



PeopleSoft Financials Tools 8.59 Delta Guide

March 28, 2023

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Introduction

Welcome to the PeopleSoft Financials Tools 8.59 Upgrade Delta Guide

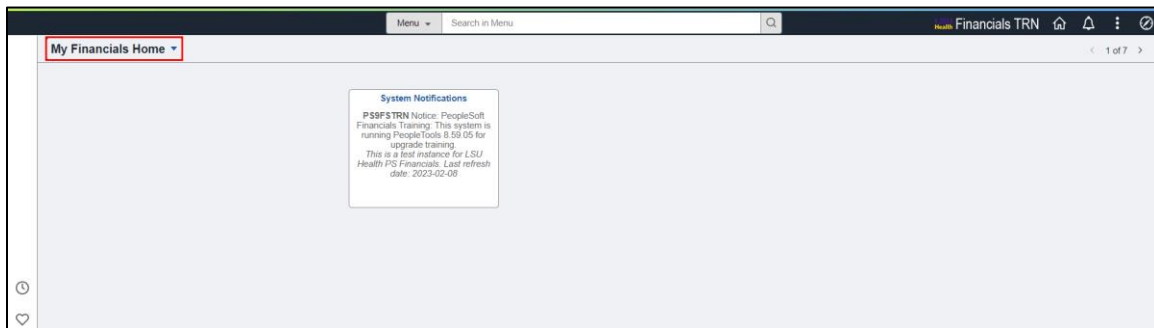
The PeopleSoft Financials Development Support and Training Teams are pleased to share the most recent upgrade with all users. The upgrade marks a significant change in the way users will navigate throughout the system. During the training session, new terminology will be introduced to help familiarize users with the new look and feel of the system and teach how to utilize the new homepages and tiles created to facilitate work in PeopleSoft Financials.

Basic functionality is still the same, and most items can still be accessed and utilized as they were in the previous version of the application. However, in addition to the new terminology and navigations, there are a few minor changes and some new features which are presented in this document.

LSU Health PeopleSoft Financials

Home Pages

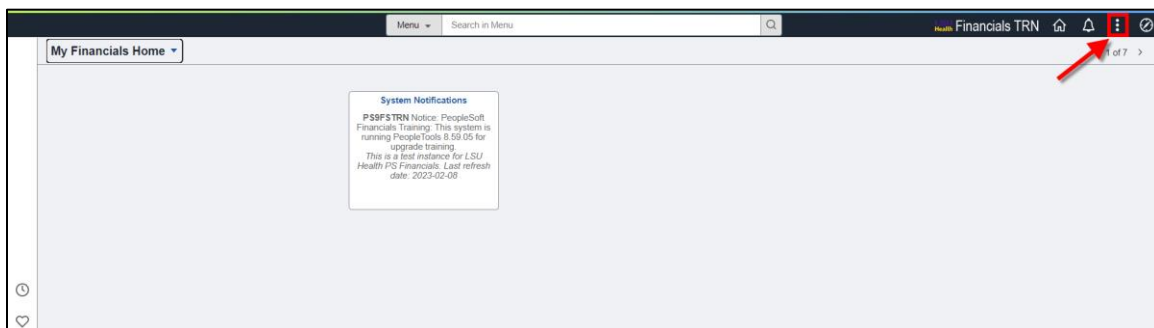
A new landing page is now available once you launch PeopleSoft Financials. The new landing page is called “**My Financials Home**”, and the title displays in the top left corner of the page. You will be returned to **My Financials Home** from anywhere in the system by clicking the **Home** icon.



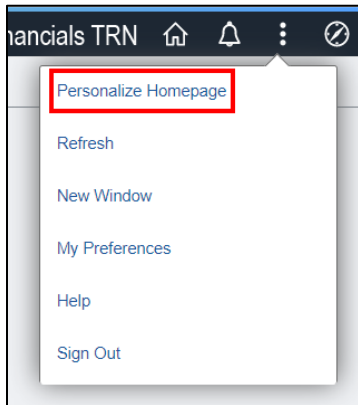
The **Systems Notification** tile is the only tile defaulted to **My Financials Home**. It will display on **all** homepages. In this example, it provides information regarding what system and database you are using as well as the last refresh date. Messaging on the tile can be changed, so do not assume it is always the same.

Users can personalize **My Financials Home** by adding individual tiles for frequently used navigation collections or pages. For example, the **Speedtype Lookup** tile can be added to the **My Financials Home** page for quick access rather than searching for it in the various homepages. The steps for adding a tile to My Financials Home are outlined below.

First, click the **Actions** icon – three stacked dots – in the upper right corner of the page.



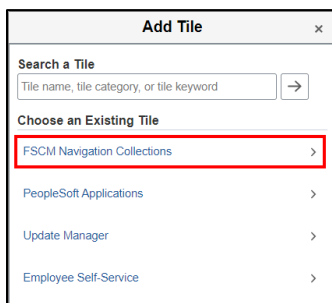
Next, select the **Personalize Homepage** link from the drop-down menu



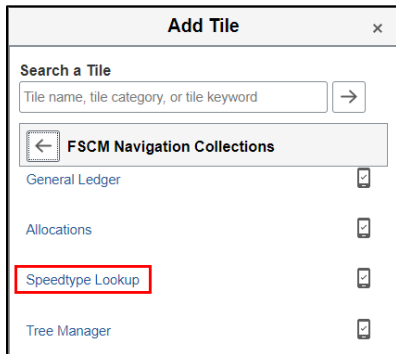
Once on the **Personalize Homepage**, select the **Add Tile** link on the far right of the page opposite of the **Select Homepage Settings** title.



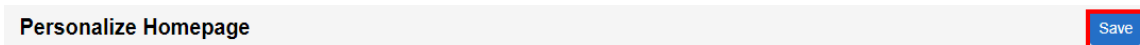
Select the **FSCM Navigation Collections** link. This is a list of available tiles from all homepages.



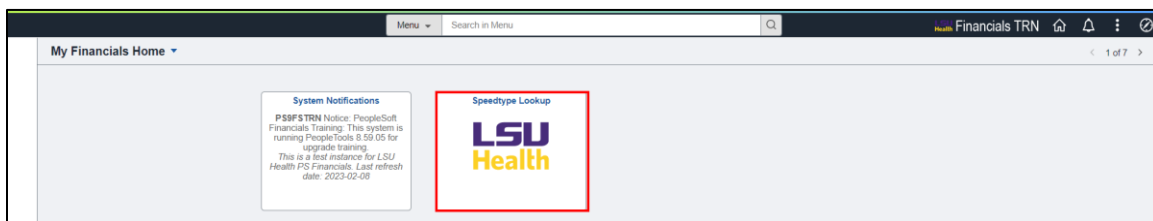
Scroll down until you find the **Speedtype Lookup** option and click the **Speedtype Lookup** link.



