PeopleSoft_Financials_Upgrade_to_PUM51_Delta

Version Date: October 22, 2025

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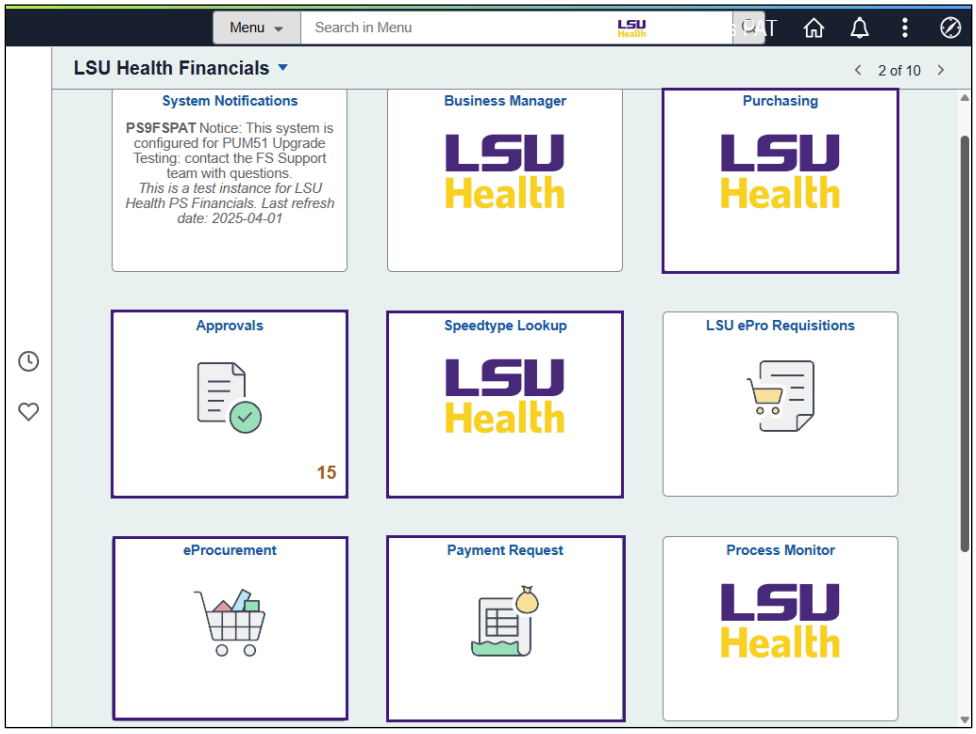
Overall Look and Feel Changes for PUM 51

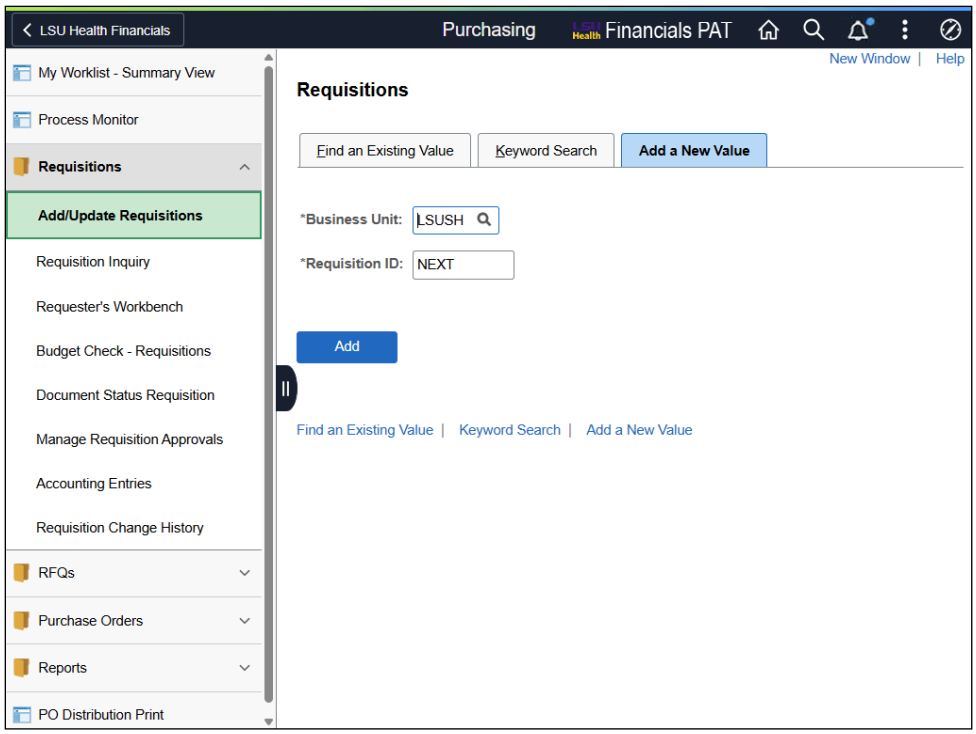
Procedure

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

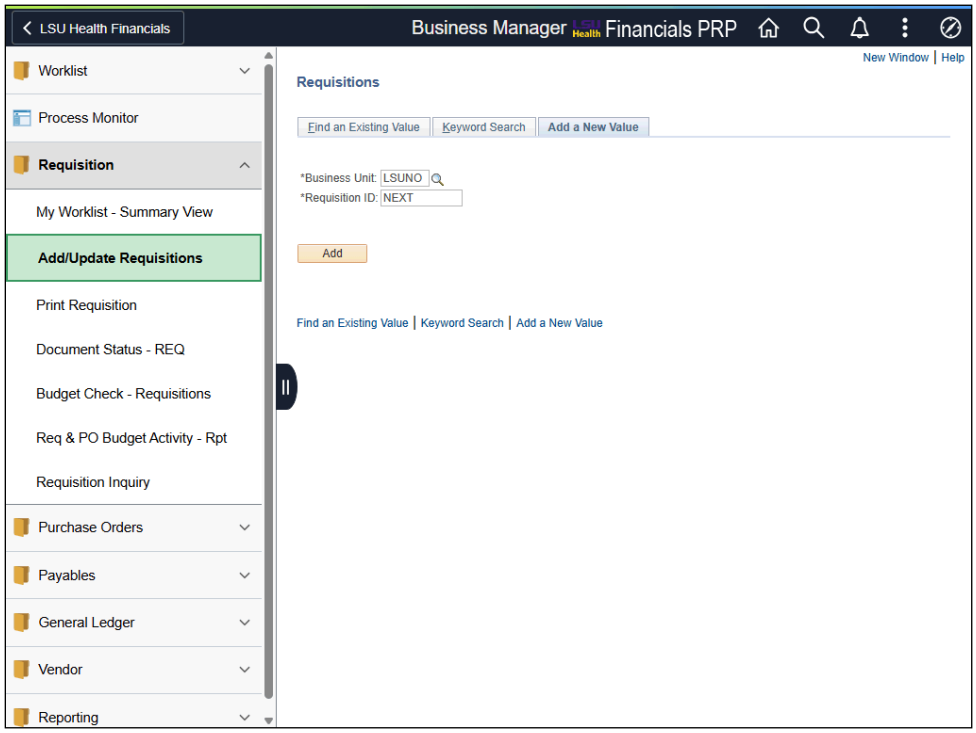
Step	Action
1.	***NOTE: This topic was completed using the PS9FSPAT database for <u>training purposes only</u>. Normally, these actions will be performed by users in the PS9FSPRD (Production) database.***
2.	***The purpose of this document is to share differences in the look and feel of the PeopleSoft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



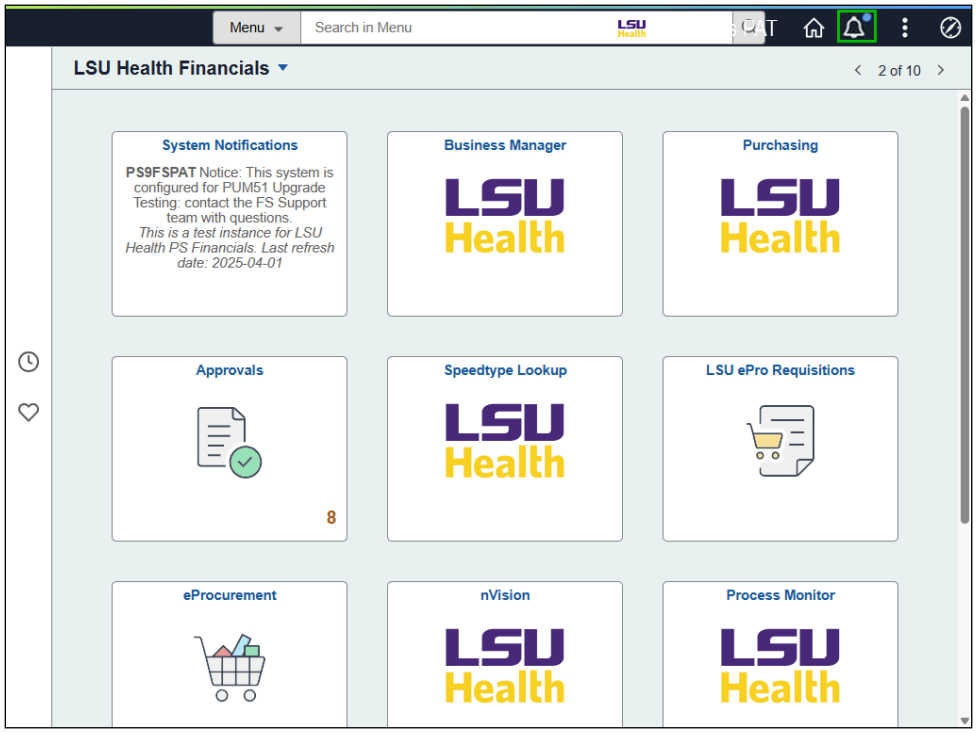
Step	Action
3.	**LSU Health Financials Home Updates** Several *tiles* are *added* to the **LSU Health Financials** homepage for your use as desired. We've included an *Approvals Tile*, *Payment Request Tile*, *Speedtype Lookup*, *eProcurement*, *Purchasing*, and will include *Expenses* when we *go-live*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



