



**PeopleSoft_Financials_Upg
rade_to_PUM51_Delta
Download to Excel
Find Icon
Personalize**

Version Date: October 22, 2025

Training Guide
PeopleSoft_Financials_Upgrade_to_PUM51_Delta

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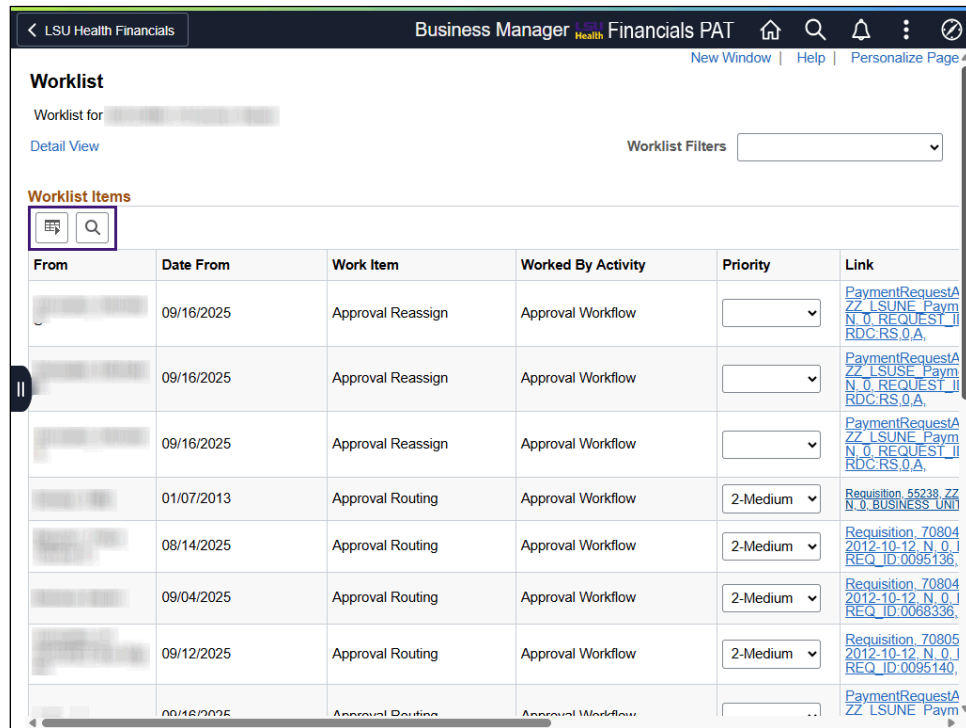
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 Download to Excel, Find, and Personalize Buttons1

