

PeopleSoft Financials Tools 8.59 Upgrade

Training Presentation

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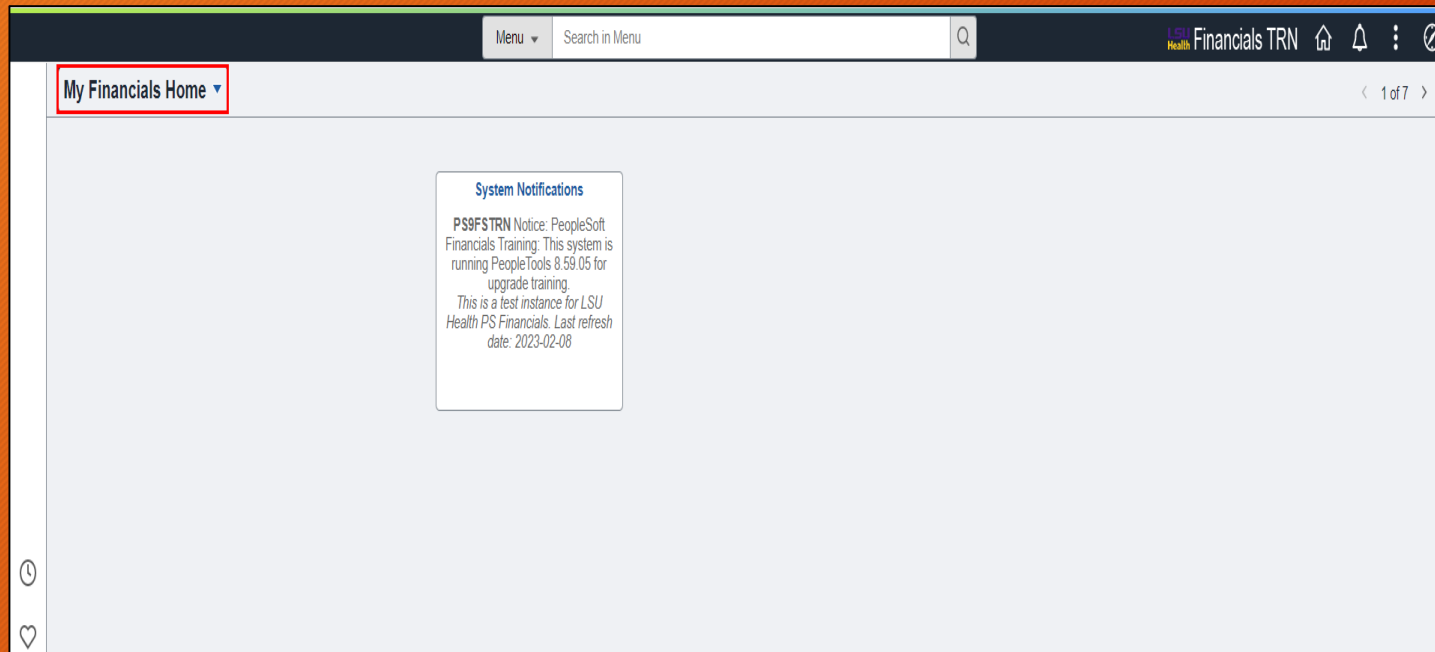
Introduction

- Significant navigational change throughout the system
- New terminology introduced
- New homepages and tiles
- Basic functionality same
 - Few minor changes and some new features

What will be introduced to you today:

- Homepages
- Notifications
- My Preferences
- NavBar Menu Appearance and Terminology Differences
- Recently Visited and Favorites Icons
- PS nVision
- Process Monitor