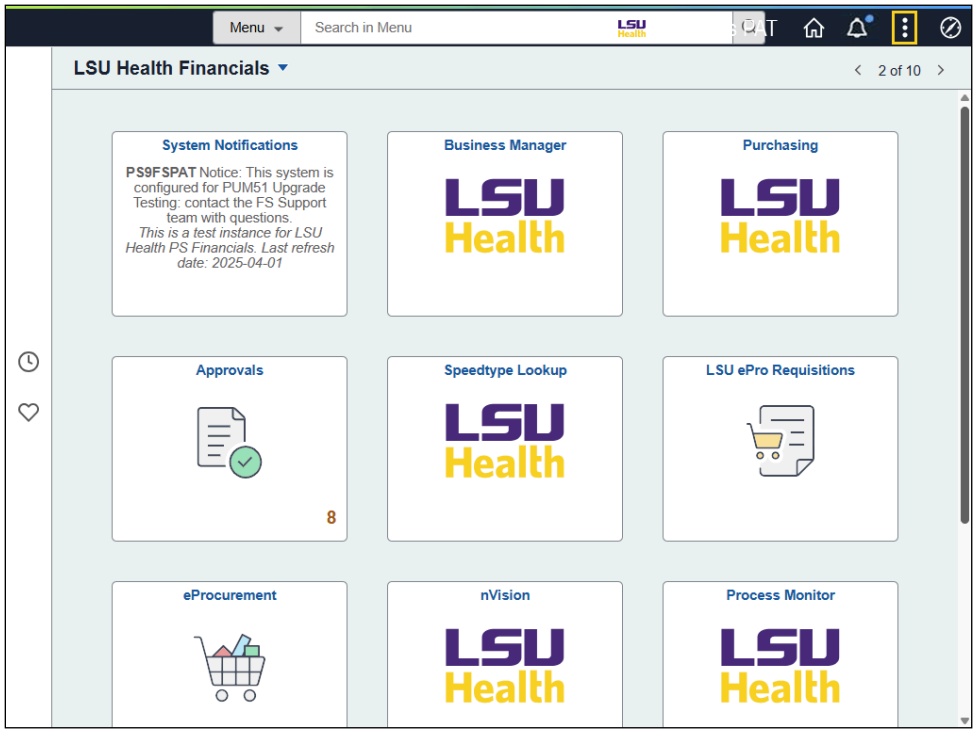
Step	Action
4.	**Larger View** ***<u>PAT Upgraded</u>*** Users will notice that the *screen display appears larger* in the upgraded environment. This is due to the use of the PeopleSoft *Fluid stylesheet* that allows form *factor adjustment* based on the *device used*.



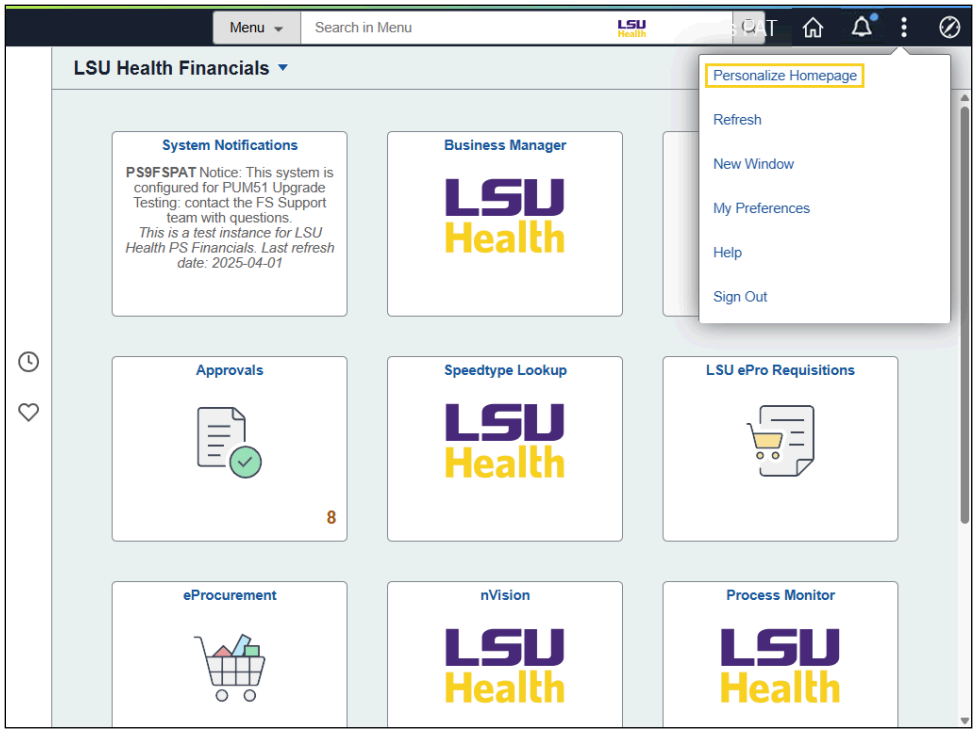
Step	Action
5.	**Larger View** ***PRP - Not Upgraded*** The *buttons, tabs and fields* on the **Add/Update Requisitions** page are *substantially smaller* on the ***PRP - Not Upgraded*** page.



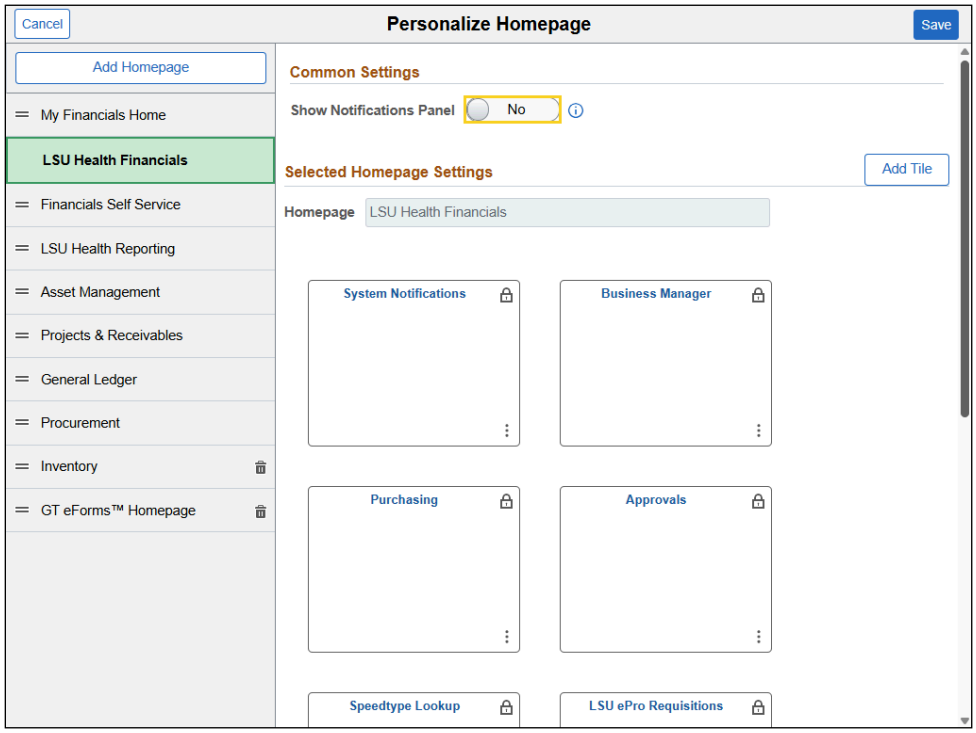
Step	Action
6.	**Notification Bell and the Notification Pane** ***PAT - Upgraded*** Users will see the **Notification Bell** on all home and transactional pages. The ***blue dot*** indicates that notifications are available. However, if the user elects to turn on the ***Notification Pane***, the **Notification Bell** will not show on the homepages. The **Notification Bell** displays at the *top right* of the page *between* the *Home* and *Actions icons*. From the **Notification Bell**, users can view tasks that require attention. ************WARNING************* ***Users should not 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 entire navigation collection rather than the individual page. 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.***

