After the upgrade you will continue to use the PeopleSoft 9.1 launcher; however, you will select and choose the 9.2 version of the Financials database from the launcher.

PENDLE		
2001		
PS9.1 Launcher		
LSUHSC PeopleSoft	9.1 Launcher	
Options Clear Cache T	raining Help	
PeopleSoft <u>S</u> ystem:	Financials	•
<u>D</u> atabase:	PS 9.2 Financials Production	n (PS9FSPRD)
-		45
Application:	PeopleSoft	•
<u>O</u> perator ID:	TWIL11	
	Start Cancel	

As a reminder, whenever there is an upgrade, the system will start in a default status the first time you launch it. You must reset any personalizations you may have had prior to the upgrade. For example, changing Pagelets or adding menu layout customizations that you previously set in PS Financials 9.1:



The PeopleSoft 9.2 upgrade provides several enhancements to the Financials Application. In addition to upgrade "look and feel" type changes, the following are items of note.

Please note that not all users will see each of the items noted in these examples; your access is directed by your security permissions.

1. SUPPLIERS

Vendors are now called Suppliers within PeopleSoft. This is noted within the menu navigation, page information and report.

Favorites 👻	Main	Menu 👻		_	
PS9FSUPG	Sea	rch Menu:	_		
FSCM 9.2 PSTools 8 PS9FSWEBDEV12			∞.	>>	Advanced Sea
I SHI SWEDDEV 12	~				
		Accounts Payable			
		Allocations			
		Commitment Control	•		
		Cost Accounting	•		
		Customer Contracts	•		
		Enterprise Components	•		
		General Ledger	•		
		Inventory	•		
		Items	•		
		LSU Processes	•		
		PeopleTools	•		
		Procurement Contracts	•		
		Purchasing	•		
		Reporting Tools	•		
		Set Up Financials/Supply Chain	•		
		Suppliers	÷		
		Worklist	÷		
		My Personalizations			

2. SES Search

The SES search replaces the older Verity Search functionality within PeopleSoft. The new feature is more robust and allows users to search within the menus and for documents matching the search criteria. Additional filters provide flexibility in locating the object of choice. The search box is located at the "header" or top of the page. It includes a basic search, advanced search and a selection box to narrow the search to several specific components within PeopleSoft.

NOTE: The SES Search functionality requires several new Indexing processes. It will only be available in the PRD database and will be made available to users beginning Tuesday, April 19.

SCM 9.2 PSTools 8.53 PS9FSWEBDEV12	Menu - Search	Advanced S
	All	
	Suppliers	
	Vouchers	
	Journals	
	Procurement Contracts	
	Receipts	
	Requisitions	
	Purchase Orders	
	Menu	

Display of the Advanced Search from the Header

Favorites	
PS9FSUPG FSCM 9.2 PSTools 8.53 PS9FSWEBDEV12	Advanced Search
I Search Criteria	
*Search in Keywords	Menu 🔽 Search Tips
With this Exact Phrase With any of these Words	
Exclude	
Portal Label Long Description	contains phrase
	contains phrase
Source Application	
	Search Clear

Example of using a Search in "All" for the Word "Pipette":

Favorites 👻	Main Menu ▼ → ""	
PS9FSUP FSCM 9.2 PSToo PS9FSWEBDEV1	als 8.53 All	▼ >>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>
I Searce	h Criteria	
	*Search in Keywords	
	With this Exact Phrase With any of these Words Exclude	s Pipette ×
	[Search Clear

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As you can see, there are 980 matching results for Pipette. You may use the category filters to narrow down the search, scroll through the results or, use the related actions arrow to the right of certain results.