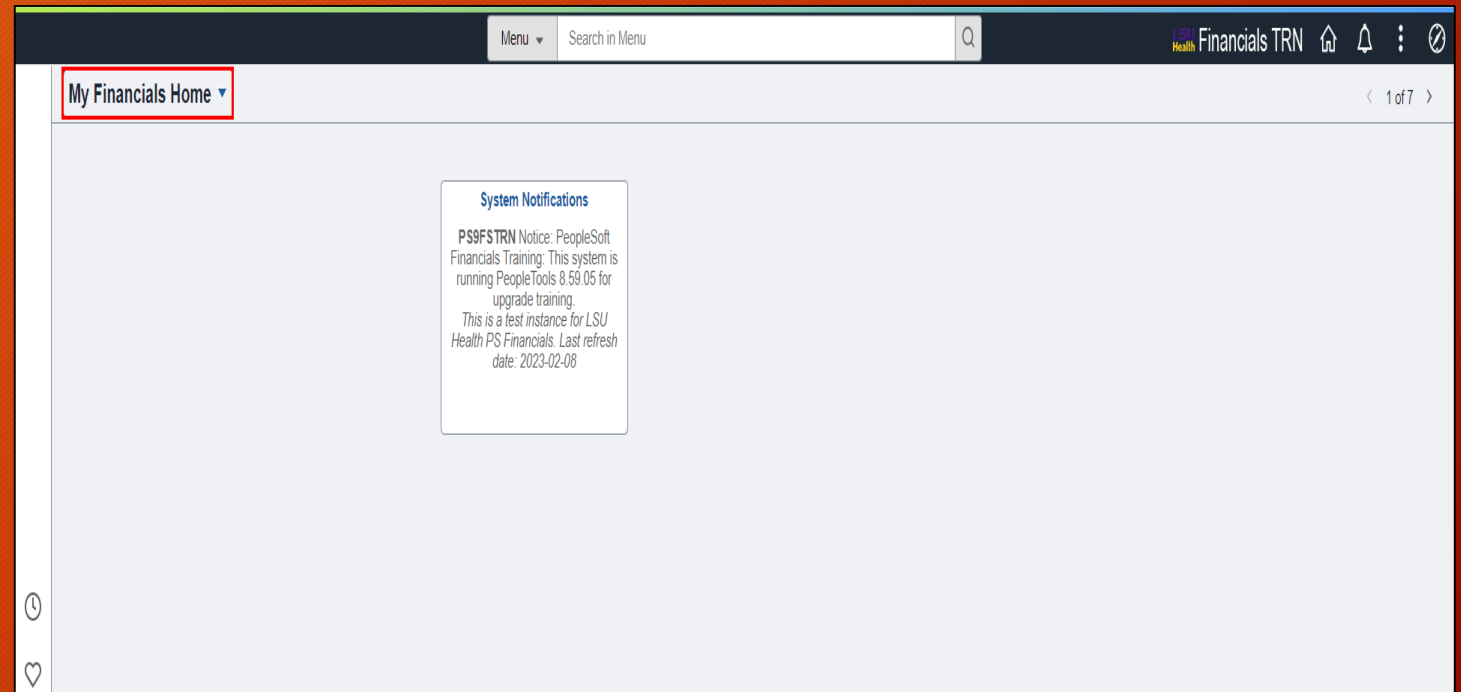
Home Pages



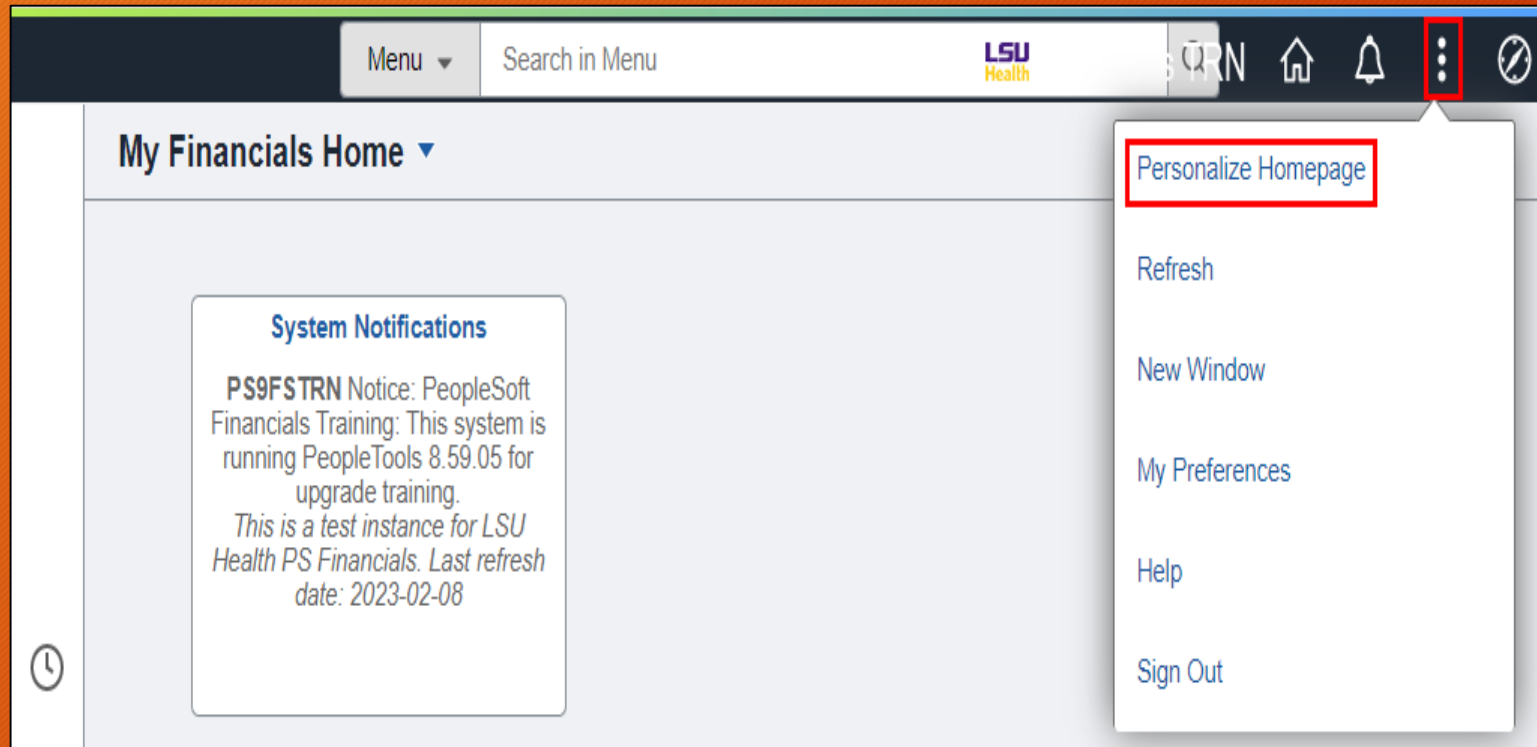
- New Landing page - My Financials Home
 - New icons
 - What is a tile?
 - Navigation collection
 - System Notification tile
- **NO CLASSIC NAVIGATION**
 - NavBar navigation available
 - Compass icon

Home Pages continued

- Can personalize and add frequently used navigation tiles for quick access
- Systems Notification tile
 - System & database
 - Last refresh date
 - Changeable



Home Pages continued



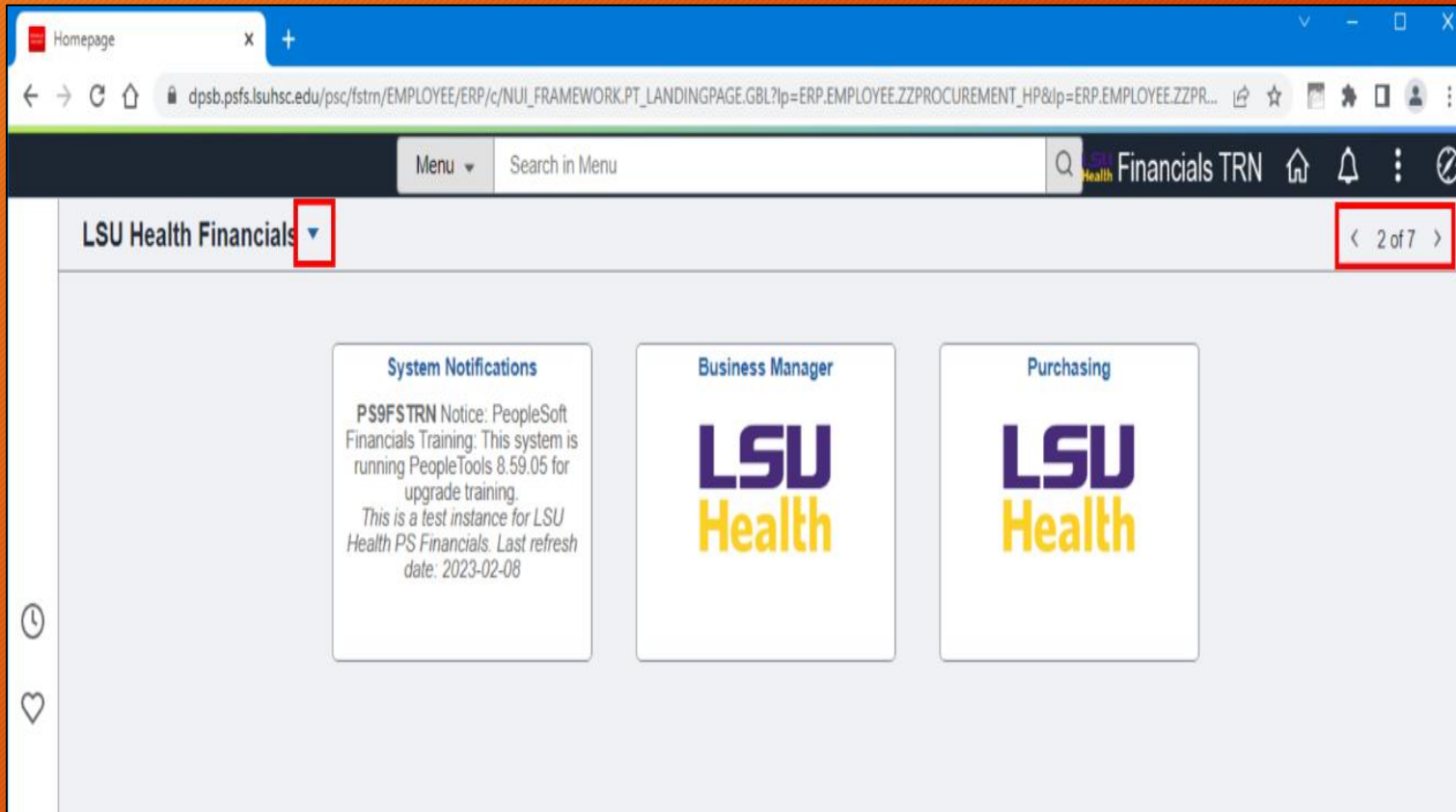
- Personalize by adding tiles
- Action icon (3 stacked dots)
- Personalize Homepage

Home Pages continued

- Add tile to homepage
 - Add tile
 - FSCM Navigation Collection
 - List of current tiles
 - Select tile
 - Save

The screenshot displays the 'Personalize Homepage' interface. On the left, a sidebar lists various homepage categories under 'My Financials Home', including 'LSU Health Financials', 'Asset Management', 'Projects & Receivables', 'General Ledger', 'Procurement', and 'Employee Self Service'. The main area is titled 'Personalize Homepage' and contains 'Common Settings' and a 'Show Notifications Panel' option. A modal dialog box titled 'Add Tile' is open in the center, featuring a search bar labeled 'Search a Tile' with the placeholder text 'Tile name, tile category, or tile keyword'. Below the search bar, a list of existing tiles is shown under the heading 'Choose an Existing Tile'. The first item, 'FSCM Navigation Collections', is highlighted with a red box. Other items in the list include 'PeopleSoft Applications', 'Update Manager', and 'Employee Self-Service'. A red box also highlights an 'Add Tile' button in the top right corner of the main dialog area.

