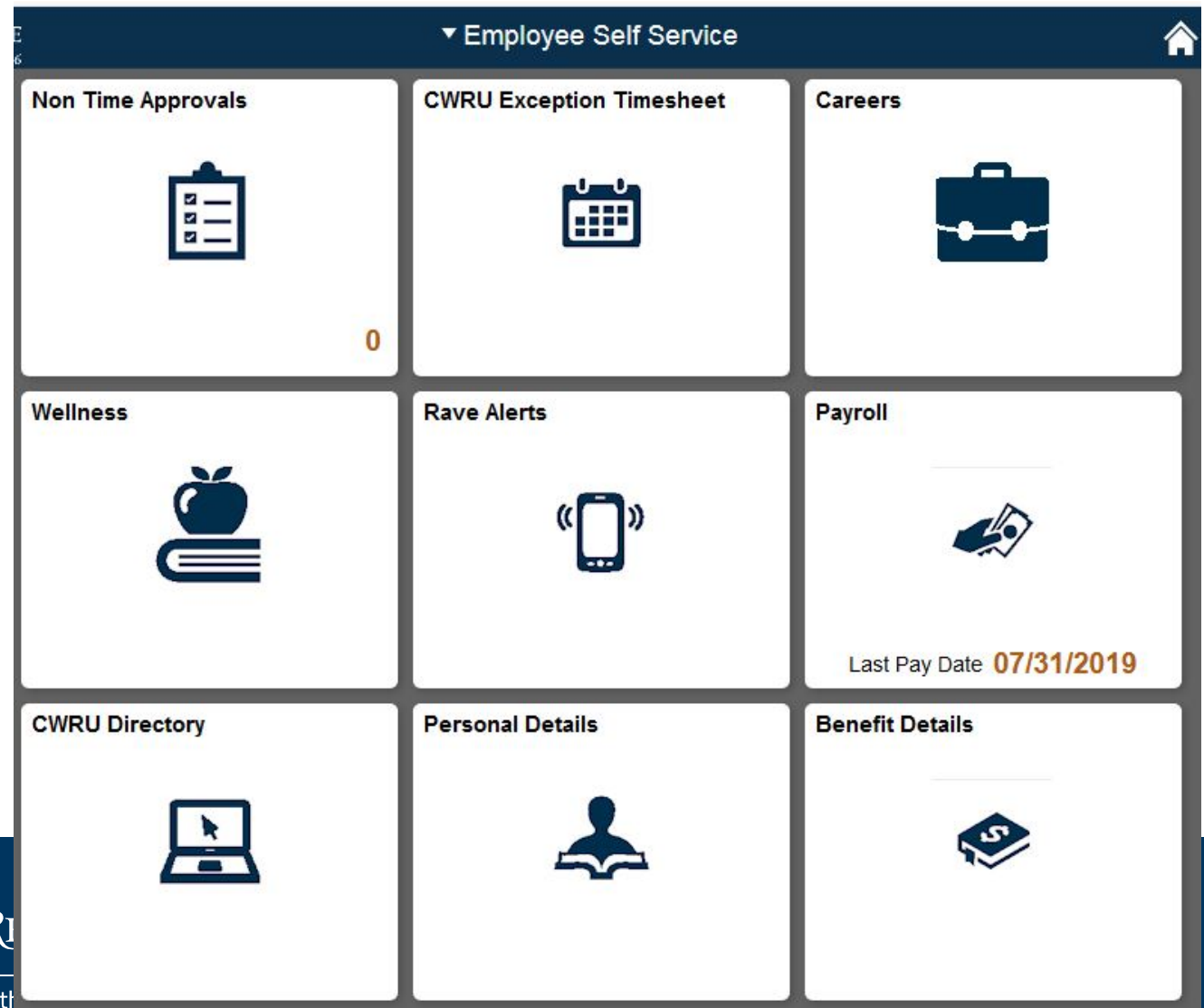
Involved Organizations	
ERP Financials	Human Resources
Utech	Marketing & Communications
Consultants	
<b>Supporting Orgs</b>	
Travel Office	Controller's Office
Procurement	Sponsored Projects
User Groups	

