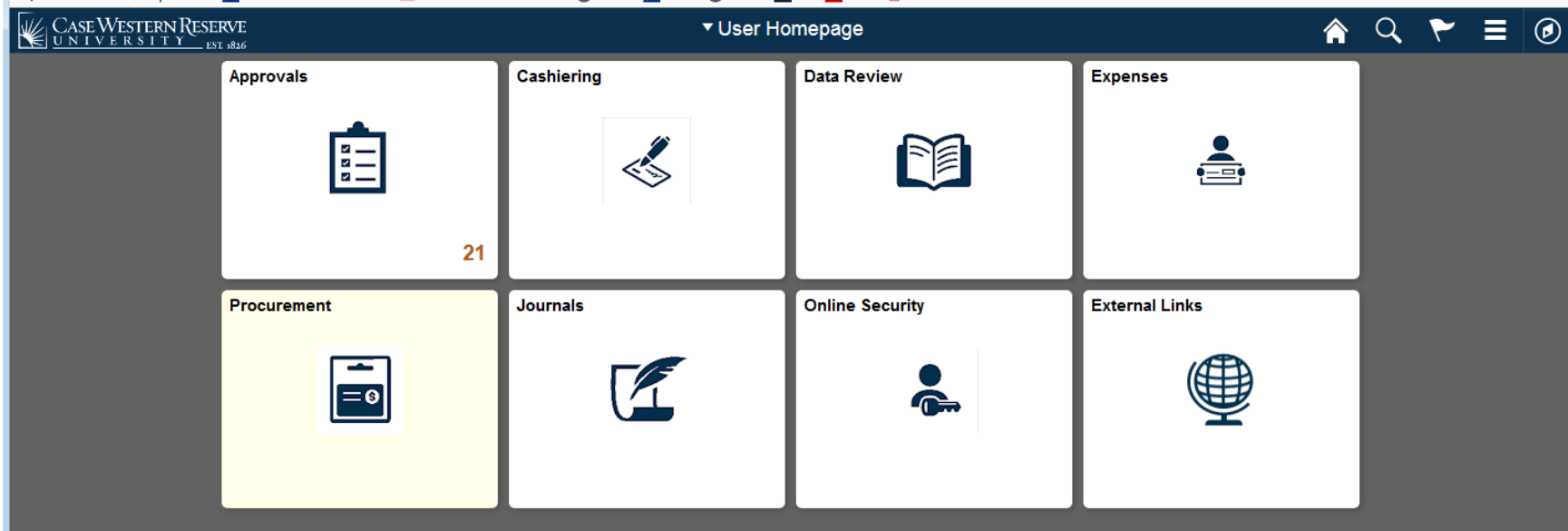# PeopleSoft Financials Navigation Guide
2020

General Navigation
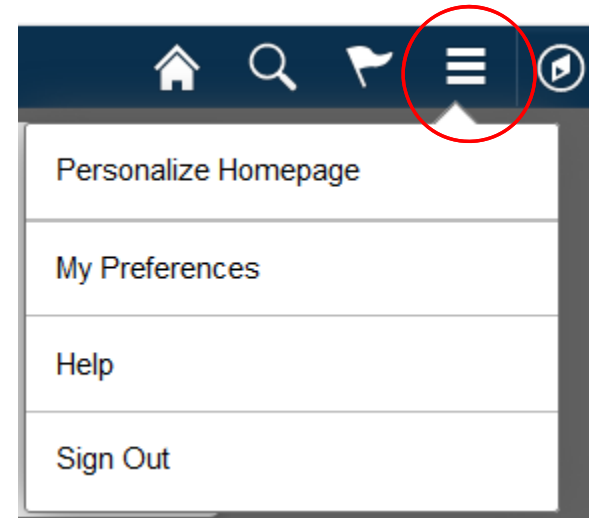
- Financials Home Page

General Navigation

- Navigation Area

- Home Icon returns to Financials Home Page

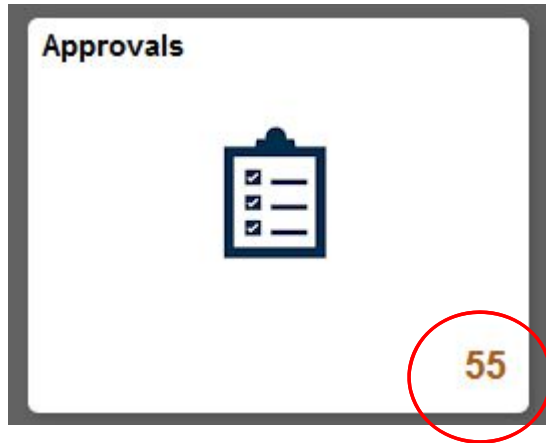- Use the Navigation Area drop down menu to Sign out of PeopleSoft Financials

