



PeopleSoft_Financials_Upg rade_to_PUM51_Delta

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Training Guide
PeopleSoft_Financials_Upgrade_to_PUM51_Delta

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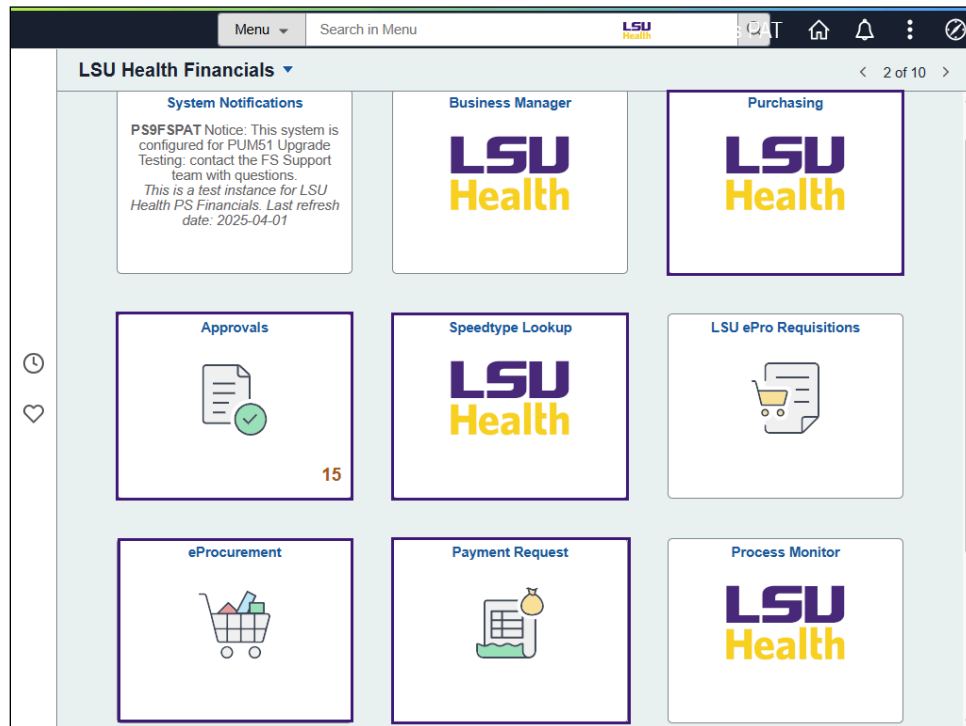
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Overall Look and Feel Changes for PUM 51

Procedure

In this topic you will learn about the **Overall Look and Feel Changes for PUM 51**.

Step	Action
1.	<i>NOTE: This topic was completed using the PS9FSPAT database for training purposes only. Normally, these actions will be performed by users in the PS9FSPRD (Production) database.</i>
2.	<i>The purpose of this document is to share differences in the look and feel of the PeopleSoft Financials application with the upgrade.</i>



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Step	Action
3.	LSU Health Financials Home Updates Several <i>tiles</i> are <i>added</i> to the LSU Health Financials homepage for your use as desired. We've included an <i>Approvals Tile</i>, <i>Payment Request Tile</i>, <i>Speedtype Lookup</i>, <i>eProcurement</i>, <i>Purchasing</i>, and will include <i>Expenses</i> when we <i>go-live</i> with that module.

The screenshot displays the 'Requisitions' page in the LSU Health Financials system. The left-hand navigation pane includes options like 'My Worklist - Summary View', 'Process Monitor', and 'Requisitions'. Under 'Requisitions', 'Add/Update Requisitions' is the active selection. The main workspace features a title bar with 'Purchasing' and 'Financials PAT'. Below the title, there are three buttons: 'Find an Existing Value', 'Keyword Search', and 'Add a New Value'. The form contains two input fields: '*Business Unit' with the value 'LSUSH' and a search icon, and '*Requisition ID' with the value 'NEXT'. An 'Add' button is positioned below these fields. At the bottom of the form, the same three buttons from the top are repeated as links.

Step	Action
4.	Larger View <u>PAT Upgraded</u> Users will notice that the <i>screen display appears larger</i> in the upgraded environment. This is due to the use of the PeopleSoft <i>Fluid stylesheet</i> that allows <i>form factor adjustment</i> based on the <i>device used</i>.

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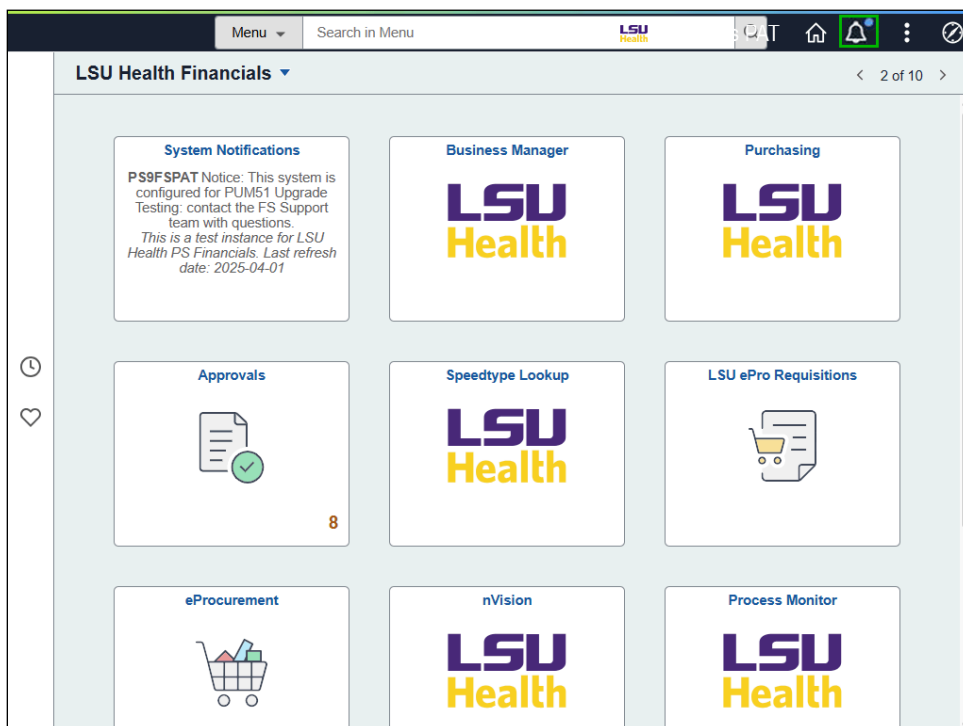
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The screenshot displays the 'Business Manager' interface for 'LSU Health Financials PRP'. The left-hand navigation pane shows a tree structure with 'Requisition' selected, and 'Add/Update Requisitions' highlighted in green. The main content area, titled 'Requisitions', features a search bar with 'Find an Existing Value', 'Keyword Search', and 'Add a New Value' tabs. Below the search bar, there are input fields for '*Business Unit' (containing 'LSUNO') and '*Requisition ID' (containing 'NEXT'), followed by an 'Add' button. At the bottom of the main area, the same search tabs are repeated.