PeopleSoft_Financials_Upgrade_to_PUM51_Delta

Download to Excel, Find, and Personalize Buttons

Procedure

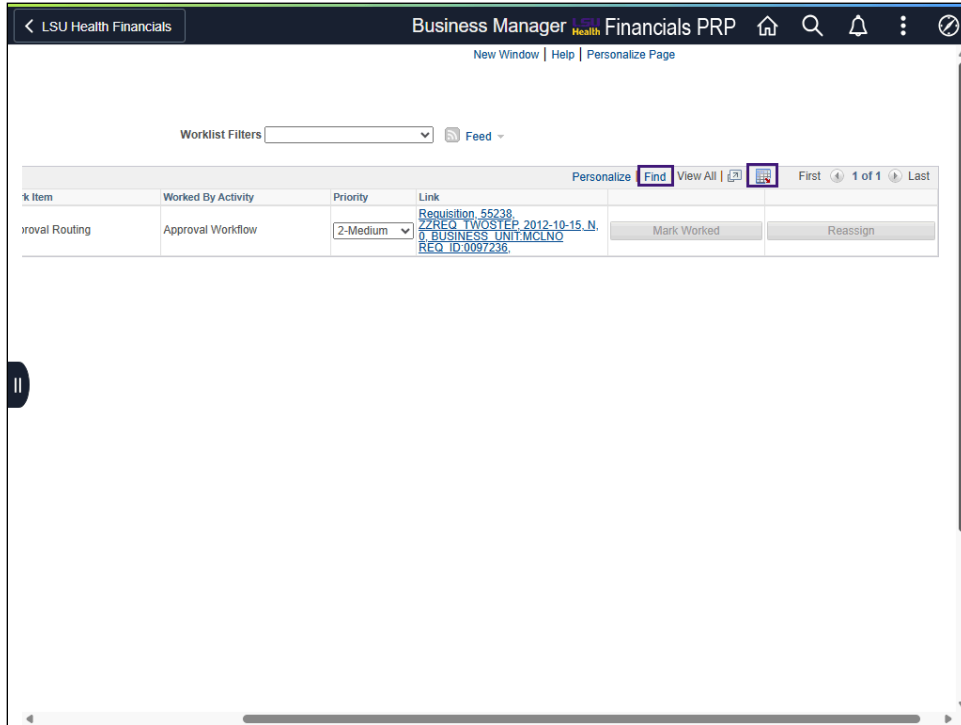
In this topic you will learn how to **Download to Excel, Find, and Personalize Buttons**.



Step	Action
1.	Download to Excel, Find, Personalize Buttons <u>PAT - Upgraded</u> With the upgrade, the <i>Find link</i> , <i>Personalize</i> , and <i>Download to Excel</i> grid links are <i>moved from the right of the page to the left of the grid list</i> and are <i>buttons</i> instead of links.

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Step	Action
2.	Download to Excel, Find, Personalize Buttons As you can see from the screenshot, Find and Download to Excel both appear on top, right of the grid list bar. <u>PRP - Not Upgraded</u> The Find link and the Download Worklist Items Table to Excel appear on the top, right of the page before Worklist Item numbers.

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LSU Health Financials Business Manager LSU Financials PAT

New Window | Help | Personalize Page

Worklist

Worklist for [REDACTED]

Detail View

Worklist Filters [REDACTED]