Home Pages continued



- Navigate between homepages using drop-down menu to right of Homepage title

OR

- Navigate between homepages using left/right arrow at top right of screen
- Access determines homepage tile availability

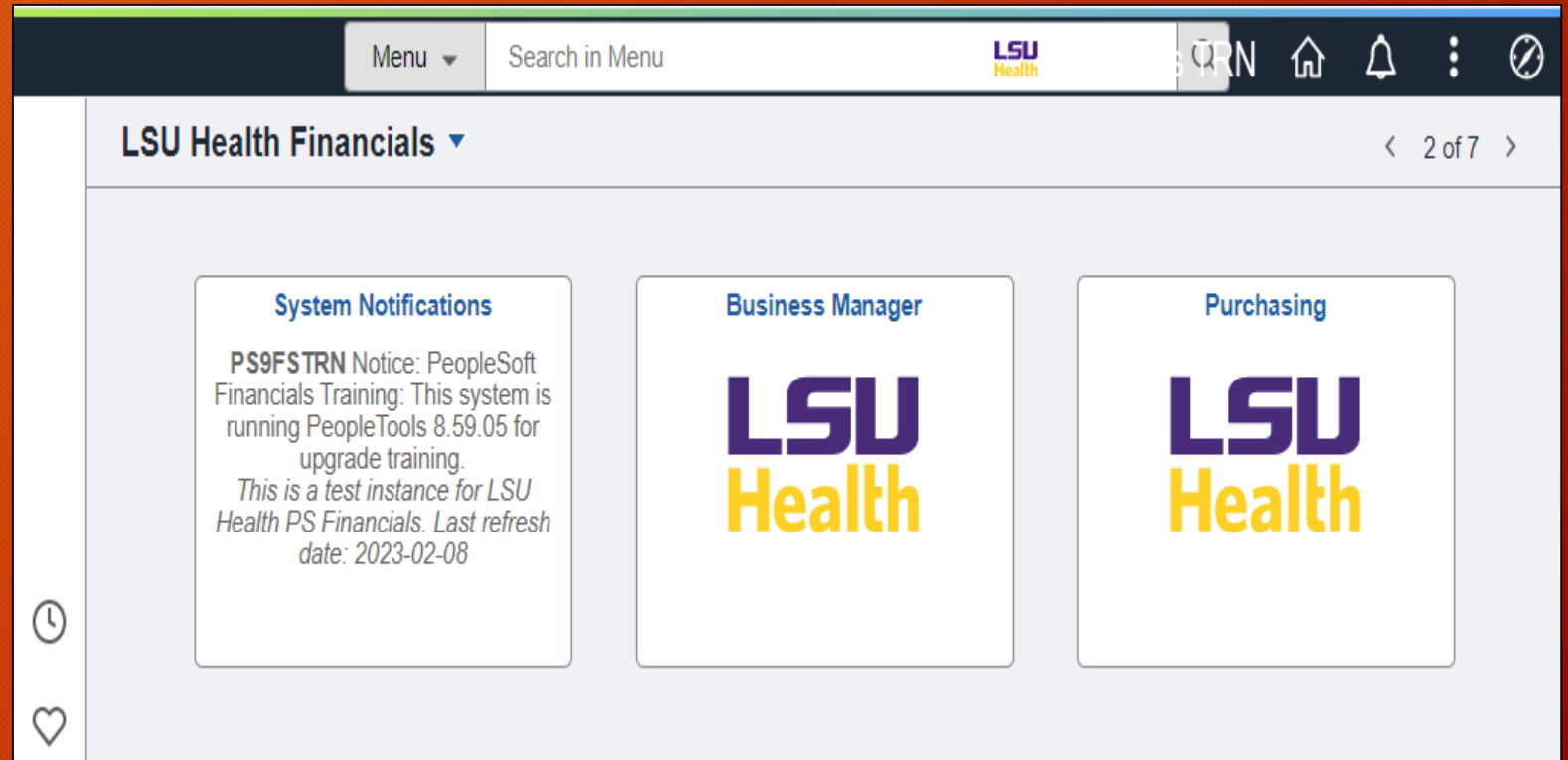
Home Pages continued

- LSU Health Financials

- Nav collections associated with requisitions, purchase orders, etc.

- Available tiles

- Business Manager
- Purchasing
- ePro Requisitions (LSUSH only)
- Reports (in PSFSRPT)



Home Pages continued

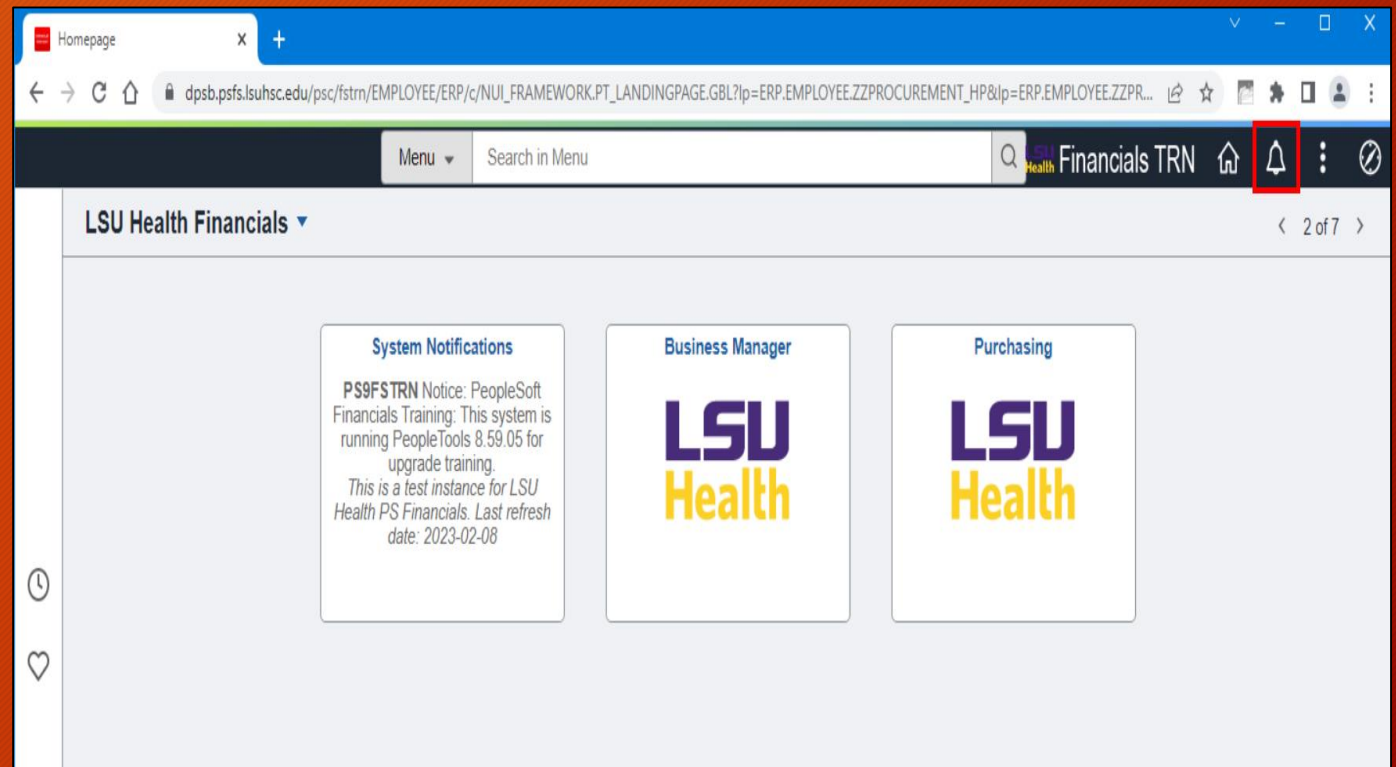
The screenshot shows the user interface for the LSU Health Financials system. At the top, there is a navigation bar with a 'Menu' dropdown, a search field labeled 'Search in Menu', the 'LSU Health' logo, and several utility icons including a home icon, a bell for notifications, a vertical ellipsis for more options, and a refresh icon. Below the navigation bar, the page title is 'LSU Health Financials' with a dropdown arrow, and a breadcrumb indicator shows '< 2 of 7 >'. The main content area features three tiles: 1. 'System Notifications' containing a message about PeopleSoft Financials Training and upgrade training, noting it is a test instance for LSU Health PS Financials, with a last refresh date of 2023-02-08. 2. 'Business Manager' featuring the 'LSU Health' logo. 3. 'Purchasing' also featuring the 'LSU Health' logo. On the left side of the interface, there are icons for a clock and a heart.