980 results matched your search criteria	12345
Supplier - SHARE 0000036701 PIPETTE RE-001 Last Updated Date: 2016-03-22 19:23:45 Supplier: PIPETTE REPAIR SERVICE, INC. Date: 2012-11-02 St	Maintain Supplier Conversations Review Supplier Contacts
Supplier - SHARE 0000020515 PIPETTE SU-001 Last Updated Date: 2016-03-22 19:23:45 Supplier: PIPETTE SUPPLIES, INC. Date: 2005-07-27 Status: A	Approve Suppliers Review Supplier Name History Review 1099/Withholding
Supplier - BRFHH 0000020515 PIPETTE SU-001 Last Updated Date: 2016-03-22 19:23:45	

3. SES Keyword Search

The keyword Search is an additional SES Search feature released within the Purchase Requisition, Purchase Orders, Procurement Contracts, Suppliers, Receipts, Asset Entry, Voucher Entry, and Journal Entry components. When adding a new value or searching for an existing one, the new Keyword Search tab appears. It provides additional fields on which you may search to locate the desired document. The following screenshot displays the Keyword "Advanced Search" tab for requisitions.

Favorites - Main Menu -	>""				
PS9FSUPG					
FSCM 9.2 PSTools 8.53 PS9FSWEBDEV12	Requisitio	ns 🔻		>> Advan	ced Search
Requisitions					
Use the following search to look	for an existing Requi	sition.			
Eind an Existing Value	word Search Ad	d a New Value			
Note: Keyword Search will retu	rn results last update	d 7 days ago (04/01/2016	(7:15:27AM)		Search Tips
Keywords					
Business Unit:	= 🖌	LSUSH ×	Q		
Requisition ID:	contains phrase 🗸]		
Requisition Name:	contains phrase 🗸				
Requisition Status:	= 🖌		~		
Origin:	contains phrase 🗸		Q		
Requester:	contains phrase 🗸		Q		
Requester Name:	contains phrase 🗸		Q		
Hold From Further Processing					
		1	_		
Business Unit Description:	contains phrase 🗸				
Budget Status - NonProrated:					
Budget Status - Prorated:	contains phrase 🗸				
Requisition Date:	= 🗸		31		
Buyer:	contains phrase 🗸				
Buyer Name:	contains phrase 🗸				
Category Code:	contains phrase 🗸				
Category Description:	contains phrase 🗸]		
Category Description Short:	contains nhrasa 🗸		1		

4. Pop-Up Windows after selecting a link

In PeopleSoft 9.2, when you select a link from a page, instead of always directing the user to a new page, PeopleSoft now opens a pop-up window over the existing page. The user is then able to review the information and/or make a selection. Once completed, the information is populated onto the original window and the pop-up window closes. Although the screenshot displayed is an example from query manager, this feature is used throughout all of PeopleSoft.

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M 9.2 PSTools 8.53 All Search FSWE8DEV11					Advanced Sea	ch	
Records Query Expressions Prompts Field	s Crit	eria	Havi	ng	View SQL Run		
Query Name REPORT_REQUESTS_LIST View field properties, or use field as criteria in query state	ment.			Des	cription	Reorde	€) Feed →
Fields			Pe	ersona	lize Find View All	🗵 🛄 🛛 First	1-6 of 6 Last
Col Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria Edit	t Query Properties
1 A.BUSINESS_UNIT - Business Unit	Char5	3			Unit	9.	Help
2 A.REPORT_ID - Report ID	Char8	2			Report	9.	*Query: Pop-up winREPORT_REQUESTS_LI ×
3 A.LAYOUT_ID - nVision Layout	Char50	1			Layout	9.	Description:
4 A.DESCR - Description	Char30				Descr	%	
5 A.NVS_REPRQST_AMODE - Report Request Access	Char1		N		Access Mode	%	Folder: *Query Type: User
6 A.LASTUPDDTTM - Last Update Date/Time	DateTm				Last Upd DtTm	9.	*Owner: Private
Save Save As New Query F	Preference	95	Pro	pertie	s Publish as F	eed New Unic	on Distinct I Security Join Optimizer Query Definition:
							Last Updated Date/Time: 10/26/2011 1:47:15PM Last Update User ID: MGONZA

5. Users that run Crystal Reports from the launcher: Please note there are no changes to how you access or run Crystal Reports.

Users that run system delivered Crystal Reports from within a module: The Crystal Reports tool is replaced with BI Publisher versions of the reports.

PeopleSoft has updated the tool utilized for the delivered system reports from Crystal to BI Publisher. The Crystal versions are no longer available from the menu navigation. Users should expect to see the same output. The Process Name and Type are updated to BI Publisher as noted in the screenshot below.