Step	Action
5.	Larger View <u><i>PRP - Not Upgraded</i></u> The <i>buttons, tabs and fields</i> on the Add/Update Requisitions page are <i>substantially smaller</i> on the <u><i>PRP - Not Upgraded</i></u> page.

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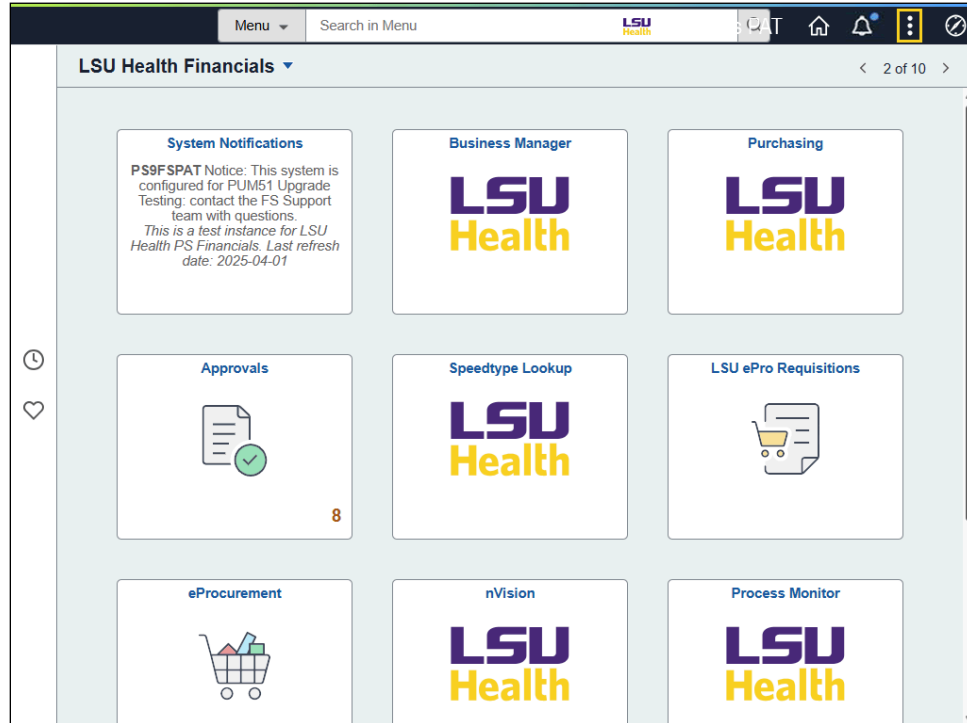
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Step	Action
6.	Notification Bell and the Notification Pane <u>PAT - Upgraded</u> Users will see the Notification Bell on all home and transactional pages. The blue dot indicates that notifications are available. However, if the user elects to turn on the Notification Pane, the Notification Bell will <u>not show</u> on the <u>homepages</u>. The Notification Bell displays at the <i>top right</i> of the page <i>between</i> the <i>Home</i> and <i>Actions icons</i>. From the Notification Bell, users can view tasks that require attention. *****WARNING***** <i>Users should <u>not</u> add pages to My Financials Home, Add to NavBar or Add to Favorites using navigations from the Business Manager tile. When adding a page from inside the Business Manager tile, users are adding the <u>entire</u> navigation collection rather than the <u>individual page</u>. Users will need to navigate through the NavBar to the desired page, and then add the page to My Financials Home, Add to NavBar or Add to Favorites.</i>

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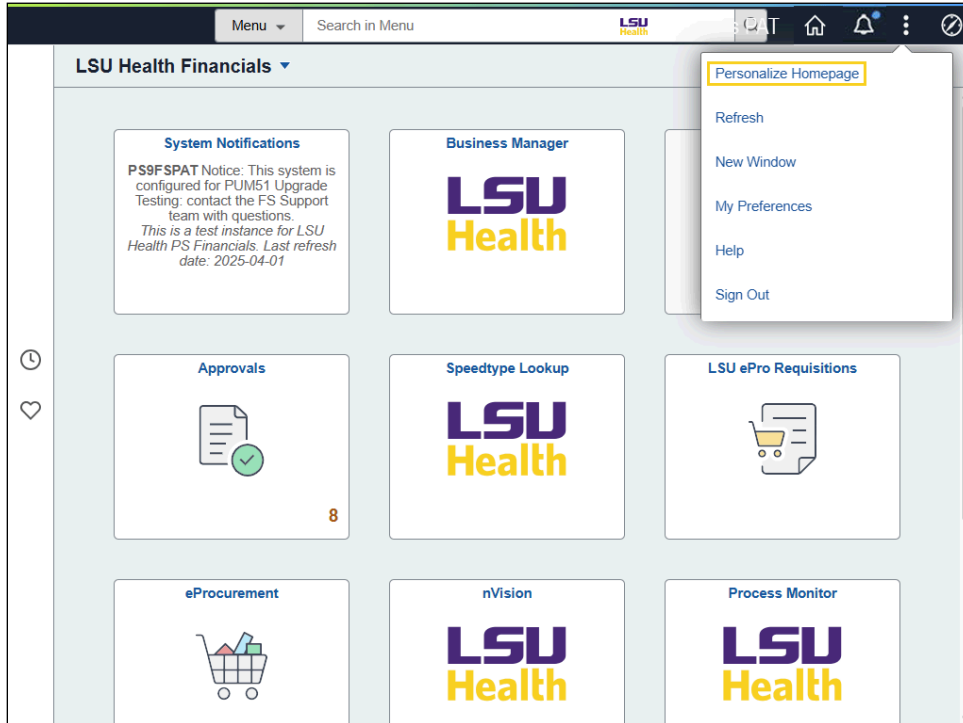
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Step	Action
7.	Notification Bell and the Notification Pane <u>PAT - Upgraded</u> When a <i>Home</i> such as My Financials Home or LSU Health Financials, the Notification Pane can be always turned on the display. This pane allows the user to view tasks that require attention directly from that home. And, for the <i>homepages</i>, the <i>pane replaces the Notification icon, the Bell</i>. However, when a user is navigating and on tractional pages in the system, the pane does <u>not</u> display, and the bell icon does. *****WARNING***** <i>Users should <u>not</u> add pages to My Financials Home, Add to NavBar or Add to Favorites using navigations from the Business Manager tile. When adding a page from inside the Business Manager tile, users are adding the <u>entire</u> navigation collection rather than the <u>individual page</u>. Users will need to navigate through the NavBar to the desired page, and then add the page to My Financials Home, Add to NavBar or Add to Favorites.</i> Click the Actions menu to turn on the Notification Pane. 