- Cannot add tiles to LSU Health Financials

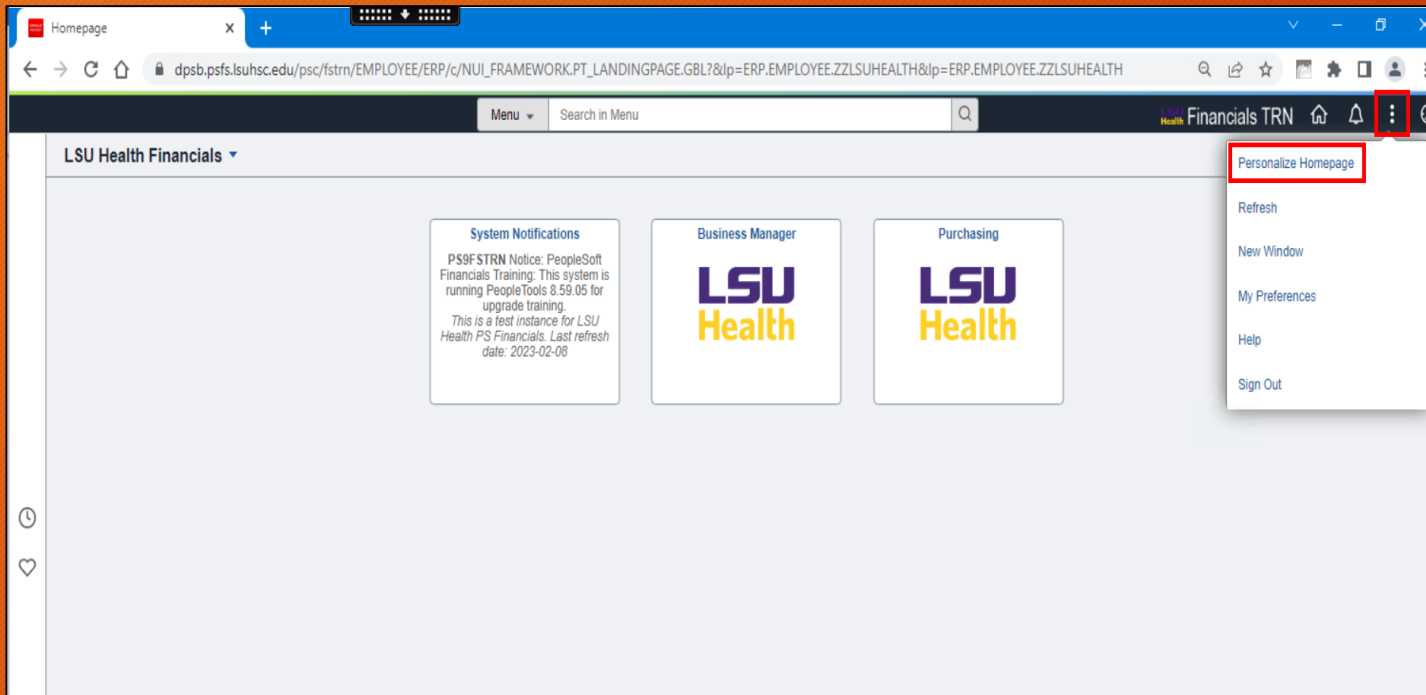
NOTE: Homepage tiles may vary from user to user due to security access.

Notifications

- Icon changed from flag to bell
 - Little flag on bell indicating action/alert required.
- Notifications
 - Actions
 - Require “action” be taken such as:
 - Requisition approval
 - Voucher approval
 - Payment request approval
 - Alerts
 - Informational
 - Requisition denial



Notifications continued



- Alternative to bell is Notification Panel
 - Displays same Actions/Alerts as on Bell
 - Defaults to all homepages once “turned on”
 - Provides same two options as bell
 - Actions
 - Alerts
- Select the *Action* icon (3 stacked dots)
 - Select Personalize Homepage

Notifications continued

- Toggle switch for Show Notifications Panel from No to Yes.