Worklist Items

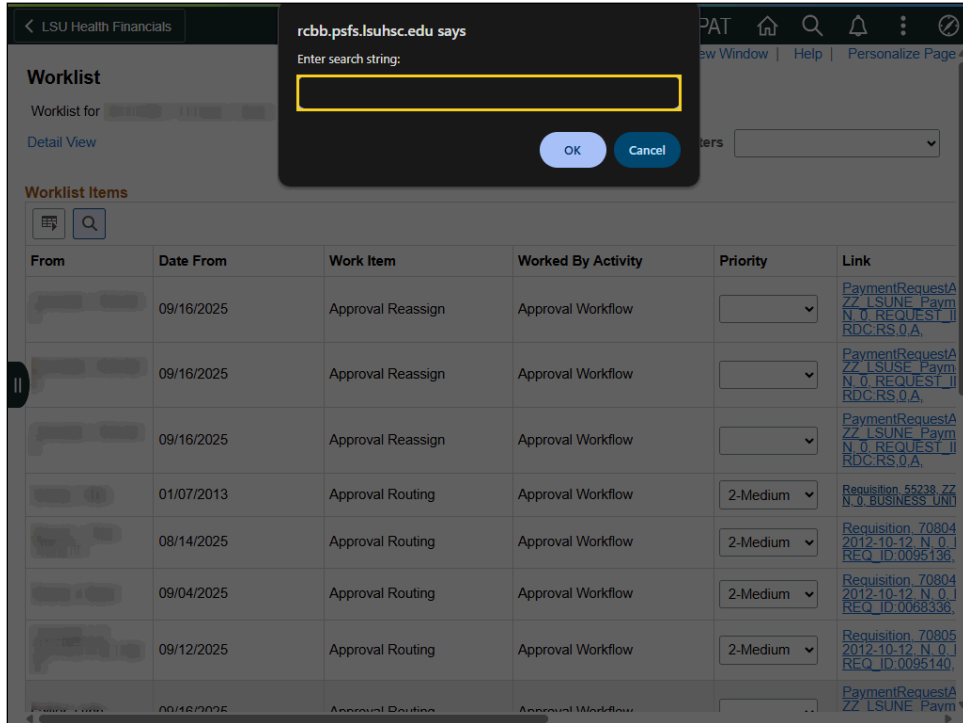
Find

From	Date From	Work Item	Worked By Activity	Priority	Link
[REDACTED]	09/16/2025	Approval Reassign	Approval Workflow	[REDACTED]	PaymentRequestA ZZ LSUNE Paym N.O. REQUEST II RDC.RS.0.A.
[REDACTED]	09/16/2025	Approval Reassign	Approval Workflow	[REDACTED]	PaymentRequestA ZZ LSUNE Paym N.O. REQUEST II RDC.RS.0.A.
[REDACTED]	09/16/2025	Approval Reassign	Approval Workflow	[REDACTED]	PaymentRequestA ZZ LSUNE Paym N.O. REQUEST II RDC.RS.0.A.
[REDACTED]	01/07/2013	Approval Routing	Approval Workflow	2-Medium	Requisition 55238 ZZ N.O. BUSINESS UNIT
[REDACTED]	08/14/2025	Approval Routing	Approval Workflow	2-Medium	Requisition 70804 2012-10-12 N.O.I REQ_ID:0095136
[REDACTED]	09/04/2025	Approval Routing	Approval Workflow	2-Medium	Requisition 70804 2012-10-12 N.O.I REQ_ID:0068336
[REDACTED]	09/12/2025	Approval Routing	Approval Workflow	2-Medium	Requisition 70805 2012-10-12 N.O.I REQ_ID:0095140
[REDACTED]	09/16/2025	Approval Routing	Approval Workflow	[REDACTED]	PaymentRequestA ZZ LSUNE Paym

Step	Action
3.	Download to Excel, Find, Personalize Buttons <u>PAT - Upgraded</u> Find is designated by the <i>magnifying glass button</i>. In this example, the user will search for the LSUSH requisition that is dated 09/18/2025. Click the Find button. 

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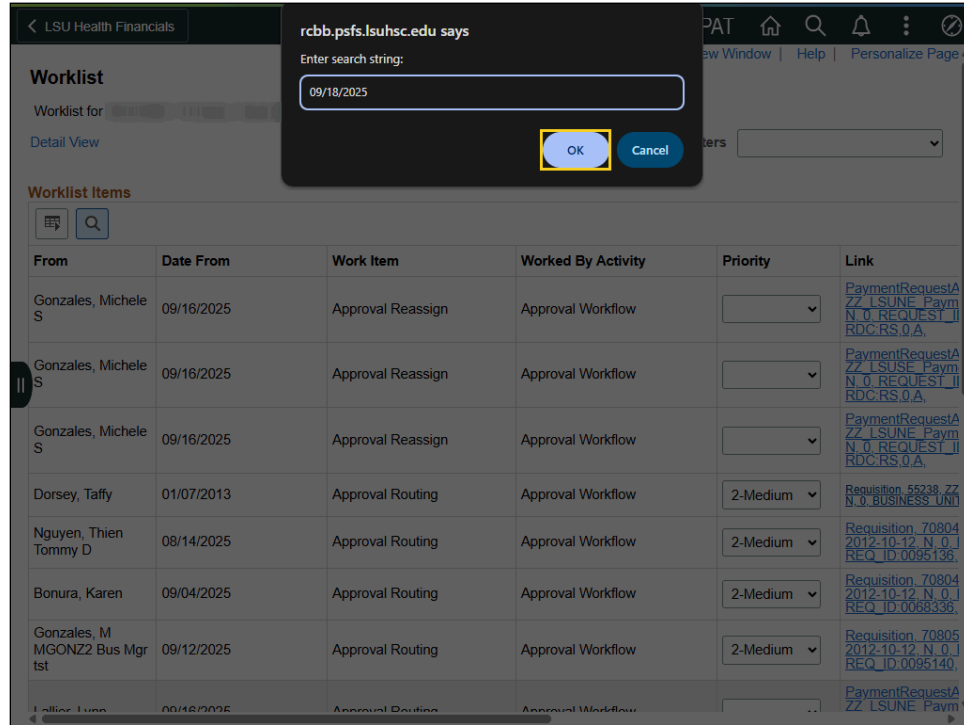
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Step	Action
4.	Download to Excel, Find, Personalize Buttons <u>PAT - Upgraded</u> Users must enter the date using the correct <i>date format: MM/DD/YYYY</i>. Enter the desired information into the Search field. Enter "09/18/2025".

