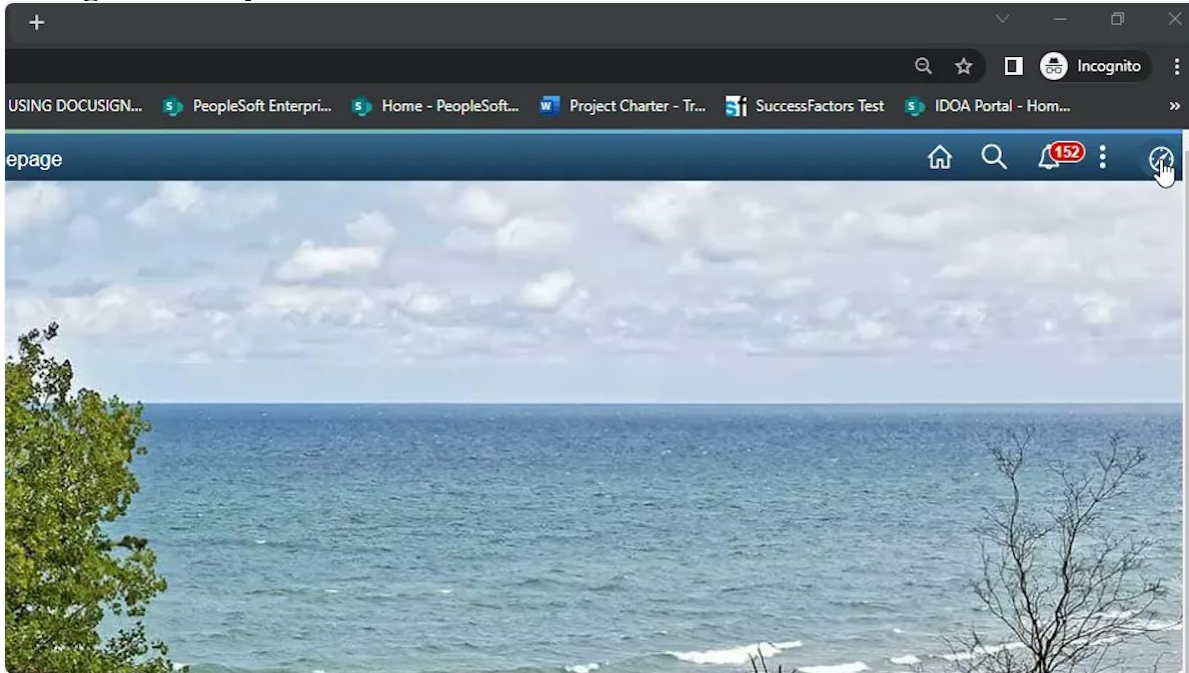


How to Submit Workflow Role Assignment Changes worksheet

This process is intended for Business Units (BUs) that have already been configured in PeopleSoft Travel & Expenses.

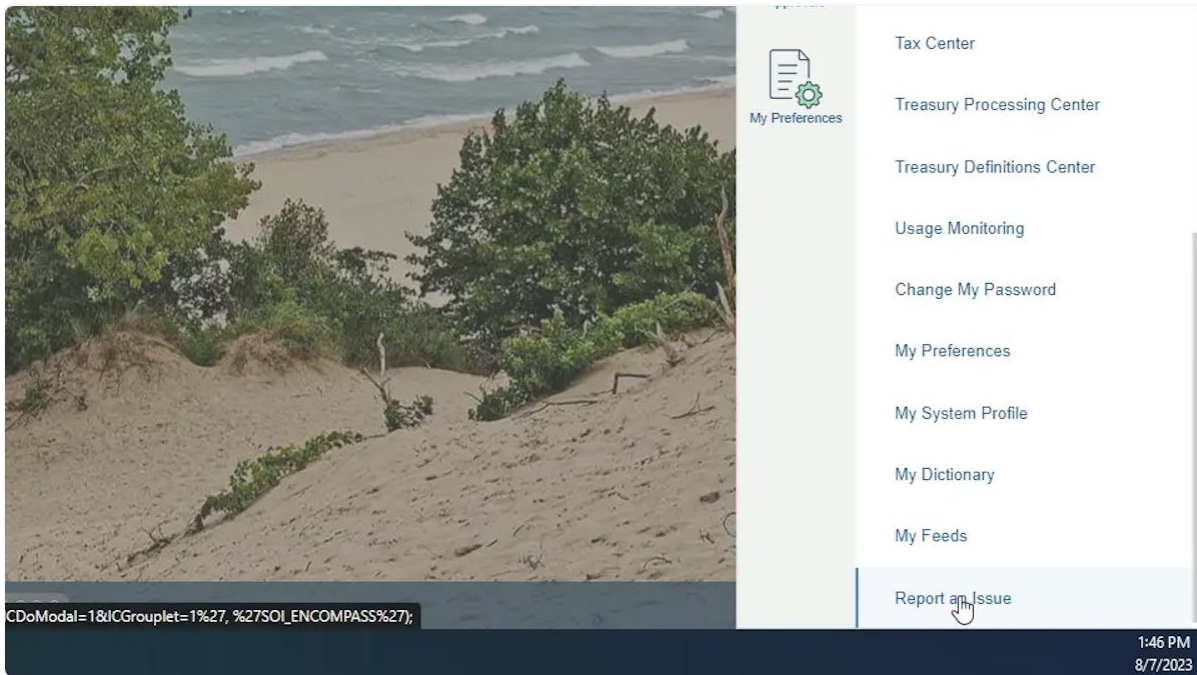
1. Log in to PeopleSoft Financials. Click on the NavBar icon.