Cancel **Personalize Homepage**

Add Homepage

= My Financials Home

LSU Health Financials

Common Settings

Show Notifications Panel No ⓘ

Selected Homepage Settings

Cancel **Personalize Homepage**

Add Homepage

= My Financials Home

LSU Health Financials

Common Settings

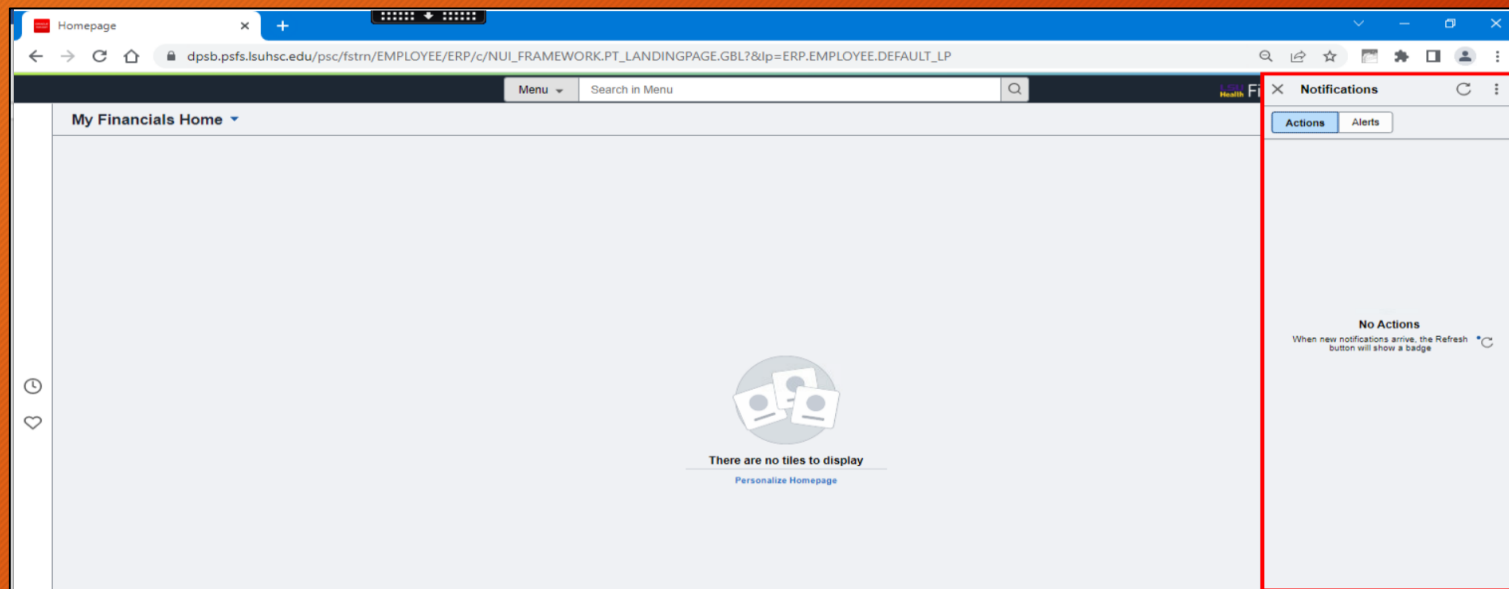
Show Notifications Panel Yes ⓘ

Selected Homepage Settings

Notifications continued




Personalize Homepage

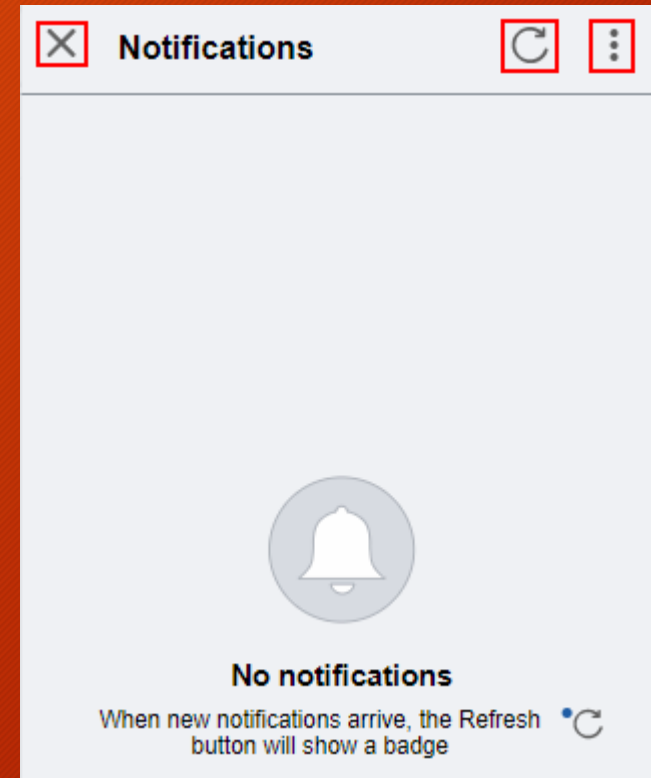
Save



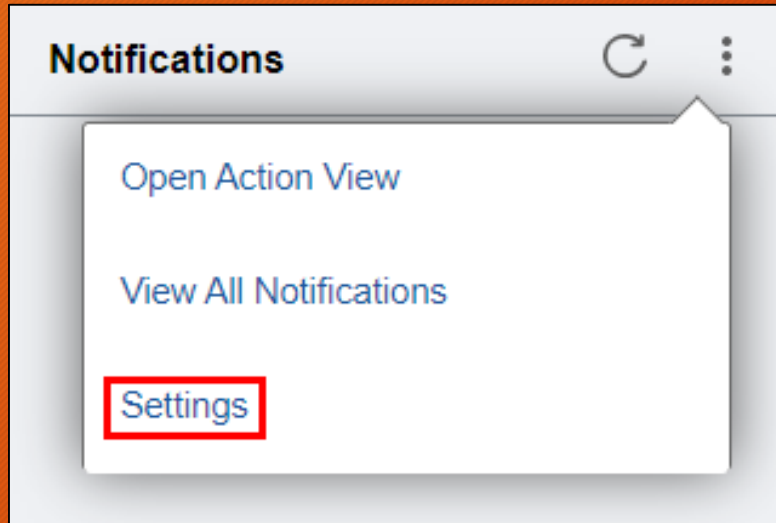
- Click **SAVE** at top right of page
- Notification Panel displays on right side of page
- Defaults to Actions tab

Notifications continued

- Notification Panel icons
 -  Close panel
 -  Refresh button
 -  Actions icon to change default settings



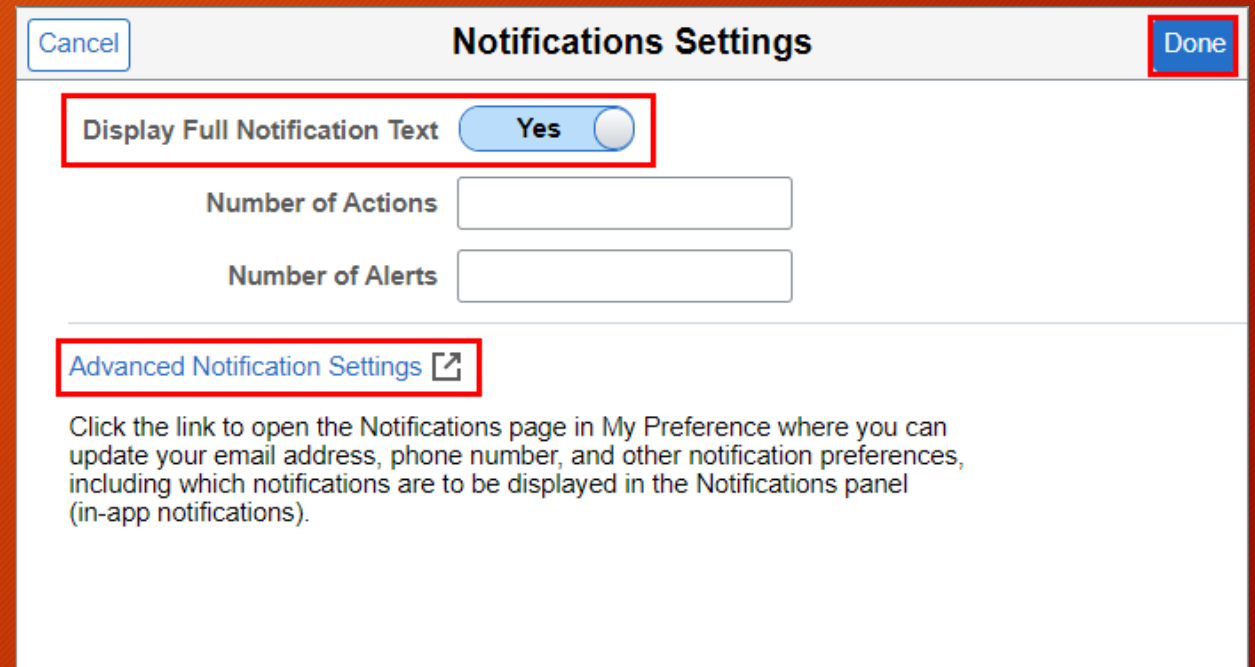
Notifications continued



- Notification Actions icon
 - Open Actions View
 - View All Notifications
 - Settings