SOFSUPG SCM 9.2 PSTeols 8.53 SOFSWEBDEV11	All - Search		>> Advance	d Search								
Detail Listings Run Control ID: Language: Report Request Parameters	PO_List Repo English V	rt Manager	Process Monito	r	Run							
From Date 11/01/201	c 100	Through Dat	e 11/10/2015 🕅									
Business Unit LSUSH		rinougii Dai	e 11/10/2015 M	Drees	ss Scheduler Reques	4						×
				Proce	ss scheduler Reques	a						Help
Supplier SetID SHARE					User ID: MGONZA			Run Control ID	: PO_List			
Buyer				5	erver Name: PSNT	\checkmark	Run Date: 03/	14/2016				
·					Recurrence:		Run Time: 9:4		Reset to	Current Date/Time	9	
🖥 Save 🔛 Notify					Time Zone:	Q						
Save Nouly				Proce	ss List							
				Select	Description		Process Name	Process Type	*Туре	*Format	Distribution	
					PO Detail Listing By PO I	Date	POX4030	BI Publisher	Web		Distribution	
					PO Detail Listing By Sup	plier	POX4031	BI Publisher	Web		Distribution	
					PO Detail Listing By Buy	er	POX4032	BI Publisher	Web	PDF V	Distribution	
				OF	Cancel							

6. nVision Report Books – Process Scheduler Page Type Selection The nVision Report Book feature includes a slight change on the Process Scheduler page. When a user creates a Report Book to combine multiple nVision reports into one process run, the reports must be run to the Web (Report Manager). Upon selecting the Run button, the user is directed to the Process Scheduler Request page. On this page, in the selection box called "*Type", users MUST change the Default to Web prior to pressing the Ok button. If the user does not perform this change, the reports will not post to the Report Repository.

SWEBDEV11							
Report Book un Control ID:	UPG_PRD_RPTE	OOK Report Ma	nager Pr	ocess Monitor	Run		
Run Parameters							
	Specify Use As Of Reporting	Date V	06/30/2015	Ignore Run	Process Scheduler Request		×
Retention Days:				E Ignore Run			Help
		nalize Find Viev		First 📧 1-10 of 1	User ID: MGONZA	Run Control ID: UPG_PRD_RPTBOOK	
Seg Business Unit		nalize Find Viev	VAII 600 600 View	Run	Server Name: PSNT	Run Date: 03/28/2016	
1 LSUNO Q	FYEFS11	Q	View	<	Recurrence:	Run Time: 11:09:24AM Reset to Current Date/Time	
2 LSUNO Q	BSDETAIL	a a	View	Image: A state of the state	Time Zone:		
	TBPERIOD		View		Process List		
3 LSUNO Q			View	Image: A state of the state	Select Description	~ (<u>~</u>	tribution
4 HCSDA Q	AFRRLALL				Invision Report Book	RPTBOOK nVision-ReportBook Web VLS V Dis	stribution
	AFRRLALL CR111ALL		View			RPTBOOK NVision-ReportBook Web	
4 HCSDA Q 5 HCSDA Q				2			
4 HCSDA Q 5 HCSDA Q 6 HCSDA Q	CR111ALL PJ113_15	م م	View	7			
4 HCSDAQ 5 HCSDAQ 6 HCSDAQ 7 LSUSHQ	CR111ALL PJ113_15 AUX_INC	Q Q Q	View View View	V V V			
4 HCSDA Q 5 HCSDA Q 6 HCSDA Q	CR111ALL PJ113_15	م م	View View	7	OK Cancel		

- 7. **Cancelling a Requisition Differences**: In 9.2 there are two new screens the Requester will see when canceling a requisition. If a requester has security access to cancel a requisition they can click the RED X on the Requisition header to cancel. If the requester does not have cancel access they can request that their buyer cancel the requisition for them.
 - a. There is no change in 9.2 when canceling a Requisition that has been sourced to a PO; the requester will see the same message they currently see in 9.1, "Requisition has been sourced and cannot be canceled".
 - b. The new screens displayed depend on the requisitions' budget check status. Examples:
 - i. **NOT BUDGET CHECKED:** If the Requisition has not been budgeted checked; the requester will see this screen that lets the requester know the cancellation was successful. Click the OK button to continue.



