



Updates for the February 2021 PeopleSoft Update

Journal Entry

On Journal Edit a new option will be displayed for users when they edit a journal entry.

Would you like to wait for confirmation that the Edit process has completed? (5010,465)

Your request is currently in process. If you choose to wait, once the process has completed, you will be returned to the updated Journal. If you choose not to wait, please check the Process Monitor to verify that the scheduled process has completed before accessing the Journal.

This option will notify users they can wait for the journal to edit or come back to later. We recommend that users select YES and allow the journal to edit.

Travel and Expense Entry

On the Create Expense report a tile a new Action Menu drop down menu is available:

General Information

*Business Purpose	Athletic Department Travel	▼
*Description	Test	
Default Location	Domestic (USA)	🔍

Expense Details

Expense Report Action	<div style="border: 1px solid black; padding: 5px;"><div style="background-color: #e0e0e0; padding: 2px;">▼</div><div style="background-color: #0070c0; color: white; padding: 2px;">Add Expense Lines</div><div style="padding: 2px;">Add from My Wallet</div><div style="padding: 2px;">Add from Quick-Fill</div><div style="padding: 2px;">Copy Expense Report</div></div>
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Item	Description
Add Expense Lines	Most Used Option. Allows a user to add expense lines to the report.
Add from My Wallet	Allows a user to add expenses from My Wallet for users that have a AMEX Travel and Expense card.
Add from Quick-Fill	Allows a user to add expenses from a Quick-Fill template
Copy Expense Report	Allows a user to copy expenses from an existing report.

Requisition Approval

A new feature on the Requisition Approval screen displays a summary of the requisition by line.

▼ **More Information**

View Printable Version >

Business Unit: CASE1		Requester: dre5		Status: Pending Approval			
Requisition: 1000723422		Requested By: Elliott,David		Currency: USD			
Requisition Name: 1000723422		Entered Date: 1/21/21		Requisition Total: 10.00			
Line: 1	Item Description: Test Item	Quantity: 1.0000	UOM: EA	Price: 10.0000	Line Total: 10.00		
					Line Status: Pending		
Ship Line: 1		Ship To: DRE5		Shipping Quantity: 1.0000			
Attention: 336/David Elliott		Due Date:		Shipping Total: 10.00			
Ship Via: BESTWAY		Freight Terms: 3		Address:			
				BioEnterprise			
				11000 Cedar Avenue			
				5A02			
				Cleveland OH 44106			
				United States			
Dist	Status	Location	Qty	PCT	Amount	GL Unit	Account
1	Open	DRE5	1.0000	100.00	10.00	CASE1	531100
Dept		Fund		Class			
231240		97600		10			
Open QTY			Open Amt				
0.0000			10.0000				
GL Base Amount		Currency		Sequence		Capitalize	
10.00		USD		0		N	
Chartfield 2							
OPR231240							

Travel and Expense Approval

The View Notes section now shows history of all comments, including entry individuals and approvers.

▼ Attachments and Notes



Notes			
Report ID 0000208033			
Date/Time	Name	Role	Notes
09/23/2020 4:47 PM	John Smith	Prepay Auditor	Test Send Back
09/23/2020 4:46 PM	Bob Jones	Expense Manager	Test

Classic Menu Structure

As PeopleSoft's ongoing updates to improve the layout and mobile functionality the Classic menu has been removed. **No functionality has been removed.** Any user that still uses the menu structure can access those options using the Navigator. Select the compass in the upper right corner of the screen, then the navigator icon:

