



PeopleSoft_Financials_Upg rade_to_PUM51_Delta eProcurement Look and Feel Changes

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Training Guide
eProcurement Look and Feel Changes

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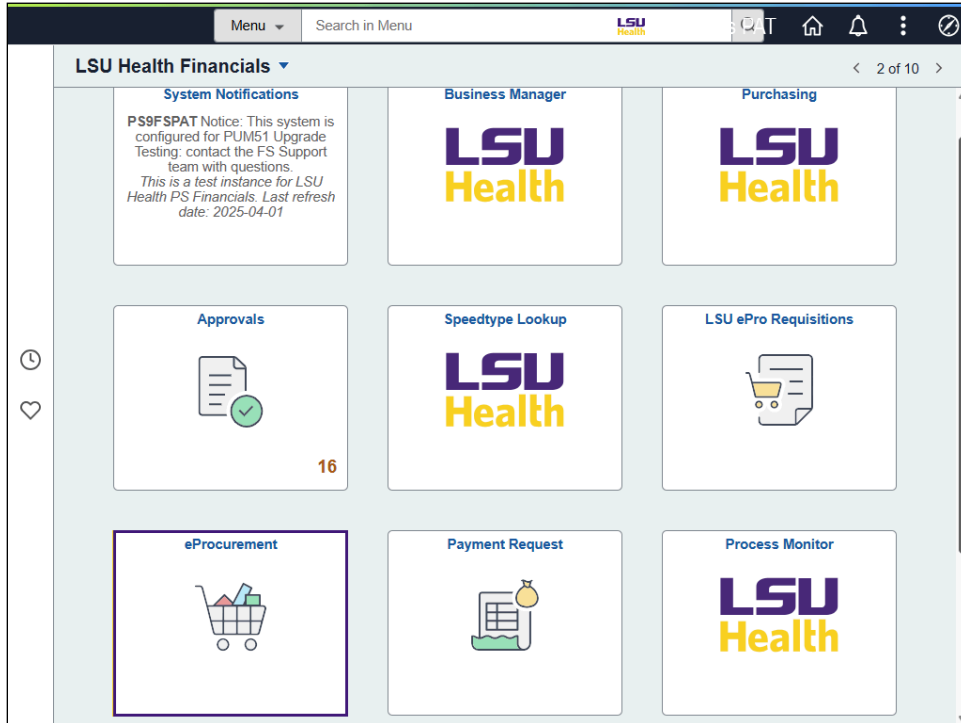
Procedure

In this topic you will learn about **eProcurement Overall Look and Feel Changes**.

Step	Action
1.	<i>NOTE: The eProcurement section is for LSUSH users only.</i>
2.	eProcurement Requisition Changes ePro requisitions are now in the <i>Fluid style</i>. This <i>change</i> presents a <i>significant "look and feel" difference</i> to the user. But the <i>functionality</i> remains the <i>same</i>. There are a few key differences to note. • eProcurement Tile instead of LSU Health ePro Requisitions to create ePro Reqs • Create Requisitions Tile selection directs the user to Requisition Defaults as the landing page • Requisition Defaults page in Fluid is the <i>equivalent</i> to the <i>Requisitions Settings</i> page in classic - o Line, Schedule and Distribution Defaults sections <i>display as collapsed</i>. Users must expand them to enter default information. - o The Chartfield Distribution section on the <i>defaults page</i> <i>includes all the chartfield options</i> and <u>cannot</u> be <i>personalized</i> to hide or reorder the fields. • New icons • Justification Comments – Users should enter the purpose of the purchase • Mass Change

