



Financial Services- Comptroller

Accessing PeopleSoft 9.2

(Approvals, iShopUTRGV and My Wallet Functionality)

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Purpose

This document will provide UTRGV employees with a way to navigate and access Approvals, iShop and My Wallet functionality. We will be using 3 Landing Pages:

- Employee Self-Service
- Procurement Operations
- Travel and Expense

Scope

This will be applicable to all UTRGV faculty and staff who participate to any extent in the procurement of goods or services.

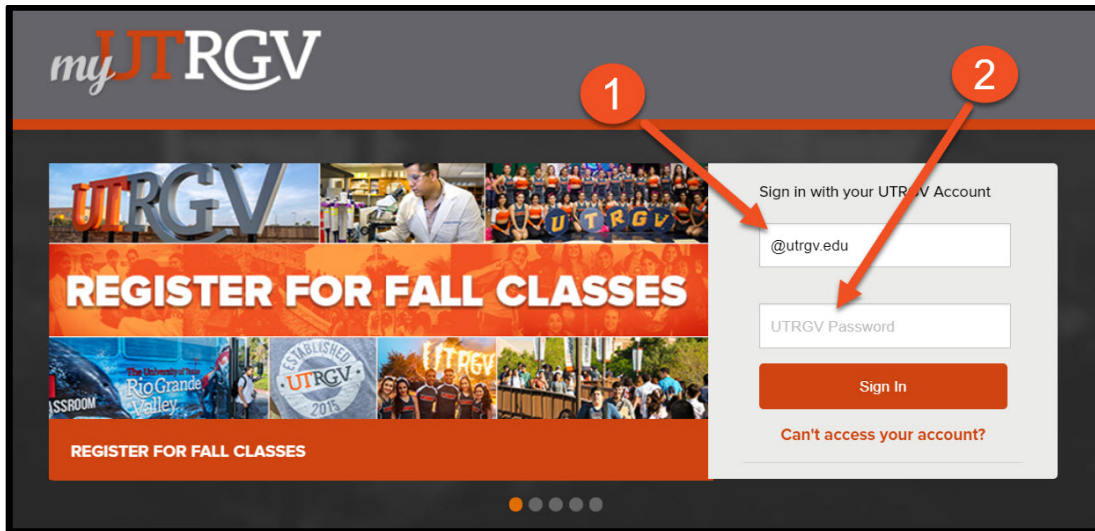
Systems & Applications

Windows 7 or higher, Internet Access, Internet Browser.

Procedure

Navigating to PeopleSoft

1. Navigate to the [MyUTRGV Homepage \(opens in a new window\)](https://my.utrgv.edu/home) and enter your credentials and click the Sign In button. **(Direct Link):** <https://my.utrgv.edu/home>



2. Click on the **PeopleSoft** icon.



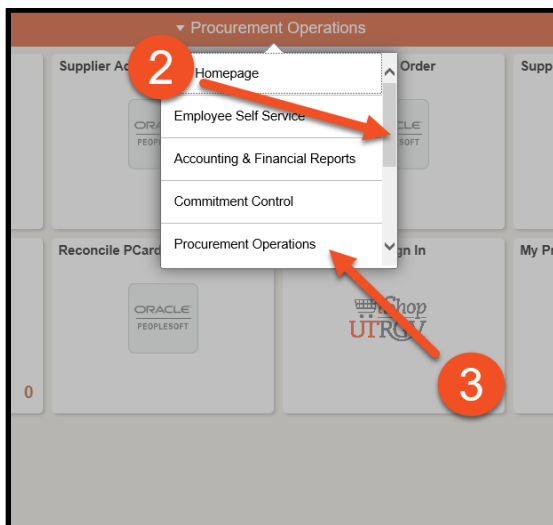
- 3.

4. After landing on the **PeopleSoft Employee Self Service** page, click on the downward arrow beside the words **Employee Self Service** to open the **drop-down menu**.
 - **NOTE:** The **Employee Self Service** landing page similar to below will display. Landing pages are the starting point for navigation. To access landing pages, you will use the Landing Page dropdown. You can also choose to access this page by clicking **Employee Self Service** from the dropdown menu.

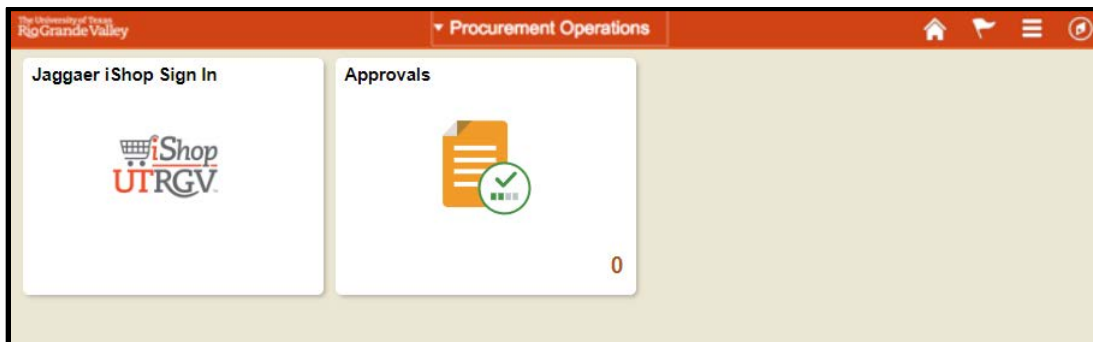


5.
 - **NOTE:** The Employee Self Service Landing page is where you would access the **Approval** Tile that will list your approvals for all functions within the PeopleSoft System. It also has the **Expenses** Tile, which accesses personal Travel Items such as your Expense Reports and My Wallet transactions.

6. After clicking on the drop-down menu, Scroll down on the drop-down menu and Click **Procurement Operations**.



7. Select the **Procurement Operations** menu item from the dropdown. The Procurement Operations landing page has a tile to access iShop and also a tile to access your Approvals specific to procurement related items.



8. Select the **Travel & Expense** menu item dropdown.



9. You will use this Landing Page to access Travel & Expense related items. These items include:
 - Creating an Expense Report
 - Viewing My Wallet transactions
 - Access the Travel & Expense Center which houses key areas to manage expense transactions, profiles and preferences, and other expense functions.
 - Access Approvals for Travel & Expense related items. There are 2 separate tiles for Travel and Expense items. They have different looks but achieve the same goal to approve transactions.
 - The **Approvals** Tile should be used when approving on any mobile device such as a phone or tablet.
 - The **Classic Approval** Tile should be used when approving via an office or home computer.