



PeopleSoft Financials Upgrade to PUM 51 Delta

Version Date: October 16, 2025

Training Guide

Delta

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PeopleSoft Financials Upgrade to PUM 51 - Delta

Overall Look and Feel Changes for PUM 51

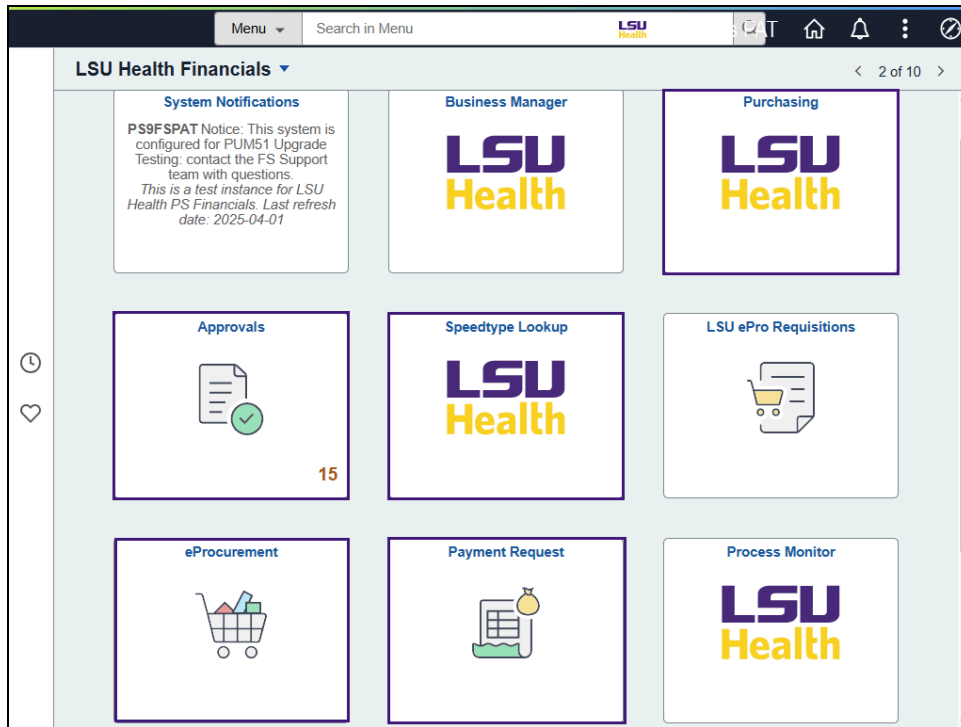
Procedure

In this topic you will learn about the [Overall Look and Feel Changes for PUM 51](#).

Step	Action
1.	<i>NOTE: This topic was completed using the PS9FSPAT database for <u>training purposes only</u>. Normally, these actions will be performed by users in the PS9FSPRD (Production) database.</i>
2.	<i>The purpose of this document is to share differences in the look and feel of the PeopleSoft Financials application with the upgrade.</i>

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Step	Action
3.	LSU Health Financials Home Updates Several <i>tiles</i> are <i>added</i> to the LSU Health Financials homepage for your use as desired. We've included an <i>Approvals Tile</i>, <i>Payment Request Tile</i>, <i>Speedtype Lookup</i>, <i>eProcurement</i>, <i>Purchasing</i>, and will include <i>Expenses</i> when we <i>go-live</i> with that module.

The screenshot displays the 'Requisitions' interface within the LSU Health Financials system. The left-hand navigation pane includes options like 'My Worklist - Summary View', 'Process Monitor', and 'Requisitions'. Under 'Requisitions', 'Add/Update Requisitions' is the active selection. The main content area features a header with 'Purchasing' and 'Financials PAT'. Below this, there are search and action buttons: 'Find an Existing Value', 'Keyword Search', and 'Add a New Value'. The form fields show '*Business Unit' set to 'LSUSH' and '*Requisition ID' set to 'NEXT'. A blue 'Add' button is positioned below these fields. At the bottom of the main area, there are links for 'Find an Existing Value', 'Keyword Search', and 'Add a New Value'.

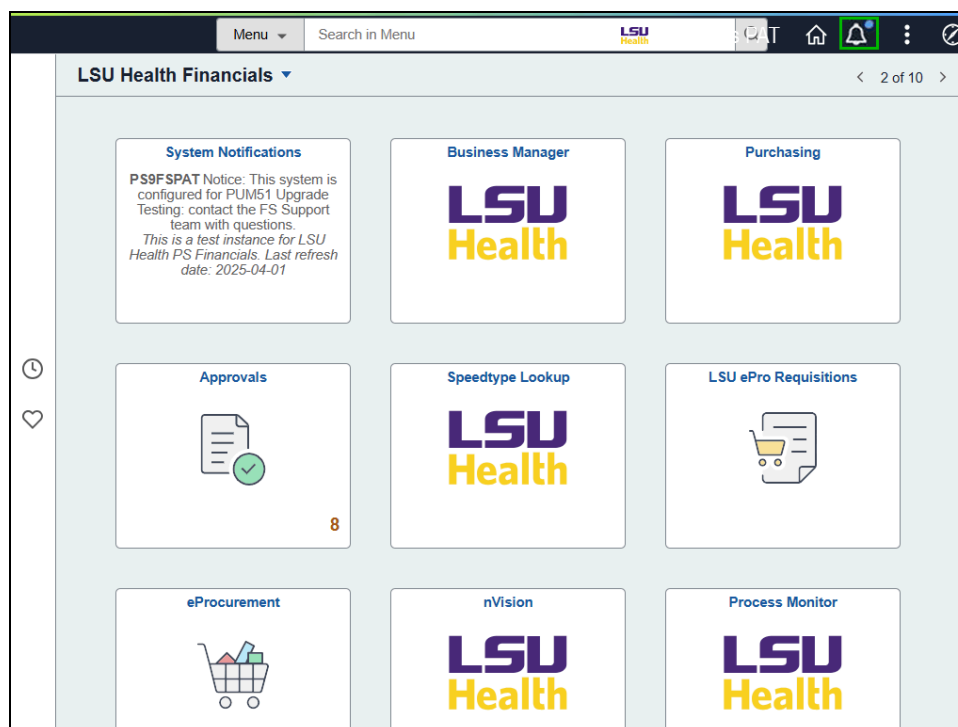
Step	Action
4.	Larger View <u>PAT Upgraded</u> Users will notice that the <i>screen display appears larger</i> in the upgraded environment. This is due to the use of the PeopleSoft <i>Fluid stylesheet</i> that allows <i>form factor adjustment</i> based on the <i>device used</i>.

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The screenshot displays the 'Business Manager Financials PRP' interface. On the left, a sidebar menu includes 'Worklist', 'Process Monitor', 'Requisition', 'My Worklist - Summary View', 'Add/Update Requisitions' (highlighted in green), 'Print Requisition', 'Document Status - REQ', 'Budget Check - Requisitions', 'Req & PO Budget Activity - Rpt', 'Requisition Inquiry', 'Purchase Orders', 'Payables', 'General Ledger', 'Vendor', and 'Reporting'. The main content area is titled 'Requisitions' and features a search bar with 'Find an Existing Value', 'Keyword Search', and 'Add a New Value' tabs. Below the search bar, there are input fields for '*Business Unit: LSUNO' and '*Requisition ID: NEXT', followed by an 'Add' button. At the bottom of the main area, the same search tabs are repeated.

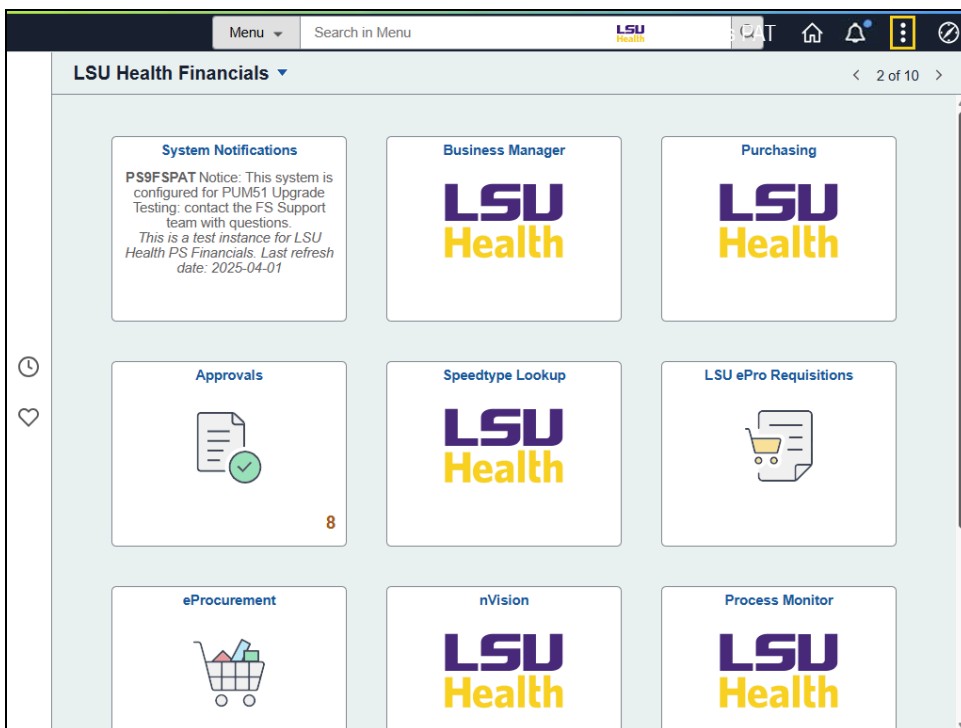
Step	Action
5.	Larger View <u><i>PRP - Not Upgraded</i></u> The buttons, tabs and fields on the Add/Update Requisitions page are substantially smaller on the <u><i>PRP - Not Upgraded</i></u> page.