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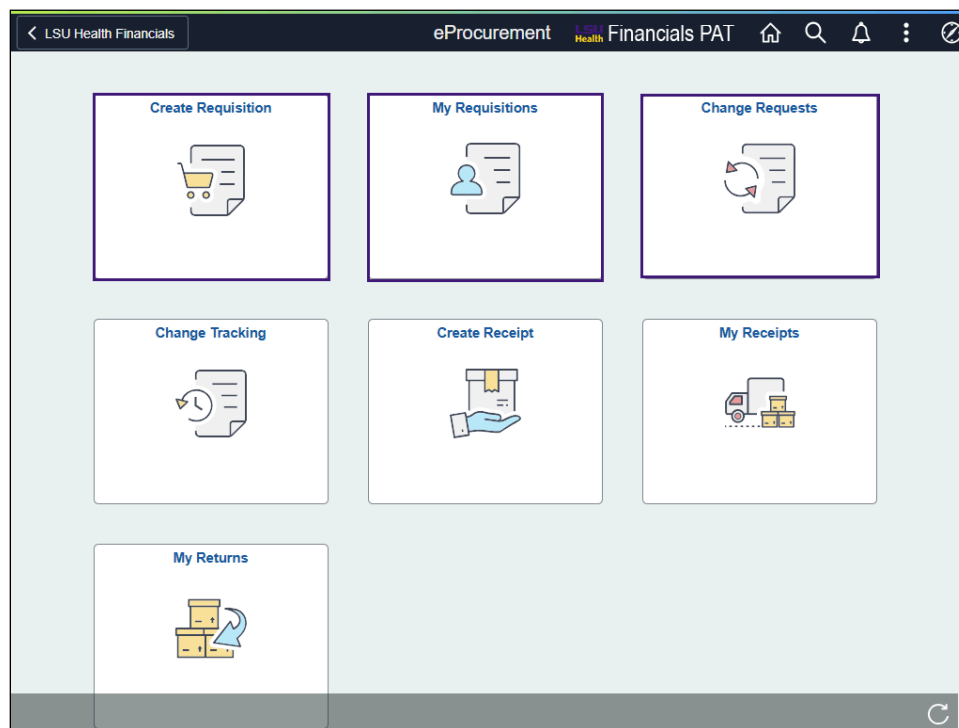
eProcurement Look and Feel Changes



Step	Action
3.	New Tile with the Upgrade - eProcurement <u>PAT - Upgraded</u> The new <i>eProcurement Tile</i> includes several <i>tiles</i> available to the <i>user</i>.

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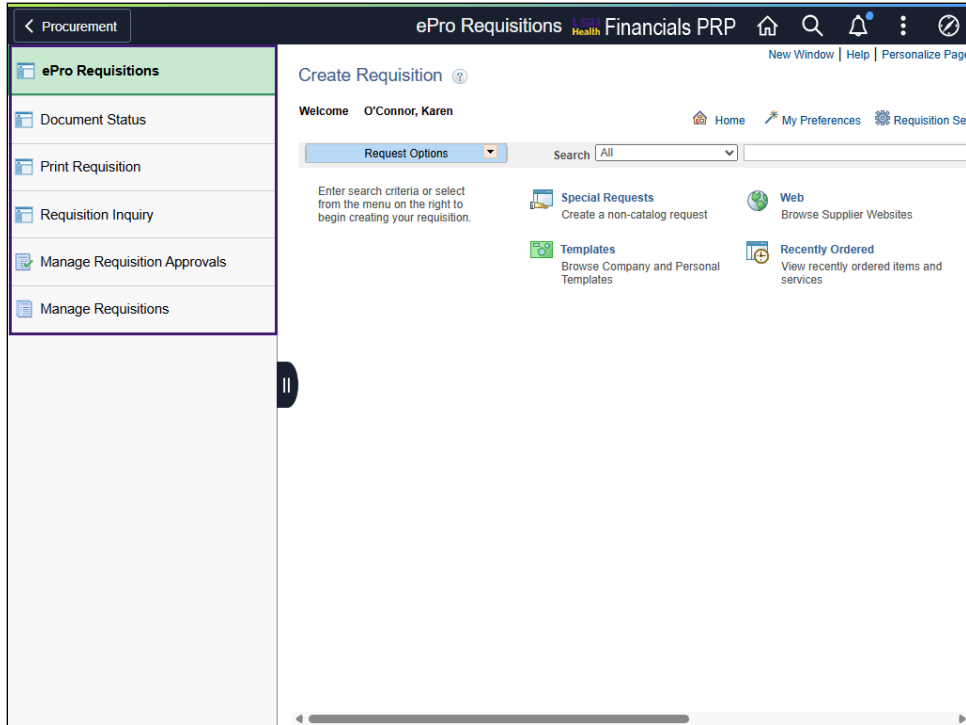
eProcurement Look and Feel Changes



Step	Action
4.	New Tile with the Upgrade - eProcurement <u>PAT - Upgraded</u> The <i>Create Requisition</i>, <i>My Requisitions</i>, and <i>Change Requests</i> are the <i>tiles</i> that will be <i>most used</i>.