Notifications continued

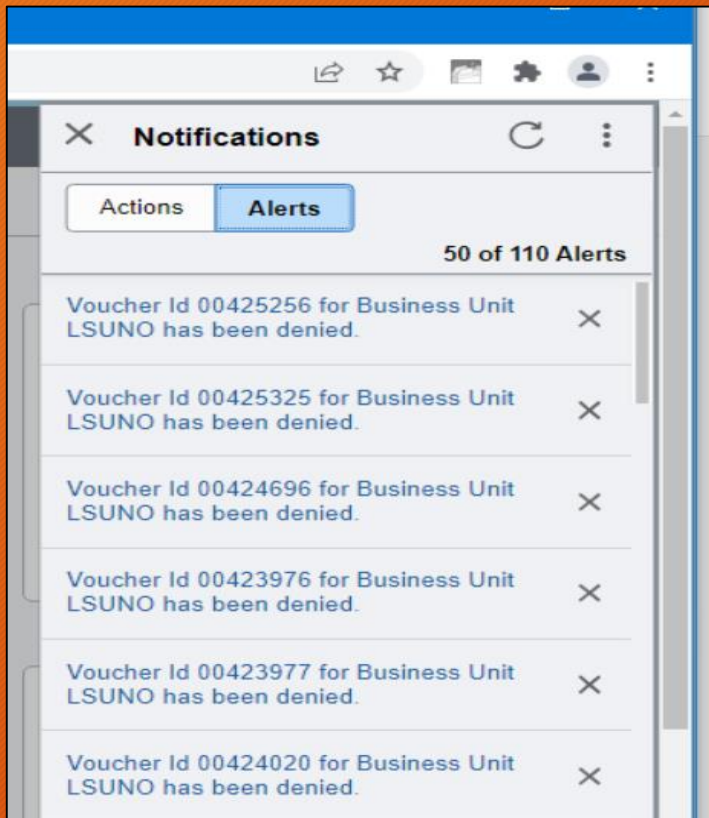
- Notification Settings
 - Display Full Notification Text
 - Defaults to “No”
 - Can specify number of Actions and Alerts to display
 - Advanced Notification Settings cannot be changed by user
 - Click Done when changes are complete



The screenshot shows a 'Notifications Settings' dialog box with a white background and a grey title bar. The title bar contains 'Cancel' on the left and 'Done' on the right, both in blue text. The main content area is white and contains the following elements:

- A red-bordered box highlights the 'Display Full Notification Text' label and a toggle switch set to 'Yes'.
- Below this is a text input field for 'Number of Actions'.
- Below that is another text input field for 'Number of Alerts'.
- A red-bordered box highlights a link labeled 'Advanced Notification Settings' with an external link icon.
- Below the link is a paragraph of text: 'Click the link to open the Notifications page in My Preference where you can update your email address, phone number, and other notification preferences, including which notifications are to be displayed in the Notifications panel (in-app notifications).'

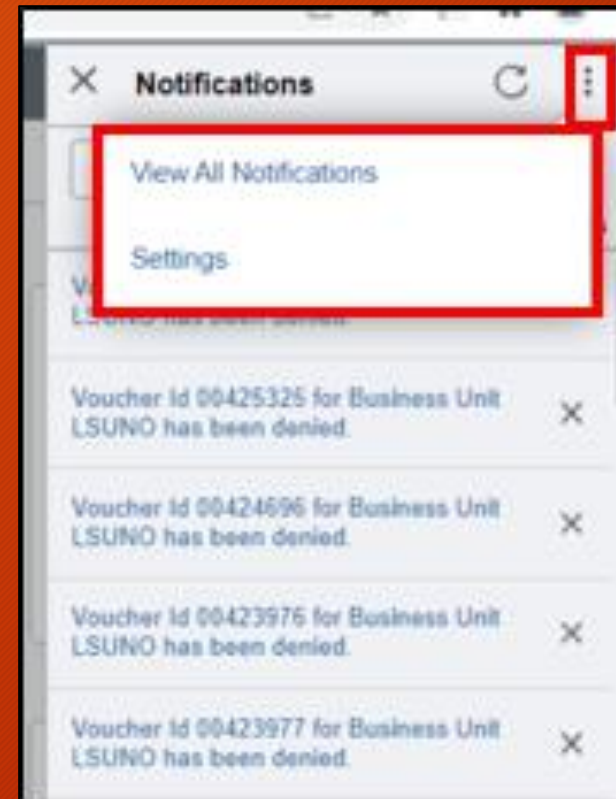
Notifications continued



- The default for both Bell and Notifications Panel is Actions tab
- Old version, Alerts had number of items on tab
- New system, number of Alerts do not display on tab
 - Number shown above Alert list
- View All is located at the bottom of the Notifications panel

Notifications continued

- Notifications Alerts
 - Actions icon
 - Open Actions View not option
 - View All Notifications
 - Settings



My Preferences

LSU Health Financials My Preferences

General Settings

Notifications

Procurement

General Settings

Navigation Personalizations

Tab over Lookup Button No

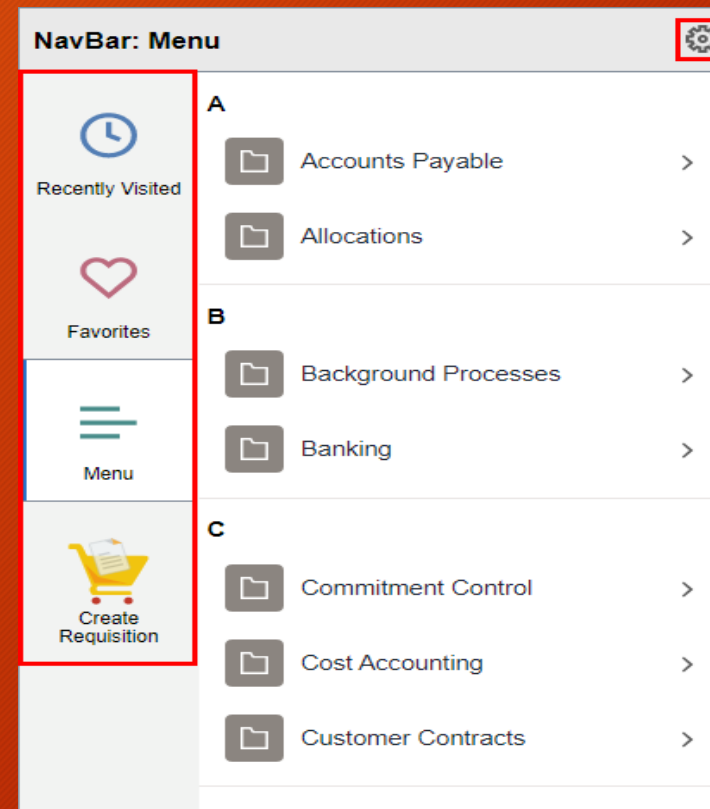
Autocomplete Yes

Restore Defaults Save

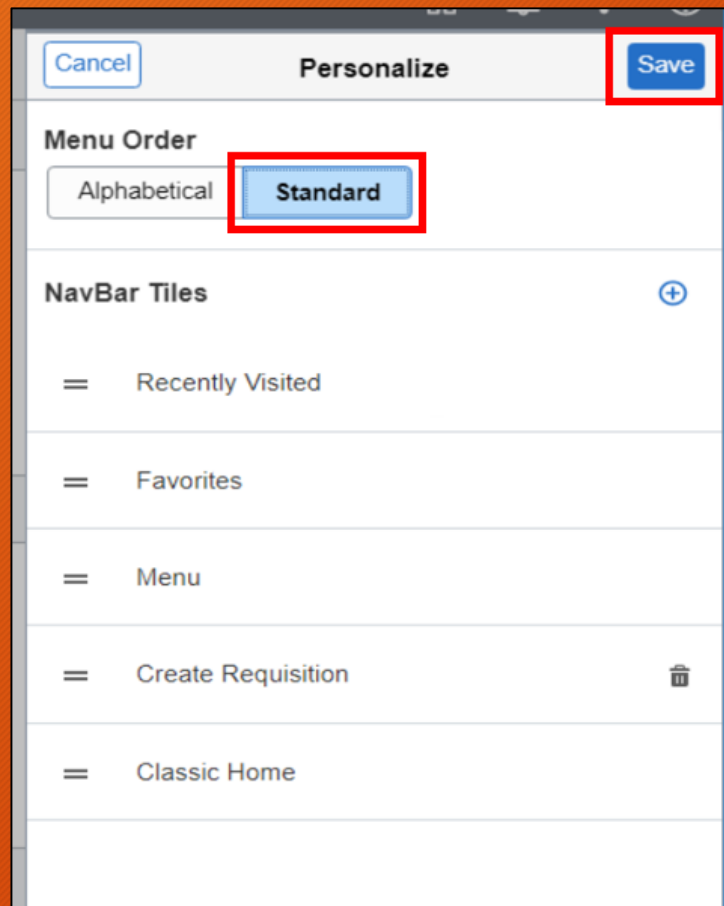
- Select Action icon (the 3 stacked dots)
- Select My Preferences
 - General Setting - Notification Personalizations
 - Tab over Lookup Button
 - Defaults to No
 - Toggle button to Yes to “turn on”
 - Autocomplete
 - Defaults to Yes
 - Toggle button to change to No to “turn off”
 - Click **SAVE** if changes made