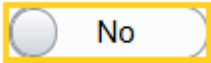
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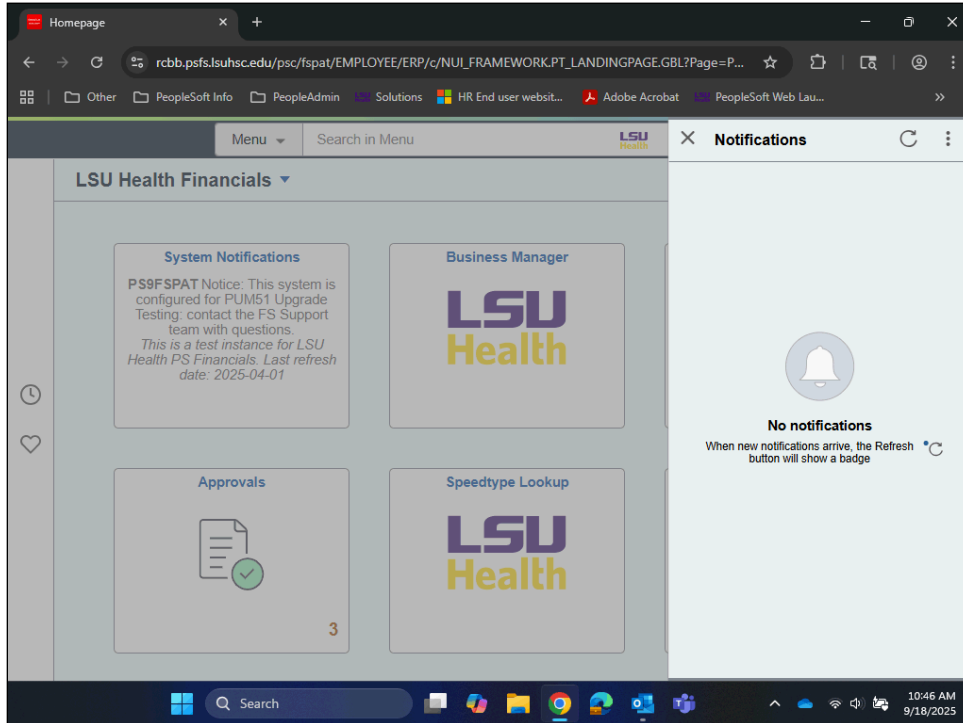
Step	Action
8.	Notification Bell and the Notification Pane <u>PAT - Upgraded</u> Click the Personalize Homepage list item. Personalize Homepage

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Step	Action
9.	Notification Bell and the Notification Pane <u>PAT - Upgraded</u> Click the Show Notifications Panel option. 
10.	Notification Bell and the Notification Pane <u>PAT - Upgraded</u> The user <u>must</u> Save to complete the process. Click the Save button. 

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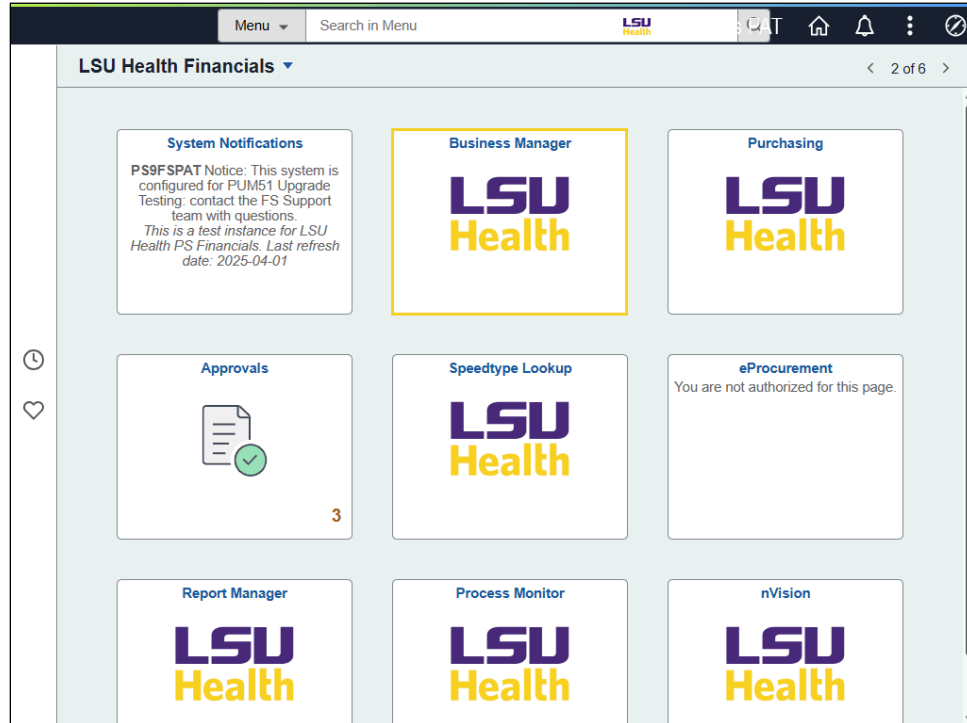
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Step	Action
11.	Notification Bell and the Notification Pane <u>PAT - Upgraded</u> Notice that the Notification Bell does <u>not</u> display when the Notification Pane is active.