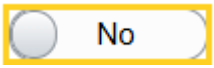


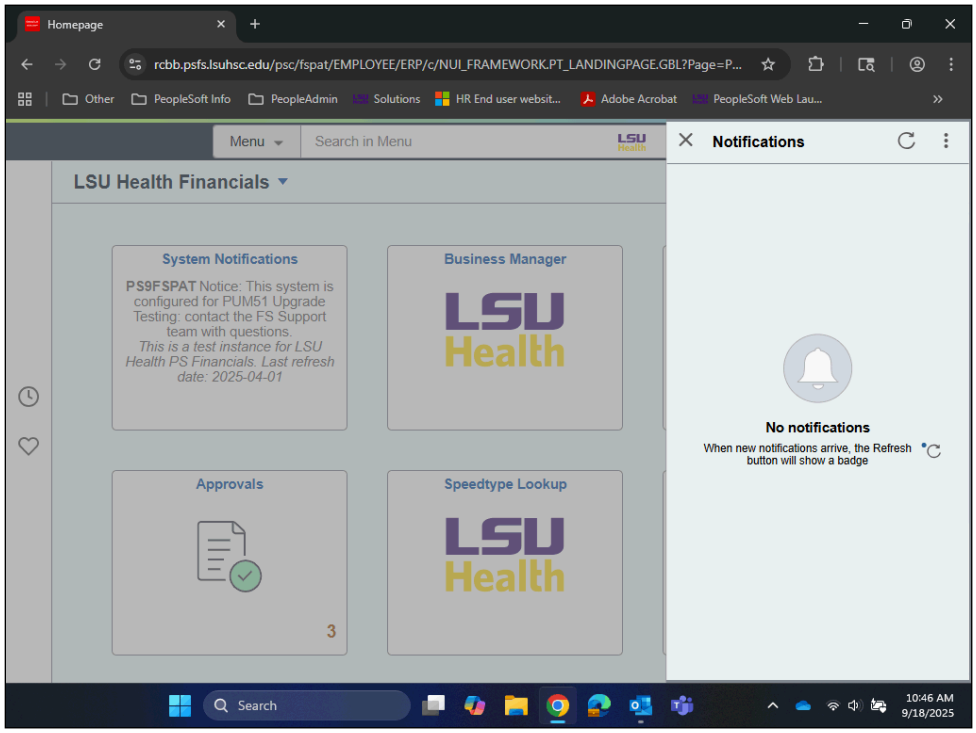
Step	Action
7.	**Notification Bell and the Notification Pane** ***<u>PAT - Upgraded</u>*** When a *Home* such as **My Financials Home** or **LSU Health Financials**, the ***Notification Pane*** can be always turned on the display. This pane allows the user to view tasks that require attention directly from that home. And, for the *homepages*, the *pane replaces the Notification icon*, the *Bell*. 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************** ***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</u> <u>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.*** Click the **Actions** menu to turn on the ***Notification Pane***.



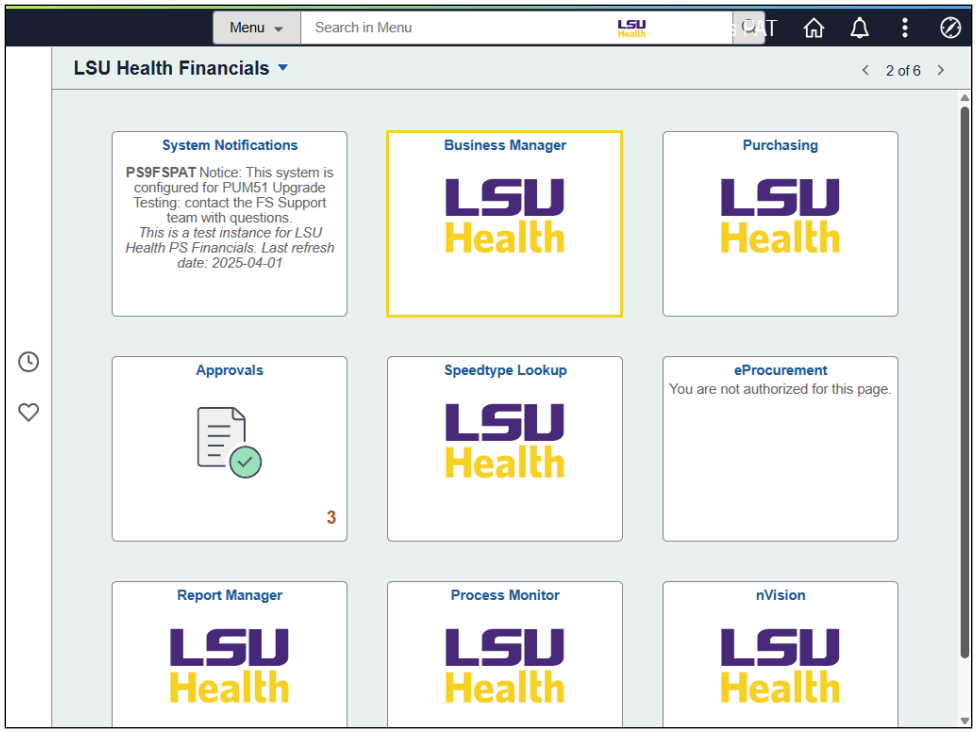
Step	Action
8.	**Notification Bell and the Notification Pane** ***<u>PAT - Upgraded</u>*** Click the **Personalize Homepage** list item. Personalize Homepage



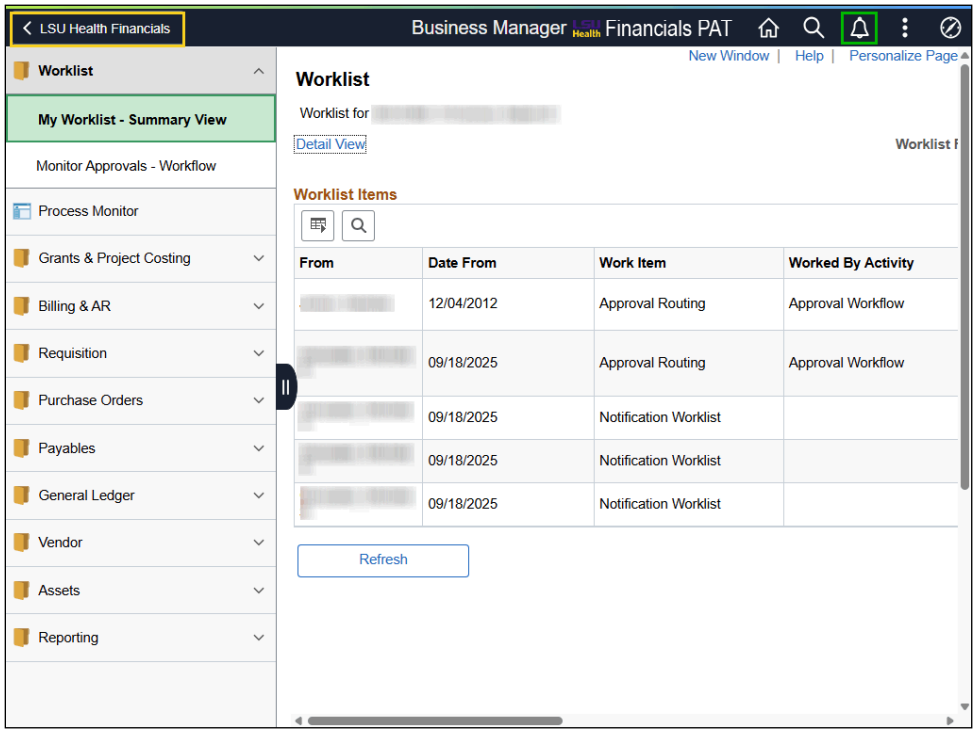
Step	Action
9.	**Notification Bell and the Notification Pane** ***PAT - Upgraded*** Click the **Show Notifications Panel** option. 
10.	**Notification Bell and the Notification Pane** ***PAT - Upgraded*** The user must **Save** to complete the process. Click the **Save** button.