NavBar Menu and Terminology

- NavBar
 - Structure same
 - Icons changed
- Menu Order
 - Two styles
 - Alphabetic
 - Standard
 - Defaults alphabetically
 - Break between each alpha character
 - Click Settings gear



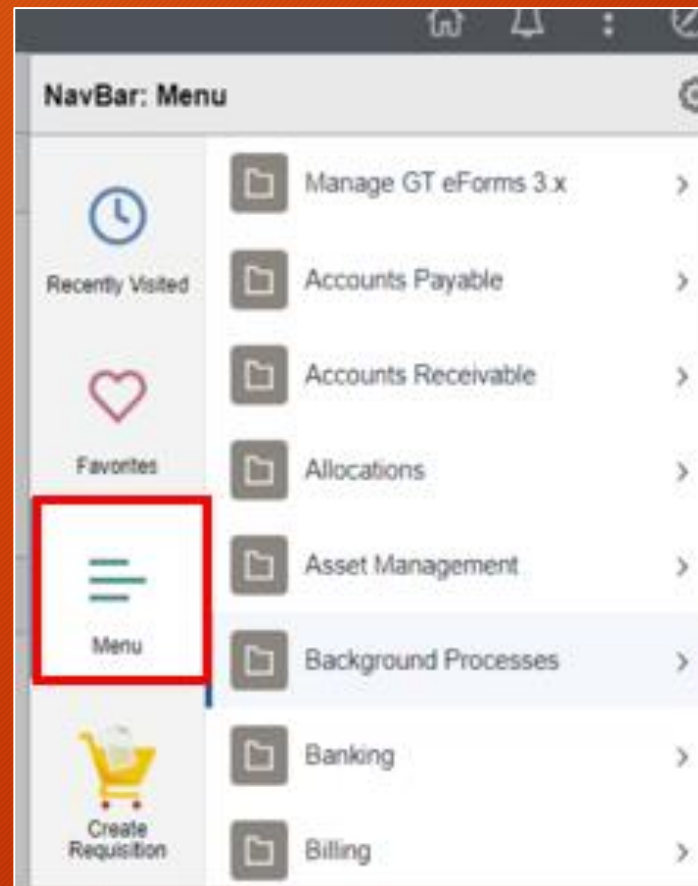
NavBar Menu and Terminology continued



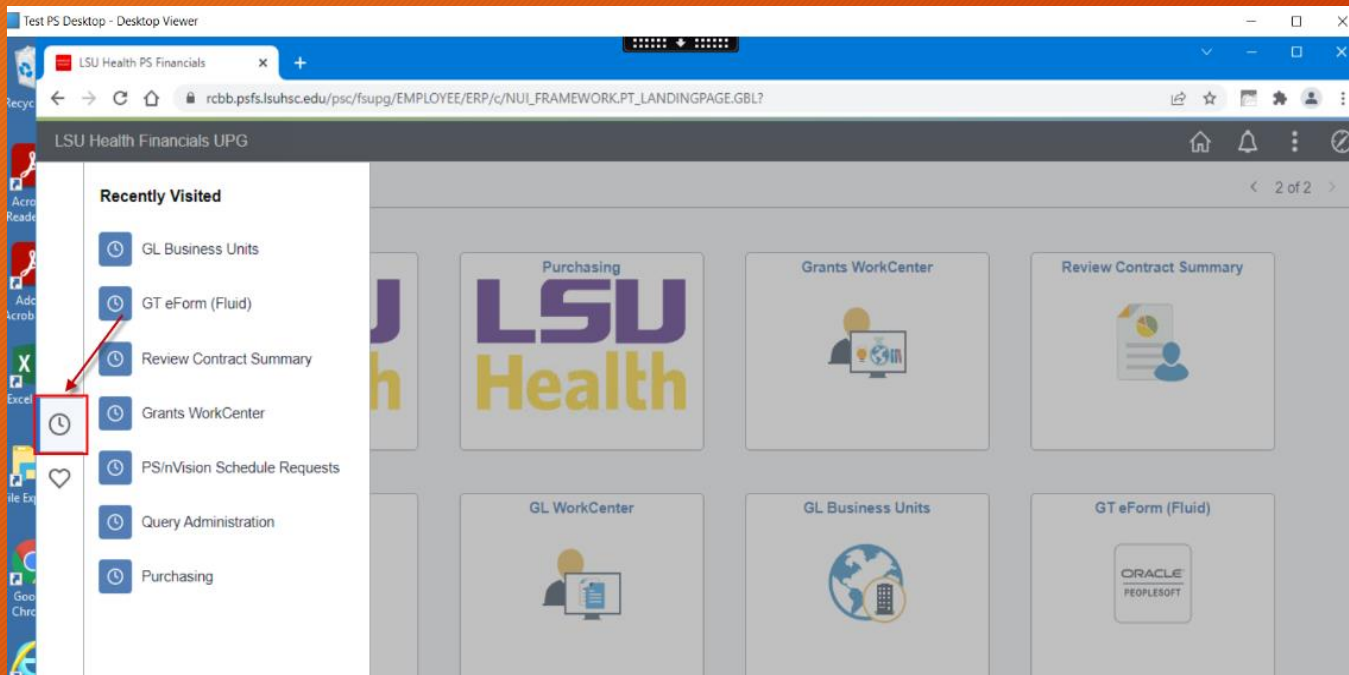
- Setting Gear
 - Change menu style
 - Standard sorted by function
 - Click Standard option
 - Save