# Thank You User Group



# HCM Overview

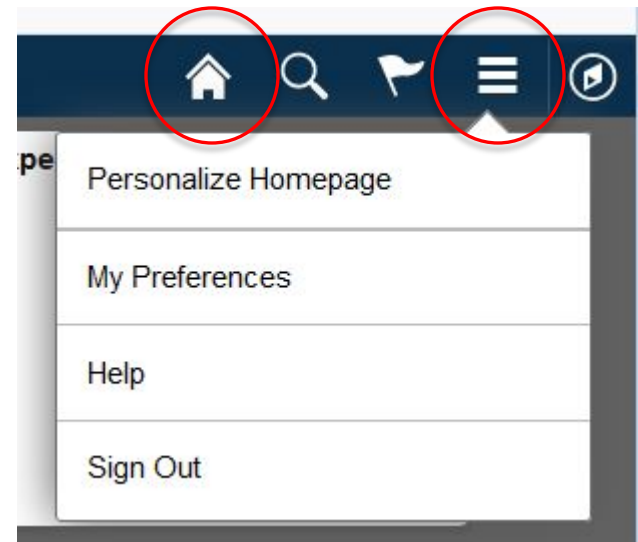
- Employee Self Service



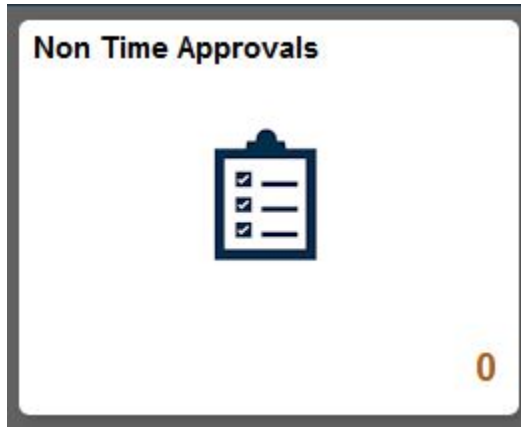


# HCM Overview

- Main Navigation



# HCM Overview



- Non Time Approvals
  - E-Recruit Approvals

# HCM Overview

- Case Time Sheet



**Employee Self Service** **Case Exception Timesheet - FL**

**Employee ID** [REDACTED] **Title** [REDACTED]  
**Rcd** 0  
**Empl Class** [REDACTED] **Department** [REDACTED] **FLSA Status** [REDACTED]

**Available Leave Hours**  
**Sick** 1000.00 **Vacation** 134.00 **Last Updated**

**Current Pay Period**  
**Start** 01/01/2020 **End** 01/31/2020 **Std Weekly Hours** 40.00

**Exception Time Entries** 11 rows

	*Date ▾	Day ▾	*TRC ▾	Hours ▾	Comments	
1	08/01/2019	Thu	REG ▾	8.00		
2	08/02/2019	Fri	REG ▾	8.00		
3	08/05/2019	Mon	REG ▾	8.00		
4	08/06/2019	Tue	REG ▾	8.00		
5	08/07/2019	Wed	REG ▾	8.00		

# HCM Overview

- Careers



### Careers

#### Search Jobs


**Welcome** John

	<a href="#">View All Jobs</a>	>
	<a href="#">My Job Notifications</a>	>
	<a href="#">My Job Applications</a>	1 >
	<a href="#">My Favorite Jobs</a>	>
	<a href="#">My Saved Searches</a>	>
	<a href="#">My Contact Information</a>	>

# HCM Overview



- Wellness
  - Tobacco Attestation Form
  - Wellness Summary
  - Wellness Program Participation



The screenshot shows the 'CW Wellness' portal under the 'Employee Self Service' tab. On the left, a sidebar lists three options: 'Tobacco Attestation Form' (highlighted in green), 'Wellness Summary', and 'Wellness Program Participation'. The main content area is titled 'Tobacco Attestation' and includes a field for 'Empl ID' which has been redacted with a black bar. Below this, the section 'Tobacco Attestation Form Instructions' provides details about the annual Wellness Premium Incentive, stating that a \$25 monthly incentive is available for faculty and staff with medical coverage through CWRU who have completed wellness activities and indicated their tobacco use status.

**Employee Self Service** **CW Wellness**

**Tobacco Attestation Form**

Wellness Summary

Wellness Program Participation

**Tobacco Attestation**

Empl ID [REDACTED]

**Tobacco Attestation Form Instructions**

One requirement to be eligible for the annual Wellness Premium Incentive - a \$25 monthly inc is available for faculty and staff with medical coverage through CWRU and have completed th wellness activities - is that you must indicate whether or not you currently use tobacco.