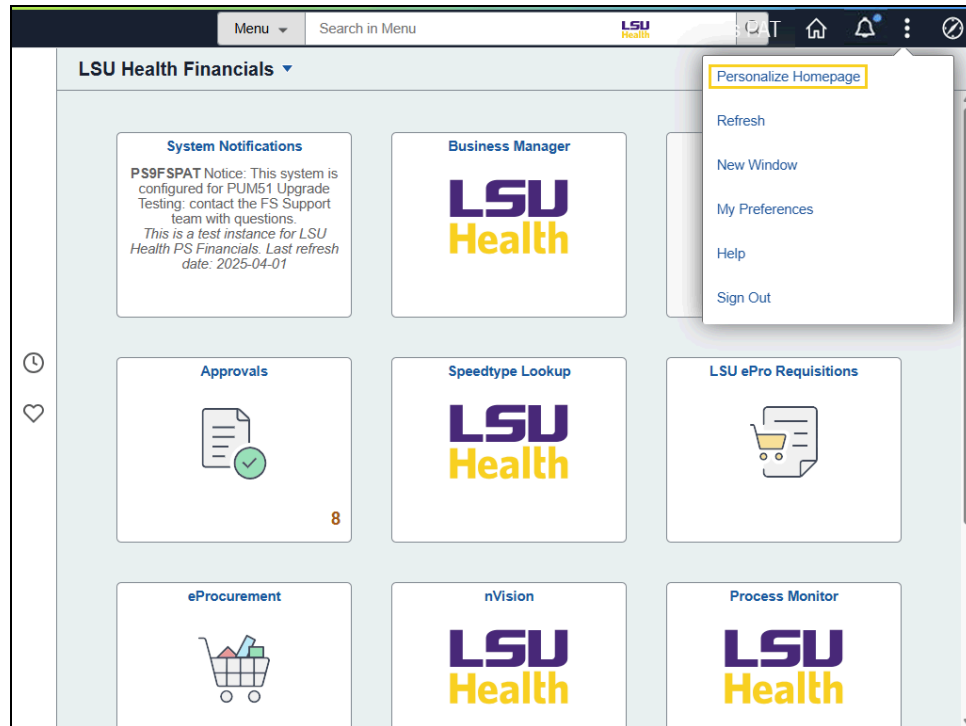
Step	Action
6.	Notification Bell and the Notification Pane <u>PAT - Upgraded</u> Users will see the Notification Bell on all home and transactional pages. The blue dot indicates that notifications are available. However, if the user elects to turn on the Notification Pane, the Notification Bell will <u>not show</u> on the <u>homepages</u>. The Notification Bell displays at the <i>top right</i> of the page <i>between</i> the <i>Home</i> and <i>Actions</i> icons. From the Notification Bell, users can view tasks that require attention. *****WARNING***** <i>Users should <u>not</u> add pages to My Financials Home, Add to NavBar or Add to Favorites using navigations from the Business Manager tile. When adding a page from inside the Business Manager tile, users are adding the <u>entire</u> navigation collection rather than the <u>individual page</u>. Users will need to navigate through the NavBar to the desired page, and then add the page to My Financials Home, Add to NavBar or Add to Favorites.</i>

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Step	Action
7.	Notification Bell and the Notification Pane <u>PAT - Upgraded</u> When a <i>Home</i> such as My Financials Home or LSU Health Financials, the Notification Pane can be always turned on the display. This pane allows the user to view tasks that require attention directly from that home. And, for the <i>homepages</i>, the <i>pane replaces the Notification icon, the Bell</i>. However, when a user is navigating and on tractional pages in the system, the pane does <u>not</u> display, and the bell icon does. *****WARNING***** <i>Users should <u>not</u> add pages to My Financials Home, Add to NavBar or Add to Favorites using navigations from the Business Manager tile. When adding a page from inside the Business Manager tile, users are adding the <u>entire</u> navigation collection rather than the <u>individual page</u>. Users will need to navigate through the NavBar to the desired page, and then add the page to My Financials Home, Add to NavBar or Add to Favorites.</i> Click the Actions menu to turn on the Notification Pane. 

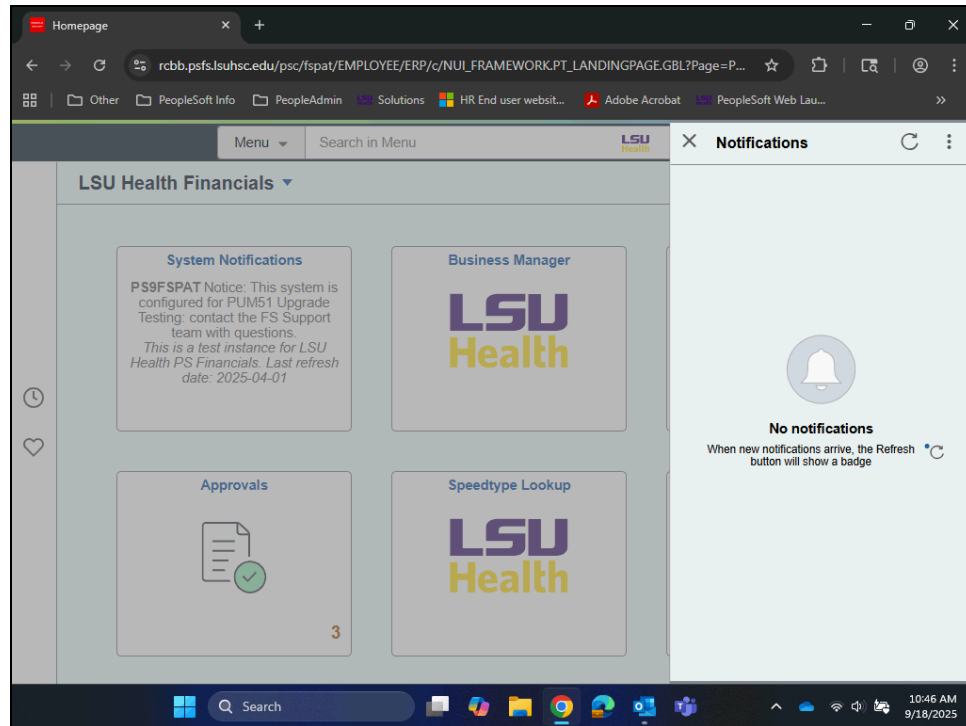


Step	Action
8.	Notification Bell and the Notification Pane <u><i>PAT - Upgraded</i></u> Click the Personalize Homepage list item. Personalize Homepage

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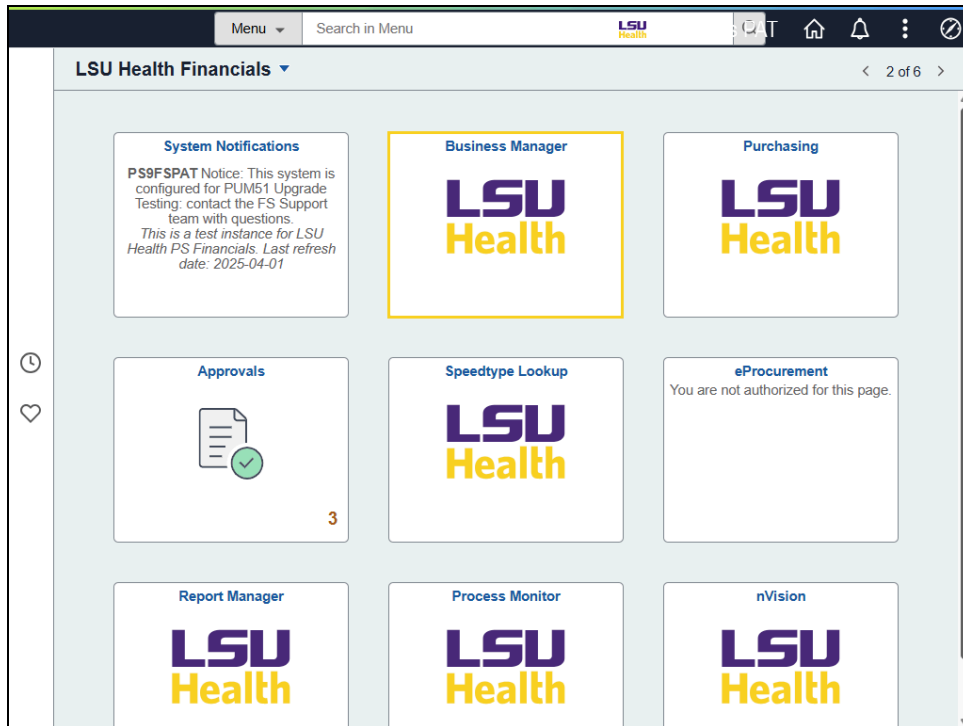
Step	Action
9.	Notification Bell and the Notification Pane <u>PAT - Upgraded</u> Click the Show Notifications Panel option. 
10.	Notification Bell and the Notification Pane <u>PAT - Upgraded</u> The user <u>must</u> Save to complete the process. Click the Save button. 



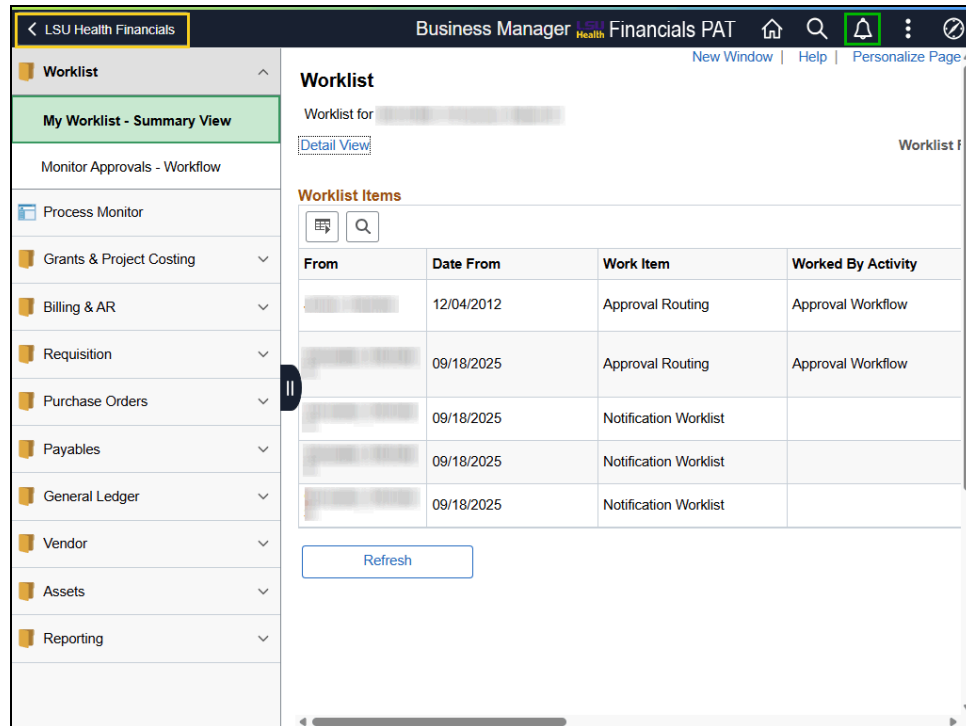
Step	Action
11.	Notification Bell and the Notification Pane <u>PAT - Upgraded</u> Notice that the Notification Bell does <u>not</u> display when the Notification Pane is active.