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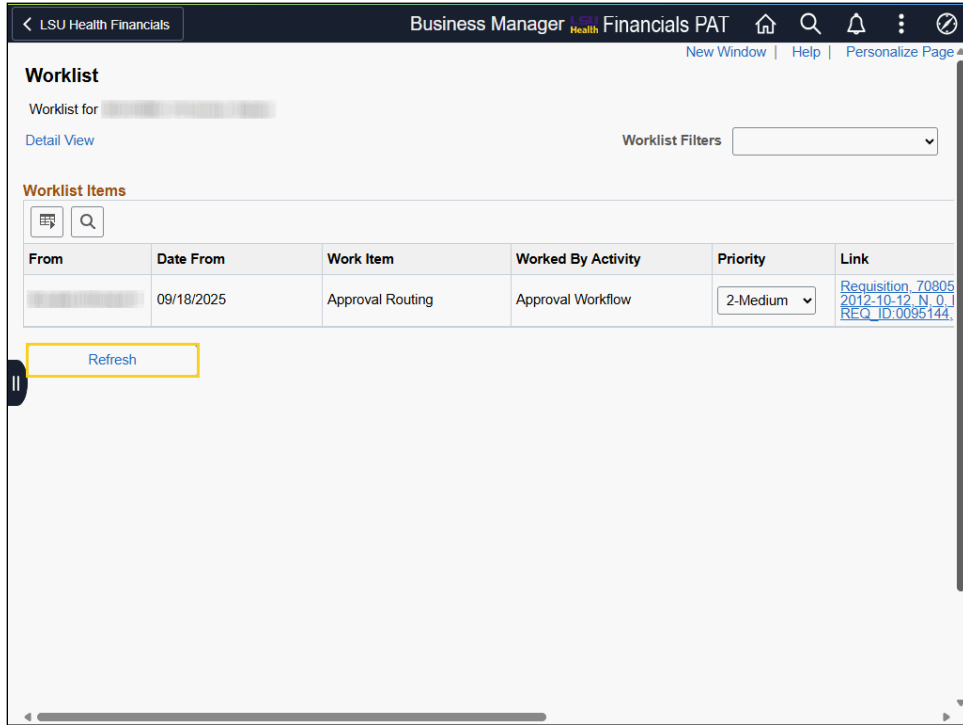
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Step	Action
5.	Download to Excel, Find, Personalize Buttons <u>PAT - Upgraded</u> Users must enter the date using the correct <i>date format: MM/DD/YYYY</i>. Click the OK button. 