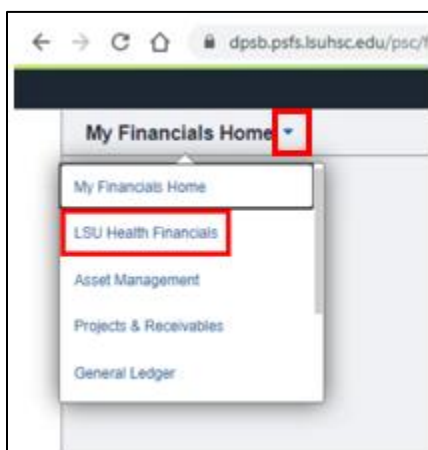
Click the **Save** button in the upper right corner of the page opposite the **Personalize Homepage** title.



The tile displays on **My Financials Home**.



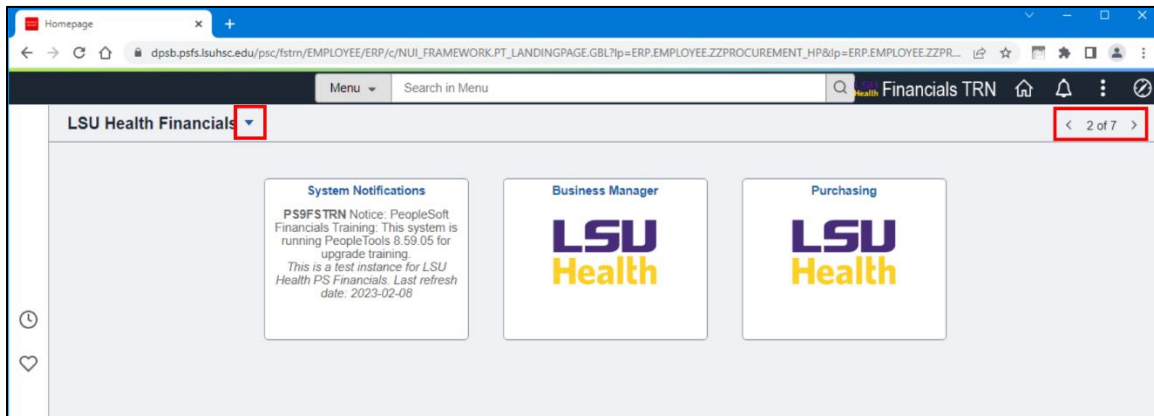
Navigation to another homepage may be accomplished by selecting the drop-down arrow to the right of **My Financials Home**. Select from the menu which homepage you wish to view. In this example, the **LSU Health Financials** page is selected.



The “**LSU Health Financials**” page is where users will access the tiles and navigation collections associated with requisitions and purchase order functions. Your access determines which tiles will be available on the page. Unlike the **My Financials Home**

page, users **cannot** add tiles to **LSU Health Financials**. Tiles that you may see on the **LSU Health Financials** are: Business Manager, Purchasing, ePro Requisitions (**LSUSH only**), and Reporting (in PS9FSRPT).

NOTE: The Tiles shown on this page may vary from user to user. These are based on security access.

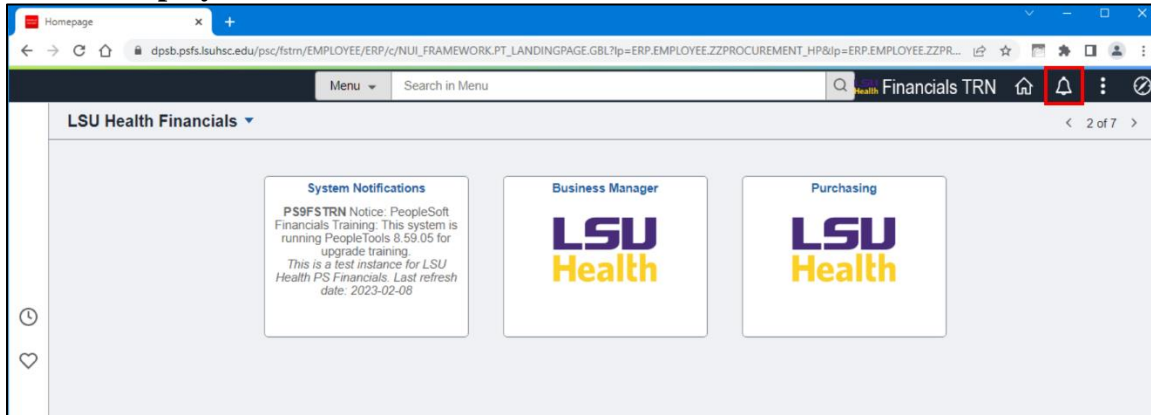


Just as you can navigate between homepages from the drop-down menu to the right of the homepage name, you can also navigate between them using the page counter at the top right of the page. In the above screenshot page counter display as **< 2 of 7 >**. The **“7”** indicates the total number of homepages to which the user has access. The **“2”** indicates homepage number currently being viewed, which is the **LSU Health Financials** page. The right arrow advances you to a new page, and the left arrow returns you to a previous page.

Personalize Homepage Settings – Notifications

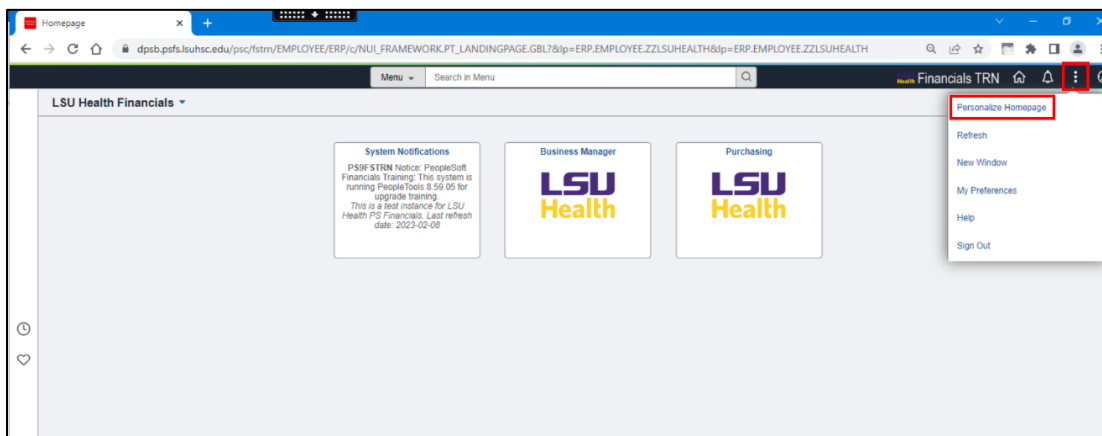
Financials users receive notifications for items needing their attention, such as a requisition approval (via the Worklist), voucher approval or payment request approval. The **Bell** icon at the top right of the page now serves as the **Notifications** icon instead of the Flag in the Classic version. A little **flag** on the bell will display to indicate there is an action or alert available.