2. Click on the Navigator icon.



3. Click on Report an Issue



The screenshot displays a web application interface. On the left, there is a background image of a sandy dune with green trees and a beach in the distance. Overlaid on the right side is a vertical navigation menu. The menu items, from top to bottom, are: Tax Center, Treasury Processing Center, Treasury Definitions Center, Usage Monitoring, Change My Password, My Preferences, My System Profile, My Dictionary, My Feeds, and Report an Issue. The 'Report an Issue' item is highlighted with a blue bar and a mouse cursor is pointing at it. At the top of the menu, there is a gear icon and the text 'My Preferences'. At the bottom of the screen, there is a dark blue footer containing the text 'CDModal=1&ICGrouplet=1%27, %27SOLENCOMPASS%27);' on the left and '1:46 PM 8/7/2023' on the right.

CDModal=1&ICGrouplet=1%27, %27SOLENCOMPASS%27);

1:46 PM
8/7/2023

4. On the Report an Issue screen:

-Select Travel from the Module drop down menu

-In the Briefly Describe Reason for the Ticket field, enter '***Please assign to GMIS Travel*** BU (Your 5 digit BU) Workflow Changes'

-In the Describe your problem in more detail field, enter your request for workflow changes.

Report An Issue

Instructions

We will automatically send you a copy of the issue you submit. To copy additional people on this issue, a valid email address must be entered below. Please separate multiple email addresses with a semicolon (;).

Your Name or Company Name

Your eMail address

Your User ID or Bidder ID

CC

Subject Date Requested Tuesday

Importance Date Required Thursday

Phone Ext

Business Unit Administration

Voucher ID, Journal ID, PO ID, Req ID, etc.

Document ID

Application FINANCIALS Module ←

*Briefly describe reason for ticket
 ←

(Example - Purchase Order did not liquidate)

*Describe your problem in more detail
 ←

Attach file containing screen shots and details of the issue:

5. Click the 'paperclip' icon.

Report An Issue

Report An Issue

Instructions
We will automatically send you a copy of the issue you submit. To copy additional people on this issue, a valid email address must be entered below. Please separate multiple email addresses with a semicolon(;).

Your Name or Company Name

Your eMail address

Your User ID or Bidder ID

CC

Subject Date Requested Tuesday

Importance Date Required Thursday

Phone Ext

Business Unit Administration


Voucher ID, Journal ID, PO ID, Req ID, etc.
Document ID

Application FINANCIALS Module

*Briefly describe reason for ticket

(Example - Purchase Order did not liquidate)