The Tobacco Attestation Form requires you to attest to your current tobacco use statu

# HCM Overview

## Rave Alerts



- Rave Alerts

◀ Employee Self Service

▼ CW Alerts

### EMPLOYEE CONTACT INFORMATION UPDATES

The **CWRU Emergency Notification System** (also known as Rave) is used to alert the campus community about safety alerts and information about inclement weather closures. If you have provided a cell phone in HCM, it will be shared with the Rave System.

To manage your settings in **Rave**, please go to: [www.getrave.com](http://www.getrave.com). On this site, you may add additional contact information including phone numbers and email addresses as well as update your preferences on how you wish to be contacted in case of an emergency on campus.

Please note, you will not receive messages from the emergency notification system unless you have a **U.S./10 digit cell number**.

Please enter your cell number as **10 digits only**. If you choose not enter a cell phone, please enter **9999999999** as your cell phone number.

#### Cell Phone Information

Phone Type : Cell

Cell phone: [REDACTED]

# HCM Overview



- Payroll
  - Paychecks
  - Direct Deposit
  - Compensation History
  - **View W2**
  - Charity Choice
  - Vacation Donation

Employee Self Service Payroll

Paychecks

Direct Deposit

Compensation History

View W-2/W-2c Forms

Charity Choice

Vacation Donation

Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Paycheck Number
07/31/2019	Case Western Reserve Univ	07/01/2019 07/31/2019	[REDACTED]	>
06/28/2019	Case Western Reserve Univ	06/01/2019 06/30/2019	[REDACTED]	>
05/31/2019	Case Western Reserve Univ	05/01/2019 05/31/2019	[REDACTED]	>
04/30/2019	Case Western Reserve Univ	04/01/2019 04/30/2019	[REDACTED]	>



# HCM Overview

- CW Directory



Employee Self Service CW Directory

### CASE Directory Address

Empl ID: [REDACTED]  
Business Title: [REDACTED] Last Updated: 07/03/2019 SYS

#### Campus Mailing Location

Department: [REDACTED]  
Default Location Code: 4905 DEN - School of Dentistry  
Override Campus Mailing Location: [ ]  
Campus Mail Building: School of Dental Medicine  
Campus Mail Room: 1

#### Physical Campus Office Address

Office Building: [ ] Office Room: [ ]  
☐ Suppress Campus Office Address in Online Directory

#### Off Campus Office Address

Address 1: [ ]  
Address 2: [ ]  
City: [ ] State: [ ] Postal: [ ]  
Off Campus Office Phone: [ ]  
☐ Suppress Off Campus Office Address in Online Directory

Updates will appear in the online directory the next day.

Save

Go To: Employee Home  
Personal Information Home  
Home and Mailing Address





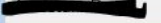
# HCM Overview


## Personal Details





- Personal Details
  - Addresses
  - Contact Details
  - Ethnic Groups
  - Emergency Contacts
  - Additional Information
  - Disability
  - Veteran Status


[Employee Self Service](#) **Personal Details** 


  



 **Addresses**


 Contact Details

 Ethnic Groups

 Emergency Contacts

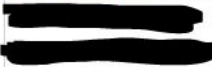
 Additional Information

 Disability

 Veteran Status

**Addresses**

**Home Address**



Current

# HCM Overview

## Benefit Details



- Benefits Details
  - Life Events
  - Dependent
  - Benefits Enrollment

[Employee Self Service](#)

Benefit Details

Benefits Summary

Life Events

Dependent/Beneficiary Info

Benefits Enrollment

**Benefits Summary**

As Of 01/15/2020

Refresh

Type of Benefit	Plan Description
-----------------	------------------

# HCM Overview

- Life Events

## Life Events

There are some events that involve you as the Employee or your family members.

Review the choices and select the appropriate Event. Then enter the date of your event.

If the appropriate Life Event choice is grayed out below, contact the HR Service Center at (216) 368-6964 for assistance.