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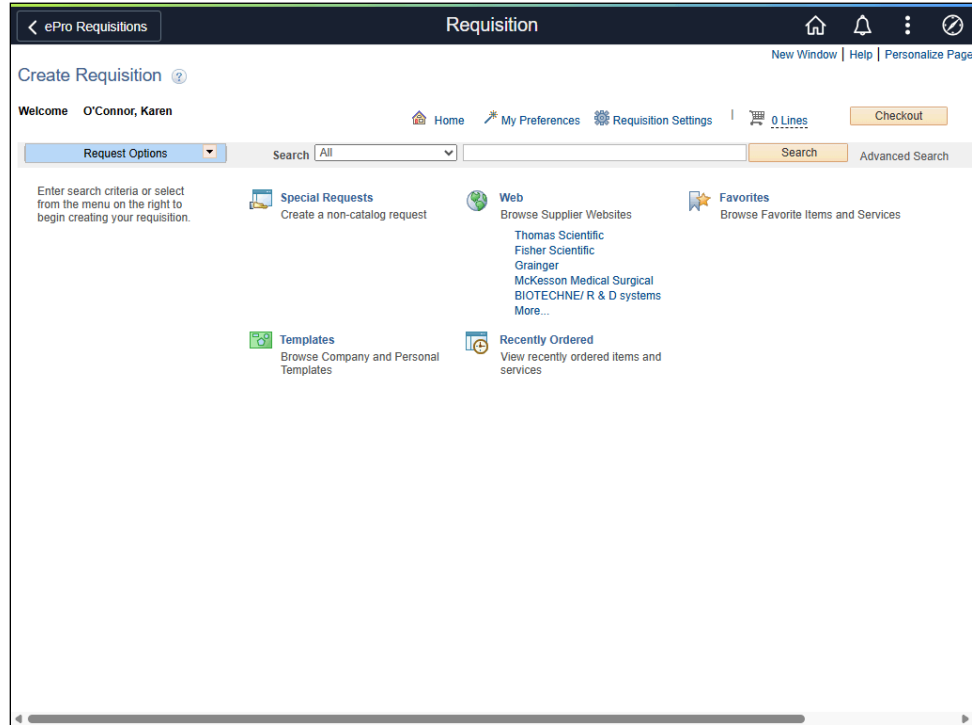
eProcurement Look and Feel Changes



Step	Action
5.	LSU ePro Requisition Tile Changes <u>PRP - Not Upgraded</u> The LSU ePro Requisitions Tile may still be used to <i>perform Document Status Inquiry, Requisition Inquiry, and Manage Requisition Approvals</i> if desired. You may <u>no longer</u> access ePro Requisitions to <u>create reqs</u> from this tile.

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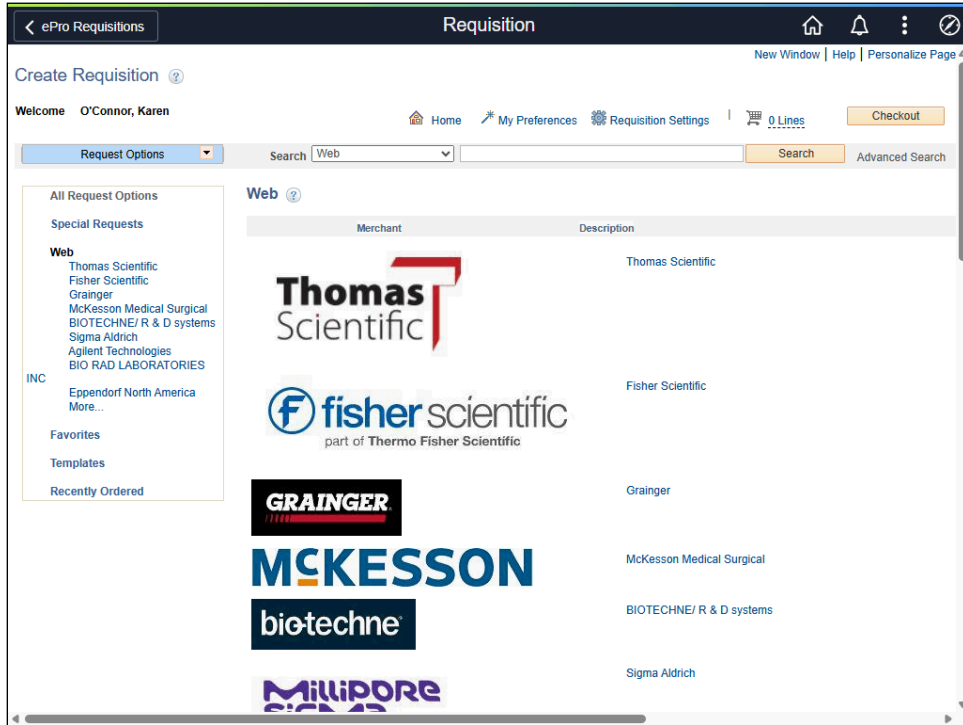
eProcurement Look and Feel Changes



Step	Action
6.	LSU ePro Requisition Tile Changes <u><i>PRP - Not Upgraded</i></u> After completing Requisition Settings, users will see this screen.

