

First, log into [PeopleSoft Finance](#). Effective May 13, 2021, the Financials login process consists of two parts:

Part 1: Log in to your Williams Google account, e.g. abc1@williams.edu

If you're already logged in to your Williams account, you'll automatically proceed to part 2. For example, if you have Williams Gmail open, Google will consider you to be logged in already.

Part 2: Log in to Finance using your Williams username.

For example, if your email address is abc1@williams.edu, enter abc1 as the User ID. Your Williams account password is what you use for Google and Glow.

As an alternative, you can continue to use your W##### user ID and password.

Note: This change will only affect PeopleSoft Financials. No changes will be made to either HR or Student Records.

Please contact [Client Services](#) if you need assistance with our new login process.

Next, follow this navigation: Main Menu – Main Menu (again) – WMS **Financial Reports**.

Below is a screenshot of how to fill out the screen.

Enter a Project number (6 digits) or department number (7 digits) and click on **Search for Reports**.

The screenshot shows the 'WMS Report Locator' interface. At the top, there are two tabs: 'WMS Report Locator' (selected) and 'Archived Reports'. Below the tabs, there is a step-by-step guide: 'Step 1: Enter Search Criteria, then click Search for Reports.' and 'Step 2: Click View to view an individual report'. The search form includes fields for 'Fiscal Year', 'Accounting Period', 'Report Type' (a dropdown menu), 'Location*', 'Department*' (with '5002000' entered), and 'Project/Grant*'. There are checkboxes for 'Include Only What I Manage' and '*Partial value okay'. Two buttons are present: 'Search for Reports' and 'Clear Search Criteria'. A callout box on the right states: 'FY22 Reports are located here' and '2002-2021 Reports can be found under the Archived Reports tab'. Below the search form is a 'Report List' table with columns: View, File Type, Location, Value, Description, Rpt Type, Rpt Dt, FY, and Period. The table contains six rows of report data.

View	File Type	Location	Value	Description	Rpt Type	Rpt Dt	FY	Period
<input type="checkbox"/> View	.xls	/VPFINANCEADMIN/CONTROLLER/5002000	5002000	Controllers Office	DSOA	05/13/22	2022	11
<input type="checkbox"/> View	.pdf	/VPFINANCEADMIN/CONTROLLER/5002000	5002000	Controllers Office	DSOA	05/13/22	2022	11
<input type="checkbox"/> View	.xls	/VPFINANCEADMIN/CONTROLLER/5002000	5002000	Controllers Office	TrnDtl MTD	05/13/22	2022	11
<input type="checkbox"/> View	.xls	/VPFINANCEADMIN/CONTROLLER/5002000	5002000	Controllers Office	TrnDtl MTD	05/13/22	2022	10
<input type="checkbox"/> View	.xls	/VPFINANCEADMIN/CONTROLLER/5002000	5002000	Controllers Office	TrnDtl YTD	05/13/22	2022	11
<input type="checkbox"/> View	.pdf	/VPFINANCEADMIN/CONTROLLER/5002000	5002000	Controllers Office	TrnDtl YTD	05/13/22	2022	11

You will see multiple **reports**.

The first two reports are usually the summary reports (SOA's) which offer a snapshot of all spending for the current Fiscal Year (2022). The pdf version is already formatted to print. Sometimes the first report is the miscellaneous report.

Open this report (either a DSOA or a PSOA) depending whether you entered a Project # (PSOA) or Department # (DSOA) by checking the box and selecting "View."

You can also access transaction detail reports (month-to-date or year-to-date). The pdf version of the YTD (year-to-date) transaction detail report is already formatted to print.

If you enter no dept or project numbers, you can usually see the overall summary report for your entire office / department as a whole, with everything on one page. This is the DPSM report (not shown here).

To see financial reports from past fiscal years, please select the "Archived Reports" tab at the top. Please note, you must be logged into VPN in order to view past years' reports.

For any technical issues viewing this report, please contact:

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For any budget questions related to this report, please contact:

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