### Employee

- ☐ I got married
- ☒ I had a baby
- ☐ I adopted or gained legal custody/guardianship of a child
- ☐ I got divorced/legally separated

\*As Of



Start Life Event

✱ **Welcome to the Birth Event**  
✔ Complete

✱ **Birth Date**  
☐ Not Started

**Dependent/Beneficiary Info**  
☐ Not Started

**Benefit Enrollment**  
☐ Not Started

**Benefit Election Review**  
☐ Not Started

**Document Upload**  
☐ Not Started

**Summary**  
☐ Not Started

# HCM Overview

## Manager Self Service



## Security Dependent

# HCM Overview

- Time Approval



< Manager Self Service

Group ID Begins with

41 rows

1 1001021 801000

Exception Time Entries									
	*Date ◇	Day ◇	*TRC ◇	Hours ◇	Apprv ◇	Dispute ◇	Reason Code ◇	Comments ◇	
1	08/01/2019	Thu	REG	8.00	<input type="radio"/> No	<input type="radio"/> No			<input type="button" value="Add"/>
2	08/02/2019	Fri	REG	8.00	<input type="radio"/> No	<input type="radio"/> No			<input type="button" value="Add"/>
3	08/05/2019	Mon	REG	8.00	<input type="radio"/> No	<input type="radio"/> No			<input type="button" value="Add"/>
4	08/06/2019	Tue	REG	8.00	<input type="radio"/> No	<input type="radio"/> No			<input type="button" value="Add"/>
5	08/07/2019	Wed	REG	8.00	<input type="radio"/> No	<input type="radio"/> No			<input type="button" value="Add"/>

# HCM Overview



- Payment Request

< Manager Self Service **CW MSS Pmt Request**

**Payment Request**

Payment Request History

**Payment Request**

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Search by: Group ID begins with

Search Advanced Search

# HCM Overview



- Salary Administration
  - Salary Distribution
  - Salary Adjustment
  - Time & Labor Adjustments
  - Summer Salary

A screenshot of a web application interface for "Salary Distribution". On the left is a sidebar with four menu items: "Salary Distribution" (highlighted in green), "Salary Adjustment", "Time & Labor Adjustments", and "Summer Salary". The main content area has the title "Salary Distribution" and a subtitle "Enter any information you have and click Search. Leave fields blank for a list of all values." Below this is a button "Find an Existing Value". A section titled "Search Criteria" contains a dropdown menu for "Group ID" with the text "begins with" and an empty input field. At the bottom are buttons for "Search", "Clear", "Basic Search" (with a magnifying glass icon), and "Save Search Criteria" (with a save icon).

# HCM Overview



- Manager Reports
  - Case Directory Address
  - Time Entry Report
  - Manager time Entry History
  - Department Security Entry
  - Salary Distribution Report
  - Salary Analysis by Dept
  - Salary Analysis by Employee

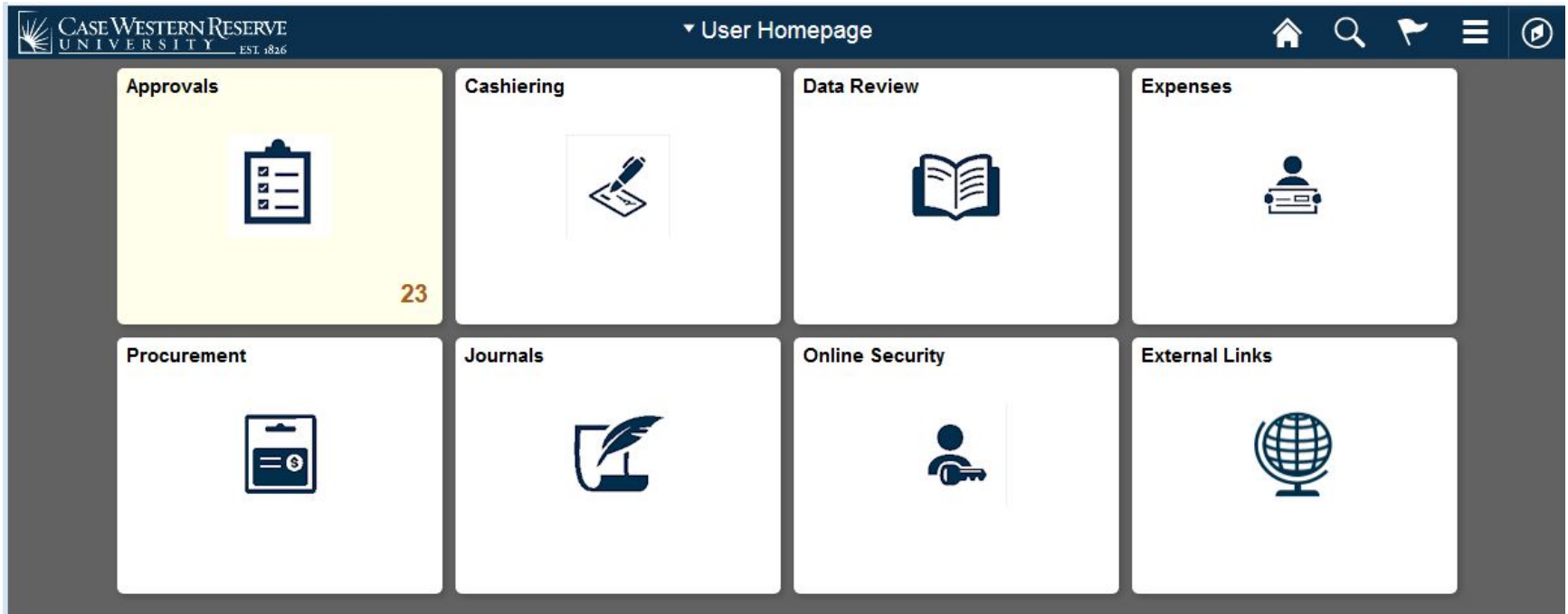
CASE Directory Address
Time Entry Report
Manager Time Entry History
Department Security Entry
Salary Distribution Rpt
Salary Analysis by Dept
Salary Analysis by PI
Salary Analysis by Employee