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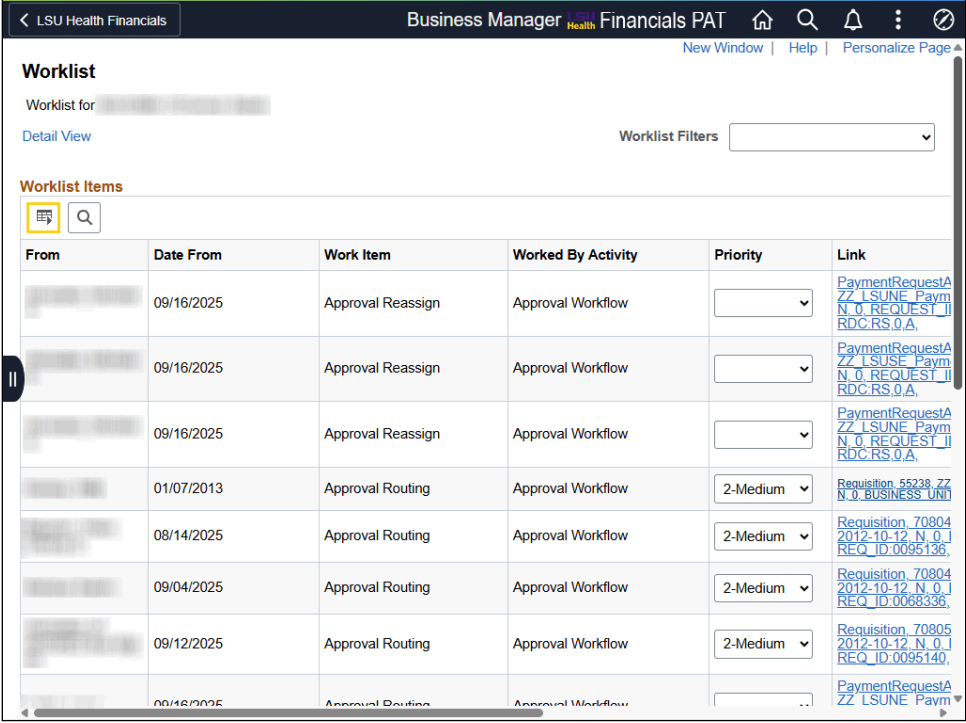
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Step	Action
6.	Download to Excel, Find, Personalize Buttons <u>PAT - Upgraded</u> The 09/18/2025 Worklist Item is displayed by itself on the page. Click the Refresh button. Refresh

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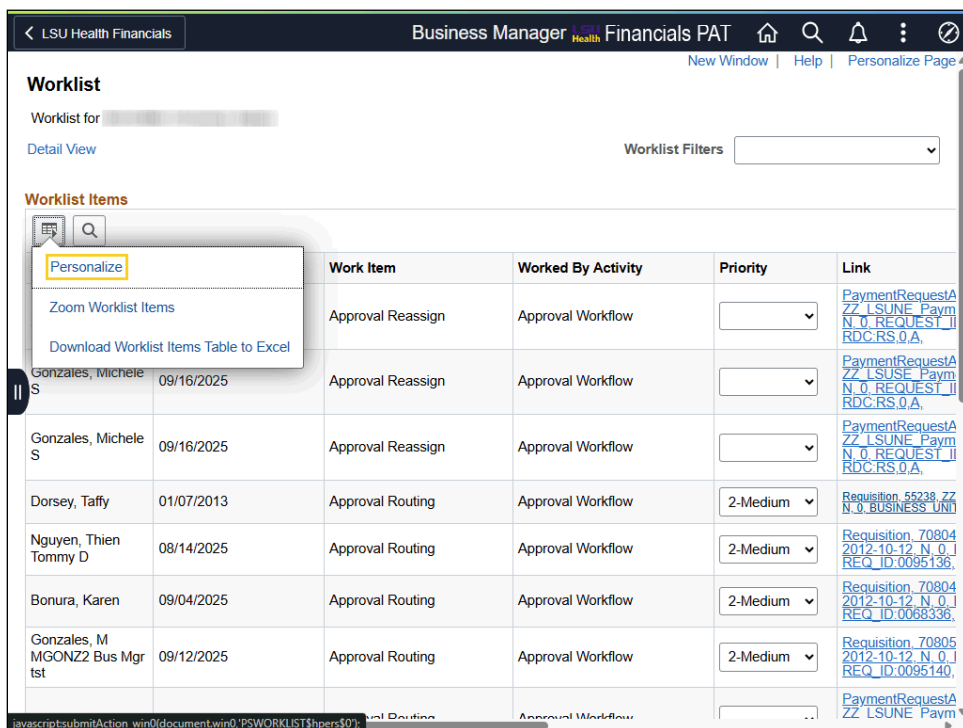


