



Financials and Supply Change Management Image 39 Overview

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Introduction

The Image/Upgrade Overview Document is intended to provide ctclink users with a summary of the changes that will be made in the system as a result of the upcoming image or PeopleTools upgrade implementation. Oracle releases multiple PeopleSoft updates, called images, for each pillar every year. Each Image contains bug fixes and features that are important for PeopleSoft to work well. PeopleTools upgrades update the underlying framework of the system. There are minimal changes that are noticeable to the end users. Below is a brief overview of the changes that you can expect to see as part of this upgrade.

Travel and Expenses

T&E - Delegations

The Travel and Expenses Delegations feature was released with DG4 in February. Following are some screenshots and information regarding this new functionality. The old way to Delegate work required a Security Administrator to Reassign work in the Employees Distributed User Profile. This task was time consuming and there was no acknowledgement created by the Proxy (Delegate). The new Delegations functionality is accessed from the Employee Self Service Fluid Tile at Fluid Pages > Employee Self Service > Delegations. Here are some key features of this new functionality: Self-sufficient, Quick, Proxy acknowledgement, Options for proxy to decline, Options for requester to revoke, Delegation administrator.

Navigation

Fluid Pages > Employee Self Service > Delegations

Image (Before): People Tools > Security > Distributed User Profile > User Profile – Workflow Tab

General ID Roles **Workflow** Audit Links User ID Queries

User ID []
Description []

Workflow Attributes

Alternate User ID []
From Date []
To Date []
Supervising User ID []

Routing Preferences

- Worklist User
- Email User

Reassign Work

Reassign Work To []

Total Pending Worklist Entries: 0

Image (After): Fluid Pages > Employee Self Service > Delegations

Delegations

- Create Delegation Request
- My Delegates
- My Delegated Authorities

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[All T&E Delegations QRG's](#)

General Ledger

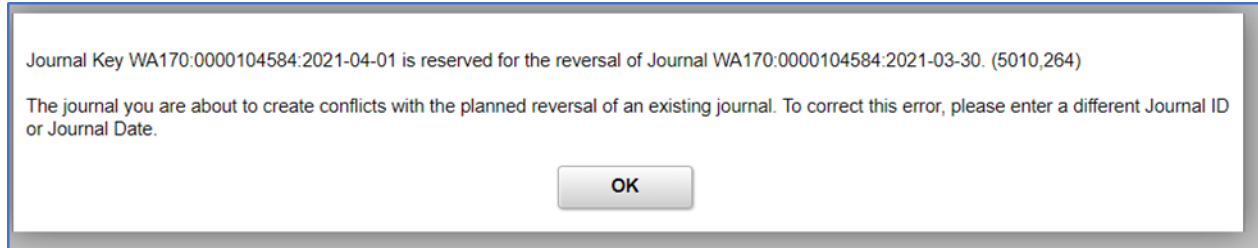
Reversal of Journal

There is an update to the General Ledger when processing a journal with a reversal. If the document number on a reversal is used again it will display an error message.

Navigation

Main Menu > General Ledger > Journals > Journal Entry > Create/Update Journal Entries

Image: Journal Error Message



QRG

[9.2 Creating and Posting a Manual Journal Entry](#)

[9.2 Creating and Reviewing a Journal Entry Reversal](#)

General Ledger

Mark Journal for Unposting

The General ledger has a wild card capability utilized when searching for a Journal to unpost. The wild card is the % symbol.

Navigation

Main Menu > General Ledger > Journals> Process Journals > Mark Journals for Unposting.

Image: Wild Card Search for a Journal Number

Mark Journals for Unposting

*Unit: WA1 | *Ledger Group: ACTUALS | *Year: 2021 | *Period: 5 | Source: | Journal Class: | Adjustment Periods

Journal ID: %10 | Journal Date From: 11/01/2020 | Journal Date To: 11/30/2020 | User ID: |

ChartField Search Criteria

Field Name	ChartField Value

Buttons: Search, Select All, Deselect All, Unpost Selected Journals

Select Journals to Unpost

Process	Journal ID	Journal Date	Approval Required?	Request Status	*Unpost Date	Lines	Description	User ID
<input type="checkbox"/>	00000987	11/30/2020	<input type="checkbox"/>	Mark to Unpost	11/30/2020	18	Transfer Brehm salary & benefi	101002114
<input type="checkbox"/>	ADD00984	11/02/2020	<input type="checkbox"/>	Mark to Unpost	11/02/2020	8	Asset Additions	101009381
<input type="checkbox"/>	ARDJ0971	11/12/2020	<input type="checkbox"/>	Mark to Unpost	11/12/2020	2	AR Direct Cash Journal	JOBS_FIN
<input type="checkbox"/>	TR000970	11/10/2020	<input type="checkbox"/>	Mark to Unpost	11/10/2020	6	Treasury Journals	JOBS_FIN

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[9.2 Unposting Journals](#)

Asset Management

Search for an Asset

Navigation

Main Menu > Asset Management > Search for an Asset

Image: ARO Field Removed

Image 39 removed the field "ARO" from view since it is not being used.

Search for an Asset

Search for an Asset

Asset Search Criteria

Unit <input type="text"/>	Book <input type="text"/>	Parent ID <input type="text"/>
Category <input type="text"/>	Location <input type="text"/>	Area ID <input type="text"/>
Asset ID <input type="text"/>	Asset Status <input type="text" value="In Service"/>	Group ID <input type="text"/>
Tag Number <input type="text"/>	Profile ID <input type="text"/>	ARO <input type="text"/>
Serial ID <input type="text"/>	Threshold ID <input type="text"/>	

Approval Pending

Additional Search Criteria Charfield Search Criteria

Acquisition Details

PO Unit <input type="text"/>	Receipt Unit <input type="text"/>	AP Unit <input type="text"/>	PC Bus Unit <input type="text"/>
PO No <input type="text"/>	Receipt No <input type="text"/>	Voucher <input type="text"/>	Project ID <input type="text"/>

Retrieve ?

Cost Information Acquisition Information Location Non Capital Asset Custodian Lease

Speed search by entering Unit.

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[9.2 Using the Asset Search Page](#)

Accessibility

Create Travel Authorization

Corrected the tab order for the create travel and authorization page when in accessibility mode.

Navigation

Navigator > Employee Self-Service > Travel and Expenses > Travel Authorizations > Create/Modify

Image (Before): Create Travel Authorization

Employee Self Service

Create Travel Authorization Save for Later Summary and Submit

[Redacted Name]

Quick Start Populate From

Business Purpose

Description

Projected Expenses

Default Location

Date From Date To Reference

Expand All Collapse All Add Quick-Fill
Totals (0 Lines) 0.00 USD

Date Expense Type Description Payment Type Amount Currency
 0.00 USD

Expand All Collapse All
Totals (0 Lines) 0.00 USD

Image (After): Create Travel Authorization

Employee Self Service

Create Travel Authorization Save for Later Summary and Submit

[Redacted Name]

Quick Start Populate From

Business Purpose

Description Default Location

Date From Date To Reference

Projected Expenses

Expand All Collapse All Add Quick-Fill
Totals (0 Lines) 0.00 USD

Date Expense Type Description Payment Type Amount Currency
 0.00 USD

Expand All Collapse All
Totals (0 Lines) 0.00 USD

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[9.2 Creating Travel Authorizations](#)



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Washington State Board for Community and Technical Colleges