Default Display:

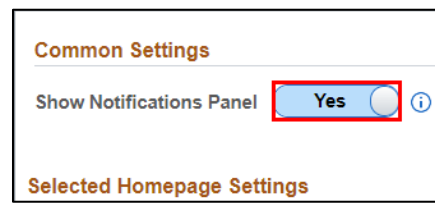
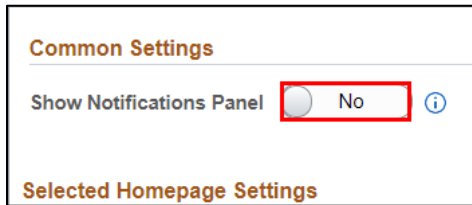


An alternative to using the **Bell** icon is using the **Notifications Panel**. The **Notifications Panel** defaults to the “No” position, meaning it does **not** display on the user’s homepage. The user may choose to set the **Notifications Panel** to the “Yes” position and have the panel default onto **all** homepages to which the user has access. The **Notifications Panel** displays on the right side of all PeopleSoft homepages. This panel provides two options: **Actions** and **Alerts**. **Actions** are “actionable” items, such as approving a payment request, while **Alerts** are “informational” items, such as a voucher denial. Outlined below are the steps to turn the **Notifications Panel** to the “Yes” position.

Select the **Action** icon – the three stacked dots - at the top right of the page. Select the **Personalize Homepage** option.



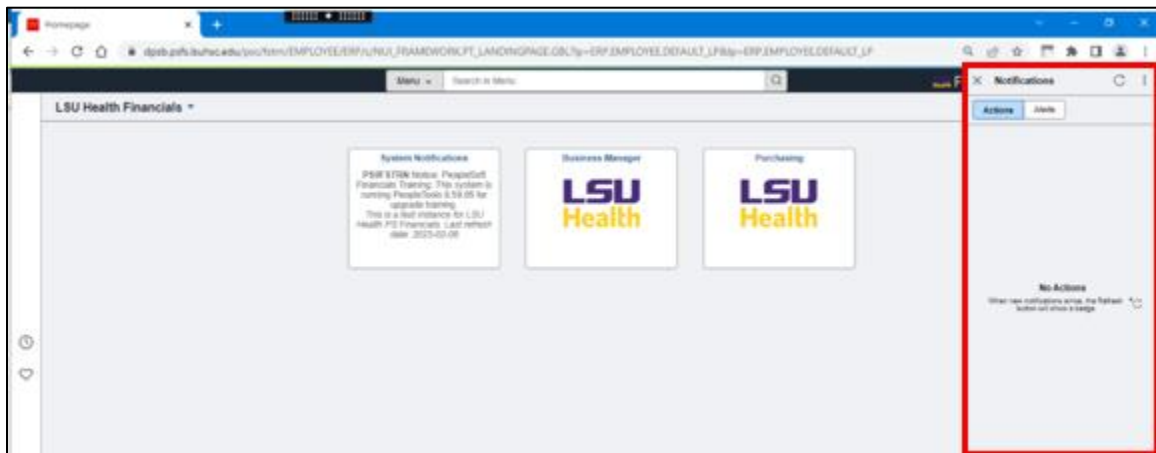
On the **Personalize Homepage**, toggle the switch for the “**Show Notifications Panel**” from No to Yes.



Click the **Save** button on the top right of the page opposite the **Personalize Homepage** title.

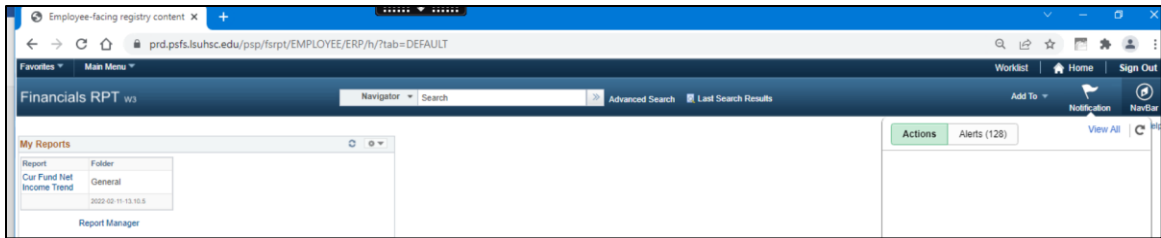


You are returned to the **LSU Health Financials** page with the **Notifications Panel** displayed.



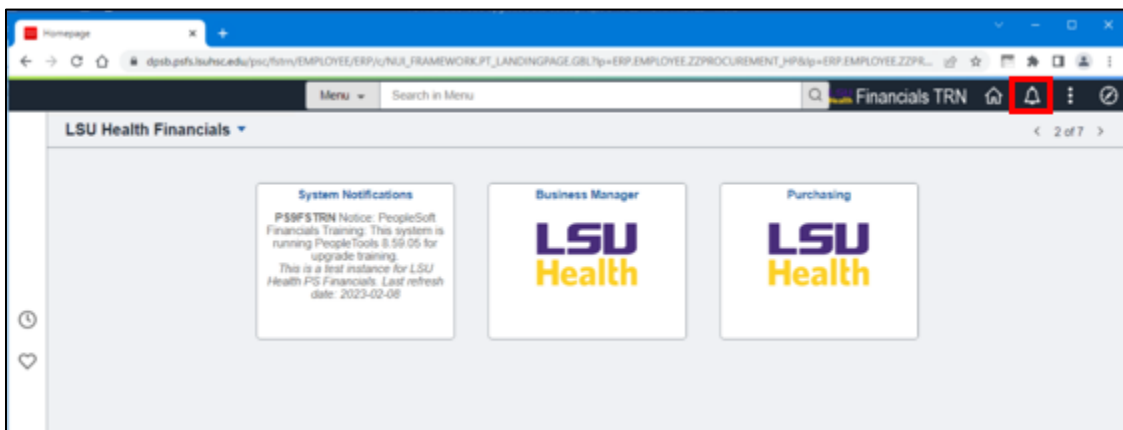
As previously stated, the **Notifications** icon changed from the Flag to a **Bell**.

Old (Tools 8.57):

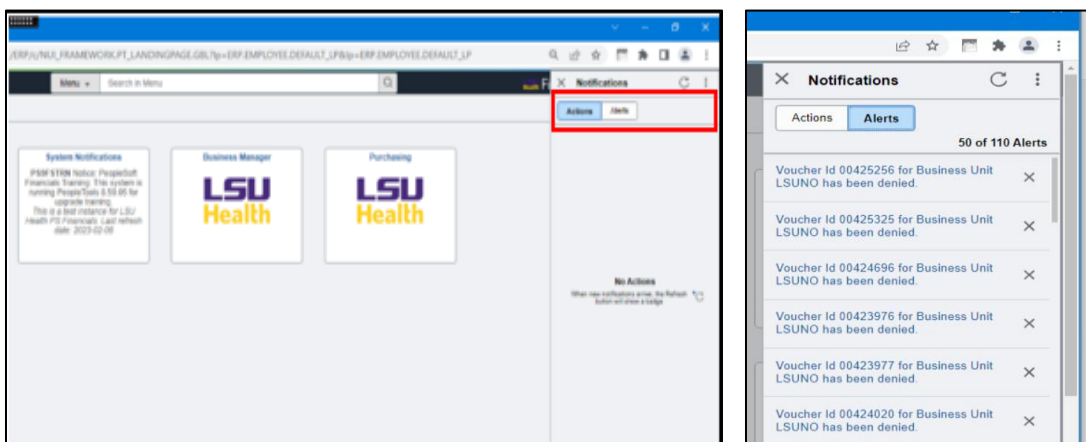


In the previous version, when selecting the **Notifications Flag**, the **Actions** option was highlighted in the drop-down. The **Alerts** option displayed a number on the tab indicating the number of alerts the user had.