From	Date From	Work Item	Worked By Activity	Priority	Link
	09/16/2025	Approval Reassign	Approval Workflow		PaymentRequestA ZZ LSUNE Paym N 0 REQUEST II RDC-RS 0 A
	09/16/2025	Approval Reassign	Approval Workflow		PaymentRequestA ZZ LSUNE Paym N 0 REQUEST II RDC-RS 0 A
	09/16/2025	Approval Reassign	Approval Workflow		PaymentRequestA ZZ LSUNE Paym N 0 REQUEST II RDC-RS 0 A
	01/07/2013	Approval Routing	Approval Workflow	2-Medium	Requisition 55238 ZZ N 0 BUSINESS UNIT
	08/14/2025	Approval Routing	Approval Workflow	2-Medium	Requisition 70804 2012-10-12 N 0 REQ_ID:0095136
	09/04/2025	Approval Routing	Approval Workflow	2-Medium	Requisition 70804 2012-10-12 N 0 REQ_ID:0068336
	09/12/2025	Approval Routing	Approval Workflow	2-Medium	Requisition 70805 2012-10-12 N 0 REQ_ID:0095140
	09/16/2025	Approval Routing	Approval Workflow		PaymentRequestA ZZ LSUNE Paym

Step	Action
7.	Download to Excel, Find, Personalize Buttons <u>PAT - Upgraded</u> The button that looks like a <i>little spreadsheet</i> is the Grid Actions Menu. This allows the user to <i>download to Excel</i>, <i>zoom in</i> on the <i>list of items</i>, or <i>personalize the grid</i> for certain pages. Click the Grid Action Menu button. 

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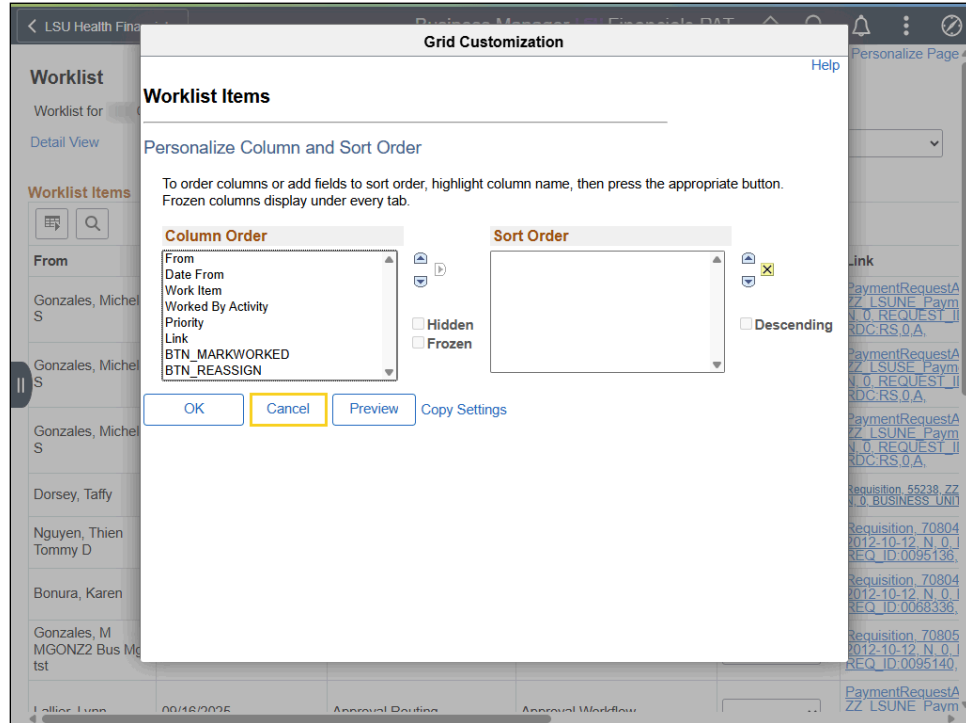
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Step	Action
8.	Download to Excel, Find, Personalize Buttons <u>PAT - Upgraded</u> By selecting the Grid Actions button on the Worklist grid, the user <i>sees</i> the <i>menu options</i> shown in the screenshot. Click the Personalize link. Personalize