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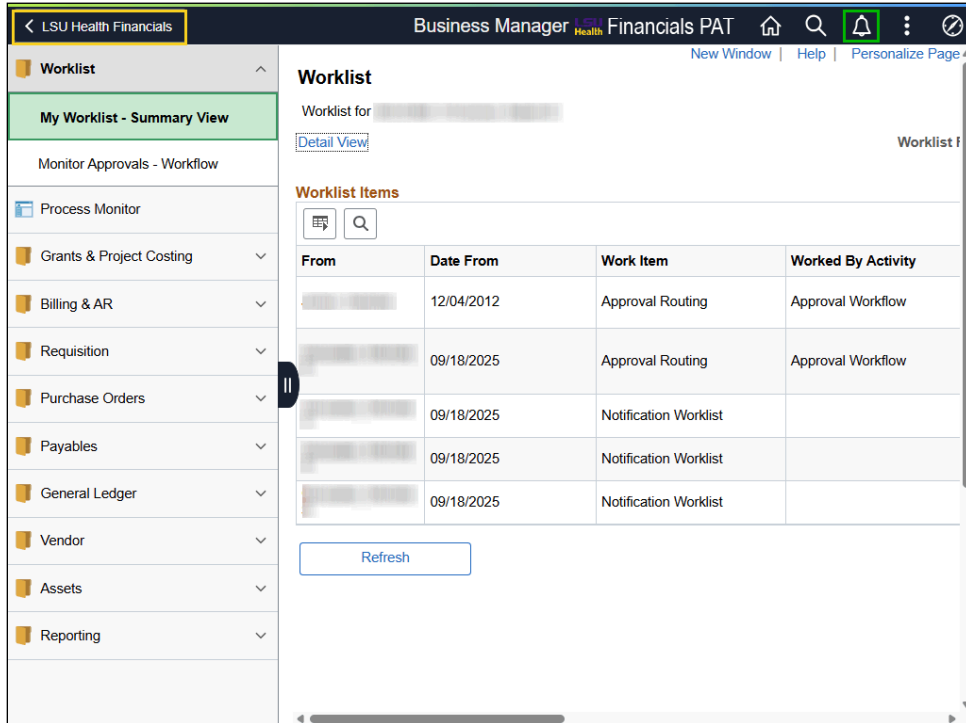
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Step	Action
12.	Notification Bell and the Notification Pane <u>PAT - Upgraded</u> Click the Business Manager button.

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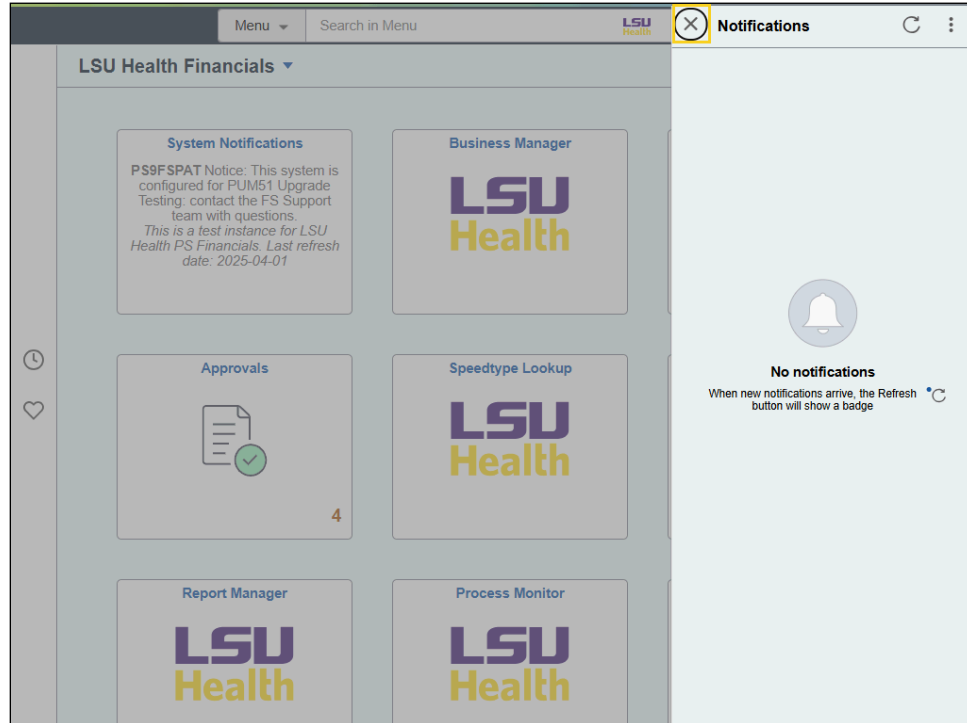
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Step	Action
13.	Notification Bell and the Notification Pane <u>PAT - Upgraded</u> <i>When users access transactional pages, the Notification Bell is displayed.</i> Click the LSU Health Financials button. < LSU Health Financials

