



CASE WESTERN RESERVE UNIVERSITY

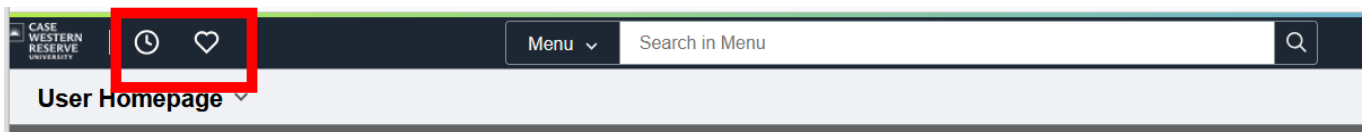
December 2024 PeopleSoft Financials Update

Notes:

- *This update will maintain PeopleSoft Financials at current levels for support and future features*
- *A new version of the Excel upload is **not** required*
- *All users should clear their web browser cache before logging into the upgraded system*

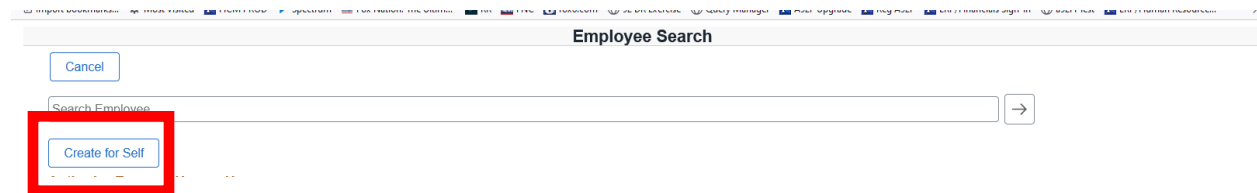
Update #1—New Menu Buttons

PeopleSoft Financials has added quick access buttons to the top menu for reaching Favorites and Recently Used Functions



Update #2— Travel and Expense Update for Delegated Entry

For users that are setup as delegated entry users for Travel and Expense, they will be displayed a new user search menu when creating a new expense report. Previously when reports were created, they defaulted to the user creating the report and required extra steps to change to the new user.



Delegated entry users may use the Create for Self button to create a report for themselves.

Users that are not delegated entry individuals are not affected by this update.

Update #3—Process Monitor Display

PeopleSoft has added the run control name to the Process Monitor display to show the run control used to run the report.

7667068	Funded_Project_Status_PI	SQR Report	CWGL0100	GLBATCH	11/11/2024 5:31:45PM EST	Success	Posted
7667067	Funded_Project_Status_Dept	SQR Report	CWGL0100	GLBATCH	11/11/2024 3:53:07PM EST	Success	Posted
7667066	CWGL0043	SQR Report	CWGL0043	GLBATCH	11/11/2024 3:45:39PM EST	Success	Posted
7667065	CWGL0042	SQR Report	CWGL0042	GLBATCH	11/11/2024 3:41:46PM EST	Success	Posted