# HCM Demo

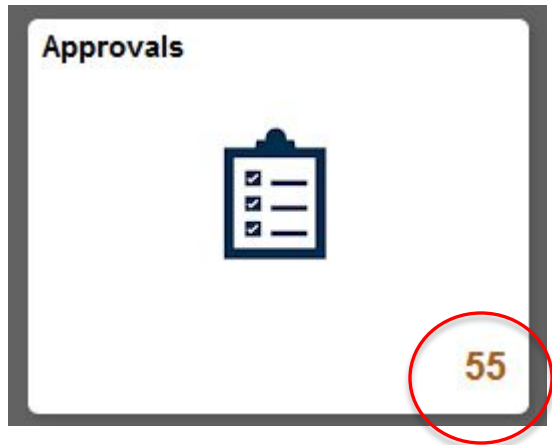
# Financials






# FIN Overview



# FIN Overview

- Approvals



View By		Type	
	All		55
	Expense Report		5
	Journal Entry		45
	Payment Request		2
	Requisition		3

# FIN Overview

## Cashiering



- Cashiering
  - Deposits
  - Petty Cash

Case Departmental Deposits ^

Case Deposit Entry

Case Petty Cash Management ^

Cash Disbursement Entry

Case Deposit Entry

Find an Existing Value

Add a New Value

User: [REDACTED]  
Deposit Id: NEXT

Add

Find an Existing Value

Add a New Value

# FIN Overview

## Data Review



- Data Review
  - Review Procurement/AP
  - Chartfield Data
  - Budget Exceptions
  - Locations
  - Process Monitor

## Review Procurement Information



## Review Accounts Payable



## Review Chartfield Data



## Review Budget Exceptions



## Review Location



## Process Monitor/Report Mana...



# FIN Overview

## Procurement



- Procurement
  - Manage Requisitions
  - Requisitions
  - Receiving
  - AP Look Up
  - Payment Request Center

## Procurement



### Manage Requisitions



### Requisitions



### ePro Receiving



### AP Regular Entry



### Payment Request Center



# FIN Overview

- Journals



[< User Homepage](#)

Journals

Create/Update Journal Entries

Edit Journals

Create/Update Journal Entries

[Find an Existing Value](#) [Add a New Value](#)

Business Unit

Journal ID

Journal Date

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)



# FIN Overview



- Online Security
- My Profile
  - Set Out of Office Approver
- My Preferences
  - Set Accessibility Options



# FIN Overview



- Online Security
  - New Requests
  - Review/Approve
  - Confidentiality Agreement

[← Online Security](#)

CWRU Online Security

 **New Security Requests**

 Review/Approve Requests

 Confidentiality Agreement

New Requests

Please enter a Network ID (in lower case) and then hit the Enter Key:

Case Network ID:

# FIN Overview

## External Links



- External Links

## External Links

### Launchpad



### Reporting Database



### PBCS



### Sparta



### Training



### BOA



### University Policy



### University Offices



### Related Systems



# FIN Overview

- External Links








# FIN Overview

## Expenses



- Expenses

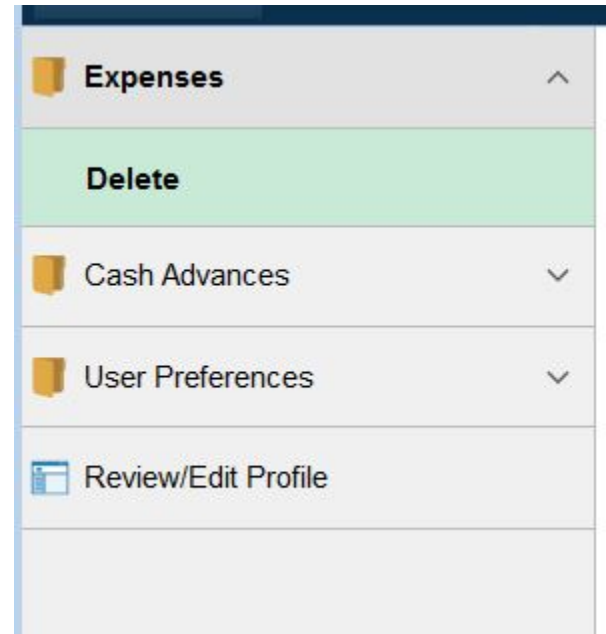
### Expenses

<h4>Create Expense Report</h4> 	<h4>My Expense Reports</h4>  <p>0 Active Expense Reports</p>
<h4>Travel &amp; Expense</h4> 	<h4>My Wallet</h4> 
<h4>View Expense Report</h4> 	

# FIN Overview



- Travel & Expense Details



# FIN Overview

- Expenses

Expenses

Expense Report

Report NEXT  
David Elliott

General Information

\*Business Purpose

\*Description

Default Location

Domestic (USA)

Attach Receipt

Accounting Defaults

Creation Date 01/17/2020 David Elliott

Updated on 01/17/2020

Expense Details

No expenses have been entered.

+ Add Expense

Add from My Wallet (2)

Quick-Fill

# FIN Overview

- Expenses

**Expense Report**

PeopleSoft Demo  
David Elliott

Save Review and Submit  
Last Saved 01/17/2020 3:52PM

Total (1 Item) 0.00 USD

+ Add 2 Wallet Delete Filter More

▼ Friday, January 17, 2020

New Expense	0.00
	USD

### Expense Entry

\*Date 01/17/2020

\*Expense Type

Description

### Payment Details

\*Payment

\*Amount 0.00 USD

### Additional Information

\*Billing Type Employee (Faculty & Staff)

Accounting 1 >



# FIN Overview

- Expenses

Cancel **Expense Type Search**






Frequently Used All Types






8 rows

Expense Type ▾
Parking / Tolls
Laundry
Mileage
Licenses and Inspection Fees
Business Supplies on Travel
Hotel / Lodging
Meal - Breakfast Actual
Internet / Telephone Charges

# FIN Overview

- Expenses

Total (2 Items) 36.60 USD		
		
Add	Wallet	Delete
		
Filter	More	
▼ Friday, January 17, 2020		
Mileage		11.60
Demo		USD
Parking / Tolls		25.00
Demo		USD

Total (2 Items) 36.60 USD		
		
Select All	Quick-Fill	Copy
		0 Selected
Delete	More	
▼ Friday, January 17, 2020		
<input type="checkbox"/>	Mileage	11.60
	Demo	USD
<input type="checkbox"/>	Parking / Tolls	25.00
	Demo	

# Misc

Website:

[www.case.edu/erpfinancials](http://www.case.edu/erpfinancials)

- This presentation
- Go Live Dates
- Other PeopleSoft related information
- Sign up for ERP Financials News

# Misc

## Open Classroom Time

- Learn the new interface
- Users will login as themselves
- ***January 30: 10 to 11:30AM & 2 to 3:30PM***
- ***January 31: 2 to 3:30PM***
- ***February 3: 3 to 4:30PM***
- ***February 5: 10 to 11:30AM***
- PeopleSoft Classroom, BioEnterprise
- E-mail [ps-classroom@case.edu](mailto:ps-classroom@case.edu)

## Time Line

**Stay Tuned  
For  
Go Live Information  
*Expected Early February***

# Questions