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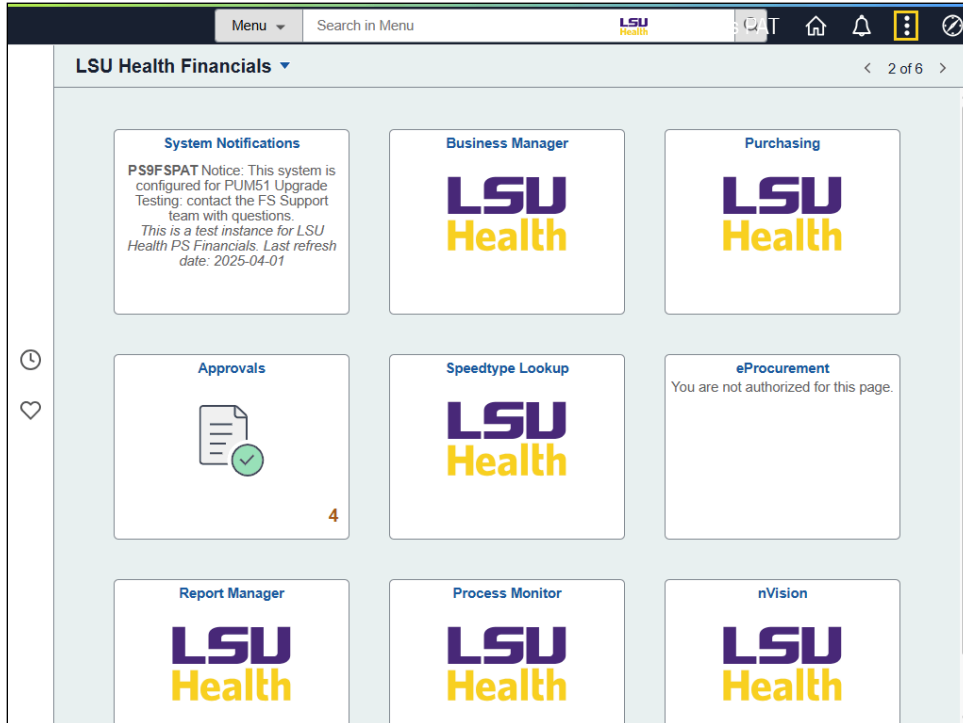
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Step	Action
14.	Notification Bell and the Notification Pane <u>PAT - Upgraded</u> Users may choose to <i>hide</i> the <i>Notification Pane</i> from displaying on their My Financials Home and LSU Health Financials. Click the Close Notifications button. 

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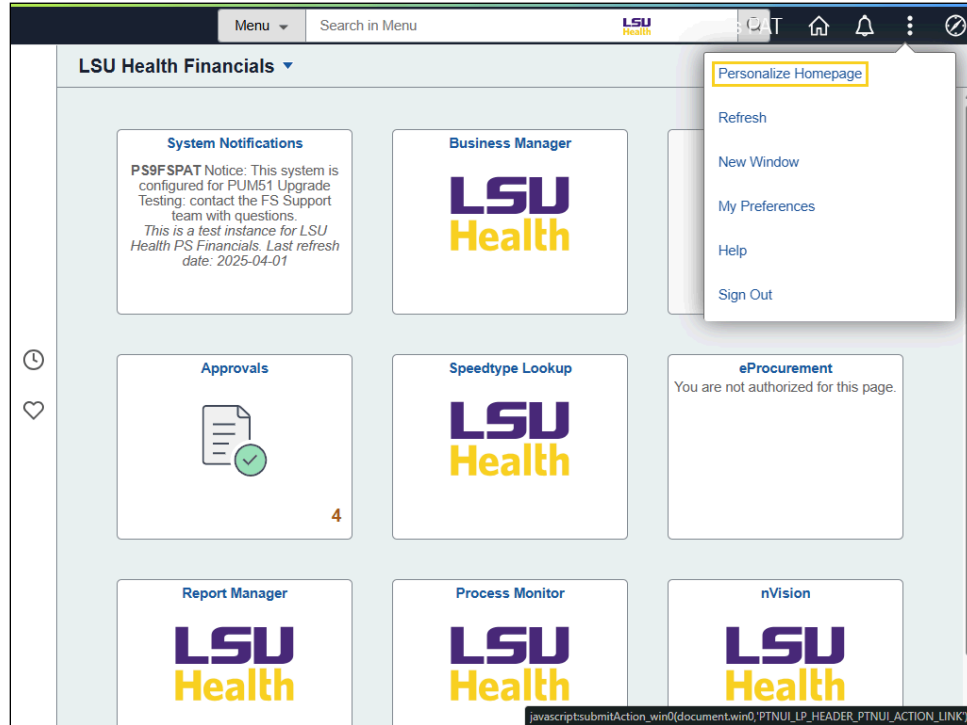
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Step	Action
15.	Notification Bell and the Notification Pane <u>PAT - Upgraded</u> Select the Actions icon, 3 ellipses at the <i>top right</i> of the screen, and then select <i>Personalize Homepage.</i> Click the Actions menu. 

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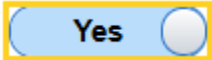
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Step	Action
16.	Notification Bell and the Notification Pane <u>PAT - Upgraded</u> Click the Personalize Homepage link. Personalize Homepage

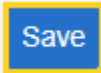
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Step	Action
17.	Notification Bell and the Notification Pane <u>PAT - Upgraded</u> On the <i>Personalize Homepage</i> screen, the <i>green colored highlight</i> on the left indicates the <i>homepage</i>, e.g., LSU Health Financials. If the user wanted to <i>add a tile</i>, s/he could do so on this page. Or, the user could <i>select a different homepage</i>, such as My Financials Home, to add a tile or toggle the Notification Pane. At the <i>top center</i> of the page, toggle the display to No and then Save. Click the Show Notification Pane option. 