Personalize Homepage

My Preferences

Help

Sign Out

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

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FIN Overview

- Approvals

FIN Overview

- Cashiering
  - Deposits
  - Petty Cash

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FIN Overview

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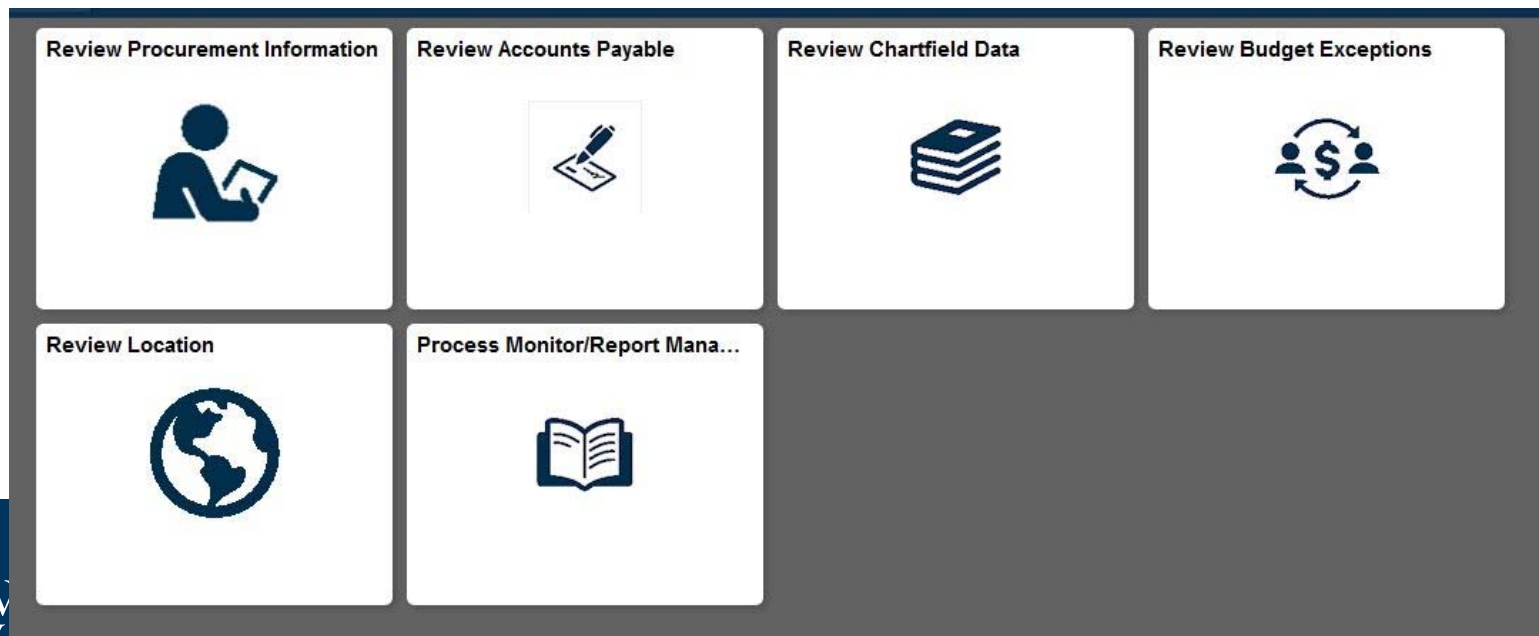
FIN Overview

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

FIN Overview

Journals

- Journals

User Homepage | Journals

Create/Update Journal Entries

Edit Journals

Create/Update Journal Entries

Find an Existing Value | Add a New Value

Business Unit CASE1
Journal ID NEXT
Journal Date 01/15/2020

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

FIN Overview

- External Links

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FIN Overview

- External Links

FIN Overview

- Expenses

FIN Overview

Travel & Expense

- Travel & Expense Details

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