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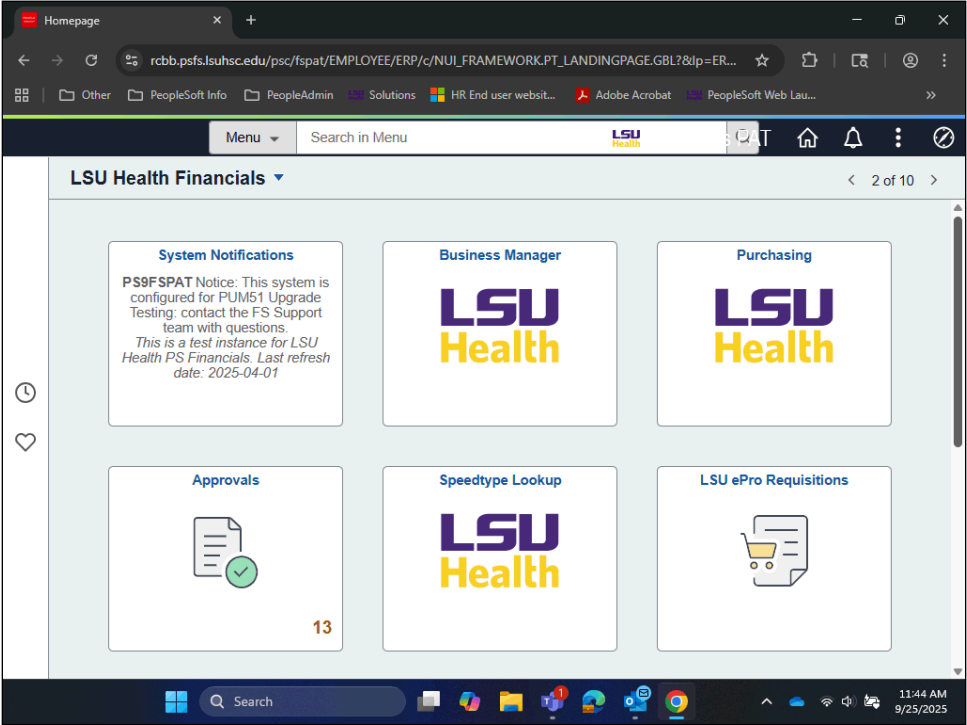
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Step	Action
7.	LSU ePro Requisition Tile Changes <u><i>PRP - Not Upgraded</i></u> Once the user selects Web, s/he will see this page.

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Step	Action
8.	LSU ePro Requisition Tile Changes <u>PAT Upgraded</u> Once the user <i>sets</i> the <i>default</i>, then the <i>main page displays</i>. <i>NOTE: The Cart icon and the Cart section are located at the top of the page.</i>

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eProcurement Look and Feel Changes

Checkout - Review and Submit

New Window | Help | Personalize Page

Checkout - Review and Submit

Review the item information and submit the req for approval.

[My Preferences](#)
[Requisition Settings](#)

Requisition Summary

Business Unit	LSUSH	LSUHSC Shreveport	Requisition Name	
*Requester			Priority	Medium
*Currency	USD			

Cart Summary: Total Amount 37.57 USD

Expand lines to review shipping and accounting details [Add More Items](#)

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total
▶ 1	TK1990365T Laser Pointer Beam		GRAINGER INC	1	EA	37.57	37.57

☐ Select All / Deselect All
 Select lines to:
 Add to Favorites
 Add to Template(s)
 Delete Selected
 Mass Change

Total Amount

Shipping Summary

Edit for All Lines

Ship To Location	LSUSH
Address	1501 Kings Highway Shreveport, LA 71103
Attention To	
Comments	

Requisition Comments and Attachments

Enter requisition comments

Step	Action
9.	ePro Requisition Page <u><i>PRP - Not Upgraded</i></u> There are <i>appearance changes</i> in the <i>ePro Req</i> page.