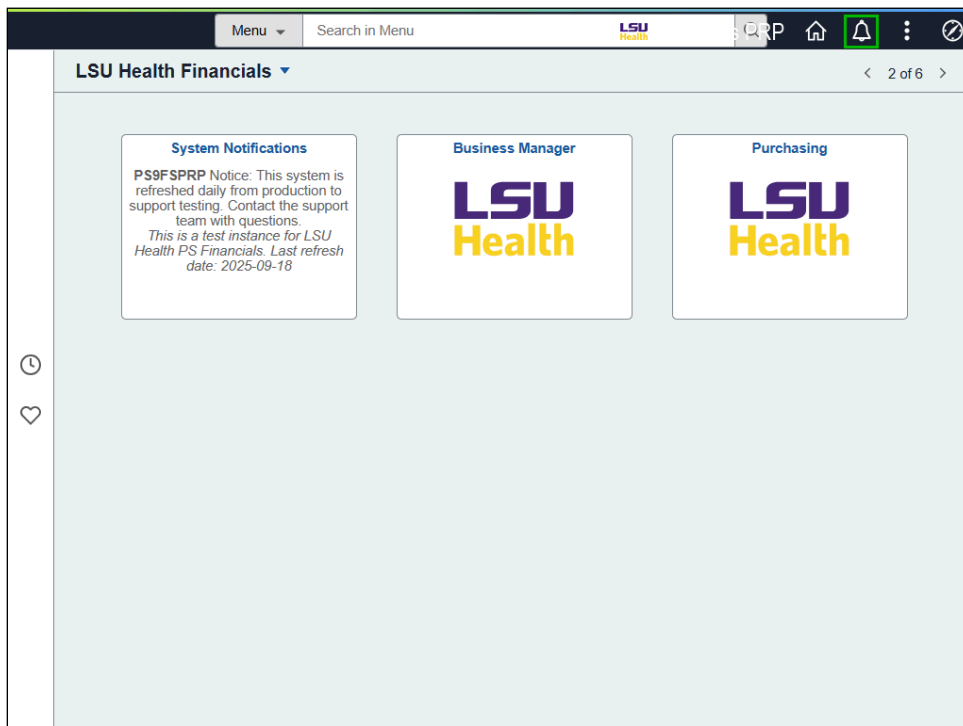
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Step	Action
18.	Notification Bell and the Notification Pane <u>PAT - Upgraded</u> Click the Save button. 

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Step	Action
19.	Notification Bell and the Notification Pane <u><i>PRP - Not Upgraded</i></u> The Homepage displays, now <i>excluding</i> the Notification Pane. The Bell icon is once again displayed.

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The screenshot displays the 'Maintain Requisitions' page in the PeopleSoft Financials PRP. The page is titled 'Requisition' and shows a form for maintaining requisitions. Key fields include Business Unit (LSUNO), Requisition ID (NEXT), Status (Pending), and Budget Status (Not Chk'd). The form is divided into several sections: Header, Amount Summary, Add Items From, and Line. The Header section contains fields for Requester, Requisition Date (09/23/2025), Origin (ONL), Currency Code (USD), and Accounting Date (09/23/2025). The Amount Summary section shows a Total Amount of 0.00 USD. The Add Items From section includes links for Purchasing Kit, Catalog, Item Search, and Requester Items. The Line section is a table with columns for Line, Item, Description, Quantity, UOM, Category, Price, Merchandise Amount, and Status. The table shows one line item with a quantity of 0.0000 and a status of Pending. The page also includes a 'View Printable Version' link and a 'View Approvals' link.

Step	Action
20.	Grid Lines and Section Dividers <u>PRP - Not Upgraded</u> In the upgraded version of PeopleSoft Financials, the Fluid display <i>style</i> of the pages <i>excludes</i> the <i>colored section dividers and section grid lines</i>. This will more closely resemble the views users are accustomed to seeing in the HCM application. <u>PRP - Not Upgraded</u> The <i>grey section dividers</i> display on the PRP - Not Upgraded Maintain Requisitions page. The <i>grey sections dividers</i> are <i>Header, Amount Summary, Add Items From, and Line</i>. The page itself is laid out in a <i>grid structure</i>. However, <i>grid lines</i> were <i>removed</i> with the introduction of <i>Fluid</i>.

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Step	Action
21.	Grid Lines and Section Dividers <u>PAT - Upgraded</u> <i>Grid lines and section dividers are not displayed on the PAT - Upgraded page. The section dividers of <i>Header</i>, <i>Amount Summary</i>, <i>Add Items From</i>, and <i>Line</i> do not have grey highlight bars over them. As previously mentioned, the <i>grid lines</i> were <i>removed</i> with the introduction of <i>Fluid</i>.</i>

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LSU Health Financials Business Manager Financials PRP

Maintain Requisitions

Requisition

Business Unit LSUNO Status Pending
Requisition ID NEXT Budget Status Not Chk'd
Requisition Name Copy From ☐ Hold From Further Processing

Header

*Requester Requester Info
*Requisition Date 09/23/2025
Origin ONL On-Line Entry
*Currency Code USD US Dollar
Accounting Date 09/23/2025

Requisition Defaults Add Comments
Requisition Activities

Amount Summary

Total Amount 0.00 USD

Add Items From

Purchasing Kit Catalog
Item Search Requester Items

Line

Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1			0.0000				0.00	Pendin

View Printable Version View Approvals *Go to ...More...

Save Notify Refresh

Step	Action
22.	Button Color Change The <i>Save, Return to Search, Notify, Refresh, Add a New Value, and Update/Display</i> buttons displayed at the <i>bottom</i> of many transaction pages have changed color. Instead of the yellow buttons, they are now blue or white. <u>PRP - Not Upgraded</u> The traditional <i>yellow Save, Notify, Refresh, Add, and Update/Display</i> are displayed on the <i>Maintain Requisitions</i> page in PRP - Not Upgraded database. NOTE: The Add and Update/Display buttons do not show on the screenshot. Users will need to scroll over to view these buttons.