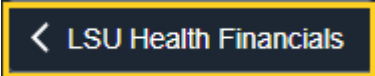
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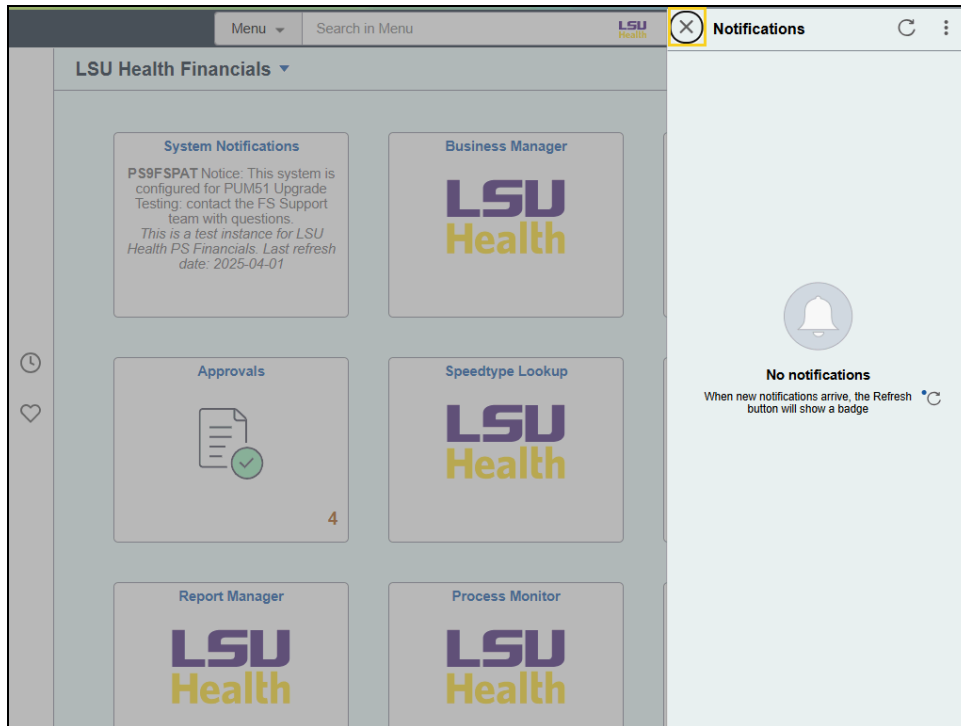
Step	Action
12.	Notification Bell and the Notification Pane <u><i>PAT - Upgraded</i></u> Click the Business Manager button.



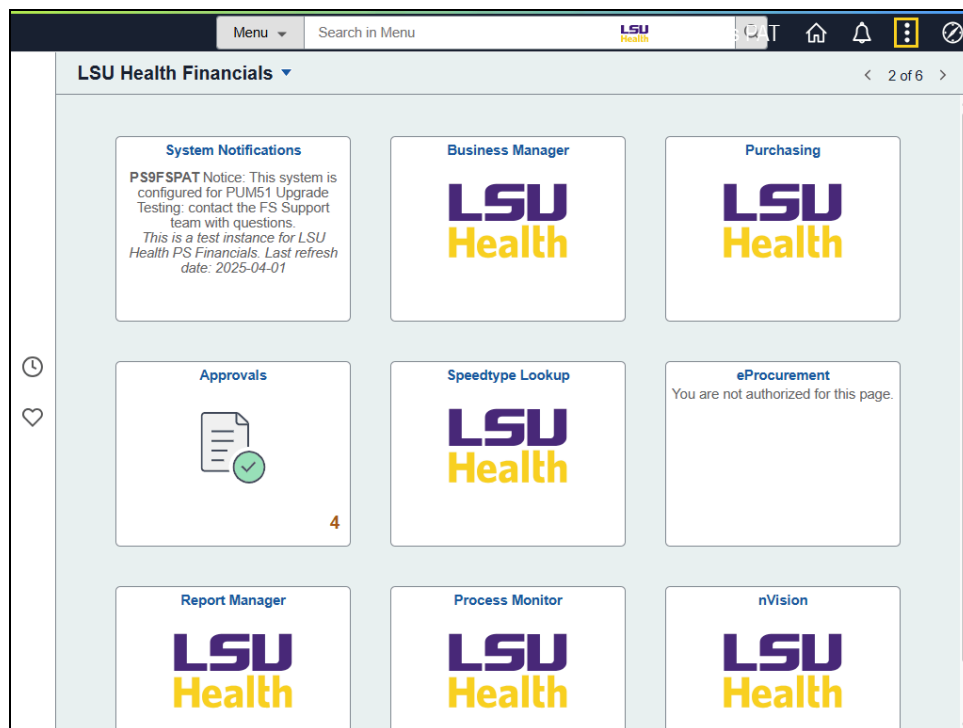
Step	Action
13.	Notification Bell and the Notification Pane <u>PAT - Upgraded</u> <i>When users access transactional pages, the Notification Bell is displayed.</i> Click the LSU Health Financials button. 

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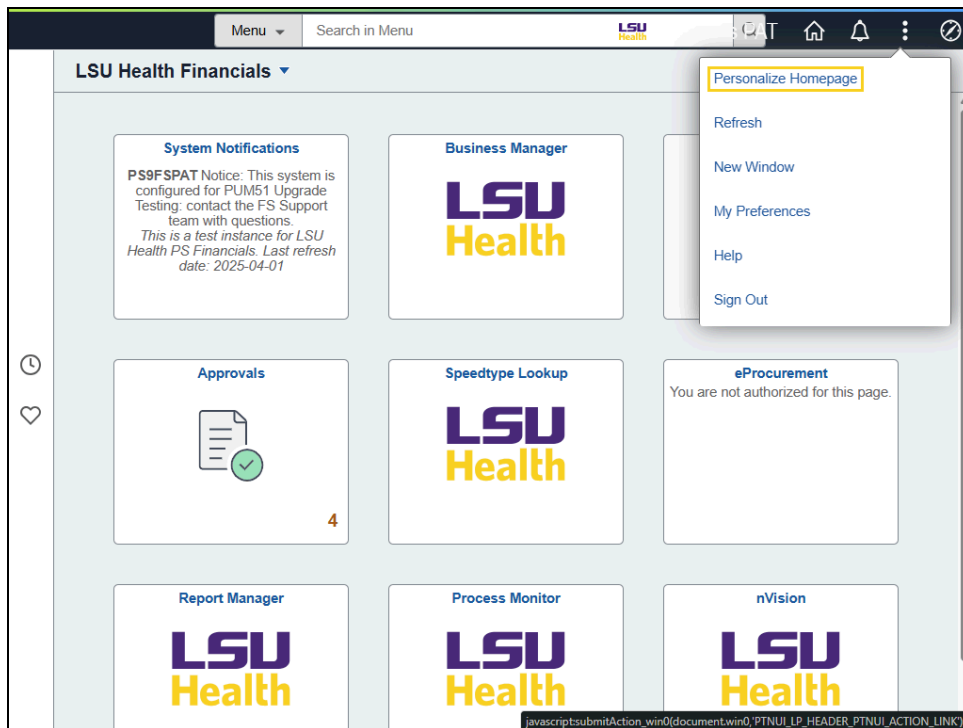
Step	Action
14.	Notification Bell and the Notification Pane <u>PAT - Upgraded</u> Users may choose to <i>hide</i> the <i>Notification Pane</i> from displaying on their My Financials Home and LSU Health Financials. Click the Close Notifications button. 



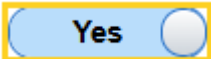
Step	Action
15.	Notification Bell and the Notification Pane <u>PAT - Upgraded</u> Select the Actions icon, 3 ellipses at the <i>top right</i> of the screen, and then select Personalize Homepage. Click the Actions menu. 

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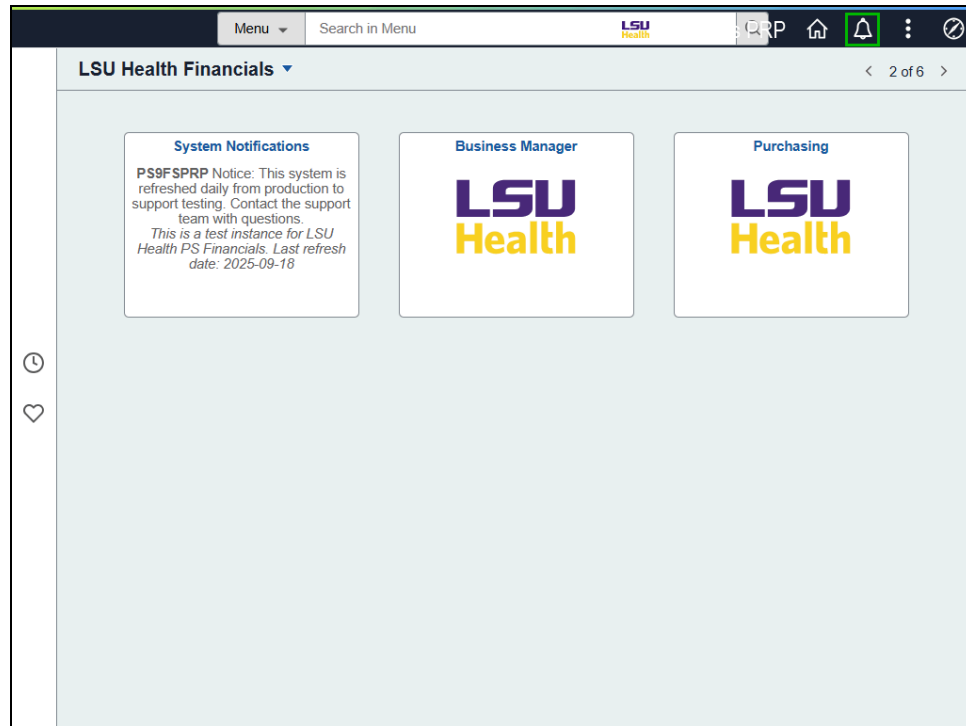
Step	Action
16.	Notification Bell and the Notification Pane <u><i>PAT - Upgraded</i></u> Click the Personalize Homepage link. Personalize Homepage

Step	Action
17.	Notification Bell and the Notification Pane <u>PAT - Upgraded</u> On the Personalize Homepage screen, the <i>green colored highlight</i> on the left indicates the <i>homepage</i>, e.g., LSU Health Financials. If the user wanted to <i>add a tile</i>, s/he could do so on this page. Or, the user could <i>select a different homepage</i>, such as My Financials Home, to add a tile or toggle the Notification Pane. At the <i>top center</i> of the page, toggle the display to No and then Save. Click the Show Notification Pane option. 