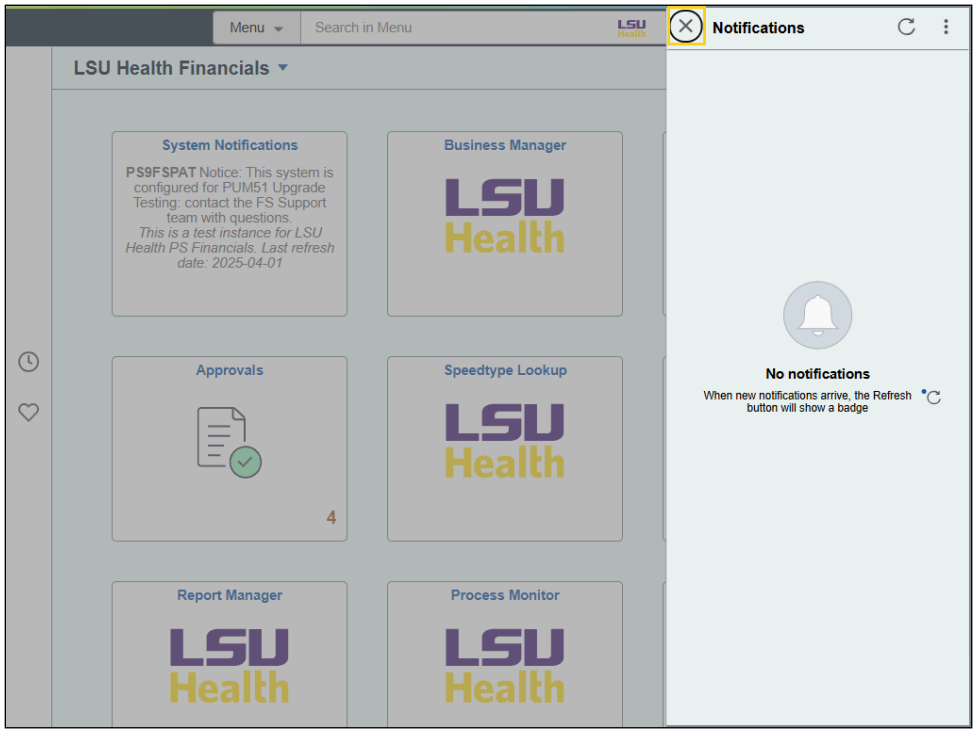
Step	Action
11.	**Notification Bell and the Notification Pane** ***<u>PAT - Upgraded</u>*** Notice that the **Notification Bell** does <u>not</u> display when the **Notification Pane** is active.



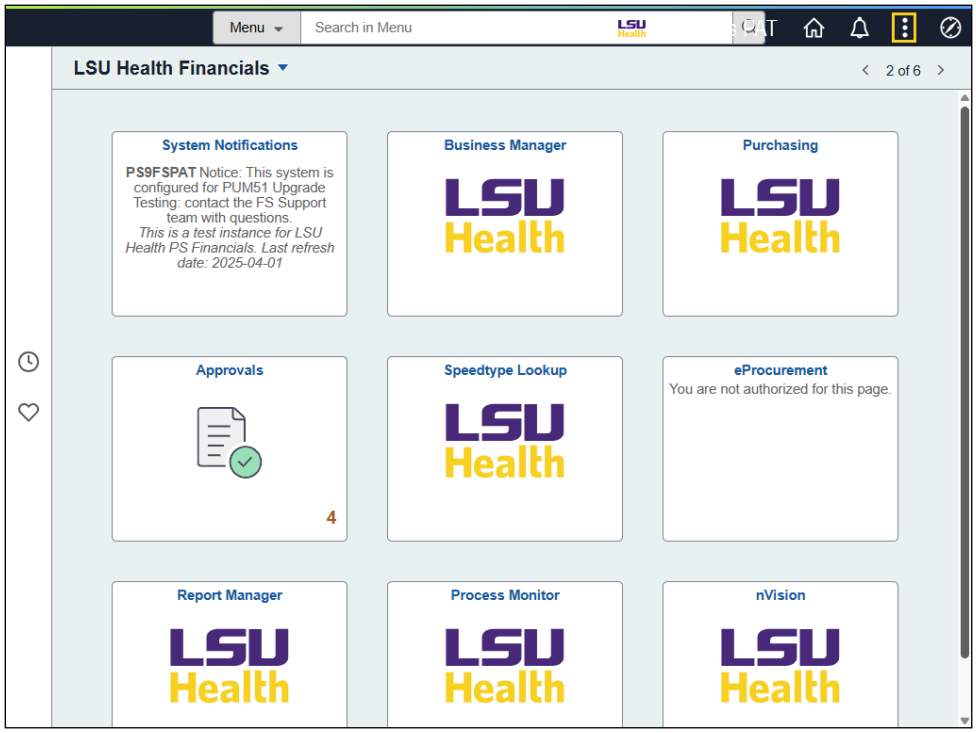
Step	Action
12.	**Notification Bell and the Notification Pane** ***PAT - Upgraded*** Click the **Business Manager** button.



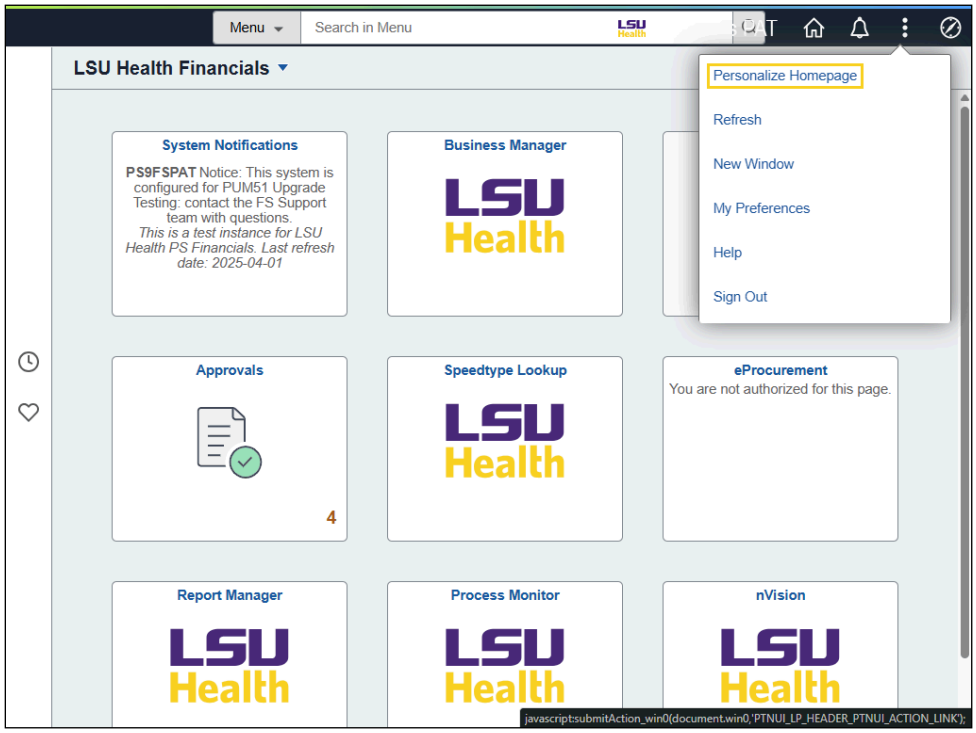
Step	Action
13.	**Notification Bell and the Notification Pane** ***PAT - Upgraded*** *When users access transactional pages, the **Notification Bell** is displayed.* Click the **LSU Health Financials** button.



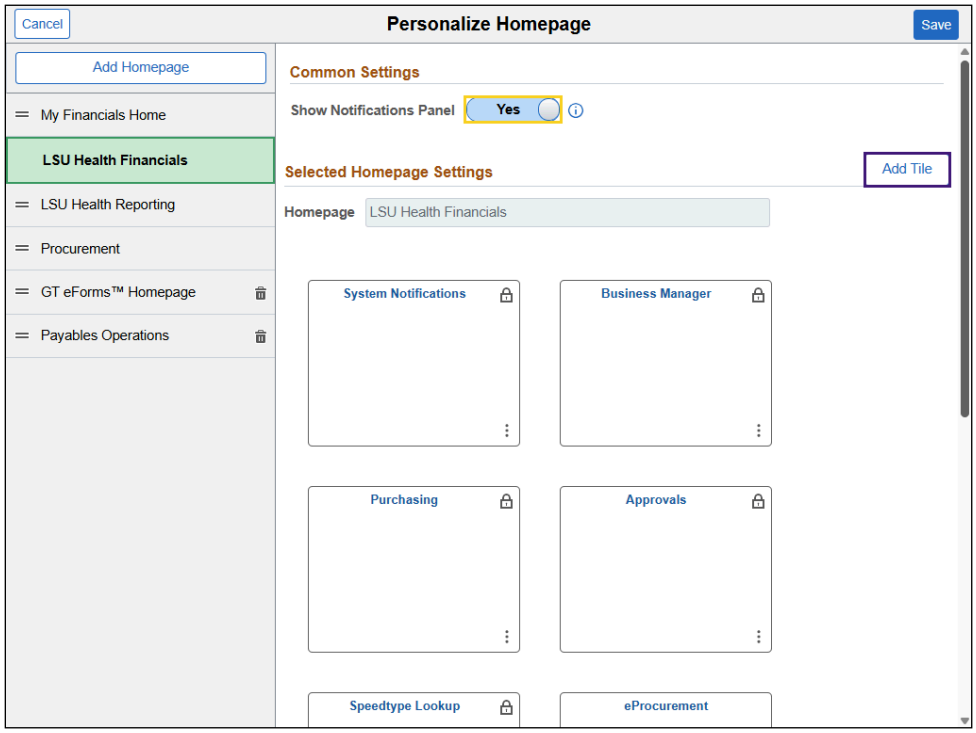
Step	Action
14.	**Notification Bell and the Notification Pane** ***<u>PAT - Upgraded</u>*** Users may choose to *hide* the *Notification Pane* from displaying on their **My Financials Home** and **LSU Health Financials**. Click the **Close Notifications** button.

