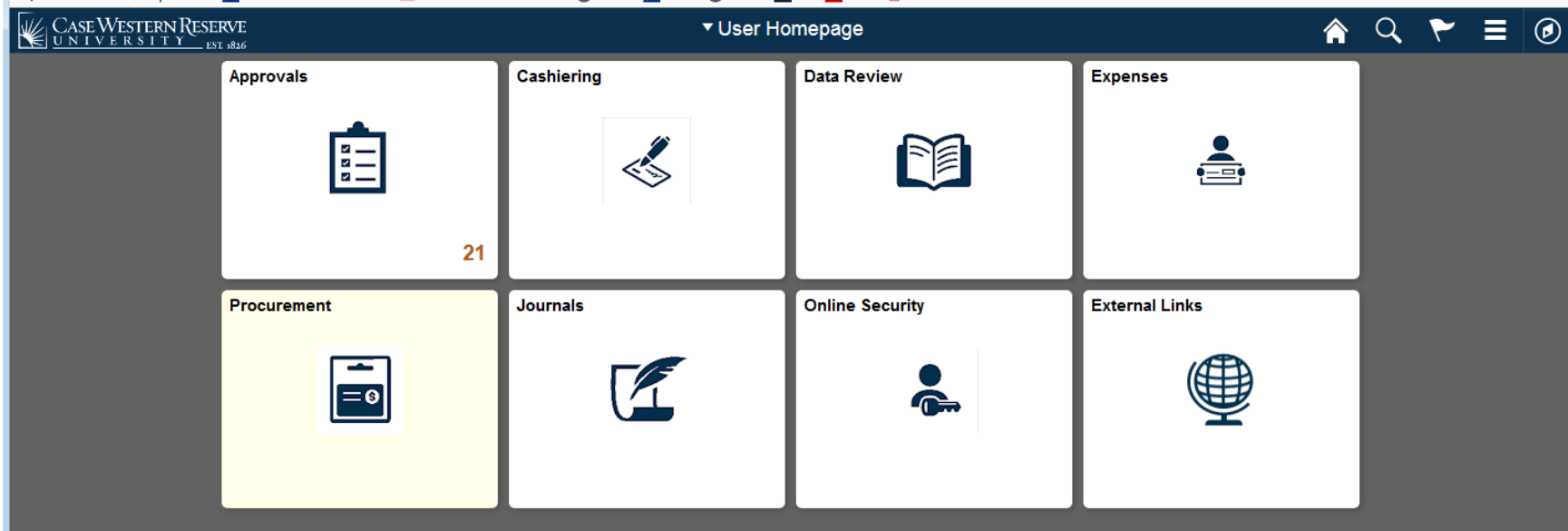


PeopleSoft Financials Navigation Guide 2020

General Navigation

- Financials Home Page

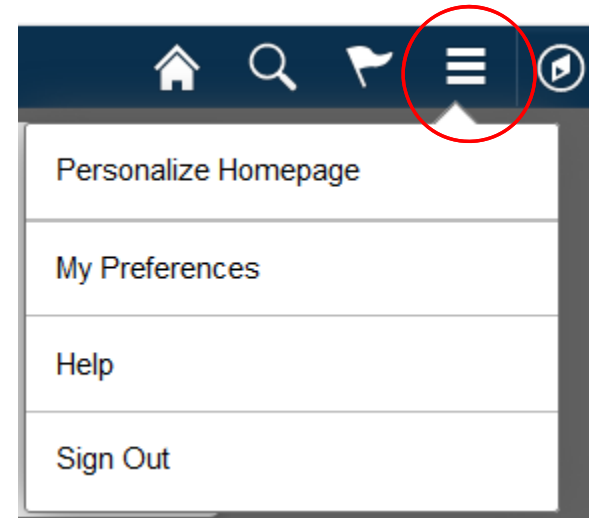


General Navigation

- Navigation Area



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



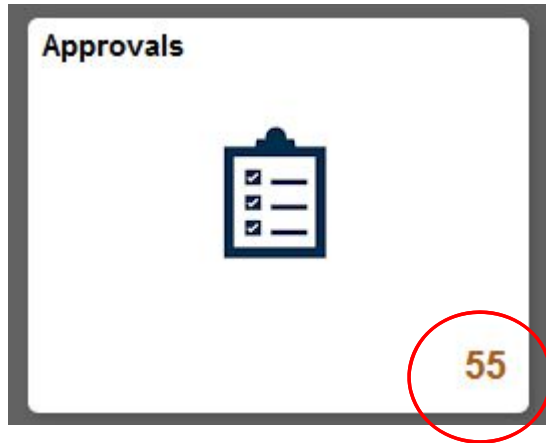
FIN Overview






Financials Task	Tile	Guide Page
Approve T&E, Journals, Procurement, Payment Reqs	Approvals	5
Do a Deposit	Cashiering	6
Create a Petty Cash Request	Cashiering	6
Look Up a Speedtype or Account Definition	Data Review	7
Create a Requisition or Manage Requisition	Procurement	8
Create a Payment Request	Procurement	8
Create a Journal	Journals	9
Create or Approve an Online Security Request	Online Security	10
View CWRU Websites	External Links	12
Create or Modify a Expense Report	Expenses	14