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Step	Action
18.	Notification Bell and the Notification Pane <u>PAT - Upgraded</u> Click the Save button. 



Step	Action
19.	Notification Bell and the Notification Pane <u><i>PRP - Not Upgraded</i></u> The Homepage displays, now <i>excluding</i> the Notification Pane. The Bell icon is once again displayed.

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LSU Health Financials | Purchasing | Financials PRP | New Window | Help | Personalize Page

Maintain Requisitions

Requisition

Business Unit: LSUNO | Requisition ID: NEXT | Status: Pending | Budget Status: Not Chk'd

Requisition Name: [] Copy From [] ☐ Hold From Further Processing

Header

*Requester: [] | *Requisition Date: 09/23/2025 | Origin: ONL | *Currency Code: USD | Accounting Date: 09/23/2025

Requester Info | On-Line Entry | US Dollar

Requisition Defaults | Add Comments | **Amount Summary**

Total Amount: 0.00 USD

Add Items From

Purchasing Kit | Catalog | Item Search | Requester Items

Line

Details | Ship To/Due Date | Status | Supplier Information | Item Information | Attributes | Contract | Sourcing Controls

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	[]	[]	0.0000	[]	[]	[]	0.00	Pending

View Printable Version | View Approvals | *Go to ...More...

Save | Notify | Refresh

Step	Action
20.	Grid Lines and Section Dividers <u>PRP - Not Upgraded</u> In the upgraded version of PeopleSoft Financials, the Fluid display <i>style</i> of the pages <i>excludes</i> the <i>colored section dividers and section grid lines</i>. This will more closely resemble the views users are accustomed to seeing in the HCM application. <u>PRP - Not Upgraded</u> The <i>grey section dividers</i> display on the PRP - Not Upgraded Maintain Requisitions page. The <i>grey sections dividers</i> are <i>Header, Amount Summary, Add Items From, and Line</i>. The page itself is laid out in a <i>grid structure</i>. However, <i>grid lines were removed</i> with the introduction of <i>Fluid</i>.

Maintain Requisitions

Requisition

Business Unit: LSUNO
 Requisition ID: NEXT
 Requisition Name: [Copy From](#)

Status: Pending
 Budget Status: Not Chk'd
☐ Hold From Further P

Header

*Requester: [Requester Info](#)
 *Requisition Date: 09/18/2025
 Origin: ONL [On-Line Entry](#)
 *Currency Code: USD [US Dollar](#)
 Accounting Date: 09/18/2025

Amount Summary

Total Amount: 0.00

[Add Items From](#)

[Purchasing Kit Item Search](#) [Catalog Requester Items](#)

Line

[Details](#) [Ship To/Due Date](#) [Status](#) [Supplier Information](#) [Item Information](#) [Attributes](#) [Contract](#) [Sourcing Coi](#)

Line	Item	Description	Quantity	*UOM

Step	Action
21.	Grid Lines and Section Dividers <u>PAT - Upgraded</u> <i>Grid lines and section dividers are not displayed on the PAT - Upgraded page. The section dividers of <i>Header</i>, <i>Amount Summary</i>, <i>Add Items From</i>, and <i>Line</i> do not have <i>grey highlight bars</i> over them. As previously mentioned, the <i>grid lines</i> were removed with the introduction of <i>Fluid</i>.</i>

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LSU Health Financials Business Manager Financials PRP

Maintain Requisitions

Requisition

Business Unit LSUNO Status Pending
Requisition ID NEXT Budget Status Not Chk'd
Requisition Name Copy From Hold From Further Processing

Header

*Requester
*Requisition Date 09/23/2025
Origin ONL
*Currency Code USD
Accounting Date 09/23/2025

Requester Info
On-Line Entry
US Dollar

Requisition Defaults Add Comments
Requisition Activities

Amount Summary

Total Amount 0.00 USD

Add Items From

Purchasing Kit Catalog
Item Search Requester Items

Line

Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1			0.0000			0	0.00	Pending

View Printable Version View Approvals *Go to ...More...

Save Notify Refresh

Step	Action
22.	Button Color Change The <i>Save, Return to Search, Notify, Refresh, Add a New Value, and Update/Display</i> buttons displayed at the <i>bottom</i> of many transaction pages have changed color. Instead of the yellow buttons, they are now blue or white. <u>PRP - Not Upgraded</u> The traditional <i>yellow Save, Notify, Refresh, Add, and Update/Display</i> are displayed on the <i>Maintain Requisitions</i> page in PRP - Not Upgraded database. NOTE: The Add and Update/Display buttons do not show on the screenshot. Users will need to scroll over to view these buttons.

LSU Health Financials Business Manager Financials PAT

Requisition Name [Copy From](#) ☐ Hold From Further P

Header

*Requester [Requester Info](#)

*Requisition Date 09/18/2025 [On-Line Entry](#)

Origin ONL [Requisition Defaults](#) [Add Comments](#)

*Currency Code USD [Requisition Activities](#)

Accounting Date 09/18/2025 [Purchasing Kit Item Search](#) [Catalog Requester Items](#)

Amount Summary

Total Amount 0.00

Add Items From

Line

[Details](#) [Ship To/Due Date](#) [Status](#) [Supplier Information](#) [Item Information](#) [Attributes](#) [Contract](#) [Sourcing Co](#)

Line	Item	Description	Quantity	*UOM
1			0.0000	

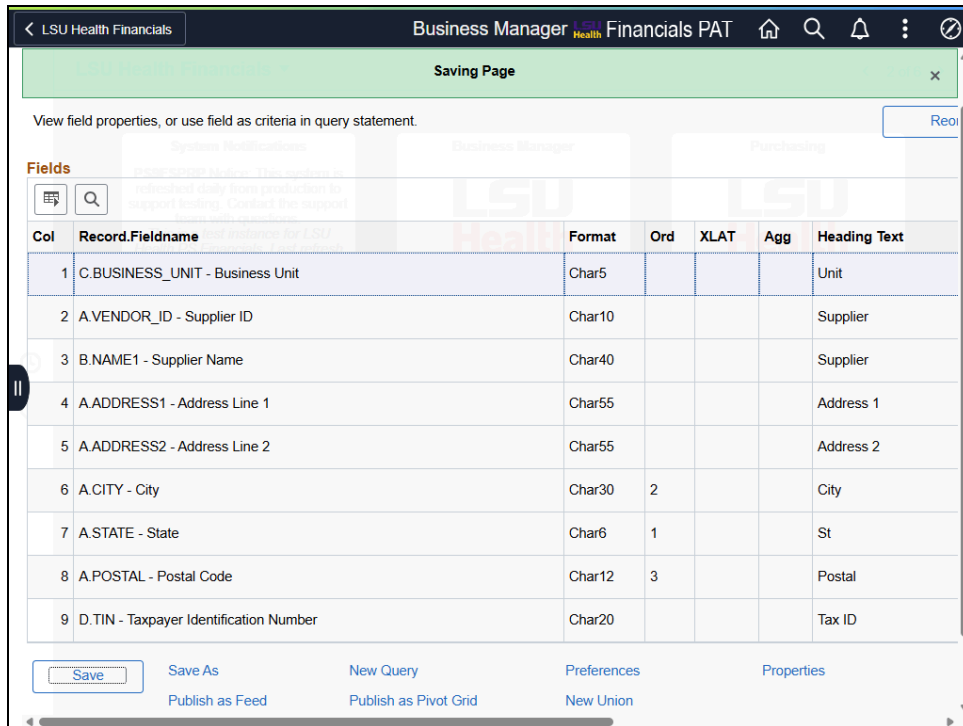
[View Printable Version](#) [View Approvals](#) [Go to](#) [More](#)

[Save](#) [Notify](#) [Refresh](#)

Step	Action
23.	Button Color Change <u>PAT - Upgraded</u> <i>Save, Notify, and Refresh buttons are now blue and white.</i> NOTE: <i>Scroll to the right to view the Add and Update/Display buttons.</i>

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Step	Action
24.	Save <u>PAT - Upgraded</u> When a document or page is saved, a green bar will display at the top of the page indicating the save is in progress.

