PEOPLESOFT FAQ – FINANCIAL SERVICES

GENERAL

Q: Why can't I log into PeopleSoft HR and Financials at the same time?

You can log into both instances of PeopleSoft at the same time by using two different browsers (i.e., Microsoft Edge for one and Mozilla Firefox for the other).

Q: Why can't I access PeopleSoft Financials while I am working remotely?

If not connected to a university server, then you will need to connect to VPN or Global Protect to access Peoplesoft. IT can assist you with getting one of these products on your computer.

Q: Do I have to go to Compass.ou.edu to access PeopleSoft Financials?

To navigate directly to the PeopleSoft Financials landing page use ***fs.ou.edu***. We recommend "bookmarking" this URL in your favorite browser as an added time saver.

Note: The only time users must use the Compass.ou.edu web address is if they are a "Shopper" creating a cart for the OU Marketplace. This is not to be confused with a "Requestor" in the OU Marketplace, who will use the fs.ou.edu for completing the order.

Q: What is the best way to communicate with Financial Services when I have questions? And how do I know which team can answer my questions?

Our preferred and most responsive method of communication is shared inbox emails. We have several shared inboxes and dedicated staff resources monitoring these boxes daily. We are working to provide responses on a 1-2 business day lag and have equipped our staff to answer all questions relevant to each area.

Please first navigate to our website (*https://www.ou.edu/financialservices/contacts****) for a list of contacts and what types of questions each group can answer. This will ensure you receive the correct answer in the most timely manner.***

QUERIES & REPORTING

Q: Who is the point of contact for new query requests and/or requests to change existing queries.

You can submit requests to the Financial Services Business Analysts – Scott Stuart and Melissa Borchardt. Please note, these requests are currently being prioritized and scrutinized by their ability to be used across multiple users on both campuses. Unfortunately, given our current staffing constraints we can't complete all requests at this time.

Q: What is the best query to see a list of all POs that have been entered in FY21?

OU_PO_DATA – lists all POs, their associated Req#, and each CFS line from the PO.

Q: Where can I locate a list of frequently used queries and what does when I run it?

The "Frequently Used Queries" Job Aid can be found here: https://financialservices.ouhsc.edu/Training#594463508-compass-training-manuals. Job Aids are listed in alphabetical order. If you haven't "bookmarked" this link in your favorite browser, another time saving tip. Be sure to check back to this website periodically for the most current and helpful resources.

OU Job Aid - **Frequently Used Queries**

Q: Are there plans to develop or bring back a report like the Commitment vs. Budget report from old PeopleSoft?

Not currently but we do get this question often and we are keeping track of the "wish list" items of campus. When time allows after getting the major system upgrades implemented, we will revisit our campus list of requests.

ACCTS PAYABLE/PCARD

Q: When receiving more than one item on a PO, is there a way to attach several documents?

Note that while you can add multiple attachments, you should still only add one invoice per receipt. In the "Receipt Header Comments" section, add your first attachment and click Attach.
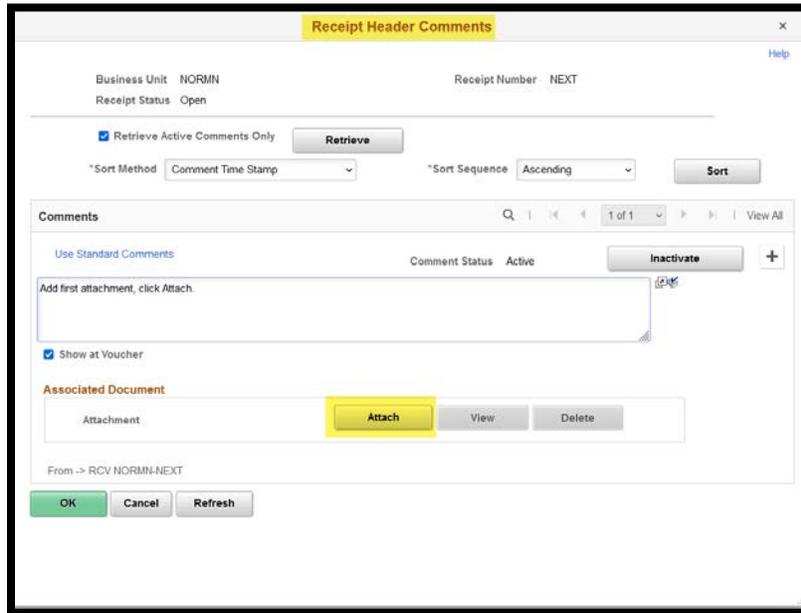