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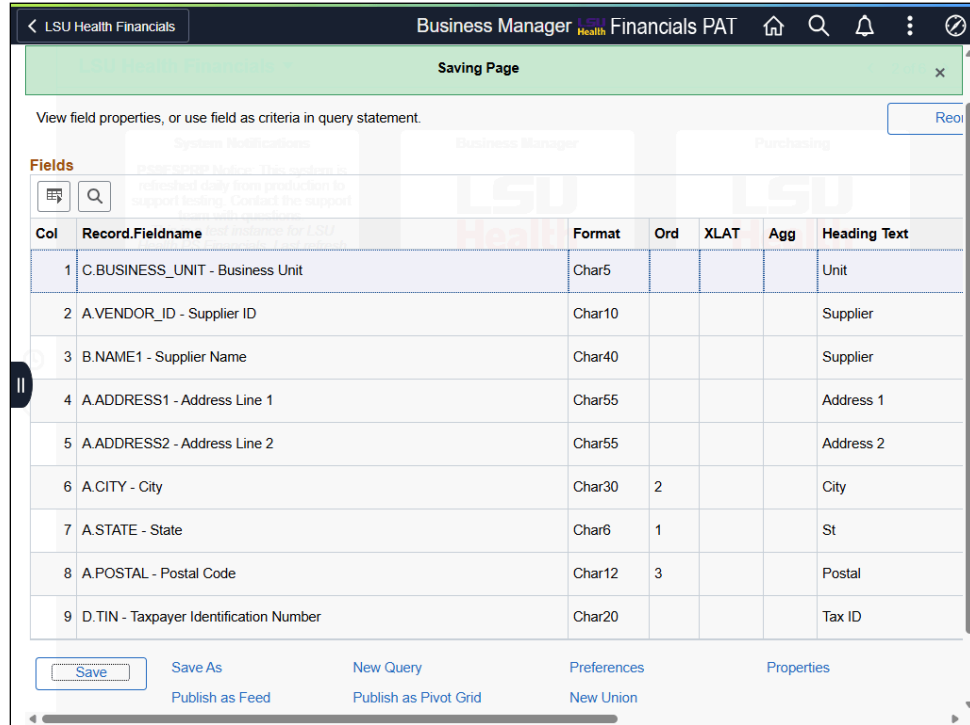
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The screenshot displays the Business Manager Financials PAT interface. The top navigation bar includes 'LSU Health Financials', 'Business Manager', and 'Financials PAT'. The main form area is titled 'Requisition Name' and contains several input fields: '*Requester' (with a search icon), '*Requisition Date' (09/18/2025), 'Origin' (ONL), '*Currency Code' (USD), and 'Accounting Date' (09/18/2025). There are also links for 'Requester Info', 'On-Line Entry', 'Requisition Defaults', 'Requisition Activities', 'Add Comments', 'Purchasing Kit Item Search', and 'Catalog Requester Items'. An 'Amount Summary' section shows a 'Total Amount' of 0.00. At the bottom, there are buttons for 'Save', 'Notify', and 'Refresh', which are highlighted with a red box. The interface also includes a 'Line' section with a table for adding items, and a 'View Approvals' link.

Step	Action
23.	Button Color Change <u>PAT - Upgraded</u> <i>Save, Notify, and Refresh buttons are now blue and white.</i> <i>NOTE: Scroll to the right to view the Add and Update/Display buttons.</i>

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Step	Action
24.	Save <u>PAT - Upgraded</u> When a <i>document or page</i> is saved, a <i>green bar</i> will display at the top of the page indicating the <i>save is in progress</i>.

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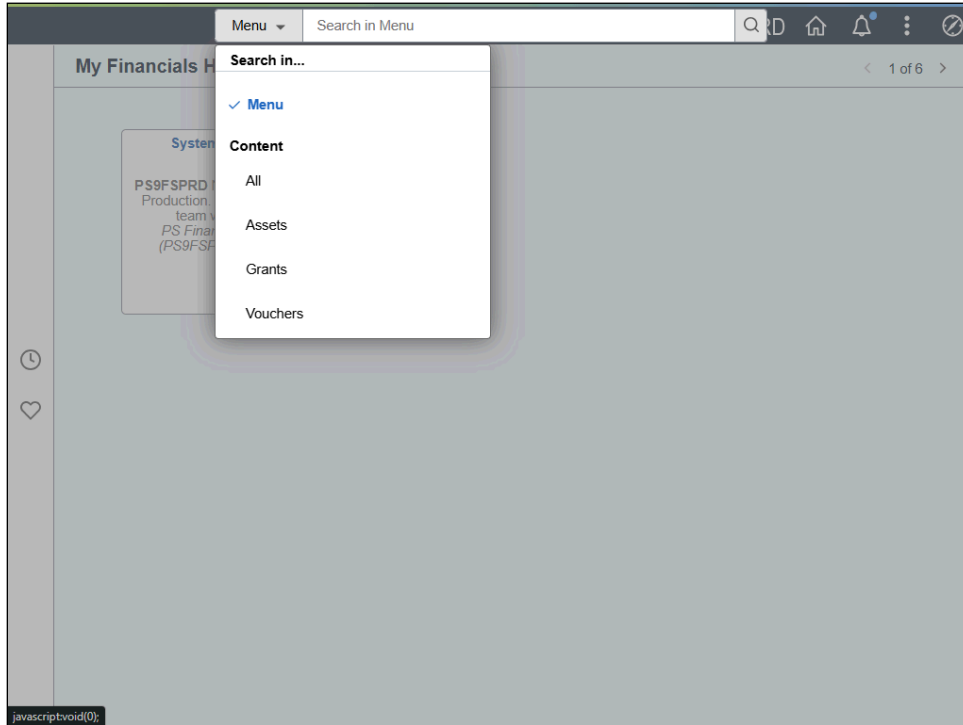
View By		Type
	All	8
	Payment Request	4
	Requisition	4

All		8 rows
Requisition	LSUSH / 0095136 [redacted]	Routed
26.90 USD	Medium Priority	08/14/2025 >
Requisition	LSUNO / 0068336 [redacted]	Routed
5.00 USD	Medium Priority	09/04/2025 >
Requisition	Test2 - LSUSH / 0095140 [redacted]	Routed
54.72 USD	[redacted] Bus Mgr tst Medium Priority	09/12/2025 >
Payment Request	0000042865 / LSUNE / DP10535002522	Routed
50.00 USD	Reassigned from [redacted]	09/16/2025 >
Payment Request	0000042907 / LSUSE / 6047376	Routed
10.29 USD	Reassigned from [redacted]	09/16/2025 >
Payment Request	0000043012 / LSUNE / DP10535002524	Routed
50.00 USD	Reassigned from [redacted]	09/16/2025 >
Payment Request	0000043614 / LSUNE / DP1052000P517	Routed
198.00 USD	[redacted]	09/16/2025 >
Requisition	LSUSH / 0095144 [redacted]	Routed
1.00 USD	Medium Priority	09/18/2025 >

Step	Action
26.	Filter Button Appearance <u><i>PAT - Upgraded</i></u> The new Filter button displays in the <i>same place on the page</i>. In the upgraded database displays as a more <i>graphic representation of a funnel</i>.