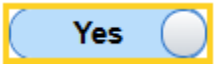


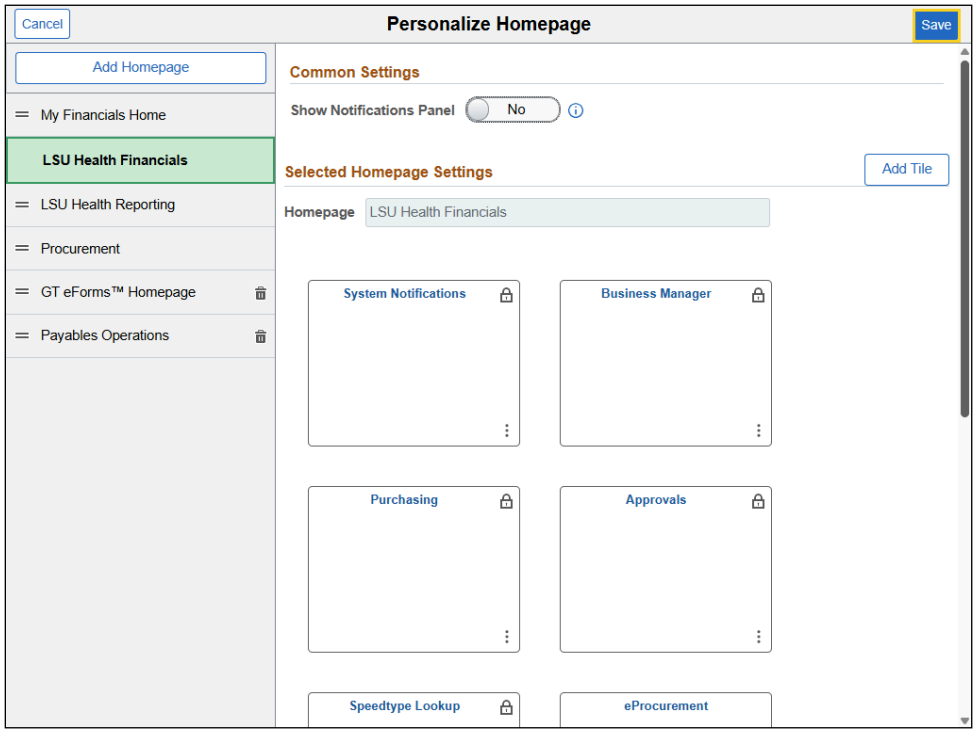
Step	Action
15.	**Notification Bell and the Notification Pane** ***<u>PAT - Upgraded</u>*** Select the **Actions** icon, 3 ellipses at the *top right* of the screen, and then select ***Personalize Homepage***. Click the **Actions** menu.



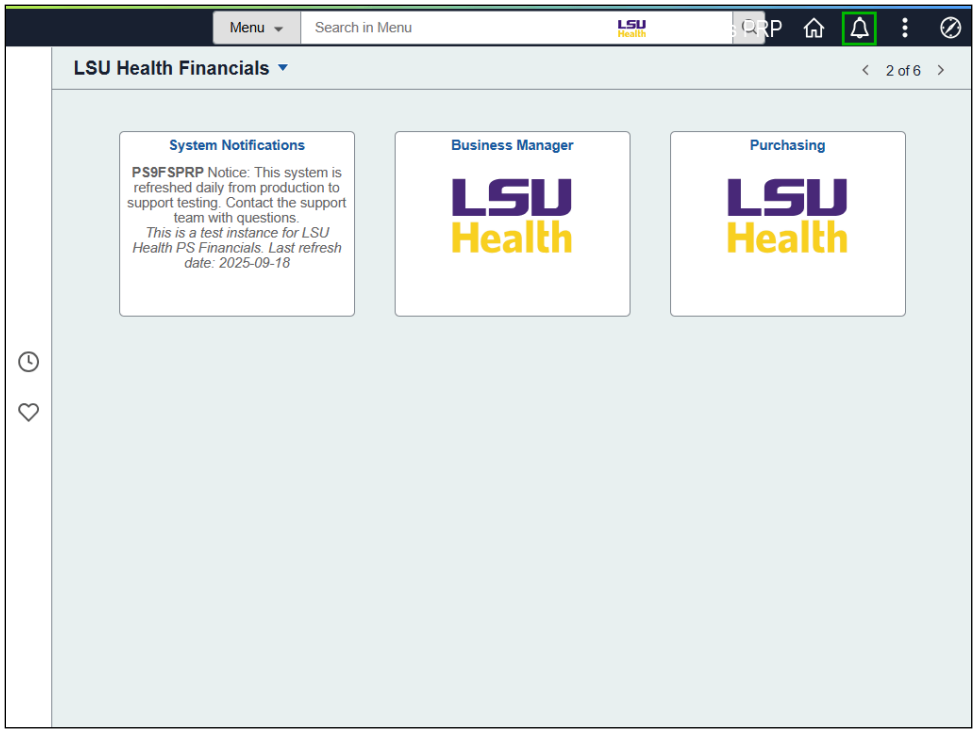
Step	Action
16.	**Notification Bell and the Notification Pane** ***PAT - Upgraded*** Click the **Personalize Homepage** link. Personalize Homepage



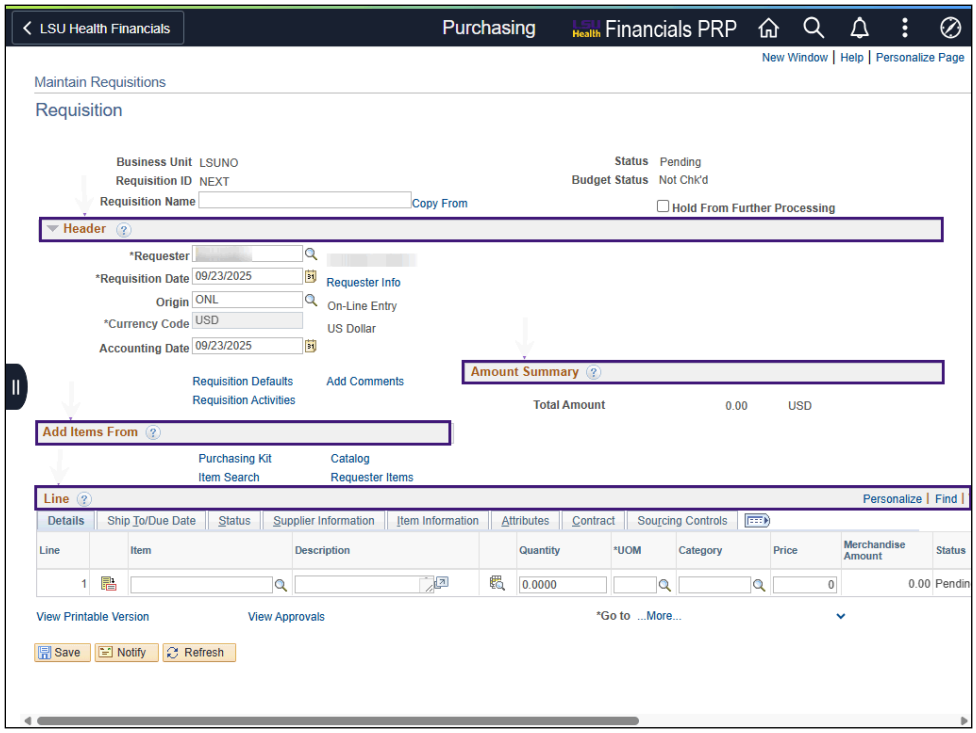
Step	Action
17.	**Notification Bell and the Notification Pane** ***PAT - Upgraded*** On the ***Personalize Homepage*** screen, the *green colored highlight* on the left *indicates* the *homepage*, e.g., LSU Health Financials. If the user wanted to *add a tile*, s/he could do so on this page. Or, the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