Then, click the plus sign (+) on the right-hand side of the screen to add more attachments.
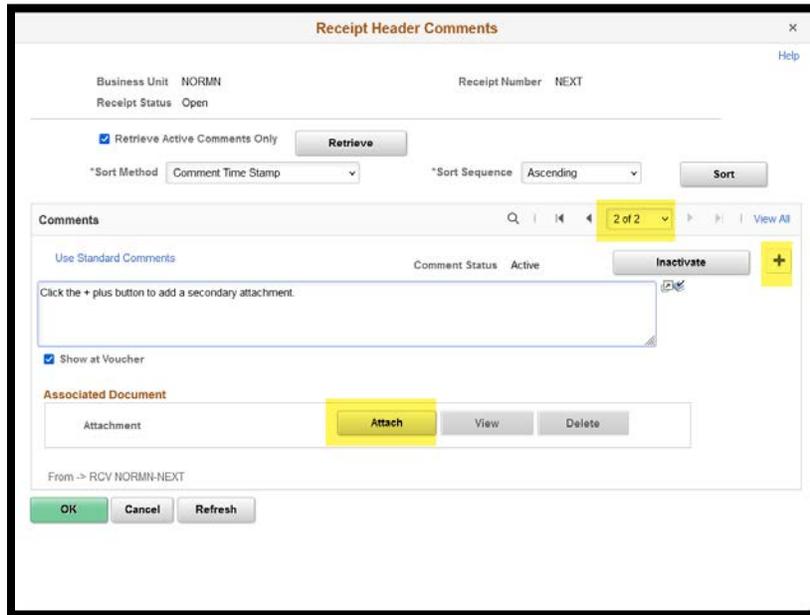
Q: Other than running an activity query, what is the best way to determine if an item received on a PO has been paid?

From the Manage Requisitions screen, click the down arrow on the left-hand side next to the requisition you want to check. This will expand the lifespan of the requisition to see additional activity. If the Invoice icon is highlighted, then there is a voucher associated with the requisition.
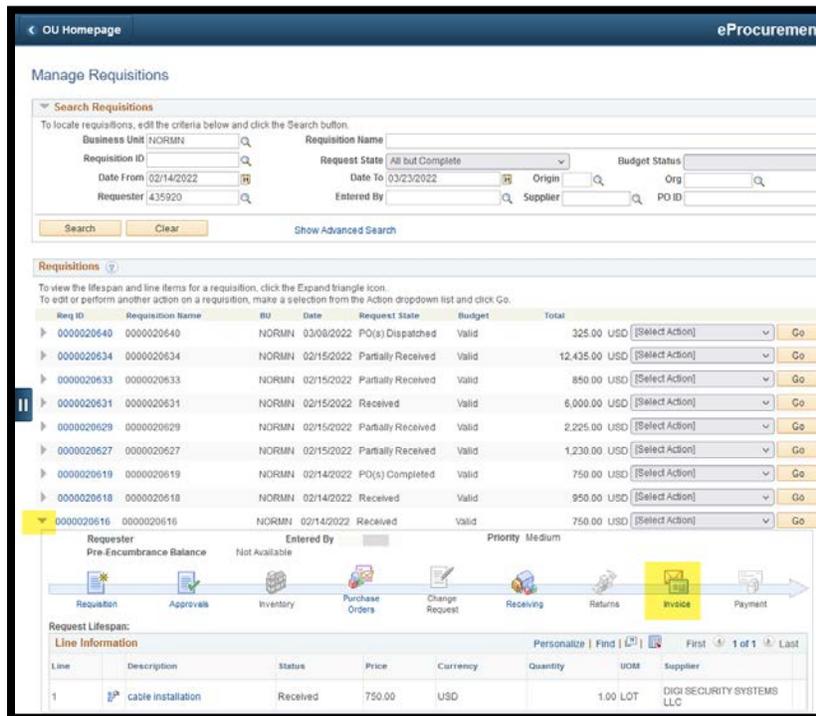
Click on the highlighted invoice icon and PeopleSoft will display the voucher numbers for any voucher paid against that PO. Note that a PO may have several vouchers to review. Click the View All hyperlink on the right-hand side of the screen to see all vouchers paid against the PO.
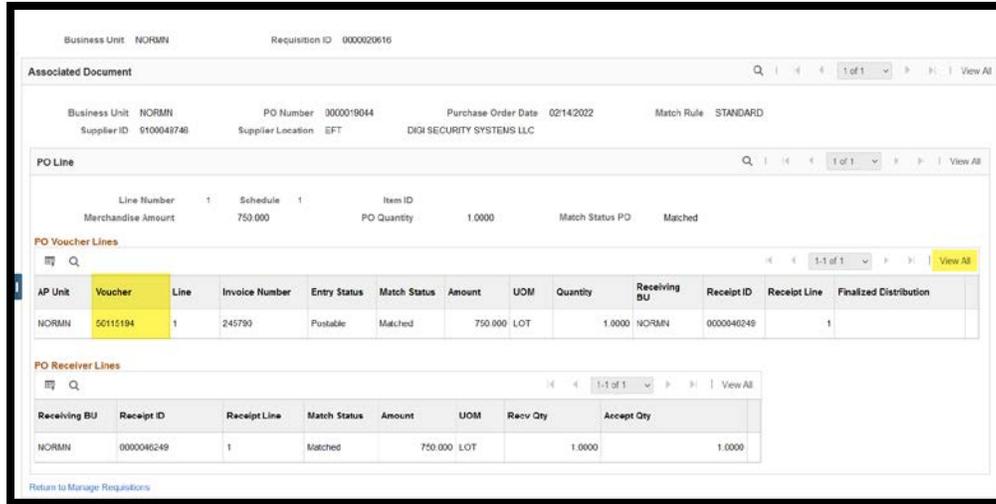
Q: Is there a way to delete attachments in the Pcard module?

Only Pcard Admin can delete attachments. Please attach the correct document In PeopleSoft (in addition to the wrong one) and email the applicable Pcard office with the TXN number and name of attachment that needs to be deleted.

SUPPLIERS

Q: Is there a way to receive an automatic notification when new Suppliers are "ready" in the system?

Unfortunately, not currently. This is a manual process, and we currently don't have the staff to accommodate. We recently added functionality to the Supplier screen so that you can more easily and clearly see the status of a Supplier.

From the home screen, select the Accounts Payable tile and then the "Supplier" tab on the left-hand side bar. You can use the filtering criteria to search for a supplier's name (try using key words here and changing the filter from "begins with" to "contains," if you are too specific you might not return the values you are looking for). Then from the list you can select the vendor you were searching and see the following.
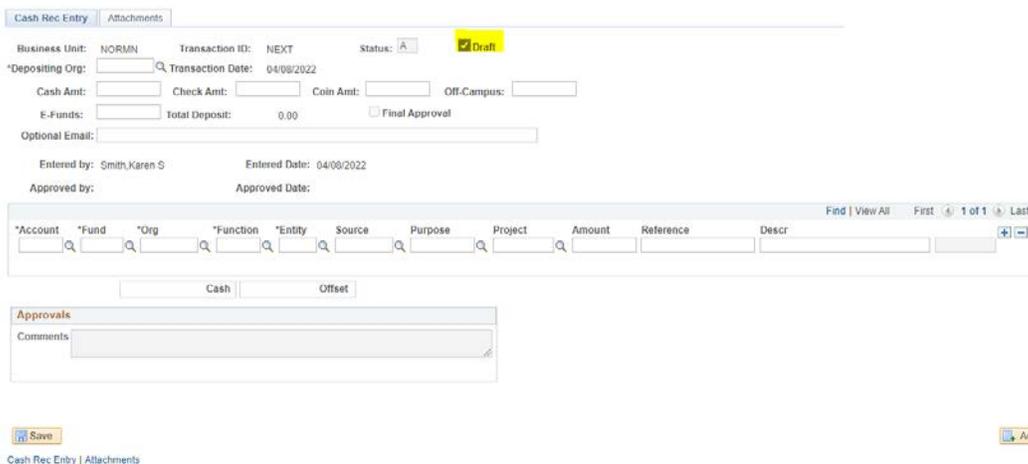
GENERAL ACCOUNTING

Q: Can we see a demonstration for a cost transfer?

We currently have a video demonstration of cost transfers posted: https://www.ou.edu/financialservices/training. Additionally, we are working to update current job aids and add other guides to assist with the more difficult rules associated with entering cost transfers. Continue to check this location for the most current resources available: https://financialservices.ouhsc.edu/Training#594463508-compass-training-manuals

CASH RECEIPTS

Q: When entering a cash receipt in draft mode, is it possible to have the screen save or prompt you to save before it times out?

When Peoplesoft "times-out" it will only retain the data in the system up to the time of the last save. Delivered Peoplesoft functionality does not include prompts to save prior to timing out. When you begin your cash receipt, it is recommended that you check the DRAFT button and immediately save the cash receipt so that the cash receipt will remain saved in the system. Then as you enter data, especially if you are prone to frequent interruptions, it is recommended that you save frequently to help ensure your data is retained if you step away and the system times out. Further information can be found in Step #8 of the "Cash Receipts" Job Aid located at: https://financialservices.ouhsc.edu/Training#594463508-compass-training-manuals