 BUDGET CHECKED: If the Requisition has been budget checked; the requester will see the following screen that indicates the cancellation was successful. The requester can click the Budget Check button to budget check the Requisition which will reverse the pre-encumbrance or they can click the OK button and let the process that runs nightly budget check the requisition which will also reverse the pre-encumbrance.

Successful Cancellation	
The requisition has been canceled, but requires a budget check. Press the budget check button below to run the budget checking process. Otherwise click OK to continue without budget checking the Requisition.	
Budget Check Ok	
Budget Status	
🗐 Save 🚨 Return to Search 🖃 Notify 🏚 Refresh 📑 Add 🖉 Update/Display	

8. View Printable of Requisitions created in version 9.1

There are two extra steps involved when printing 9.1 requisitions using the View Printable Version link. This is a temporary measure and only affects requisitions created in version 9.1 (**requisitions created prior to noon on 4/15/2016**), and not requisitions created in 9.2.

a. Click the View Printable Version Link



b. This message appears as it does now in 9.1 – Click the Yes button to save the current document and print

Message
Do you wish to save the current document? (10250,274)
Document cannot be printed if it is not saved. If you choose Yes, document will be saved and printed. If you choose No, document cannot be printed.
Yes No

c. This is a new message – Click the OK button.

Message
Field is Required: REQ_VAL_ADJ_P - ADJ_METH (124,64)
ОК

d. Click the View Printable Version link again, and the requisition will queue to print as it does now in 9.1. Once the requisition prints successfully, you will not be required to do steps 3-4, if you decide to print the same requisition from View Printable Version.

NOTE: Navigating from Main Menu > Purchasing > Requisitions > Reports > Print Requisition and selecting a run control to print works as it does now in 9.1, there is no change in 9.2.

9. Save Warning when Printing a Stock Request

After creating and saving a Material Stock request, the user selects the printer icon to print the document. Next, the user selects the Report Manager link. Upon doing so, a new "Save Warning" message appears in version 9.2 indicating that there is unsaved data on the page. The user may click cancel to continue or press ok to go back and save the request again before proceeding.

Stock Request Su	immary								6
Unit LKWHS	3					_		1	n Process No
Order No SR156	43582	*	Increment Dei	mand Line Orde	r Line 🔽	l √] Partial O	rders Can Ship		
Name	Test Issue for U	grade							
Ship Cust	PS Support Tear	n							
Location	2047100	Override Address		Emergenc	y Room				
Load ID	G	Detail	Save War	ning					
Carrier ID			March and a	/ou have unsaved data on this page. Click OK to go back and save, or Cancel to continu					
Distrib. Type	ISSUE		rou nave un	saved data on th	s page. Cil	ICK OK to go baci	cand save, or Cancell	to continue.	
		Override ChartFie					OK	Cancel	
Demand Lines				Persor	nalize Fin	d View All 🗷	📕 🛛 First 🗹 1 d	of 1 🗈 Last	
Detail Status									
*Line Schedule	Demand	Item ID		*Qty Requested	*UOM	Schedule Date	Schedule Time		
1	1	1 124195	Q 🞵	1.0000	BOX Q	04/06/201()	7:15AM	+	

NOTE: The Material Stock Request Document is one of the many old Crystal reports replaced with the BI Publisher version. The name that appears on the Report Manager differs. Instead of IN Material Document INC6501, users will see INX6501 – INX6501.htm

	Description
INX6501 - INX6501.htm	INX6501 - INX6501.htm

10. Purchase Orders and Requisition Document Status Inquiry

The voucher payment information in 9.2 has been moved from the Document Status page to the Voucher Inquiry Page.