New (Tools 8.59):



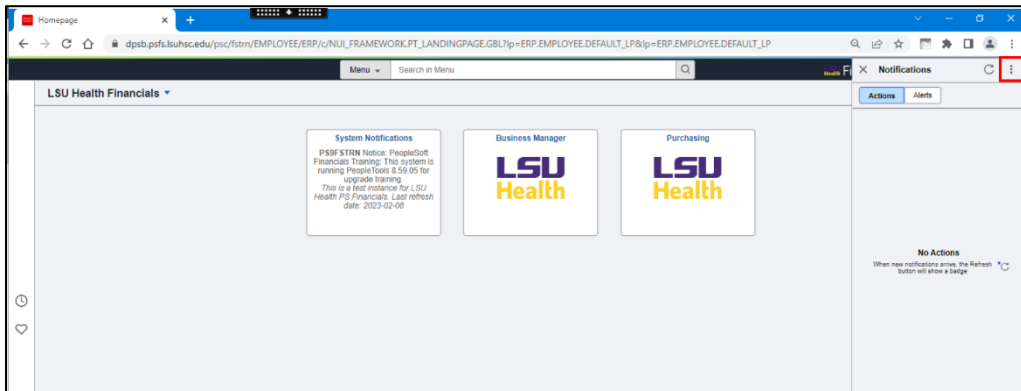
In the new version, when selecting the **Notifications Bell**, the drop-down also defaults to **Actions**. The tab for **Alerts** does not display on the tab the number of alerts the user has; instead it is shown above the **Alert** list box. In this example, the user has 110 alerts.



In the new tools version, the “**View All**” link on the **Notifications Panel** displays at the bottom of the panel instead of the top.

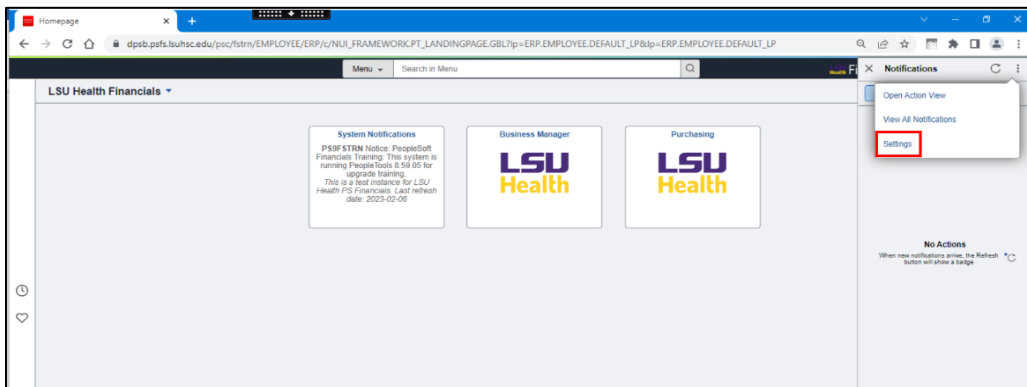
Notifications Panel Actions Icon

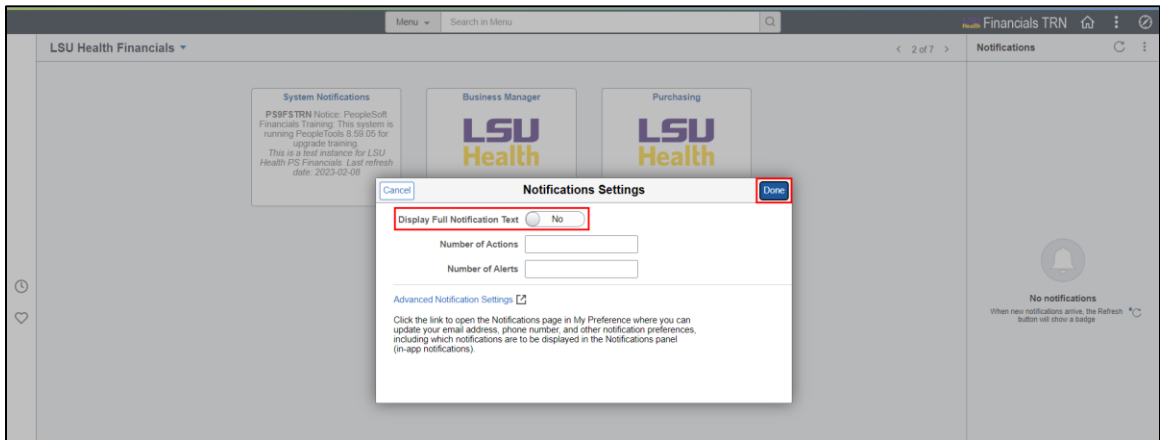
The **Notifications Panel** includes an ‘**X**’ to close the panel, a **Refresh** icon and **Actions** icon -three stacked dots - to change the default settings. Click the **Actions** icon (three stacked dots). The **Actions** icon contains the following links: *Open Actions View*, *View All Notifications* and *Settings*.



NOTE: In the screenshot below, view the **Notifications Panel Actions icon** (three stacked dots).

Select the **Settings** option.

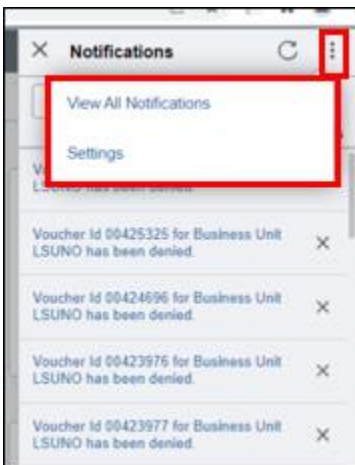




The user may choose to display the full notifications text, and if desired, a set number of actions and alerts to display. If **any** entry is performed, select the **Done** button at the top right of the pop-up.

NOTE: The Advanced Notifications Settings link is not changeable by users. Please disregard link.

NOTE: When on the Alerts tab of the Notifications Panel, select the Actions icon (three stacked dots). Notice the “Open Action View” option does not appear in the menu selection.



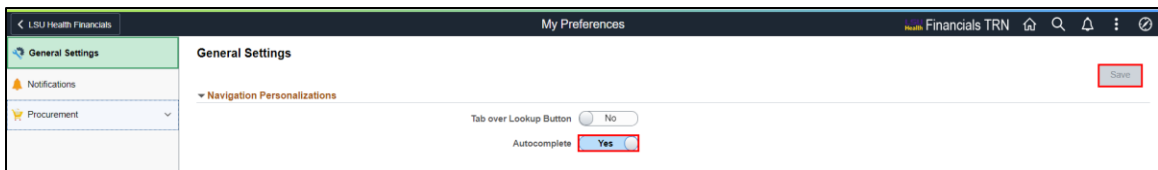
My Preferences

The **General Settings** panel for **My Preferences** is where the user may opt to make **Navigational Personalizations**. There are two **Navigational Personalization** options available: **Tab over Lookup Button** and **Autocomplete**. Both options have been in previous versions of PeopleSoft, so they should be familiar to users.

