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.

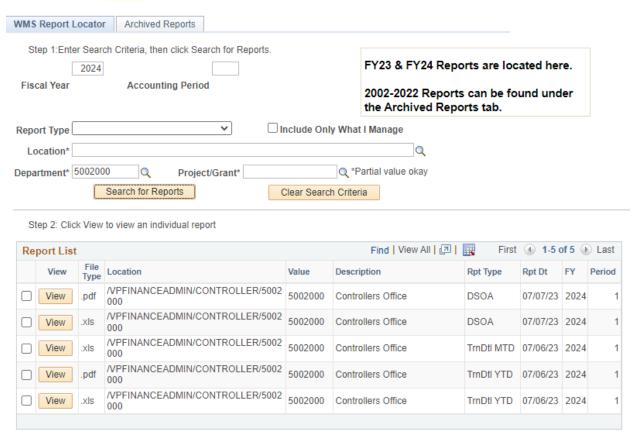
Please contact <u>Client Services</u> if you need assistance with our new login process.

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) <u>or</u> department number (7 digits) and click on <u>Search for</u> Reports.



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 (Igazaill@williams.edu)

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

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