FIN Overview

- Approvals



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

FIN Overview

Cashiering



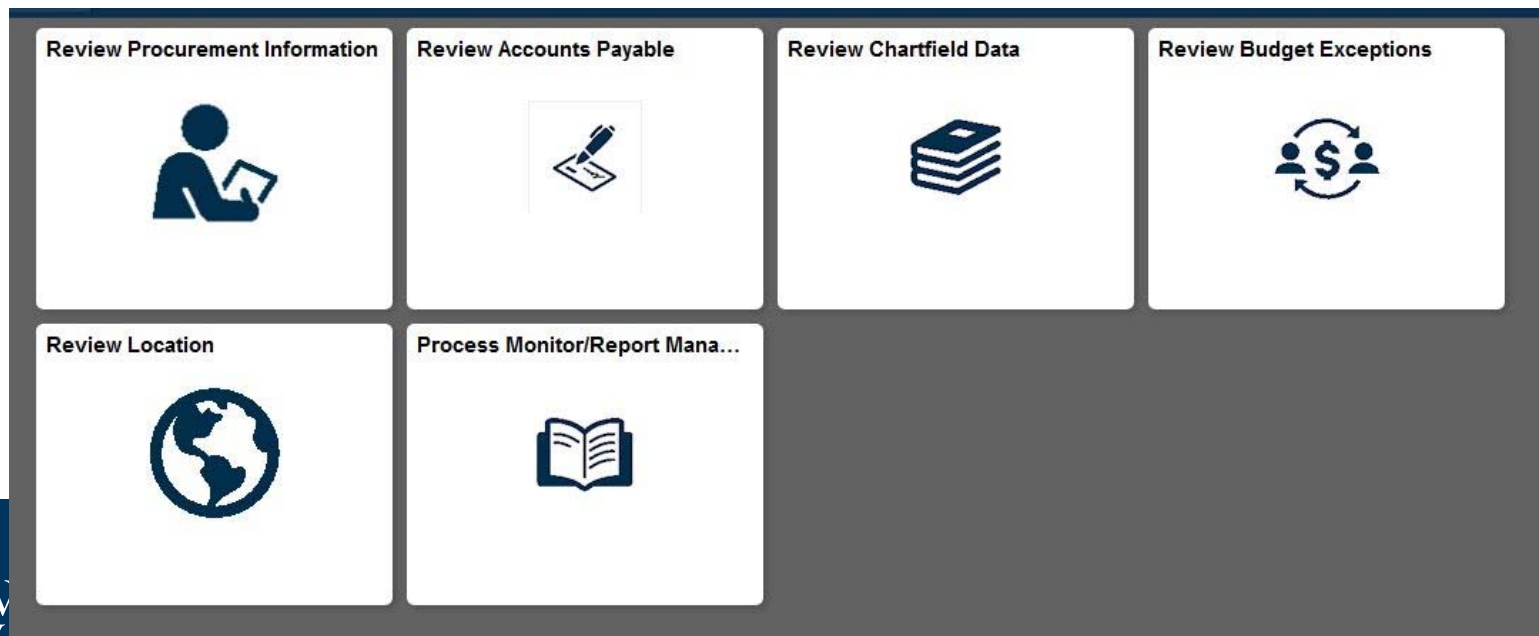
- Cashiering
 - Deposits
 - Petty Cash

Case Departmental Deposits ^	Case Deposit Entry
Case Deposit Entry	<input type="text" value="Find an Existing Value"/> <input type="button" value="Add a New Value"/>
Case Petty Cash Management ^	User: [REDACTED]
Cash Disbursement Entry	Deposit Id: NEXT
	<input type="button" value="Add"/>
	<input type="text" value="Find an Existing Value"/> <input type="text" value="Add a New Value"/>

FIN Overview



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



FIN Overview

Procurement



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



The screenshot shows a dashboard titled "Procurement" with a home icon in the top right corner. The dashboard is divided into five main sections:

- Manage Requisitions:** Contains a clipboard icon with a dollar sign.
- Requisitions:** Contains an icon of a person holding a tablet.
- ePro Receiving:** Contains an icon of a checkmark and a pen.
- AP Regular Entry:** Contains an icon of a pen writing on a document. This section is highlighted with a yellow background.
- Payment Request Center:** Contains an icon of a hand holding a document.

FIN Overview



- Journals

A screenshot of a web application interface for managing journals. The interface has a dark blue header with a back arrow and the text "User Homepage" on the left, and "Journals" on the right. Below the header is a sidebar with two menu items: "Create/Update Journal Entries" (highlighted in light green) and "Edit Journals". The main content area is titled "Create/Update Journal Entries" and contains a search bar with "Find an Existing Value" and "Add a New Value" buttons. Below the search bar are three input fields: "Business Unit" with the value "CASE1", "Journal ID" with the value "NEXT", and "Journal Date" with the value "01/15/2020" and a calendar icon. An "Add" button is positioned below these fields. At the bottom of the main area, there is another search bar with "Find an Existing Value" and "Add a New Value" buttons.

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









The screenshot shows the 'CWRU Online Security' web application. At the top, there is a dark blue header with a back arrow and the text 'Online Security' on the left, and 'CWRU Online Security' on the right. Below the header is a left-hand navigation menu with three items: 'New Security Requests' (highlighted in green), 'Review/Approve Requests', and 'Confidentiality Agreement'. The main content area has a 'New Requests' button at the top. Below the button, there is a text prompt: 'Please enter a Network ID (in lower case) and then hit the Enter Key:'. Underneath this prompt is a text input field labeled '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



University Offices 

Budget and Financial Planning 	Controller's Office 	ERP Financials 
Procurement 	Research 	Finance 
Travel Office 	UTech 	HR 

FIN Overview

Expenses



- Expenses

Expenses

Create Expense Report 	My Expense Reports 0 Active Expense Reports
Travel & Expense 	My Wallet
View Expense Report 	

FIN Overview



- Travel & Expense Details