The **Tab over Lookup Button** defaults to “**No**”. This indicates that the user may **not** tab over the various Lookup buttons within PeopleSoft. You would toggle the button to change it to “**Yes**” if you desire to “*turn on*” this feature. In this example, it will remain as “**No**”.

The current version of the **Autocomplete** option is defaulted to the “**Yes**” position, meaning it is turned on for all users. Users may elect to switch the option to “**No**” so that it is turned off. This may be accomplished by selecting **My Preferences** from any homepage. Preferences are universal through the system, so by changing the **Autocomplete** default for one homepage, you change it for all.

- Select the **Action** icon – three stacked dots - in the top right of the screen.
- Select the **My Preferences** option.



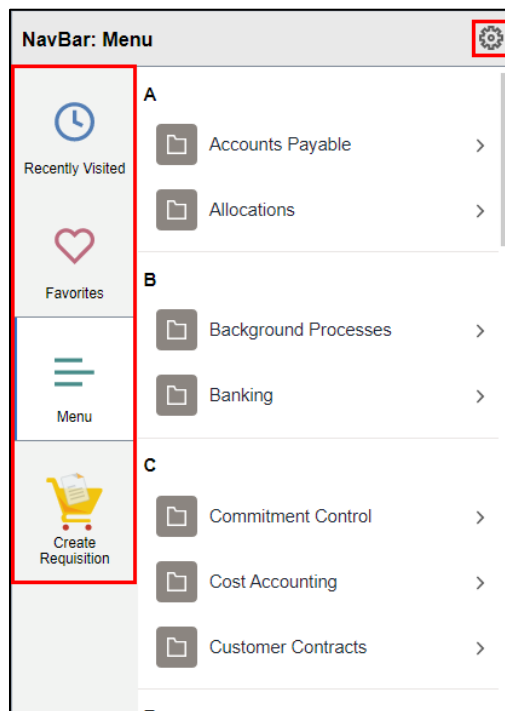
- Toggle the option for **Autocomplete** to **No**.
- Click the **SAVE** button in the upper right corner of the screen.

NavBar Menu Appearance and Terminology Differences

The **NavBar** still serves as an alternative means of navigation within PeopleSoft. The **NavBar** appearance and some terminology has been updated, but the structure is essentially the same. By clicking the **NavBar**, the panel expands to the left to display menu options as in the previous version.

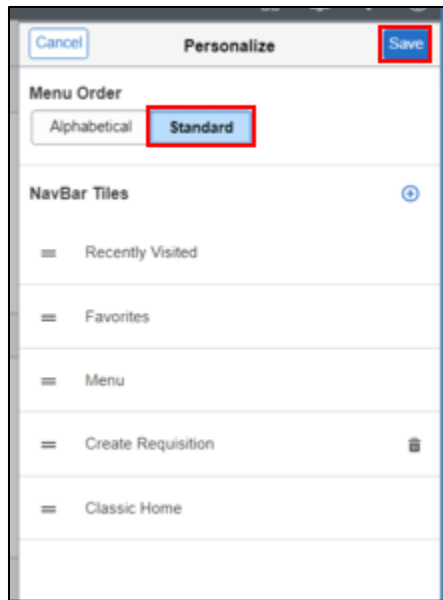
The **Recently Viewed** icon is now the **Recently Visited** icon, and the icon has changed from a *calendar* to a *clock*. The **My Favorites** icon is now just **Favorites**, and the icon has changed from a *star* to a *heart*. Lastly, the **Navigator** icon is now the **Menu** icon, and the icon has changed from a *book* to *lines*.

NOTE: The Create Requisition cart is for LSUSH users only.

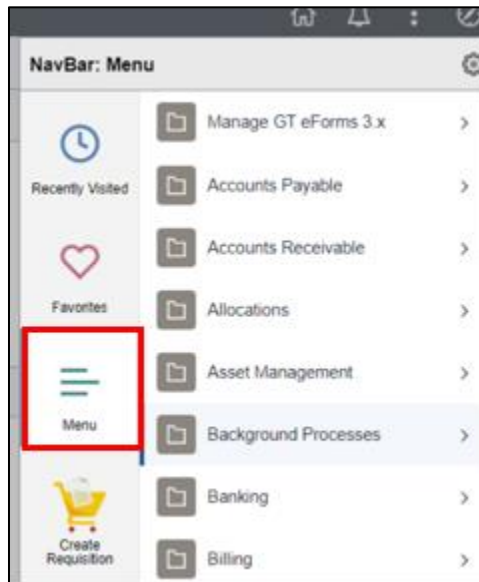


The default **Menu** is organized alphabetically with a break between each alpha character. If desired, the user may change the order of the **Menu** from **Alphabetical** to **Standard**. In **Standard** order, menu items are viewed by *function*. Select **Settings** (gear icon) at the top right of the menu.

On the **Personalize** page, select **Standard** and, then **Save**.

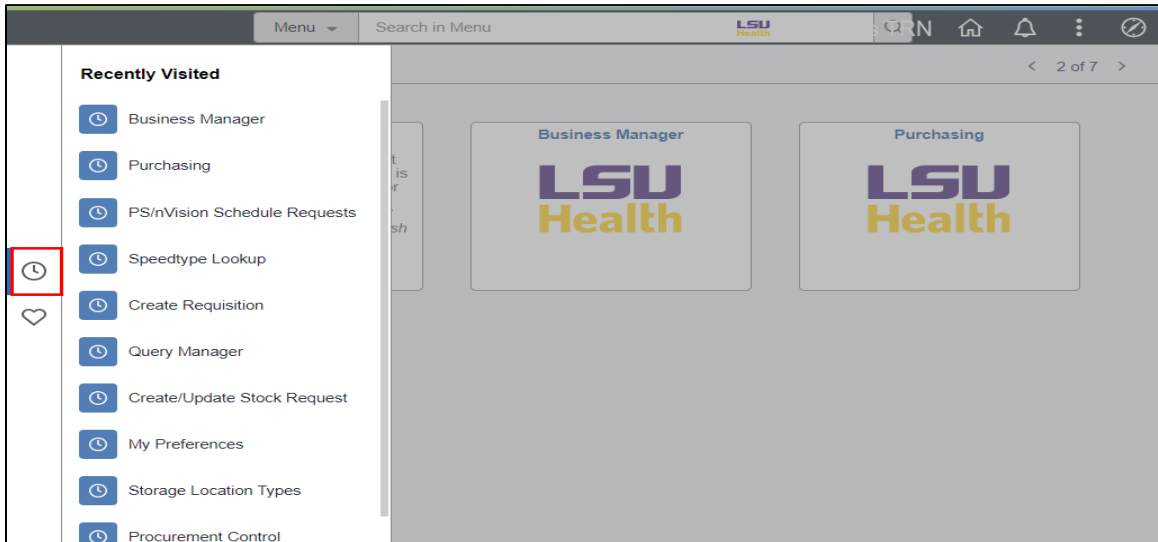


Select the **Menu** option to view the **Standard** order.

