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.


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.

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

NavBar (Navigation Bar)

Navbar (Navigation Bar)

Home
Action List (a.k.a “hamburger”)

Personalize Homepage
Help
Sign Out