Associat Document	ed Document ts Related I			ocument		Person	ialize Find View 4 I	🄊 🛗 🛛 Firs
SetID	Business Unit Document Type		DO	Status page		Document Date	Vendor ID	Locatio
	LSUSH	Requisition	<u>0062351</u>	Approved		06/12/2015		
	LSUSH	Voucher	00587930	Posted		08/01/2015	0000020900 💂	000000
	LSUSH	Voucher	00589044	Posted		09/01/2015	0000020900 д	000000
	LSUSH	Voucher	00590013	Posted		10/01/2015	0000020900 💂	000000
	LSUSH	Voucher	00590676	Posted		11/01/2015	0000020900 📃	000000
	LSUSH	Voucher	00591761	Posted		12/01/2015	0000020900 📃	000000
	LSUSH	Voucher	00593588	Posted		02/01/2016	0000020900 📃	000000
	LSUSH	Voucher	00594675	Unposted		04/01/2016	0000020900 周	000000
SHARE	1	Payment	470269	Posted		08/14/2015	0000020900 周	000000
	5		171511			0014010045		

a. Click the Voucher Link on the Document Status page to access the Voucher Inquiry page

Document	t Status		(9.2				
		ess Unit LSUN ent Date 07/20/	-	Document Status			ID 00378128 Is Dispatched	
	C	urrency USD				Document Typ	e Purchase Orde	r
		Buyer Desim	ione, Gary			Merchandise Ar	nt 5,000.00	
						Budget Statu	us Valid	
Associated D	ocument				Pers	onalize Find	View All 💷 🛗	First
Documents	Related In	nfo 💷						
Actions	Business Unit	Document Typ	DOC ID	Status		Document Date	Supplier ID	Location
- Actions	LSUNO	Requisition	004572	Approved	(06/24/2015		
✓ Actions	LSUNO	Voucher	003092	68 Posted	(08/14/2015	0000004983	9999999

b. Click the Actions link on the Voucher Inquiry page, and select Payment Information

Voucher	Inquiry								
Search C	riteria								
▷ Sort Crite	ria								
▷ Display C	Currency Criteri	а							
▷ Late Inter	est Analysis								
Voucher Inqu	uiry Results						Personalize Fin	nd View All 🗇	🔠
Voucher De	etails A <u>m</u> ou	nts <u>M</u> ore	Details <u>S</u> upplie	er Details	==•				
Actions	Business Unit	Voucher ID	Invoice Number	Invoice Date	Supplier ID	Entry Status	Incomplete	Match Status	Sho
- Actions	LSUNO	00309270	900812044	07/30/2015	0000004983	Postable		Matched	BIO
Match Paymer	/ Accounting Er Workbench nt Information er Details	ntries				·			

c. From the Voucher Payment Inquiry page, you can drilldown to payment details by clicking the Payment Reference ID link.

	Busines	s Unit LSUN	10 /	/oucher ID	00309270	Invoice	Number 9008	312044		
5	Supplier	Name BIO R		RIES INC		Supplier	Location 9999	9999999		
Gross In	voice Ar	nount	178.00)		Transaction (Currency USD	1		
Details							Personaliz	e Find View	/ All 🖾 🛗	Fi
Bank SetID	Bank Code	Bank Account	Payment Reference ID	Applied Business Unit	Applied Voucher ID	Payment Date		Payment Currency	Voucher Paid Amount	Pa
SHARE	BKOL	BKOL	006694			09/04/2015	1,968.70	USD	178.00	P

11. Reminder: Current Features extended into version 9.2

- **Personalizations** Upgrades bring the system to a "default" status. <u>You</u> <u>must reset any personalizations you may have had prior to the</u> <u>upgrade.</u>
- Changes that became effective with the upgrade to IE11 and Office 2010 (October 2015). These changes included the nVision web drill bug from Oracle/Microsoft that require users to open an IE11 session prior to launching PeopleSoft and running a nVision report.
- 12. "New Features" to be released at a later date
 - a. Workcenters Purchasing, AP, Asset Management, General Ledger, Accounts Receivable, Billing, and Grants
 - b. Payment Request Form and workflow process
 - c. Voucher Approval Process
 - d. Additional Metrics in Purchasing and Payables
 - e. Supplemental Data for Grants and Contracts
 - f. Post Award Administrator for Grants