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Step	Action
9.	Download to Excel, Find, Personalize Buttons <u>PAT - Upgraded</u> The Personalize page allows the user to order column or add field to the sort order. The user accomplishes this by clicking on the column name and then pressing the appropriate button. Click the Cancel button. Cancel

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The screenshot displays the 'AM Search for an Asset' window in the PeopleSoft Financials PRP application. The window has a dark header bar with navigation icons and the title 'AM Search for an Asset Financials PRP'. Below the header, there's a 'Search for an Asset' section with a dropdown for 'Asset Search Criteria'. This section contains several input fields: Unit (with 'LSUNO' entered), Book, Location, Asset ID, Tag Number, Serial ID, Asset Status (set to 'In Service'), Profile ID, Parent ID, Area ID, and Group ID. There are also checkboxes for 'Approval Pending' and 'Additional Search Criteria'. Below this is the 'Acquisition Details' section with fields for PO Unit, Receipt Unit, AP Unit, PC Bus Unit, PO No, Receipt No, Voucher, and Project ID. At the bottom, there's a 'Retrieve' section with checkboxes for 'Cost Information', 'Acquisition Information', 'Location', 'Non Capital Asset', 'Custodian', and 'Lease'. A 'Search' button and a 'Clear' button are located below the checkboxes. A 'Notify' button is also present at the bottom left of the search area.

Step	Action
10.	Search/Find Button Moved to within the Field Box <u><i>PRP - Not Upgraded</i></u> Users will see that the Find button, the <i>magnifying glass</i> is now <i>inside</i> the <i>field box</i> instead of immediately to the right.

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Search for an Asset

Asset Search Criteria

Unit:

Book:

Category:

Location:

Asset ID:

Asset Status:

Tag Number:

Profile ID:

Serial ID:

☐ Approval Pending

[Additional Search Criteria](#) [Chartfield Search Criteria](#)

Acquisition Details

PO Unit:

Receipt Unit:

AP Unit:

PO No:

Receipt No:

Voucher:

Retrieve

☐ Cost Information ☐ Acquisition Information ☐ Location ☐ Non Capital Asset ☐ Custo

Step	Action
11.	Search/Find Button Moved to within the Field Box <u>PAT - Upgraded</u> The screenshot shows the <i>Search/Find - magnifying glass</i> - button <i>within the field box</i>.

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LSU Health Financials Business Manager LSU Health Financials PAT

Search for an Asset

▼ **Asset Search Criteria**

Unit:

Category:

Asset ID:

Tag Number:

Serial ID:

☐ Approval Pending

[Additional Search Criteria](#)

Book:

Location:

Asset Status:

Profile ID:

[Chartfield Search Criteria](#)

Acquisition Details

PO Unit:

Receipt Unit:

AP Unit:

PO No:

Receipt No:

Voucher:

Retrieve ⓘ

☐ Cost Information ☐ Acquisition Information ☐ Location ☐ Non Capital Asset ☐ Cust

Step	Action
12.	This completes <i>Download to Excel, Find, and Personalize Buttons</i> . End of Procedure.