*Describe your problem in more detail

Attach file containing screen shots and details of the issue:
  ←

6. Click Choose File

Date Requested Tuesday

Date Required Thursday

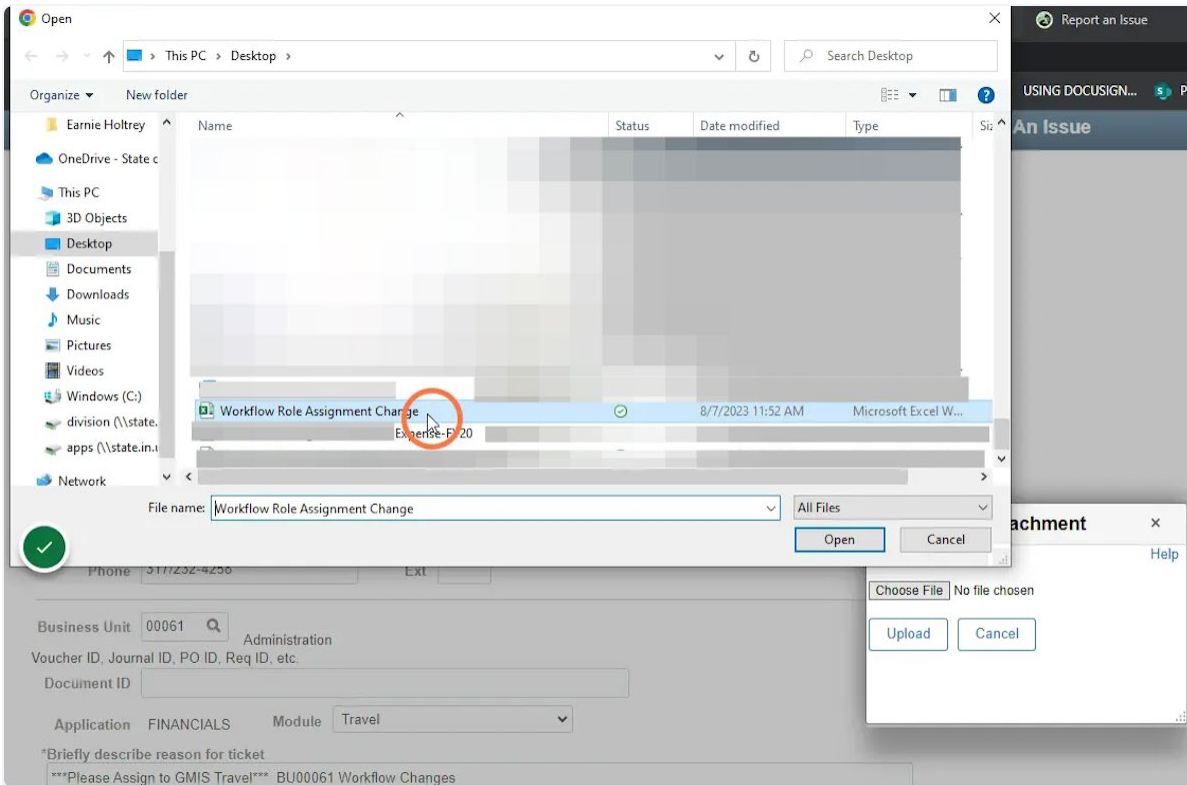
Ext

hanges

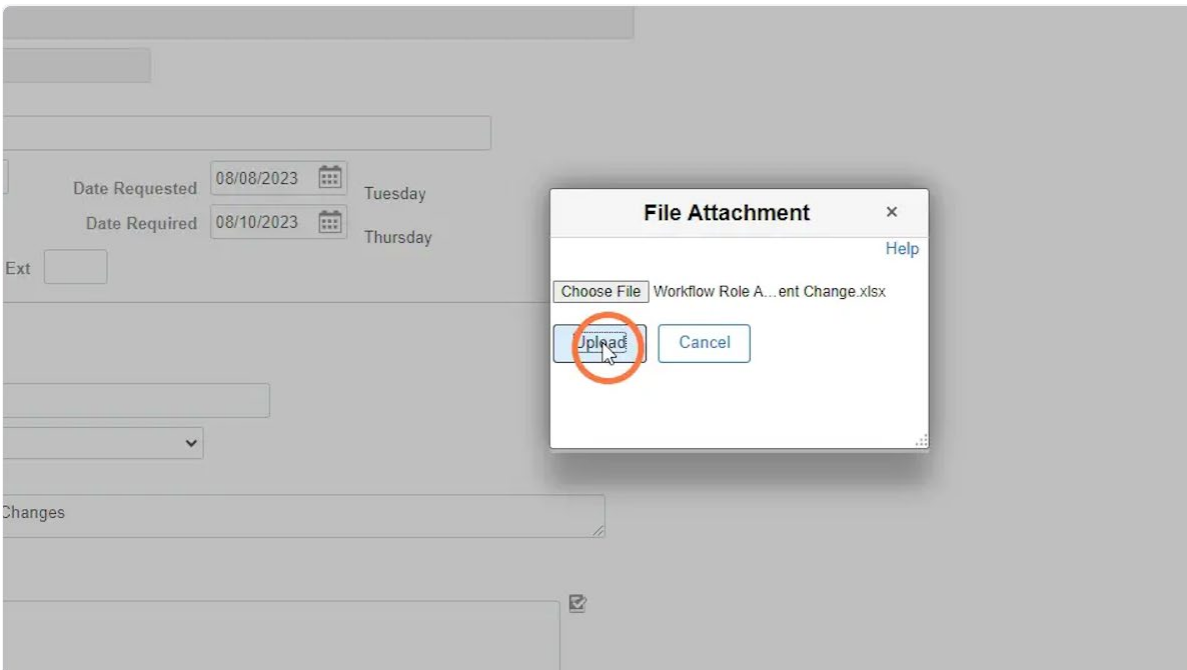
File Attachment x

Choose File No file chosen

7. Click on the worksheet you want to upload and click Open



8. Click Upload



9. Click Submit

Business Unit Administration

Voucher ID, Journal ID, PO ID, Req ID, etc.

Document ID

Application FINANCIALS Module

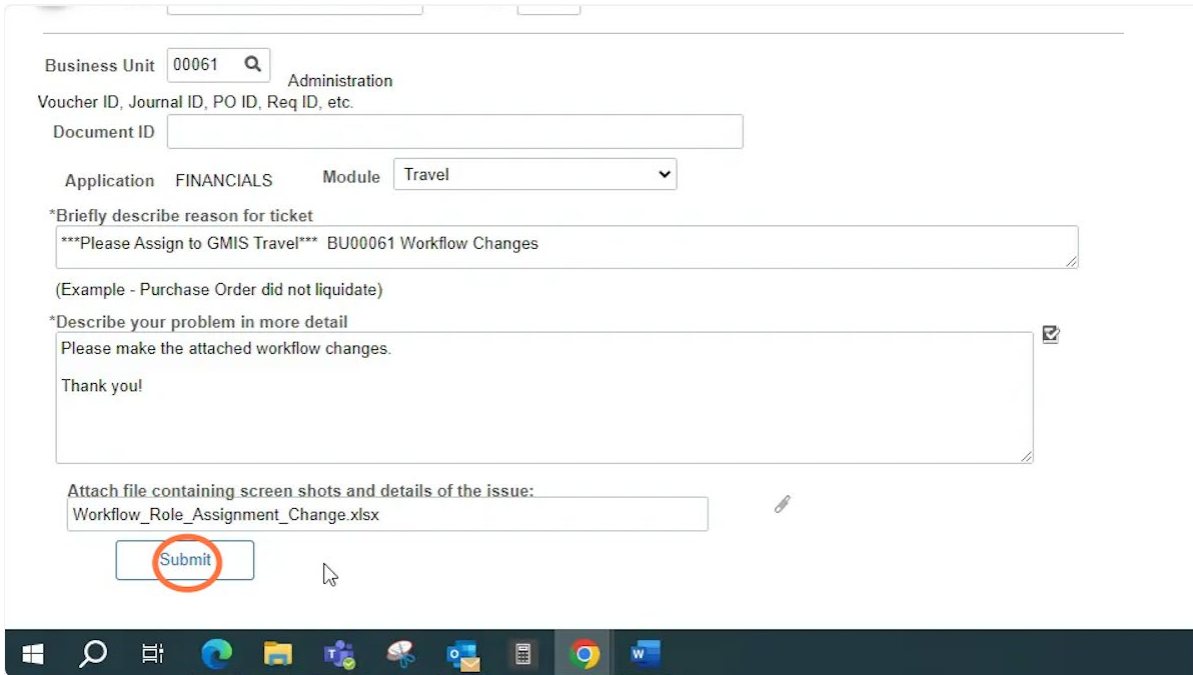
*Briefly describe reason for ticket

(Example - Purchase Order did not liquidate)

*Describe your problem in more detail

Thank you!

Attach file containing screen shots and details of the issue:

A screenshot of a web-based form interface. The form contains several input fields and a submit button. The 'Business Unit' field is filled with '00061'. The 'Module' dropdown menu is set to 'Travel'. The 'Briefly describe reason for ticket' field contains the text '***Please Assign to GMS Travel*** BU00061 Workflow Changes'. The 'Describe your problem in more detail' field contains 'Please make the attached workflow changes.' and 'Thank you!'. An attached file named 'Workflow_Role_Assignment_Change.xlsx' is listed. The 'Submit' button is highlighted with a red circle. The Windows taskbar is visible at the bottom of the screen.