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LSU Health Financials

Pending ApprovalsLSU HealthFinancials PAT

Home

Search

Notifications

Settings

Logout

View By

Type

All

8

Payment Request

4

Requisition

4

All

8 rows

Requisition

26.90 USD

LSUSH / 0095136

Routed

08/14/2025

>

⚠

Medium Priority

Requisition

5.00 USD

LSUNO / 0068336

Routed

09/04/2025

>

⚠

Medium Priority

Requisition

54.72 USD

Test2 - LSUSH / 0095140

Routed

09/12/2025

>

⚠

Medium Priority

Bus Mgr tst

Payment Request

50.00 USD

0000042865 / LSUNE / DP10535002522

Routed

09/16/2025

>

👤

Reassigned from

Payment Request

10.29 USD

0000042907 / LSUSE / 6047376

Routed

09/16/2025

>

👤

Reassigned from

Payment Request

50.00 USD

0000043012 / LSUNE / DP10535002524

Routed

09/16/2025

>

👤

Reassigned from

Payment Request

198.00 USD

0000043614 / LSUNE / DP1052000P517

Routed

09/16/2025

>

Requisition

1.00 USD

LSUSH / 0095144

Routed

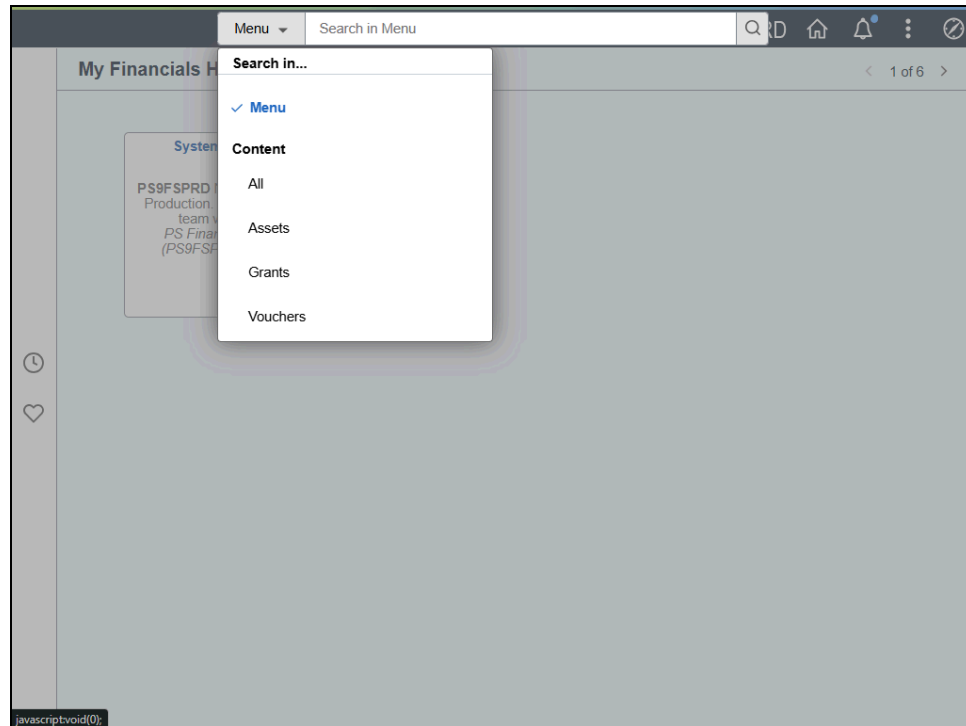
09/18/2025

>

⚠

Medium Priority

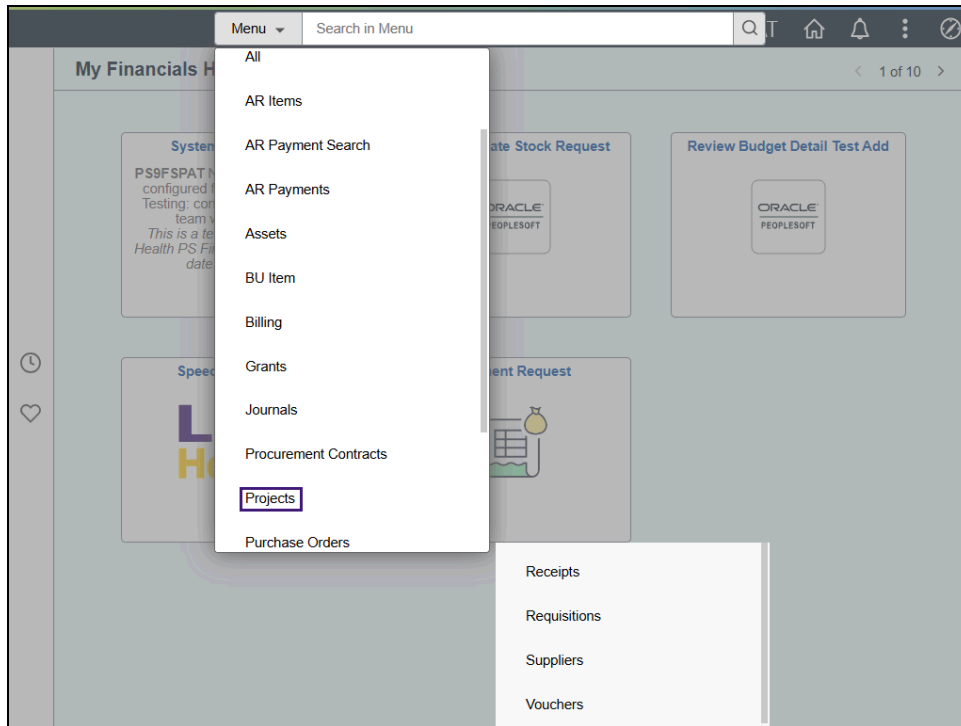
Step	Action
26.	Filter Button Appearance <u>PAT - Upgraded</u> The new Filter button displays in the <i>same place on the page</i> . In the upgraded database displays as a more <i>graphic representation of a funnel</i> .



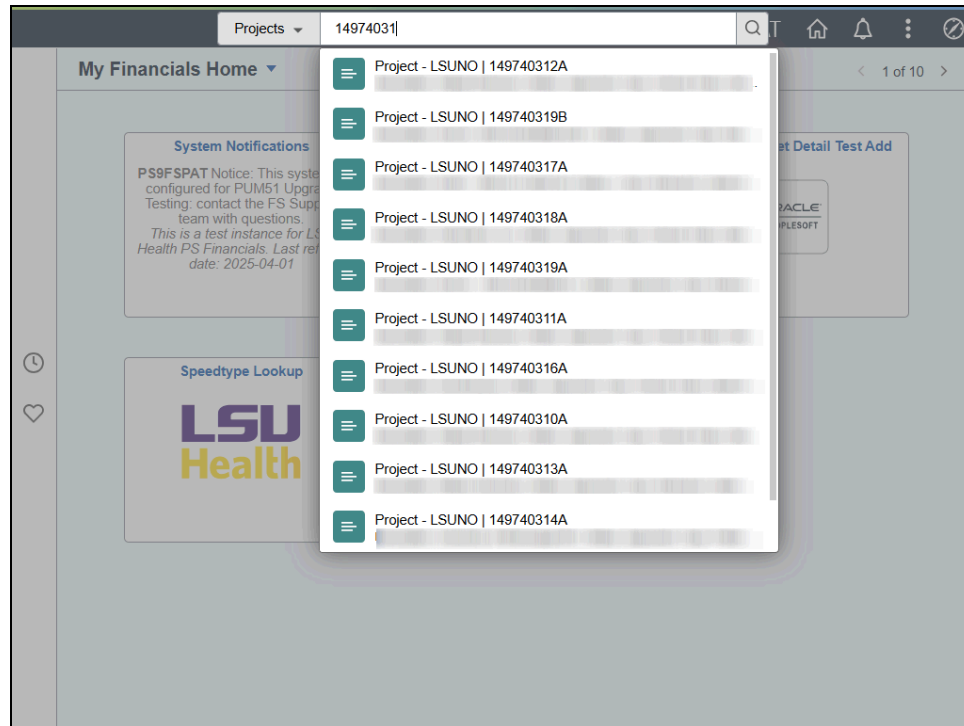
Step	Action
27.	Key Word Search Expansion Users now can use the Search for Content in Account Receivable, Billing, Journals, and Projects in addition to all the existing search features. <u>PRD - Search Options</u>

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Step	Action
28.	Key Word Search Expansion <u>PAT - Upgraded</u> To search for content in Projects for example, select the <i>module</i> from the list to populate that in the search parameters.



Step	Action
29.	Key Word Search Expansion <u>PAT - Upgraded</u> Then, enter a Project ID. As you type, a list of projects meeting that criteria display. You may select one or just continue typing and press the magnifying glass at the end of the box.

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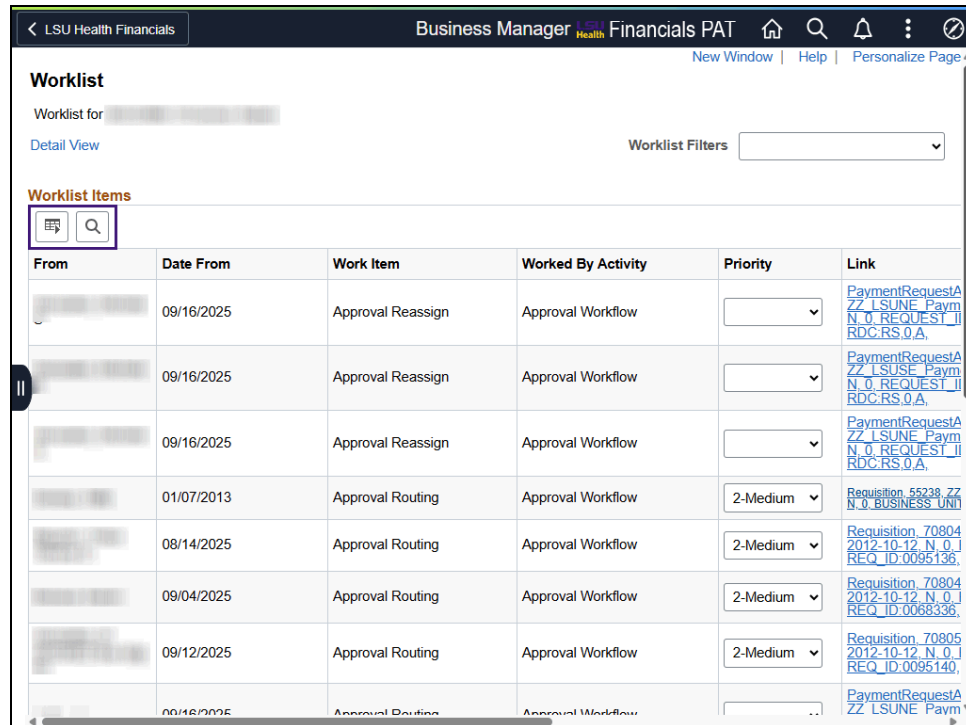
The screenshot shows a web application interface for 'Financials PAT'. On the left is a sidebar with several filter categories, each with a dropdown arrow and a list of items with counts in parentheses. The main content area is titled 'View Search Results' and shows '1 results for keyword: "149740312A"'. Below this, it displays 'Project - LSUNO | 149740312A' and 'Processing Status: Active'. The top navigation bar includes a home icon, a search icon, a bell icon, and a refresh icon.

Step	Action
30.	Key Word Search Expansion <u><i>PAT - Upgraded</i></u> Results of the search display by search criteria on the left. Select and review as desired.
31.	This completes <i>Overall Look and Feel Changes for PUM 51</i>. End of Procedure.

