

## PeopleSoft Finance Upgrade Information

There is a new look and feel to Finance. It will be similar to what you see in the Student and HR PeopleSoft systems.

The URL will remain the same: <https://finance.williams.edu> (shortcuts will not need to be changed)

You will need to clear your CACHE. You can find directions on the OIT WEBSITE.

<http://oit.williams.edu/help-docs/clearing-web-browser-cache-data-cookies-and-history/>

If you see a menu down the left side of your page, you will need to “remove” it by selecting the down arrow. You will select menus/pages by navigating across the window.

The image displays two screenshots of the Williams.edu website interface. The left screenshot shows a 'Top Menu Features Description' section with the following content:

- Our menu has changed!**  
The menu is now located across the top of the page. Click on **Main Menu** to get started.
- Highlights**
- Recently Used** pages now appear under the Favorites menu, located at the top left.
- Breadcrumbs** visually display your navigation path and give you access to the contents of subfolders.

The right screenshot shows the 'Main Menu' dropdown, which is expanded to reveal the following items:

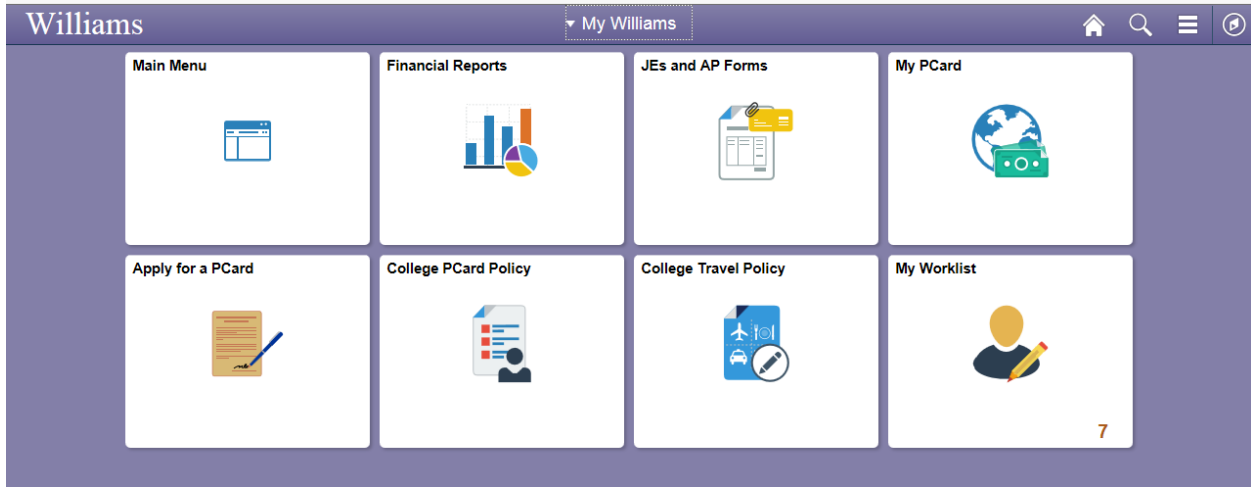
- WMS AP
- Purchasing
- General Ledger
- Enterprise Components
- Worklist
- WMS Financial Reports
- WMS Request for Payment
- WMS Travel Reimbursement Form
- Change My Password
- Change My Password Hint
- My System Profile

Arrows from the text above point to the 'Main Menu' dropdown and the 'Recently Used' section in the left screenshot.

Favorites and Personalizations will be migrated to the new system and should remain the same.

Your access to PeopleSoft functionality and reports will also remain the same. The tiles you see on the new home page is dependent upon your access.

## PeopleSoft Finance Home Page



### Tiles for easy access

- Main Menu** Select to enter the classic Finance menu system.
- Financial Reports** Select to access your financial reports. Your access will be the same.
- JE's and AP Forms** Select to enter/submit/view JE's or ONLINE AP payment/invoice requests.
- My PCard** Select to process your monthly PCARD transactions and create report.
- Apply for a PCARD** Select to apply for a PCARD (if not a current cardholder).
- College PCARD Policy** Select to view current PCARD Policy which can also be found on the Controller's Office WEBSITE.
- College Travel Policy** Select to view current Travel Policy which can also be found on the Controller's Office WEBSITE.
- My Worklist** If you are an "approver", you will see a number of items that need your Attention in the lower right hand corner of the tile.

### Other navigation