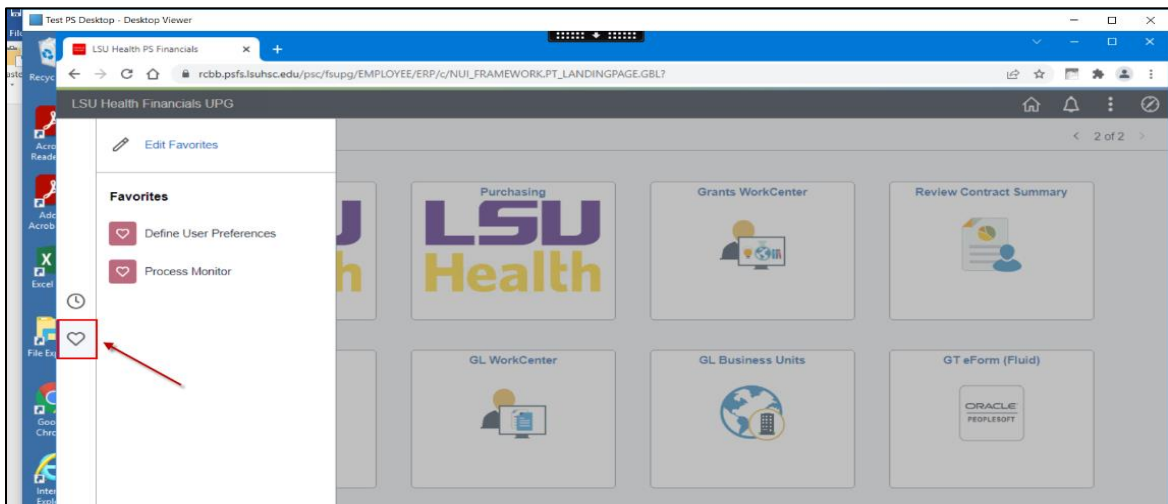


Recently Visited and Favorites Icons

Another new feature of Tools 8.59 is having the **Recently Visited** and **Favorites** icons in the left margins of homepages to facilitate quick access and navigation. The **Recently Visited** icon (clock) displays a list of previously visited pages. Simply click an option to navigate to that page again.



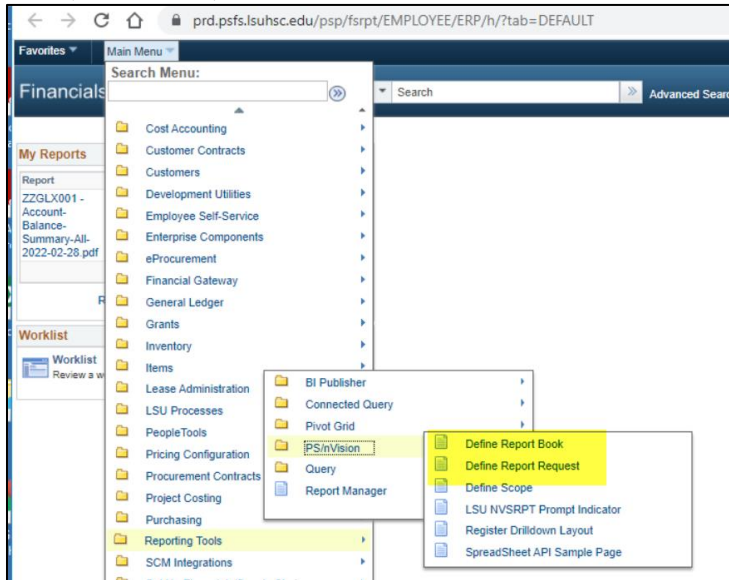
By selecting the **Favorites** icon (heart), the user's saved favorite pages display. Again, simply click an option to return to the page again.



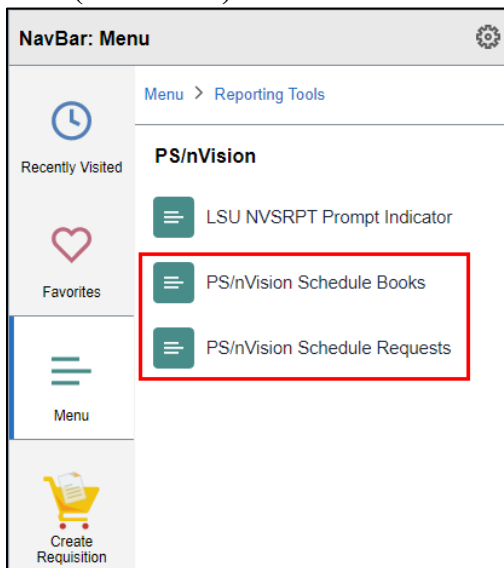
PS/nVision

The navigation options that users will see in the **Reports** database for **PS nVision** have changed with Tools 8.59. Instead of seeing “Define Report Books” and “Define Report Request” in the menu, users will see “**PS/nVision Schedule Books**” and “**PS/nVision Schedule Requests**”.

Old (Tools 8.57):



New (Tools 8.59):

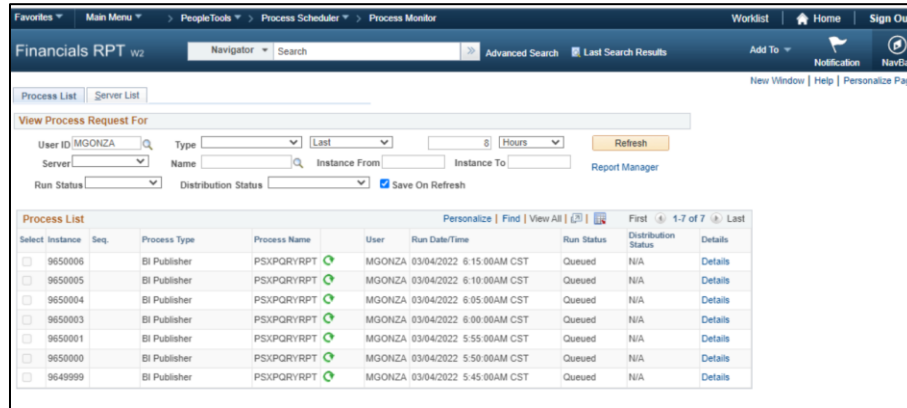


Process Monitor

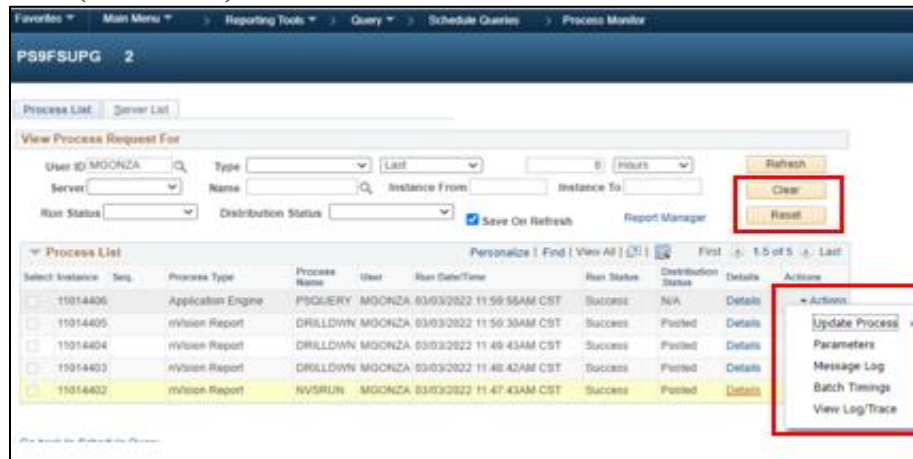
Several new features have been added to the Process Monitor for Tools 8.59. When you access the Process Monitor to review a process status, these new features will be evident.