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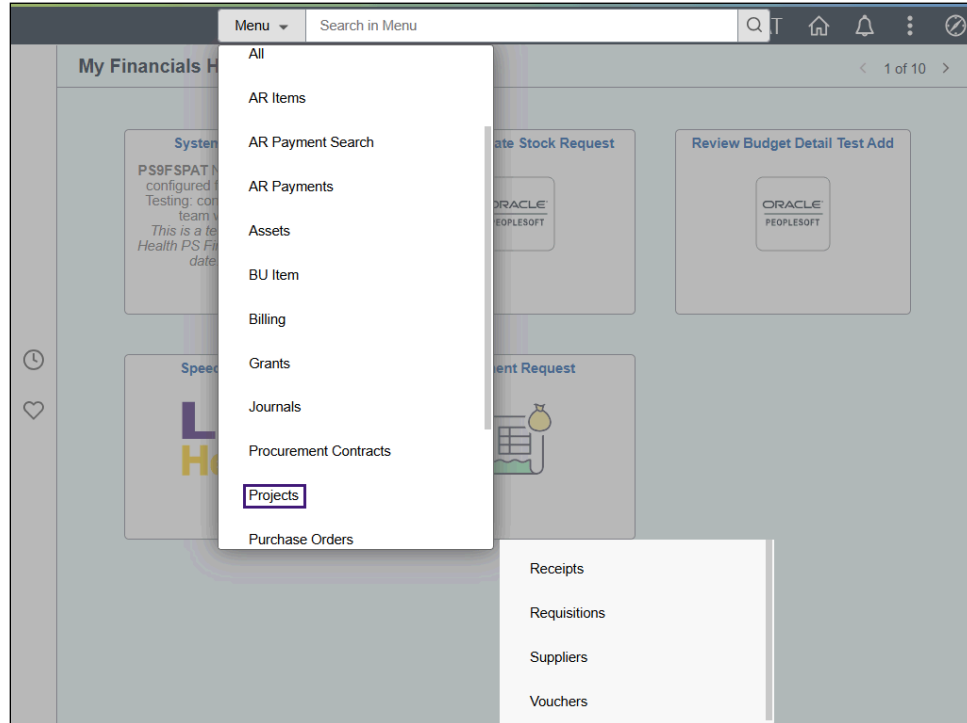
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Step	Action
27.	Key Word Search Expansion Users now can use the Search for Content in Account Receivable, Billing, Journals, and Projects in addition to all the existing search features. <u>PRD - Search Options</u>

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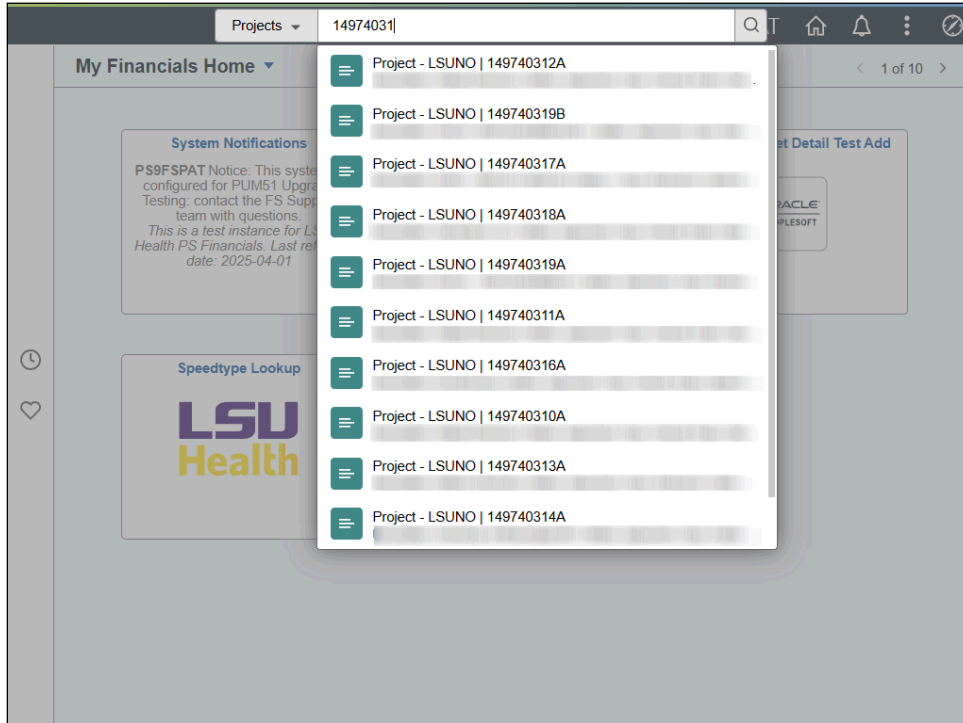
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Step	Action
28.	Key Word Search Expansion <u>PAT - Upgraded</u> To search for content in Projects for example, select the <i>module</i> from the <i>list</i> to populate that in the <i>search parameters</i>.

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Step	Action
29.	Key Word Search Expansion <u>PAT - Upgraded</u> Then, enter a Project ID. As you type, a list of projects meeting that criteria display. You may select one or just continue typing and press the magnifying glass at the end of the box.

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The screenshot displays the 'Search Results' page in the PeopleSoft Financials PAT system. On the left, a sidebar lists various search criteria with expandable sections: Business Unit (LSUNO), Project Type (Clinical Trials), Project Status (Approved), Processing Status (Active), Project Manager (No Value), Start Date (2016), and Customer Name (Gilead Sciences Inc). The main content area, titled 'View Search Results', shows 1 result for the keyword '149740312A'. The result is a project entry: 'Project - LSUNO | 149740312A' with a processing status of 'Active'.

Step	Action
30.	Key Word Search Expansion <u>PAT - Upgraded</u> Results of the search display by search criteria on the left. Select and review as desired.
31.	This completes <i>Overall Look and Feel Changes for PUM 51.</i> End of Procedure.