Download to Excel, Find, and Personalize Buttons

Procedure

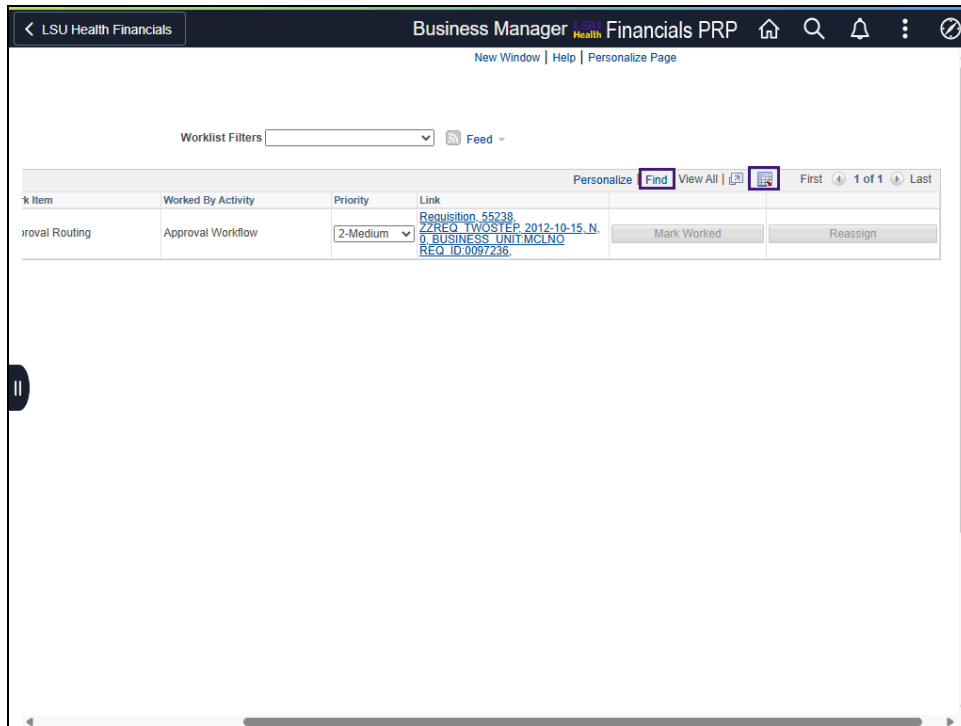
In this topic you will learn how to **Download to Excel, Find, and Personalize Buttons**.



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 moved from the right of the page to the left of the grid list and are buttons 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 <i>top, right</i> of the <i>grid list bar</i>. <u>PRP - Not Upgraded</u> The Find link and the Download Worklist Items Table to Excel appear on the <i>top, right</i> of the page <i>before Worklist Item numbers</i>.

LSU Health Financials Business Manager Financials PAT

New Window | Help | Personalize Page

Worklist

Worklist for [redacted]

Detail View Worklist Filters [dropdown]

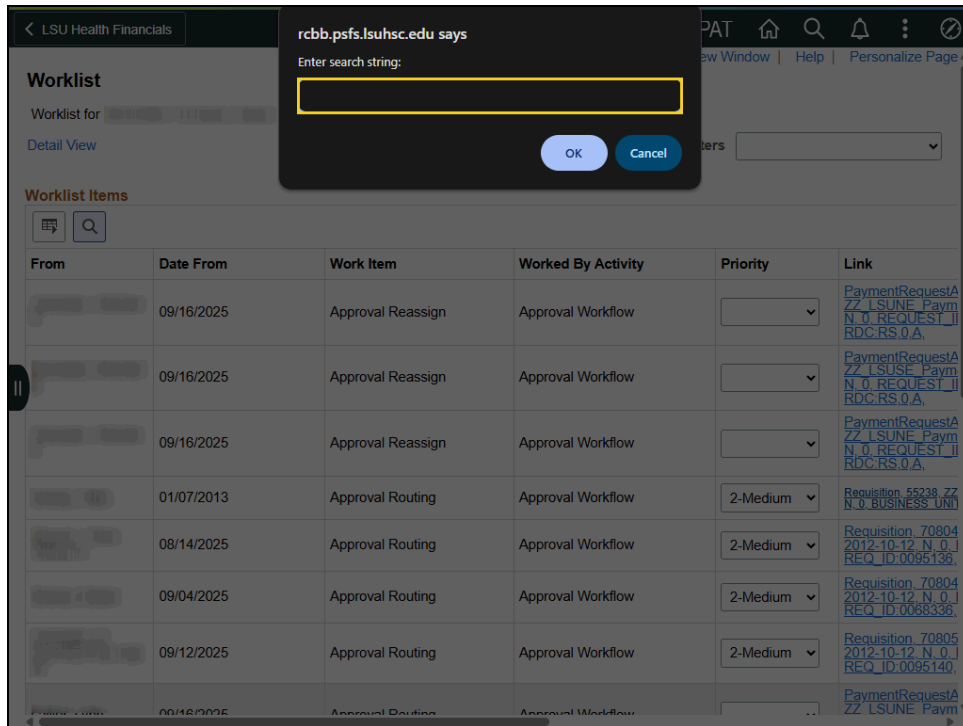
Worklist Items

From	Date From	Work Item	Worked By Activity	Priority	Link
[redacted]	09/16/2025	Approval Reassign	Approval Workflow	[dropdown]	PaymentRequestA ZZ LSUNE Paym N 0 REQUEST I RDC-RS 0 A
[redacted]	09/16/2025	Approval Reassign	Approval Workflow	[dropdown]	PaymentRequestA ZZ LSUNE Paym N 0 REQUEST I RDC-RS 0 A
[redacted]	09/16/2025	Approval Reassign	Approval Workflow	[dropdown]	PaymentRequestA ZZ LSUNE Paym N 0 REQUEST I RDC-RS 0 A
[redacted]	01/07/2013	Approval Routing	Approval Workflow	2-Medium [dropdown]	Requisition 55238 ZZ N 0 BUSINESS UNIT
[redacted]	08/14/2025	Approval Routing	Approval Workflow	2-Medium [dropdown]	Requisition 70804 2012-10-12 N 0 REQ ID 0055136
[redacted]	09/04/2025	Approval Routing	Approval Workflow	2-Medium [dropdown]	Requisition 70804 2012-10-12 N 0 REQ ID 0068336
[redacted]	09/12/2025	Approval Routing	Approval Workflow	2-Medium [dropdown]	Requisition 70805 2012-10-12 N 0 REQ ID 0095140
[redacted]	09/16/2025	Approval Routing	Approval Workflow	[dropdown]	PaymentRequestA ZZ LSUNE Paym

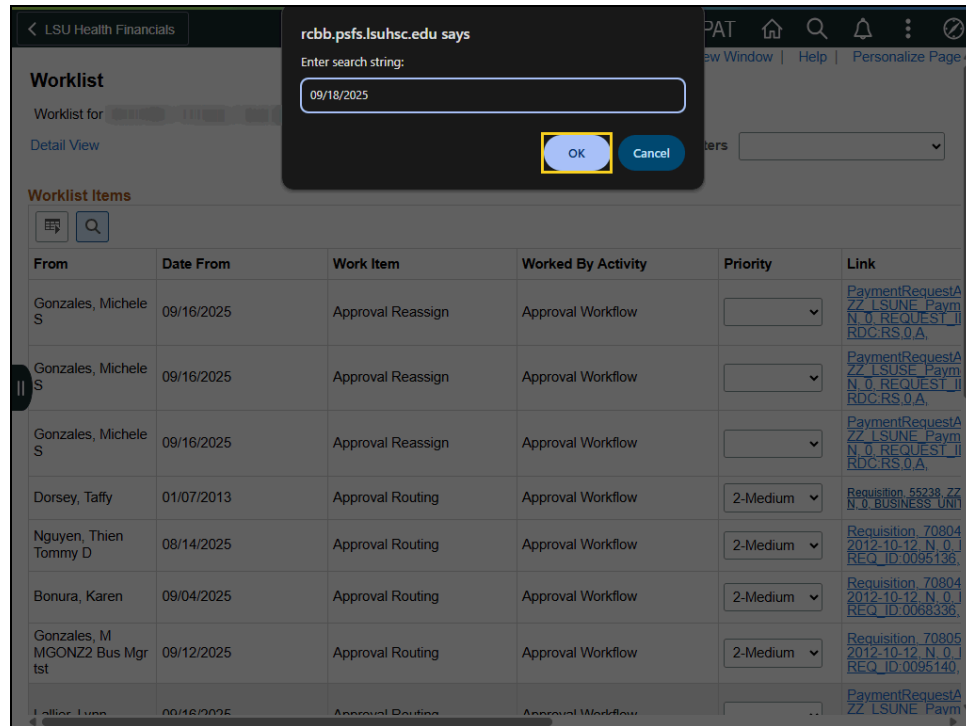
Step	Action
3.	Download to Excel, Find, Personalize Buttons <u>PAT - Upgraded</u> Find is designated by the <i>magnifying glass button</i>. In this example, the user will search for the LSUSH requisition that is dated 09/18/2025. Click the Find button. 

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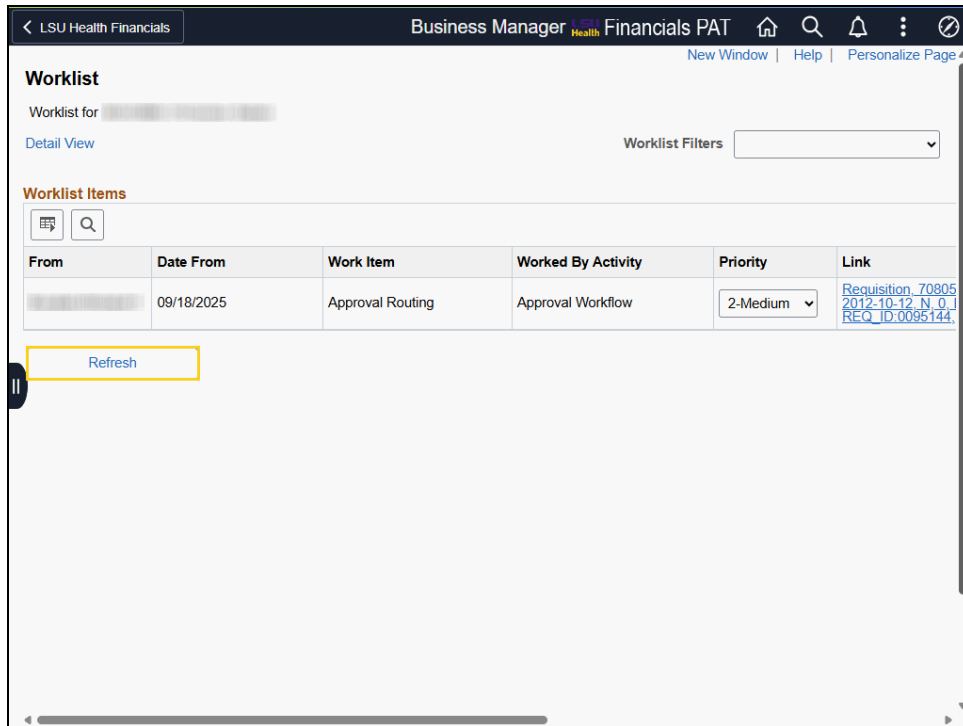
Step	Action
4.	Download to Excel, Find, Personalize Buttons <u>PAT - Upgraded</u> Users must enter the date using the correct <i>date format: MM/DD/YYYY</i>. Enter the desired information into the Search field. Enter "09/18/2025".