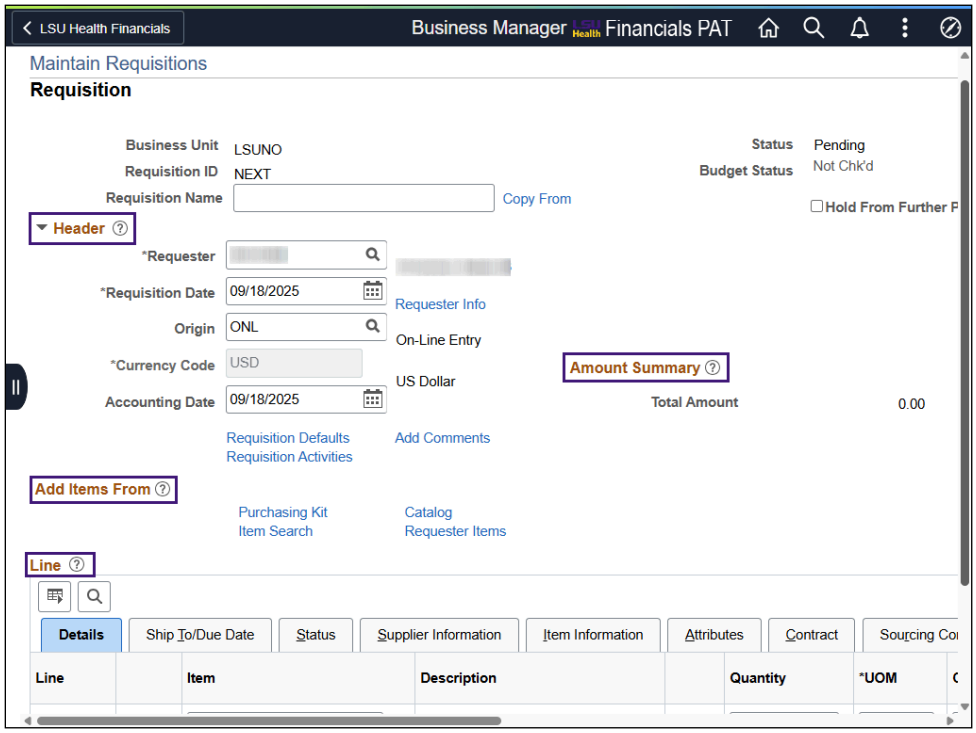
Step	Action
18.	**Notification Bell and the Notification Pane** ***PAT - Upgraded*** Click the **Save** button.



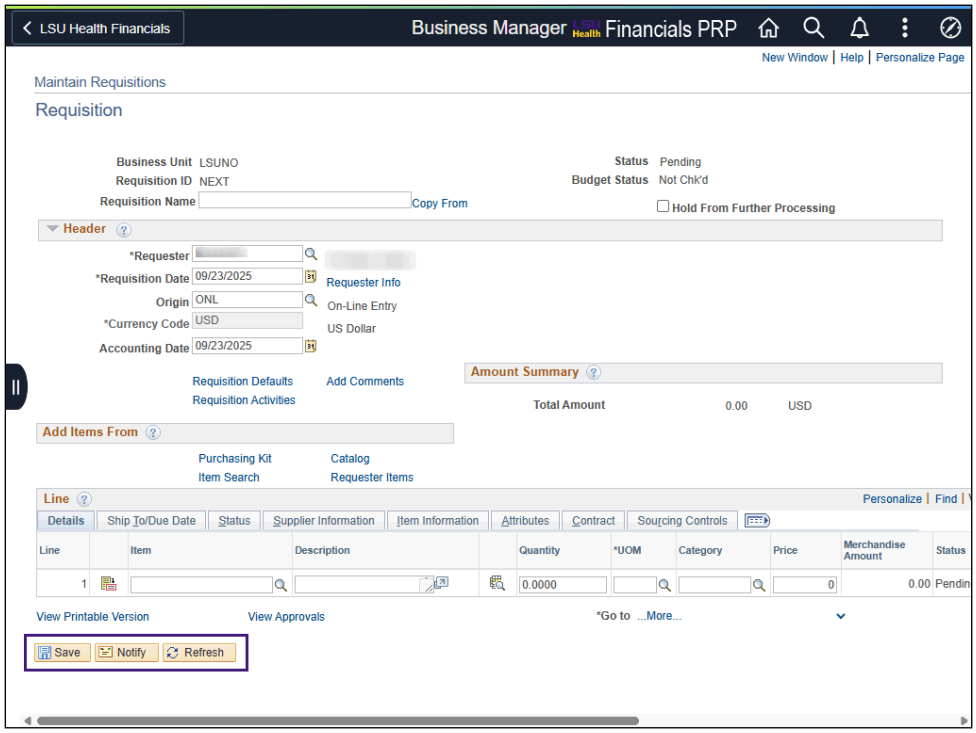
Step	Action
19.	**Notification Bell and the Notification Pane** ***PRP - Not Upgraded*** The Homepage displays, now *excluding* the ***Notification Pane***. The ***Bell*** icon is once again displayed.



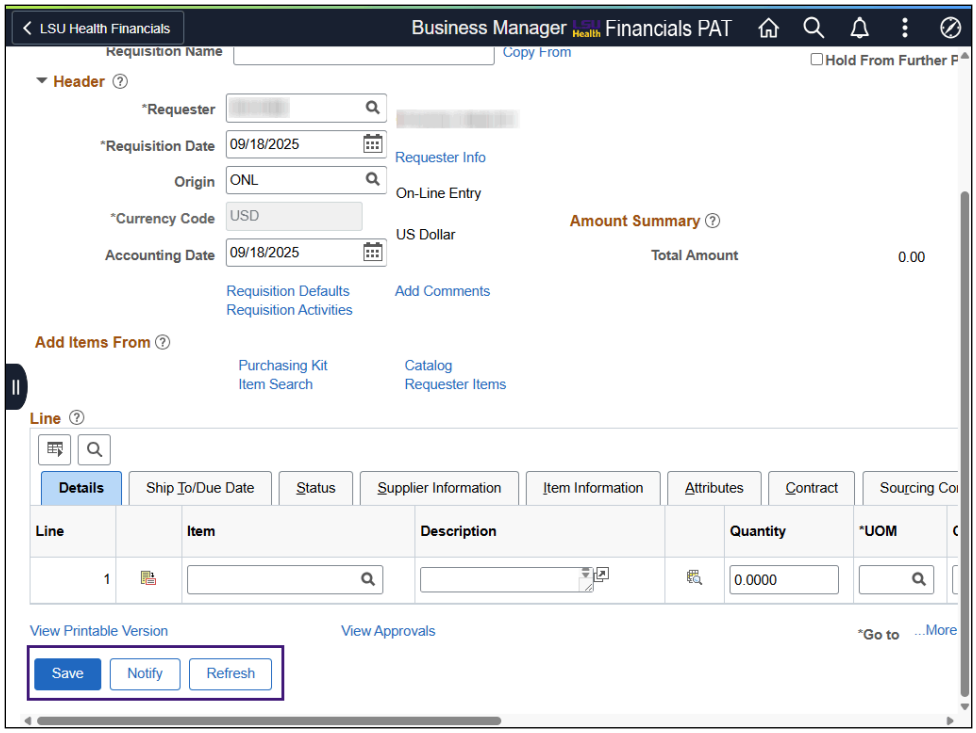
Step	Action
20.	**Grid Lines and Section Dividers** ***PRP - Not Upgraded*** In the upgraded version of PeopleSoft Financials, the Fluid display *style* of the pages *excludes* the *colored section dividers and section grid lines*. This will more closely resemble the views users are accustomed to seeing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