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eProcurement Look and Feel Changes

Create Requisition

Financials PAT

Home

Search

More

Refresh

Create Requisition

Continue Shopping

Save

Submit

Checkout

Order Total 39.55 USD

Requisition Summary

Business Unit

LSUSH LSUHSC Shreveport

Priority

Medium

Requisition Name

Laser Pointer - Lab

Requester

KOCONN O'Connor, Karen

Currency

USD

Header Comments

Justification Comments

Requisition Lines Overview

Select All

Actions

1 row

Line 1 External Item

TK1990953T Laser Pointer Beam Color

Red Class 3A Projection 655 ft Length 6

1/2 in Width 9/16 in Height 1 in Material

Plastic Color Black Includes 2 AAA

Batteries

Quantity

Unit of Measure

Price

Currency

Total

ScheduleDetails

39.55

Step	Action
10.	ePro Requisition Page <u>PAT - Upgraded</u> Notice that the <i>Header Comments</i> is a <i>button</i> in the Requisition Summary section. <i>Select</i> the button to <i>add comments and attachments</i>. <i>Justification Comments replaces Approval Justification.</i> Users should <i>enter</i> the "5Ws" that Dr. Benefield has <i>requested</i> of <i>all Shreveport users</i>.

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Create Requisition LSU Health Financials PAT

Requisition Summary

Business Unit: LSUSH LSUHSC Shreveport
 Requisition Name: Laser Pointer - Lab
 Requester: KOCONN O'Connor, Karen
 Currency: USD
 Priority: Medium

Justification Comments

Requisition Lines Overview

☐ Select All **Actions** ☒ Mass Change

Item ID	Quantity	Unit of Measure	Price	Currency	Total
Line 1 External Item TK1990953T Laser Pointer Beam Color Red Class 3A Projection 655 ft Length 6 1/2 in Width 9/16 in Height 1 in Material Plastic Color Black Includes 2 AAA Batteries Supplier: GRAINGER INC	1	EA	39.55	USD	39.55 USD

Order Total: 39.55 USD

Step	Action
11.	ePro Requisition Page <u>PAT - Upgraded</u> Notice the <i>Action</i> icon in the Lines section. This is where a user may <i>add</i> the <i>item</i> to their <i>Favorites</i>, a <i>template</i>, <i>delete</i> it from the <i>cart</i> or <i>make mass changes</i> to the requisition.

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eProcurement Look and Feel Changes

Create Requisition

LSU Health

Financials PAT

▼

Requisition Summary

Business Unit

LSUSH LSUHSC Shreveport

Requisition Name

Laser Pointer - Lab

Requester

KOCONN O'Connor, Karen

Currency

USD

Header Comments

Priority

Medium ▼

▼

Justification Comments

▼

Requisition Lines Overview

Select All

Actions

1 row

Line 1

External Item

TK1990953T Laser Pointer Beam Color

Red Class 3A Projection 655 ft Length 6

1/2 in Width 9/16 in Height 1 in Material

Plastic Color Black Includes 2 AAA

Batteries

Quantity

1

Unit of Measure

EA

Price

39.55

Currency

USD

Total

39.55 USD

ScheduleDetails

>

Item ID

Supplier

GRAINGER INC

Line Comments

Delete

Order Total 39.55 USD

Step	Action
12.	ePro Requisition Page <u>PAT - Upgraded</u> In the Lines section, notice the <i>Schedule Details</i> button and the <i>arrow</i> at the <i>far right</i> of the line. That is <i>where</i> the <i>chartfields</i> for the <i>line</i> and the <i>schedule display</i> may be updated. Users would be able to <i>select Amount Only</i> in the Line Details, select the <i>Ship To location</i> in the Schedule Details, or even <i>split</i> the <i>chartfield accounting tags</i>. NOTE: <i>The eProcurement Delta Document and the eProcurement Training Guide detail all information on the ePro module.</i>

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eProcurement Look and Feel Changes

The screenshot displays the 'My Requisitions' filters dialog. At the top, there are tabs for 'Requisition Search' and 'Keyword Search'. The 'Filters' section contains the following fields:

- Business Unit: LSUSH
- Requisition ID: (empty)
- From Date: 07/01/2025
- To Date: 09/30/2025
- Requester: (empty)
- Entered by: (empty)
- Request State: All but Complete
- Budget Status: (empty)
- Supplier ID: (empty)
- Supplier Name: (empty)
- Item ID: (empty)
- Item Description: (empty)
- Ship To Location: (empty)
- Supplier Item ID: (empty)

Buttons include 'Cancel', 'Done', and 'Clear'. At the bottom, a sample requisition is displayed:

0095155	LSUSH/0095155	09/25/2025	RBUCAS	Open	Not Chk'd	1.00 USD
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Step	Action
13.	eProcurement - My Requisitions Tile <u>PAT - Upgraded</u> Using eProcurement Home and the eProcurement Tile, users have <i>access</i> to the My Requisitions Tile. This tile <i>grants</i> the user <i>access to review, update, and manage inquiries</i>. After selecting the My Requisitions Tile, the user will need to <i>set filters</i> the <i>first time</i> they <i>access</i> the page. The following <i>fields must</i> be <i>entered</i> at a minimum: <i>Business Unit, From Date, To Date, and Request State</i>. The user may also wish to <i>enter the Requester</i> to <i>focus results</i>. Once the <i>filters</i> are <i>set</i>, the user should <i>select</i> the Done button. The My Requisitions page <i>displays requisitions meeting the filter criteria</i>.

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eProcurement Look and Feel Changes

Action	Requisition Name	Business Unit/Requisition ID	Requisition Date	Requester	Request State	Budget Status	Total Amount
	0095163	LSUSH/0095163	09/30/2025		Approved	Not Chk'd	54.00 USD
	0095162	LSUSH/0095162	09/30/2025		Pending	Not Chk'd	33.69 USD
	0095161	LSUSH/0095161	09/30/2025		Pending	Not Chk'd	33.69 USD
	0095160	LSUSH/0095160	09/30/2025		Pending	Not Chk'd	33.69 USD
	0095159	LSUSH/0095159	09/30/2025		Approved	Not Chk'd	33.69 USD
	0095158	LSUSH/0095158	09/26/2025		Pending	Not Chk'd	536.60 USD
	0095157	LSUSH/0095157	09/26/2025		Pending	Not Chk'd	4,355.00 USD
	TESTING_REQ_JKEEGA	LSUSH/0095156	09/26/2025		Pending	Not Chk'd	124.45 USD
	0095155	LSUSH/0095155	09/25/2025		Open	Not Chk'd	1.00 USD

Step	Action
14.	eProcurement - My Requisitions Tile <u>PAT - Upgraded</u> In this screenshot, notice the <i>three icons highlighted by the purple outline</i>. Sorting - Next to the Requisition Name are two arrows, facing up and down. You see this <i>same icon</i> in the header row across the display. The two arrows mean that the field may be sorted. Selecting the arrows for any of the headers sorts all of the results by that field. Related Actions - At the left side of each requisition, the Related Actions Icon displays. Selecting the Related Actions icon produces a menu that allows the user to navigate to <i>Details, Copy, Budget Check, View/Print, Create Receipt, View Approvals, and Inquiry</i>. The Related Actions available depend on the Requisition Status. Details Arrow - At the right end of the row, select the Details arrow to expand to the ePro req.

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Details

Cancel Requisition

Requisition Summary

Requisition Name

Laser Pointer - Lab

Requester

O'Connor, Karen

Business Unit

LSUSH

Entered By

O'Connor, Karen

Requisition ID

0095164

Budget Check Status

Not Chk'd

Requisition Date

10/01/2025

Total Amount

39.55 USD

Request State

Pending

Approval Justification

A laser pointer is being requested for Dr J Bon's lab. The previous laser pointer is no longer working, so this will be a replacement. The laser pointer is used regularly to identify lecture items and talking points.

Requisition Lifeline

Requisition

Approvals

Inventory

Purchase Orders

Change Request

Receiving

Delivery

Returns

Invoice

Payment

Lines

Item Image	Description	Item ID	Supplier ID	Supplier Name	Ship To	Line State	Quantity	UOM	Price	Total Amount
------------	-------------	---------	-------------	---------------	---------	------------	----------	-----	-------	--------------

Step	Action
15.	eProcurement - My Requisitions Tile <u>PAT - Upgraded</u> <i>Requisition pending Approval and Budget Check.</i>

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eProcurement Look and Feel Changes

[illegible]

Step	Action
16.	eProcurement - My Requisitions Tile <u>PAT - Upgraded</u> Requisition <i>sourced</i> to <i>PO</i> and <i>Dispatched</i>. <i>Notice the differences in the links under the icons. When active and selectable, that indicates that the requisition has been processed through that phase of the lifeline. Users may select the icon to inquire further.</i> To <i>close</i> out the <i>page</i> and <i>return</i> to the My Requisitions list, <i>select</i> the small 'x' at the <i>top right</i> of the <i>inquiry</i> page.