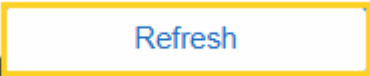


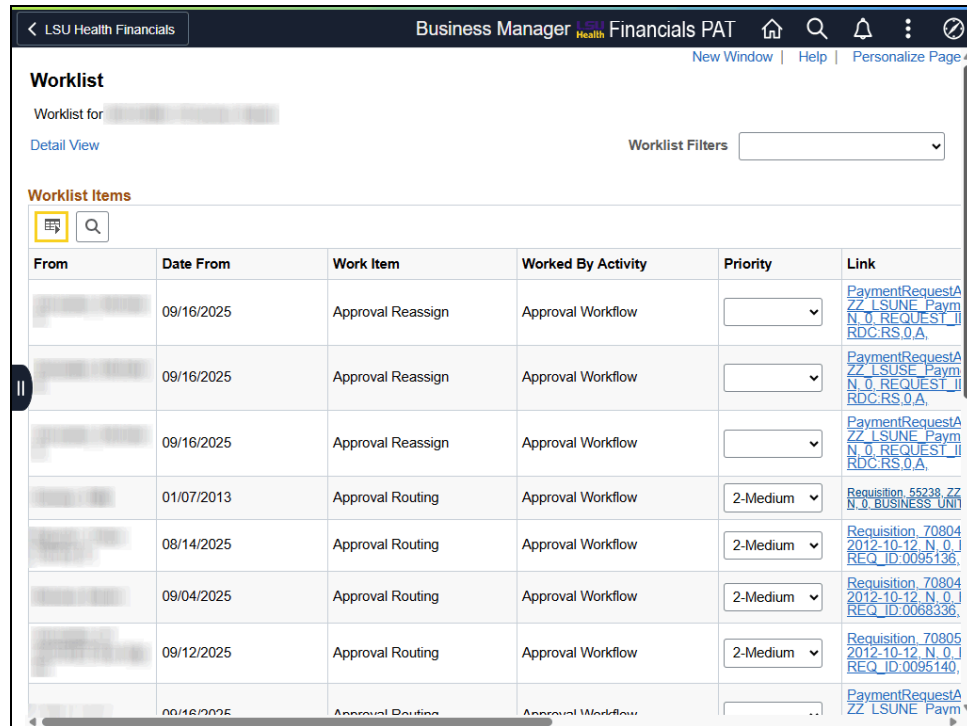
Step	Action
5.	Download to Excel, Find, Personalize Buttons <u>PAT - Upgraded</u> Users must enter the date using the correct <i>date format: MM/DD/YYYY</i>. Click the OK button. 

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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. 

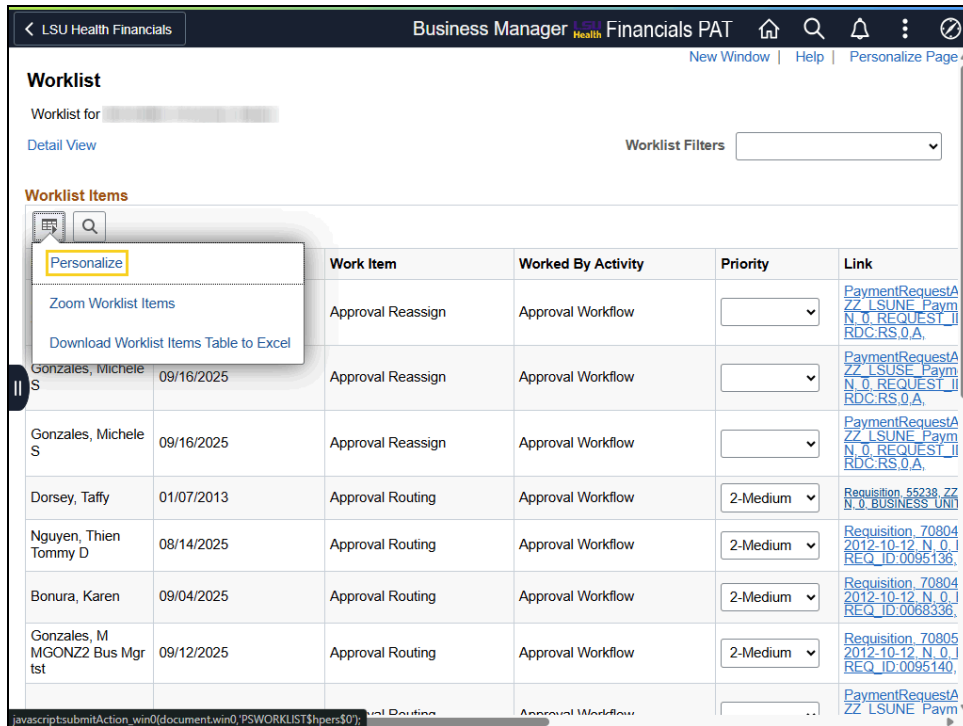


From	Date From	Work Item	Worked By Activity	Priority	Link
	09/16/2025	Approval Reassign	Approval Workflow		PaymentRequestA ZZ LSUNE Paym N 0 REQUEST II RDC-RS 0 A
	09/16/2025	Approval Reassign	Approval Workflow		PaymentRequestA ZZ LSUNE Paym N 0 REQUEST II RDC-RS 0 A
	09/16/2025	Approval Reassign	Approval 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 UNI
	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

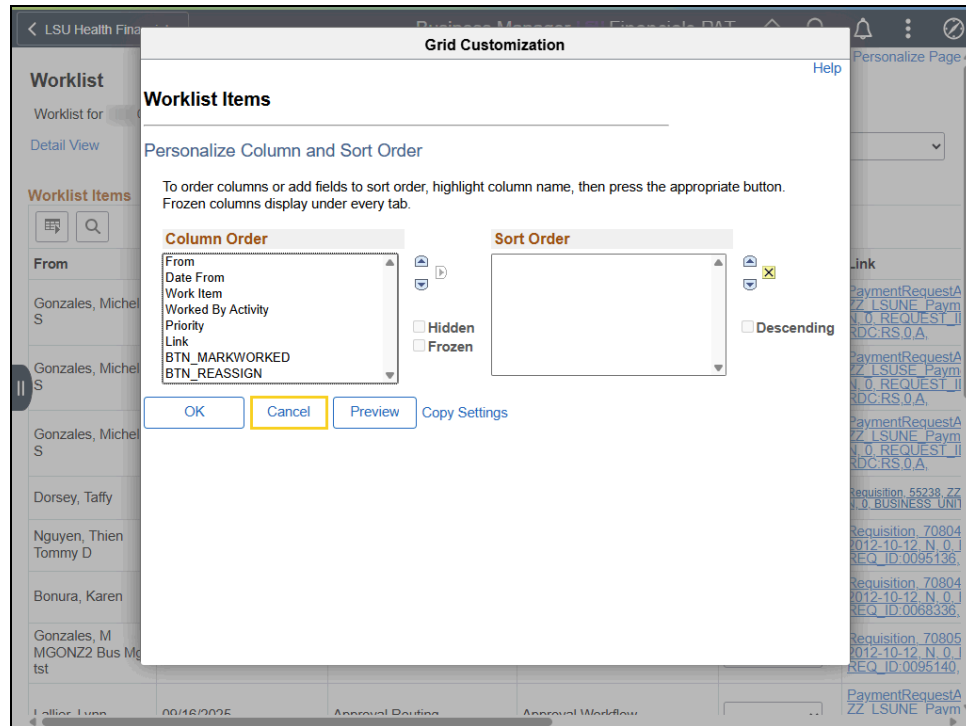
Step	Action
7.	Download to Excel, Find, Personalize Buttons <u>PAT - Upgraded</u> The button that looks like a <i>little spreadsheet</i> is the Grid Actions Menu. This allows the user to <i>download to Excel</i>, <i>zoom in</i> on the <i>list of items</i>, or <i>personalize the grid</i> for certain pages.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

Training Guide

Delta



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



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

Training Guide

Delta

AM Search for an Asset Financials PRP

Search for an Asset

Asset Search Criteria

Unit: LSUNO Book: Parent ID: Category: Location: Area ID: Asset ID: Asset Status: In Service Tag Number: Profile ID: Group ID: Serial ID: Approval Pending: Additional Search Criteria: Chartfield Search Criteria

Acquisition Details

PO Unit: Receipt Unit: AP Unit: PC Bus Unit: PO No: Receipt No: Voucher: Project ID:

Retrieve ?

☐ Cost Information ☐ Acquisition Information ☐ Location ☐ Non Capital Asset ☐ Custodian ☐ Lease

Search Clear

Notify

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.

Search for an Asset

Asset Search Criteria

Unit:

Book:

Category:

Location:

Asset ID:

Tag Number:

Serial ID:

Asset Status:

Profile 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 ☐ Custom

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

Training Guide

Delta

Search for an Asset

Asset Search Criteria

Unit		Book	
Category		Location	
Asset ID		Asset Status	In Service ▼
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 ?