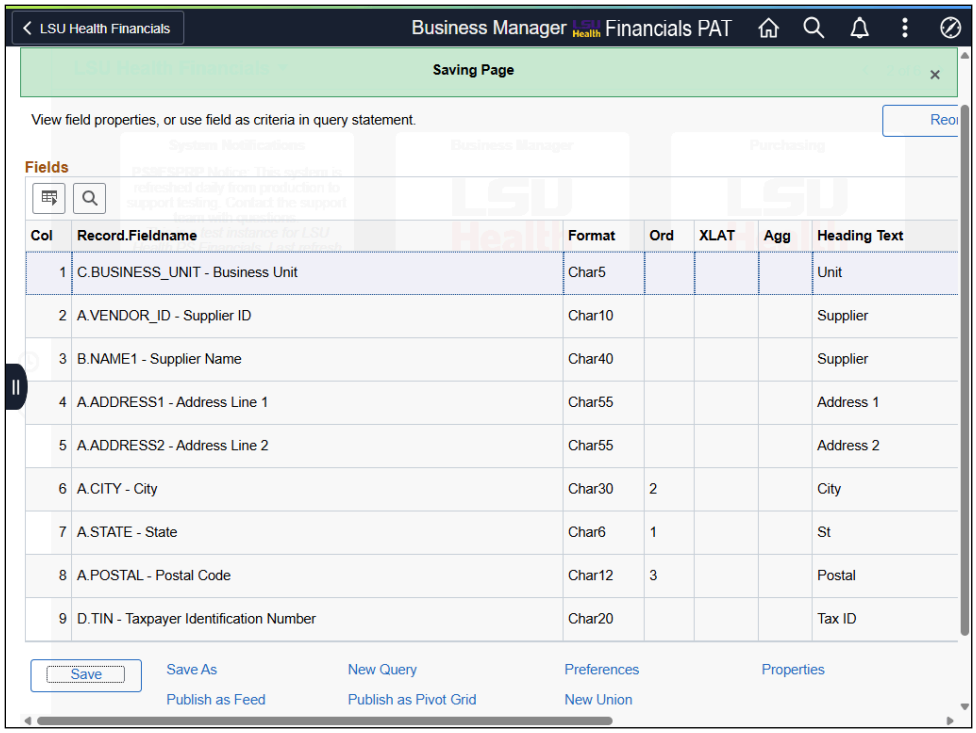
Step	Action
21.	**Grid Lines and Section Dividers** ***<u>PAT - Upgraded</u>*** *Grid lines and section dividers* are **<u>not</u>** displayed on the ***PAT - Upgraded*** page. The section dividers of *Header*, *Amount Summary*, *Add Items From*, and *Line* do **<u>not</u>** have *grey highlight bars*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



Step	Action
22.	**Button Color Change** The *Save, Return to Search, Notify, Refresh, Add a New Value, and Update/Display* buttons displayed at the *bottom* of many transaction pages have changed color. Instead of the yellow buttons, they are now blue or white. ***PRP - Not Upgraded*** The traditional *yellow Save*, *Notify*, *Refresh*, *Add*, and *Update/Display* are displayed on the *Maintain Requisitions* 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.***

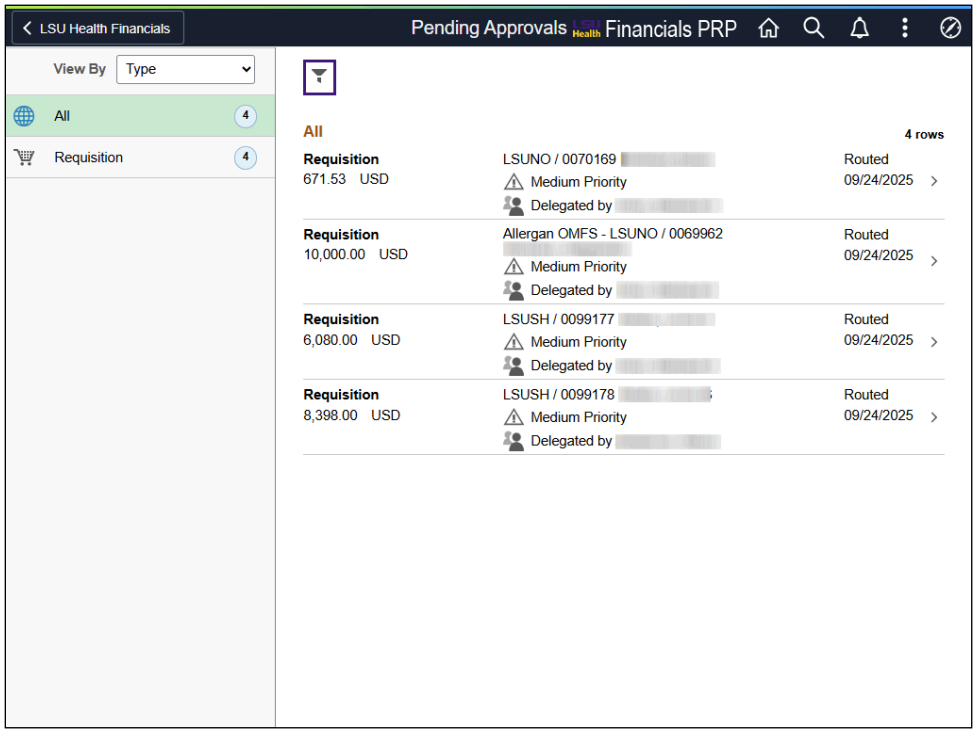


Step	Action
23.	**Button Color Change** ***PAT - Upgraded*** *Save*, *Notify*, and *Refresh* buttons are now *blue* and *white*. ***NOTE: Scroll to the right to view the Add and Update/Display buttons.***

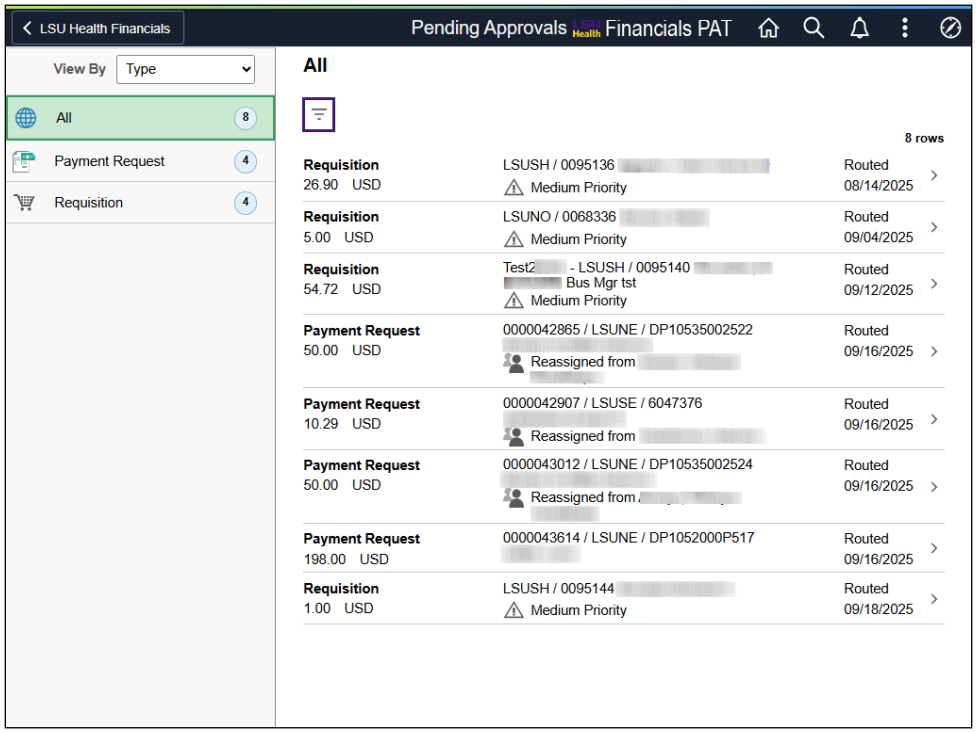


Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text
1	C.BUSINESS_UNIT - Business Unit	Char5				Unit
2	A.VENDOR_ID - Supplier ID	Char10				Supplier
3	B.NAME1 - Supplier Name	Char40				Supplier
4	A.ADDRESS1 - Address Line 1	Char55				Address 1
5	A.ADDRESS2 - Address Line 2	Char55				Address 2
6	A.CITY - City	Char30	2			City
7	A.STATE - State	Char6	1			St
8	A.POSTAL - Postal Code	Char12	3			Postal
9	D.TIN - Taxpayer Identification Number	Char20				Tax ID

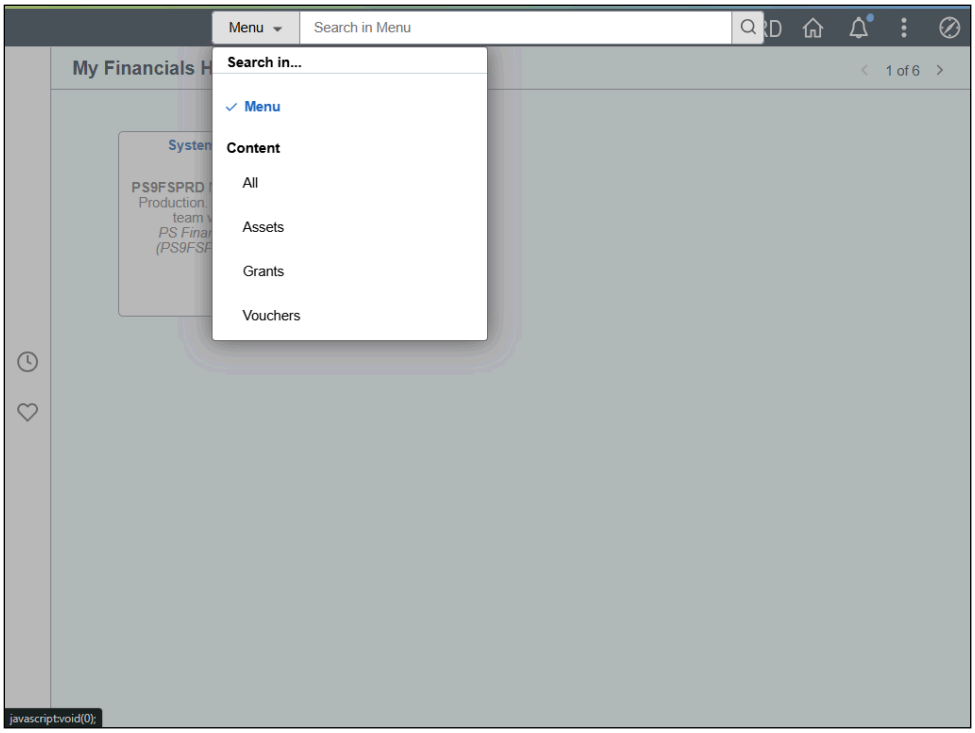
Step	Action
24.	**Save** ***PAT - Upgraded*** When a *document or page* is *saved*, a *green bar* will display at the top of the page *indicating* the *save* is *in progress*.



