

PeopleSoft Financials Reporting Navigation Guide 2020

General Navigation

- Financials Home Page

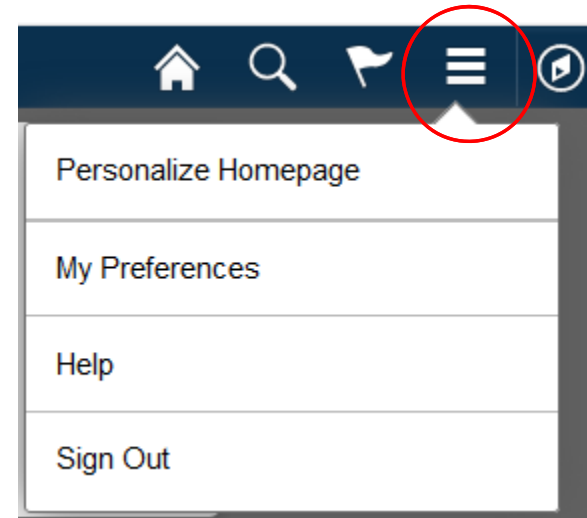


General Navigation

- Navigation Area

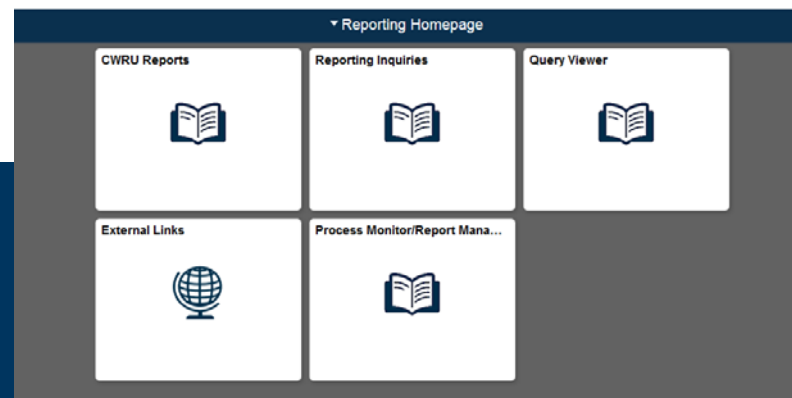


- Home Icon returns to Financials Home Page
- Use the Navigation Area drop down menu to Sign out of PeopleSoft Financials Reporting



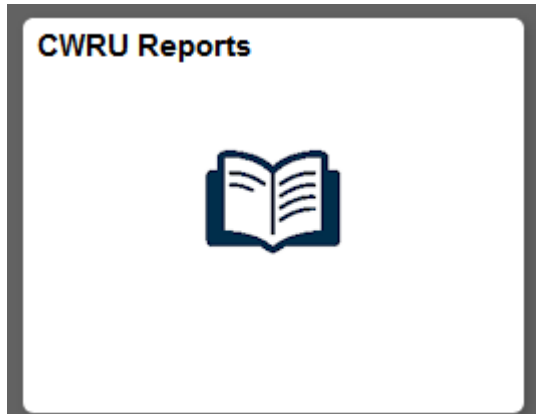
FIN Overview

| Financials Task | Tile | Guide Page |
|---|--------------------------------|------------|
| Run a CWRU Financials Report | CWRU Reports | 5 |
| Review Procurement Information | Reporting Inquiries | 6 |
| Review Accounts Payable Information | Reporting Inquiries | 6 |
| Review General Ledger Information | Reporting Inquiries | 6 |
| View Speedtype Info | Reporting Inquiries | 6 |
| Run a Query | Query Viewer | 7 |
| View External Links | External Links | 8 |
| Access Process Monitor or Reporting Manager | Process Monitor/Report Manager | 9 |



FIN Overview

- Run CWRU Reports



Reporting Homepage CWRU Reports

Income - Expense Report

Income/Expense-Funded Projects

Income-Expense Endowment Rpt

CIP Expense Statement

CASE Income & Expense Report

Budget Performance Report

FMS Vendor Cross Reference

General Ledger Report

Income Ledger Report

Unused Endowment Income

Valid SpeedType Listing

Statement of Exp. - BGT Rpt

Petty Cash Speedtype Summ Rpt

Income - Expense Report

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

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

Search Criteria

Search by: Run Control ID begins with

Case Sensitive

[Search](#) [Advanced Search](#)

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

FIN Overview

Reporting Inquiries



- Inquires
 - Procurement
 - Accounts Payable
 - General Ledger
 - Speedtypes

Reporting Inquiries



Review Procurement



Review Accounts Payable



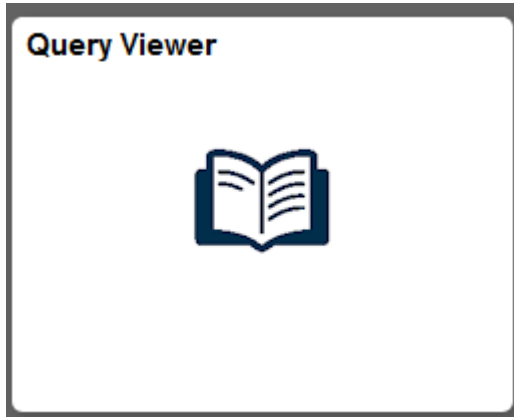
Review General Ledger



Review SpeedTypes



FIN Overview



- Query Viewer
 - Access Predefined Queries

A screenshot of a web application interface. At the top, a dark blue navigation bar contains a back arrow and the text "Reporting Homepage" on the left, and "Query Viewer" on the right. Below the navigation bar, a light green sidebar on the left contains a folder icon and the text "Query Viewer". The main content area has a title "Query Viewer" and a subtitle "Enter any information you have and click Search. Leave fields blank for a list of all values." Below this is a search form with the label "*Search By" followed by a dropdown menu set to "Query Name", the text "begins with", and an empty text input field. At the bottom of the search form are two buttons: "Search" (orange) and "Advanced Search" (blue).

FIN Overview

External Links



- External Links
 - Campus Offices
 - Related Systems

| External Links | | |
|------------------------------|-------------------------------|----------------------------|
| Launchpad | Reporting Database | PBCS |
| Sparta | Training | BOA |
| University Policy | University Offices | Related Systems |

FIN Overview

Process Monitor/Report Mana...



- Process Monitor/Report Manger
 - View Report Output

Reporting Homepage **Process Monitor/Report Manager**

Process Monitor

Report Manager

List | Explorer | Administration | Archives

View Reports For

User ID: dre5 | Type: | Last: | 1 | Days: | Refresh

Status: | Folder: | Instance: | to: |

Report List | Personalize | Find | View All | First | 1 of 1 | Last

| Select | Report ID | Prce Instance | Description | Request Date/Time | Format | Status |
|--------------------------|-----------|---------------|--------------------|-------------------|--------|--------|
| <input type="checkbox"/> | | | Report Description | | | |

Select All | Deselect All

Delete | Click the delete button to delete the selected report(s)

Save

List | Explorer | Administration | Archives