

First, log into [PeopleSoft Finance](#). 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 this Fiscal Year (2024).

Then 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 are two input fields: 'Fiscal Year' with '2024' entered and 'Accounting Period' which is empty. To the right of these fields is a yellow box with the text: 'FY23 & FY24 Reports are located here. 2002-2022 Reports can be found under the Archived Reports tab.' Below the input fields, there is a 'Report Type' dropdown menu, an 'Include Only What I Manage' checkbox, and a 'Location\*' search field. Below these are 'Department\*' and 'Project/Grant\*' search fields, both containing '5002000'. At the bottom of the search section are two buttons: 'Search for Reports' and 'Clear Search Criteria'. Below the search section, there is a heading 'Step 2: Click View to view an individual report'. Below this heading is a 'Report List' table with columns: View, File Type, Location, Value, Description, Rpt Type, Rpt Dt, FY, and Period. The table contains five rows of report data.

View	File Type	Location	Value	Description	Rpt Type	Rpt Dt	FY	Period
<input type="checkbox"/> View	.pdf	/VPFINANCEADMIN/CONTROLLER/5002000	5002000	Controllers Office	DSOA	07/07/23	2024	1
<input type="checkbox"/> View	.xls	/VPFINANCEADMIN/CONTROLLER/5002000	5002000	Controllers Office	DSOA	07/07/23	2024	1
<input type="checkbox"/> View	.xls	/VPFINANCEADMIN/CONTROLLER/5002000	5002000	Controllers Office	TrnDtl MTD	07/06/23	2024	1
<input type="checkbox"/> View	.pdf	/VPFINANCEADMIN/CONTROLLER/5002000	5002000	Controllers Office	TrnDtl YTD	07/06/23	2024	1
<input type="checkbox"/> View	.xls	/VPFINANCEADMIN/CONTROLLER/5002000	5002000	Controllers Office	TrnDtl YTD	07/06/23	2024	1

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 (2024). 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 the next month or two you will still be able to see FY23 reports on this first sheet (not archived yet).

For any technical issues viewing these reports, please contact:

Lisa Gazaille ([lgazail@williams.edu](mailto:lgazail@williams.edu))      Karen Jolin ([kjolin@williams.edu](mailto:kjolin@williams.edu))

For any budget questions related to these reports, please contact:

Kristan Renish ([krenish@williams.edu](mailto:krenish@williams.edu))      Jaime Campbell ([jrc8@williams.edu](mailto:jrc8@williams.edu))