NavBar Menu and Terminology continued

- Standard menu



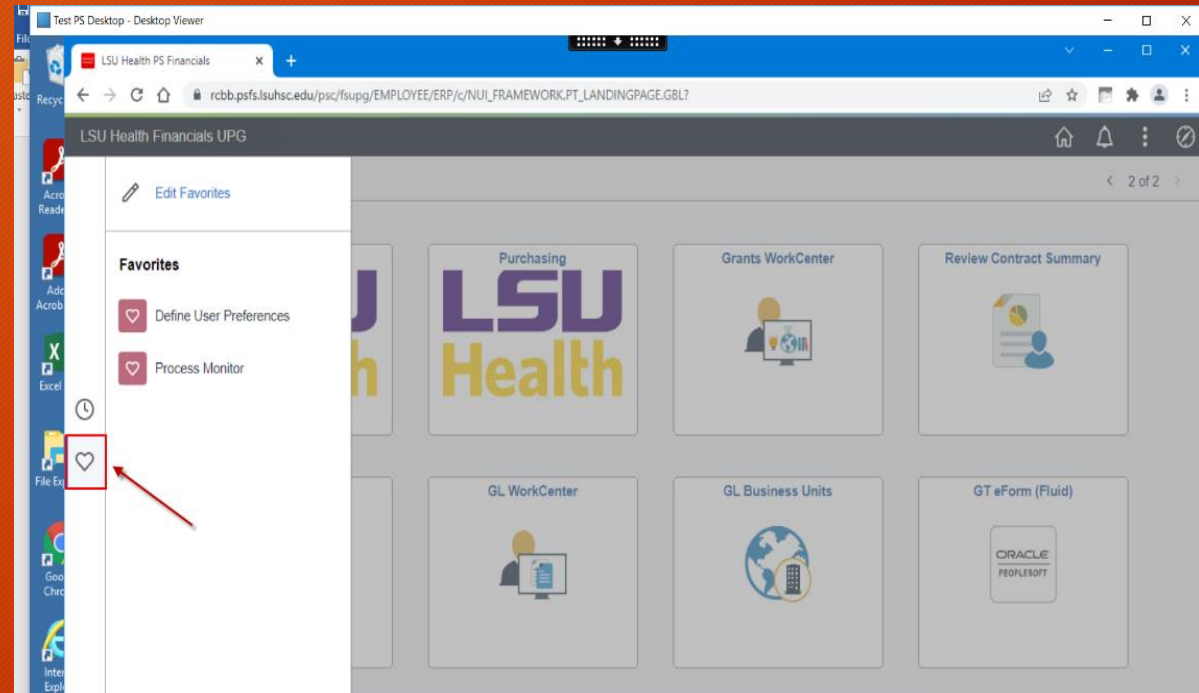
Recently Visited and Favorites Icons



- Left Margin Icons
 - Quick navigation
 - Recently Visited
 - Favorites
- Recently Visited - Clock
 - Previously Recently Viewed
 - Displays list of previously visited pages
 - Icon changed from calendar to clock

Recently Visited and Favorites Icons continued

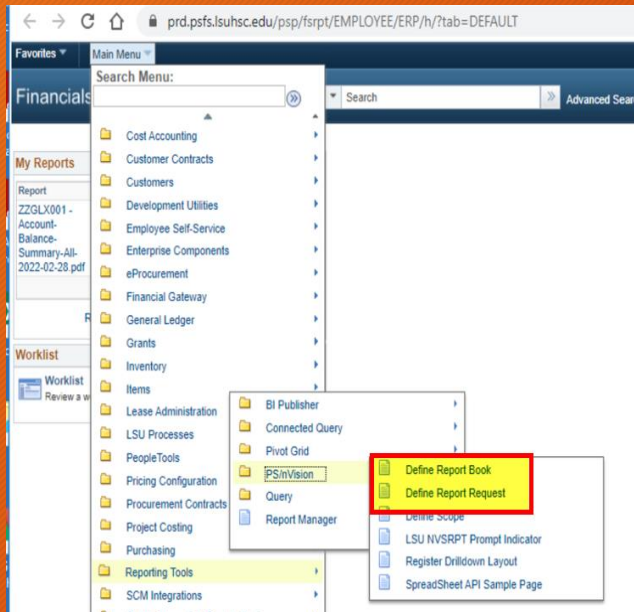
- Favorites - Heart
 - Previously My Favorites
 - Displays list of user's saved favorite pages
 - Icon changed from start to heart



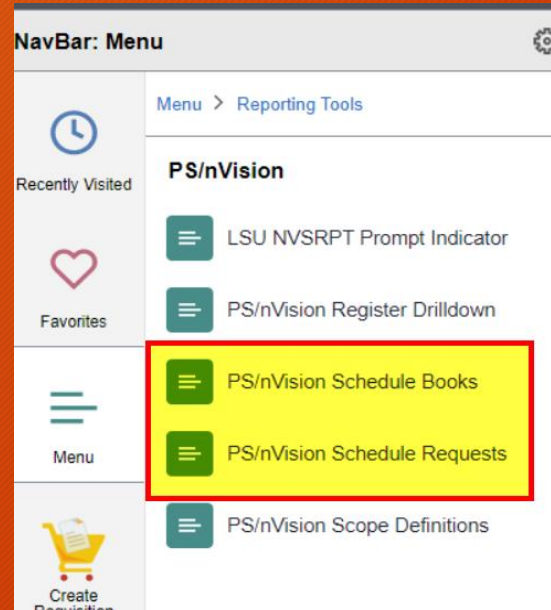
REPORTS & PROCESS MONITOR

PS/nVision Menu

Old (Tools 8.57)



New (Tools 8.59)



- PS/nVision Menu
 - Previous version
 - Define Report Books
 - Define Report Request
 - New Version
 - PS/nVision Schedule Books
 - PS/nVision Schedule Requests

Process Monitor

- Previous version of Process Monitor
- New features added
 - Basic structure same
 - 2 new buttons
 - 1 new column

Old (Tools 8.57)

Financials RPT w2

Navigator Search Advanced Search Last Search Results

Process List Server List

View Process Request For

User ID: MGONZA Type: Last Hours: 8 Refresh

Server: Name: Instance From: Instance To: Report Manager

Run Status: Distribution Status: Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	9650006		BI Publisher	PSXPQRYRPT	MGONZA	03/04/2022 6:15:00AM CST	Queued	N/A	Details
<input type="checkbox"/>	9650005		BI Publisher	PSXPQRYRPT	MGONZA	03/04/2022 6:10:00AM CST	Queued	N/A	Details
<input type="checkbox"/>	9650004		BI Publisher	PSXPQRYRPT	MGONZA	03/04/2022 6:05:00AM CST	Queued	N/A	Details
<input type="checkbox"/>	9650003		BI Publisher	PSXPQRYRPT	MGONZA	03/04/2022 6:00:00AM CST	Queued	N/A	Details
<input type="checkbox"/>	9650001		BI Publisher	PSXPQRYRPT	MGONZA	03/04/2022 5:55:00AM CST	Queued	N/A	Details
<input type="checkbox"/>	9650000		BI Publisher	PSXPQRYRPT	MGONZA	03/04/2022 5:50:00AM CST	Queued	N/A	Details
<input type="checkbox"/>	9649999		BI Publisher	PSXPQRYRPT	MGONZA	03/04/2022 5:45:00AM CST	Queued	N/A	Details

Process Monitor continued

New (Tools 8.59)

Process List | Server List

View Process Request For

User ID: MGONZA | Type: | Last: | 8 | Hours: | Refresh |

Server: | Name: | Instance From: | Instance To: | Clear |

Run Status: | Distribution Status: | Save On Refresh | Report Manager | Reset |

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	11014406		Application Engine	PSQUERY	MGONZA	03/03/2022 11:59:58AM CST	Success	N/A	Details	
<input type="checkbox"/>	11014405		nVision Report	DRILLDWN	MGONZA	03/03/2022 11:50:30AM CST	Success	Posted	Details	
<input type="checkbox"/>	11014404		nVision Report	DRILLDWN	MGONZA	03/03/2022 11:49:43AM CST	Success	Posted	Details	
<input type="checkbox"/>	11014403		nVision Report	DRILLDWN	MGONZA	03/03/2022 11:48:42AM CST	Success	Posted	Details	
<input type="checkbox"/>	11014402		nVision Report	NVSRUN	MGONZA	03/03/2022 11:47:43AM CST	Success	Posted	Details	

Process List Actions

- Update Process
- Parameters
- Message Log
- Batch Timings
- View Log/Trace

- Changes to Process Monitor page
 - 2 buttons
 - Directly below Refresh button top right of page
 - Clear
 - Removes all preset filters
 - Reset
 - Restores settings to default

Questions & Answers

Training Documentation

- *NOTE: For additional information on PeopleSoft Financials End User Training, please refer to the [link below](#):*
- **LSU Health New Orleans:**
http://www.lsuhsoc.edu/ps/support/fin_9_manuals.aspx