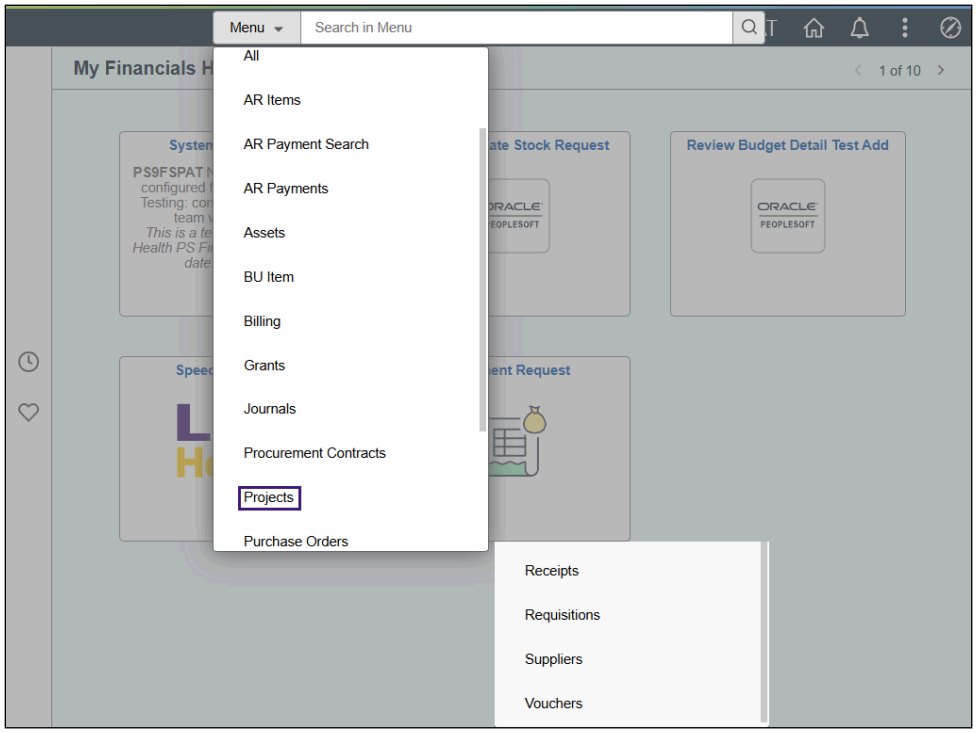
Step	Action
25.	**Filter Button Appearance** ***PRP - Not Upgraded*** The ***Filter*** button changes to a *funnel shaped lined display* instead of a more *traditional looking funnel*.



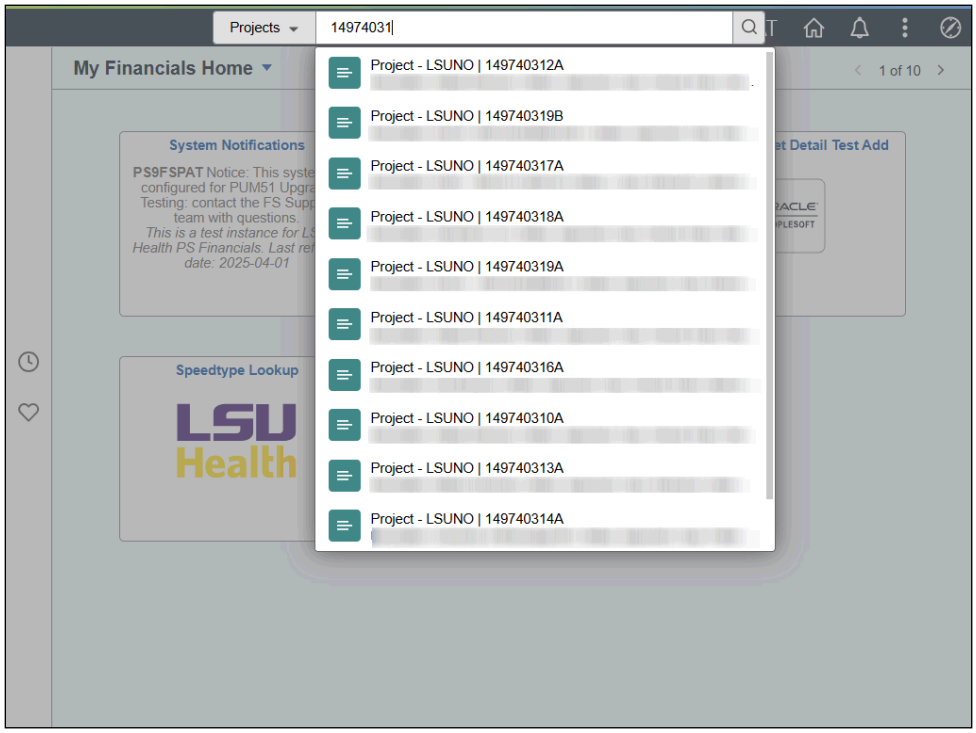
Step	Action
26.	**Filter Button Appearance** ***<u>PAT - Upgraded</u>*** The new **Filter** button displays in the *same place on the page*. In the upgraded database displays as a more *graphic representation* of a *funnel*.



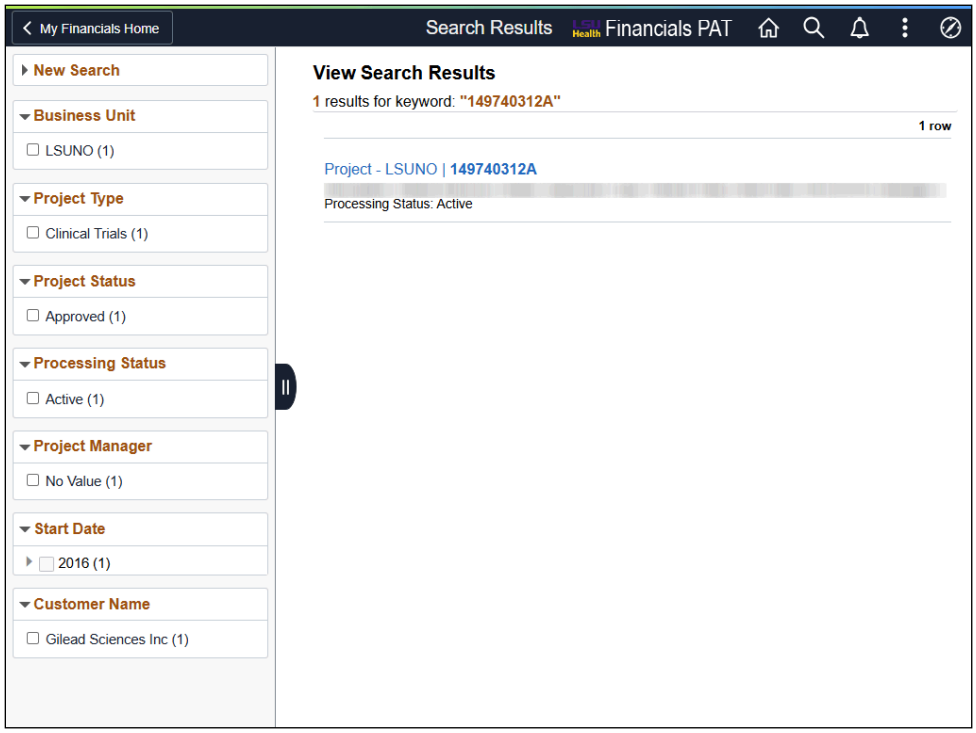
Step	Action
27.	**Key Word Search Expansion** Users now can use the Search for Content in Account Receivable, Billing, Journals, and Projects in addition to all the existing search features. ***PRD - Search Options***



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



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.



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