- In the header section, directly below the **Refresh** button at the top right of the page, there are two new buttons: “**Clear**” and “**Reset**”.
 - The **Clear** button removes all preset filters the user has entered into the header section.
 - The **Reset** button restores the Process Monitor settings to the default.
- The **Report Manager** link has moved slightly to the left of the Reset button.
- A new **Actions** column has been added to the Process List section. **Actions** will be displayed for each row in the Process Monitor.
 - The new **Actions** column provides access to the options under the **Details** link. Users will select **Actions** to get a drop-down list of available options. Users may also choose the **Details** link to select desired actions.

Old (Tools 8.57):












New (Tools 8.59):



Appendix

Icons and Terminology

<i>Icon</i>	<i>Term</i>	<i>Definition</i>
	Home Icon	returns users to the homepage
	Search Icon	used to search for documents or menu options
	Notification Flag	used to search for documents or menu options
	Action Icon	used to perform various actions including signing out
	NavBar Icon	used to select the right side navigation and menu options
	Favorites	used to select the right side navigation and menu options
	Recent	used to select the right side navigation and menu options
	Tile	Tiles are used as graphic representation of collections of pages and navigations
	Navigation Collection	This is also known as a “NavCollection”. These are groups of frequently used menu navigation links grouped together on a tile to facilitate ease of access in the system. The tiles and navigation collections can save users time by reducing the number of times they need to click menu options as well as alleviate issues when menu navigations are not easily remembered.

System Notifications
PS9FSPRD Notice: This system is the PS Financials Production system. Contact the support team with questions.
LSU Health PS Financials Production (PS9FSPRD). 2023-03-10

Test:

System Notifications
PS9FSSND Notice: This system is refreshed weekly from production to support testing. Contact the support team with questions.
This is a test instance for LSU Health PS Financials. Last refresh date: 2023-03-03

System Notifications
PS9FSPAT Notice: PeopleSoft Supply Chain testing: This system is running PeopleTools 8.59.05 for upgrade testing and review.
This is a test instance for LSU Health PS Financials. Last refresh date: 2022-11-29

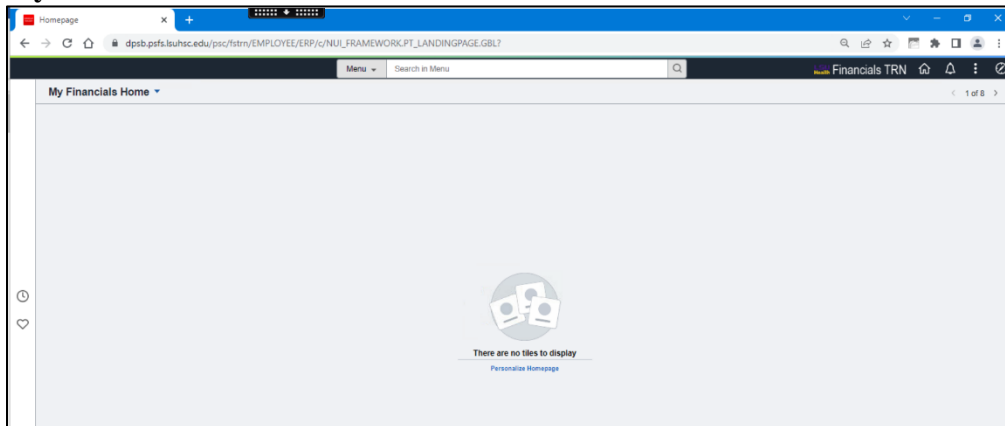
System Notification Tile

Users will see the System Notifications tile on the My Financials Home. It notifies the user which database they are in and for users to contact Support with questions.

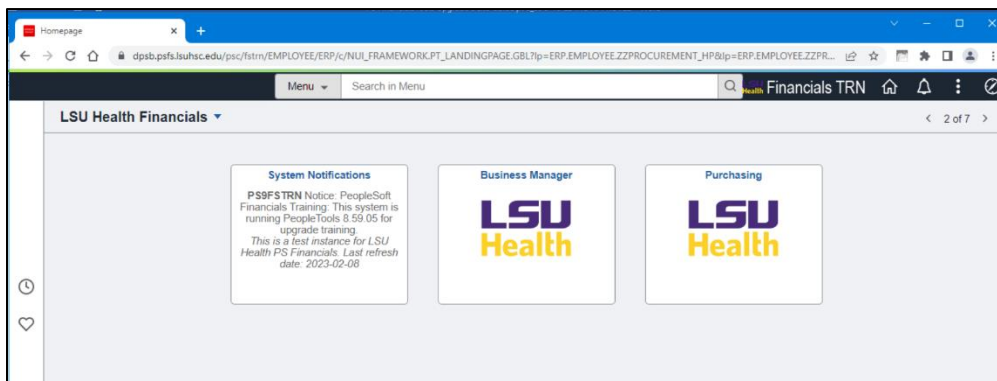
For Test instances (see second screenshot from SND and the third from PAT), the user will see a dynamic message noting the database name and the last refresh date for that instance.

Example of Homepages

My Financials Home:

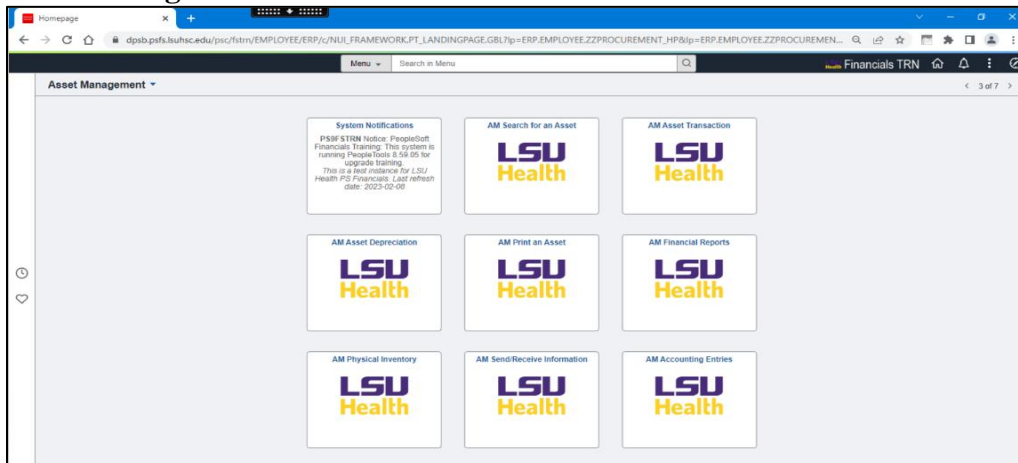


LSU Health Financials:

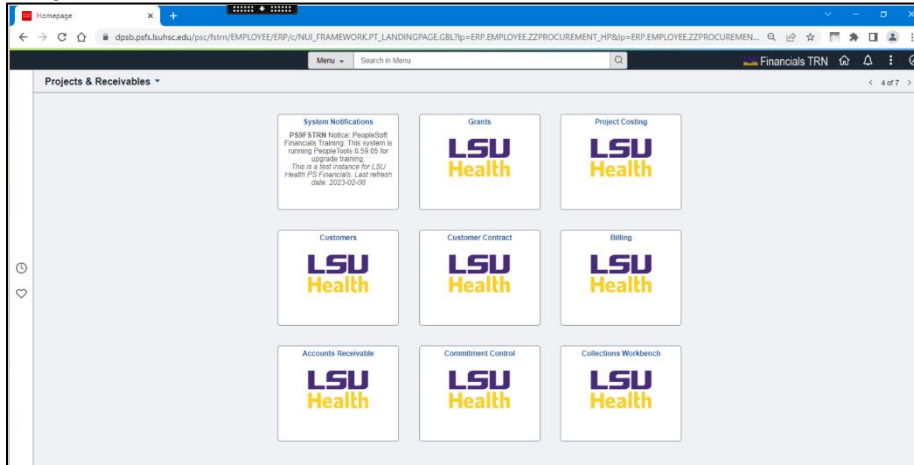


NOTE: *The Asset Management, Project & Receivables, General Ledger, and Procurement homepages are exclusively for staff in those departments. The average users will not have access to these pages.*

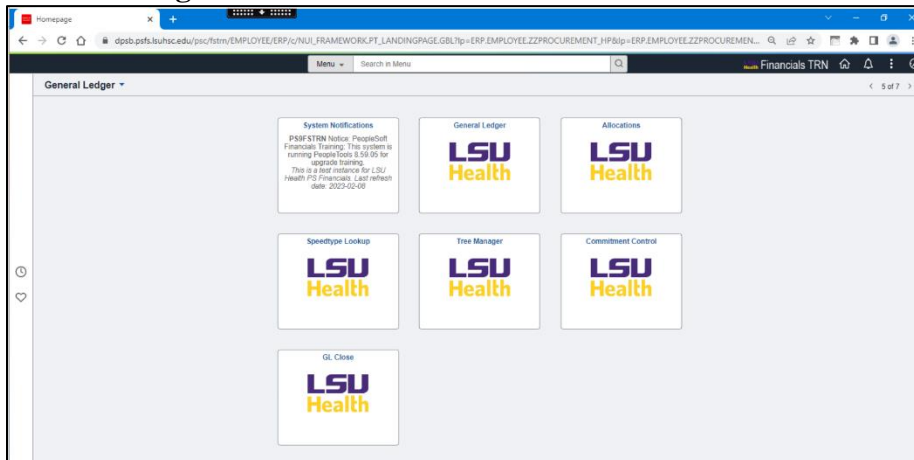
Asset Management:



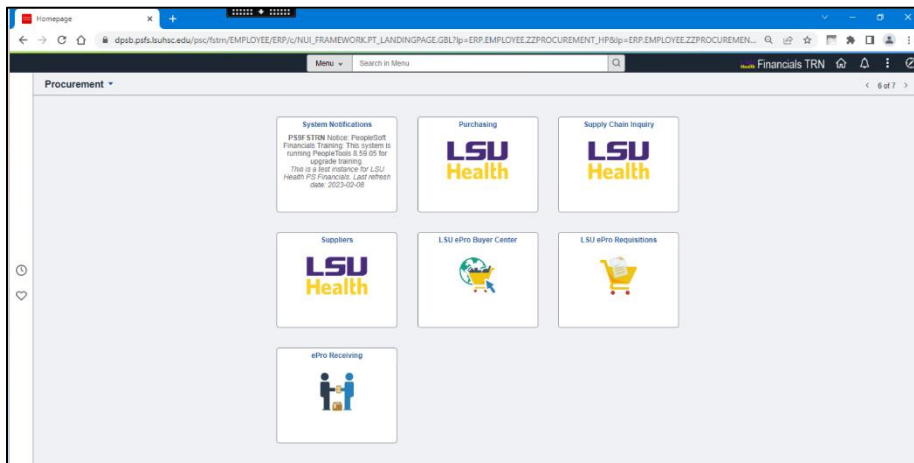
Projects & Receivables:



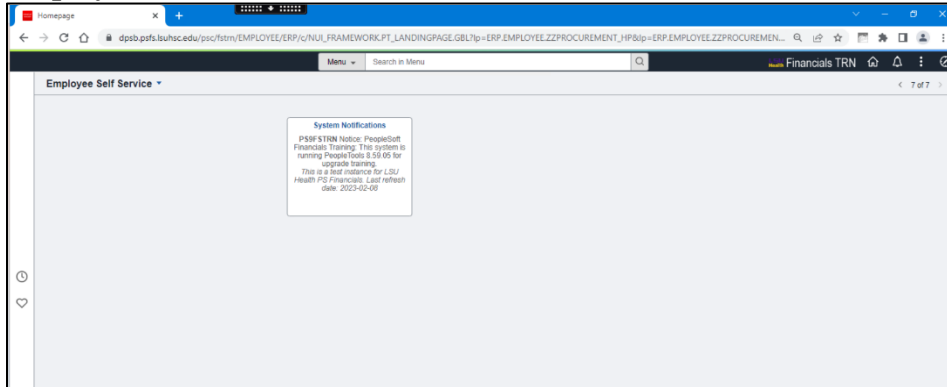
General Ledger:



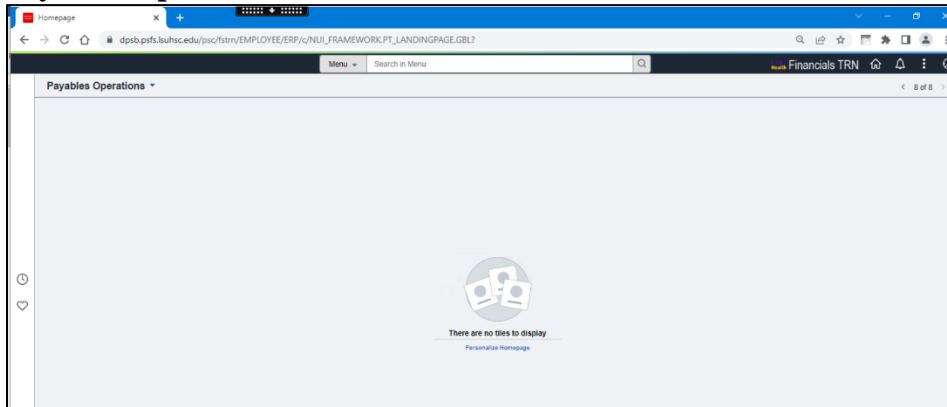
Procurement:



Employee Self Service:



Payables Operations:



NOTE: For additional information on PeopleSoft Financials End User Training, please refer to the [link below](#):

LSU Health New Orleans:

http://www.lsuhscc.edu/ps/support/fin_9_manuals.aspx