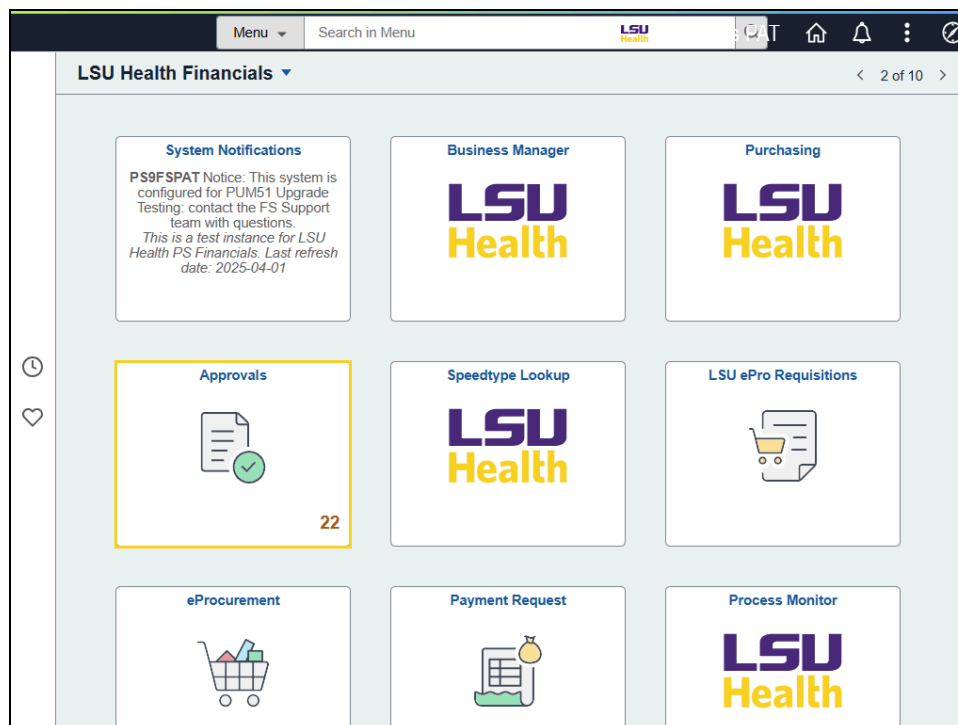
☐ Cost Information ☐ Acquisition Information ☐ Location ☐ Non Capital Asset ☐ Custodian

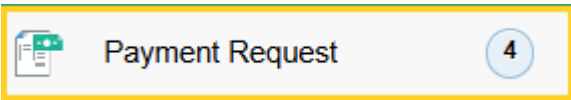
Step	Action
12.	This completes <i>Download to Excel, Find, and Personalize Buttons</i> . End of Procedure.

Approvals Tile

Procedure

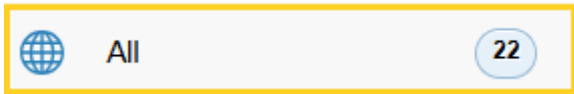
In this topic you will learn how to use the **Approvals Tile**.

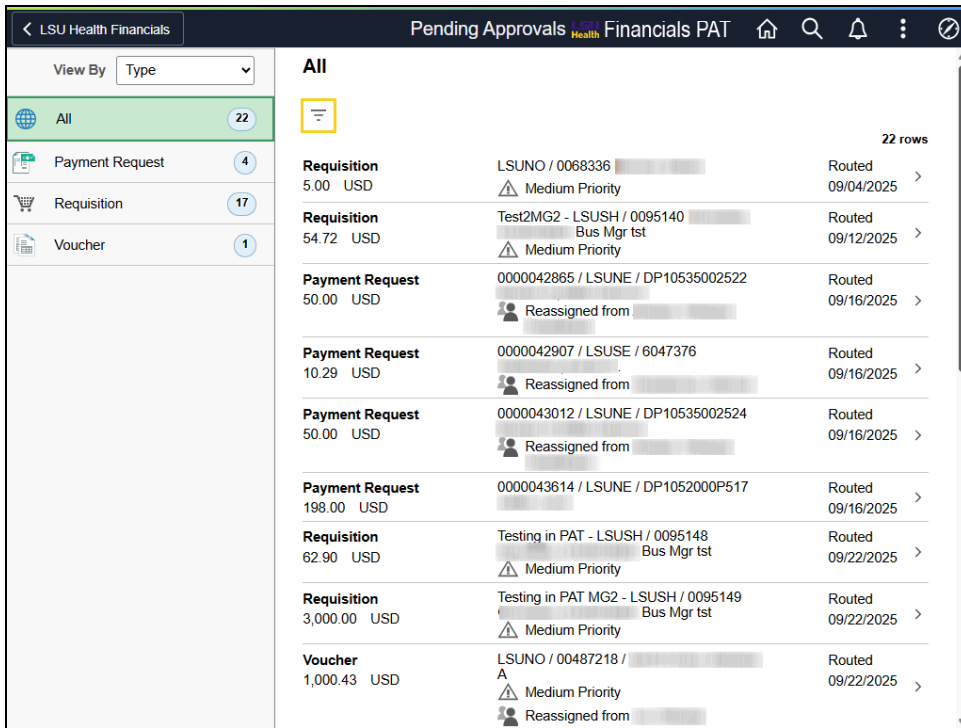


Step	Action
1.	Users with appropriate approval security will access the Approvals Tile from the LSU Health Financials homepage. Users will see any <i>requisitions, vouchers, payment requests, Journals (Shreveport), or GTeForms</i> pending their approval. Click the Approvals Tile button.
2.	The system <i>defaults</i> into the <i>All Type</i>. In this view, the user will see <i>all available types</i> of approvals needing attention. On the <i>right side</i> of the button is the <i>number of approvals by type</i>. For example, <i>All</i> has 22 records to approve. Users may <i>select</i> the <i>Payment Request, Requisition or Voucher</i> type to only view approvals for that specific type. Click the Payment Request button. 

Training Guide

Delta

Step	Action
3.	The user's view is limited to the 4 available Payment Request approvals. Click the All button. 



View By	Type	All	22
Payment Request	4		
Requisition	17		
Voucher	1		

Item Type	Amount	Currency	Requester	Status	Date
Requisition	5.00	USD	LSUNO / 0068336	Routed	09/04/2025
Requisition	54.72	USD	Test2MG2 - LSUSH / 0095140 Bus Mgr tst	Routed	09/12/2025
Payment Request	50.00	USD	0000042865 / LSUNE / DP10535002522	Routed	09/16/2025
Payment Request	10.29	USD	0000042907 / LSUSE / 6047376	Routed	09/16/2025
Payment Request	50.00	USD	0000043012 / LSUNE / DP10535002524	Routed	09/16/2025
Payment Request	198.00	USD	0000043614 / LSUNE / DP1052000P517	Routed	09/16/2025
Requisition	62.90	USD	Testing in PAT - LSUSH / 0095148 Bus Mgr tst	Routed	09/22/2025
Requisition	3,000.00	USD	Testing in PAT MG2 - LSUSH / 0095149 Bus Mgr tst	Routed	09/22/2025
Voucher	1,000.43	USD	LSUNO / 00487218 /	Routed	09/22/2025

Step	Action
4.	Users may select the Filter option to <i>search</i> for a <i>specific approval option</i>. Click the Filter button. 
5.	<i>Next to each Filter option is a drop-down arrow. Each option will display its list of options from which the user can choose. In this example, the user will choose Barbara Doss from the list of Requesters.</i> Click the button to the right of the Requester field. 

Step	Action
6.	A list of all those who have an active approval request will display. Click the Doss, Barbara A list item.
7.	Click the Filter button. 
8.	The lone <i>Voucher approval request</i> displays as <i>Doss, Barbara A</i> is the requester.
9.	The Approvals Tile displays GTeForms pending approval. This includes <i>Internal Transaction Forms, Clincard Requests, and AP Special Meals & Entertainment Requests</i> that have been submitted for approval.
10.	Due to the <i>GTeForm</i> special design for Internal Transactions , the Approvals Tile can <u>only</u> be used <u>after</u> the debit chartstring has been entered. The <i>GTeForm</i> will appear on the Approval Tile <u>even if</u> the debit chartstring has <u>not</u> been <u>entered</u> .
11.	Use <i>either</i> of these <i>three options</i> to approve <i>GTeForm Internal Transactions</i> : (1) use the IT GTeForm email link to update the debit chartstring, then use the Approvals Tile to approve, <u>or</u> (2) Use the GTeForm homepage navigations to update and approve, <u>or</u> (3) use the IT GTeForm email links to update and approve.
12.	This completes Approvals Tile . End of Procedure.

Voucher Approval Page Enhancements

Procedure

In this topic you will learn about **Voucher Approval Page Enhancements**.

Training Guide

Delta

1,000.43 USD

Reassigned from [User]

[Approve](#) [Deny](#) [More](#)

Summary

Business Unit	LSUNO	Voucher ID	00487218
Invoice Number	bd123	Created By	[User]
Supplier Name	HENRY SCHEIN, INC	Modified By	[User]
Due Date	07/30/25	Invoice Date	06/30/25
Voucher Source	Online	Voucher Style	Regular Voucher

[Edit Voucher](#)

Line Details

Voucher Line	Item	Description	Quantity	UOM	Unit Price	Amount
1		DENTAL SUPPLIES	1.0000	YR	1,000.43 USD	1,000.43 USD

More Information

- [View Attachments \(1\)](#)
- [View Printable Version](#)
- [View Remit Supplier Information](#)

Approver Comments

[Text Area]

Step	Action
1.	New - View Printable Version of the Voucher Approval Page This is a <i>new option</i> available on <i>Voucher Approval</i> page. Users can view attachments as they always have been able to do. Now, users can view and print a copy of the invoice to process by selecting the <i>View Printable Version</i> option. <i>PAT - Upgraded</i> The screenshot shows the new button for <i>View Printable Version</i>.

1,000.43 USD

Reassigned from [User]

[Approve](#) [Deny](#) [More](#)

Summary

Business Unit LSUNO Voucher ID 00487218
 Invoice Number bd123 Created By [User]
 Supplier Name HENRY SCHEIN, INC Modified By [User]
 Due Date 07/30/25 Invoice Date 06/30/25
 Voucher Source Online Voucher Style Regular Voucher

[Edit Voucher](#)

Line Details

Voucher Line	Item	Description	Quantity	UOM	Unit Price	Amount
1		DENTAL SUPPLIES	1.0000	YR	1,000.43 USD	1,000.43 USD

More Information

[View Attachments \(1\)](#) >
[View Printable Version](#) >
[View Remit Supplier Information](#) >

Approver Comments

Step	Action
2.	New - View Remit Supplier on Voucher Approval Page This is a <i>new option</i> available on the Voucher Approval page that allows the user to <i>View Remit Supplier Information</i>. <u>PAT - Upgraded</u> The screenshot shows the <i>new View Remit Supplier button</i> on the Voucher Approval page.
3.	This completes <i>Voucher Approval Page Enhancements</i>. End of Procedure.

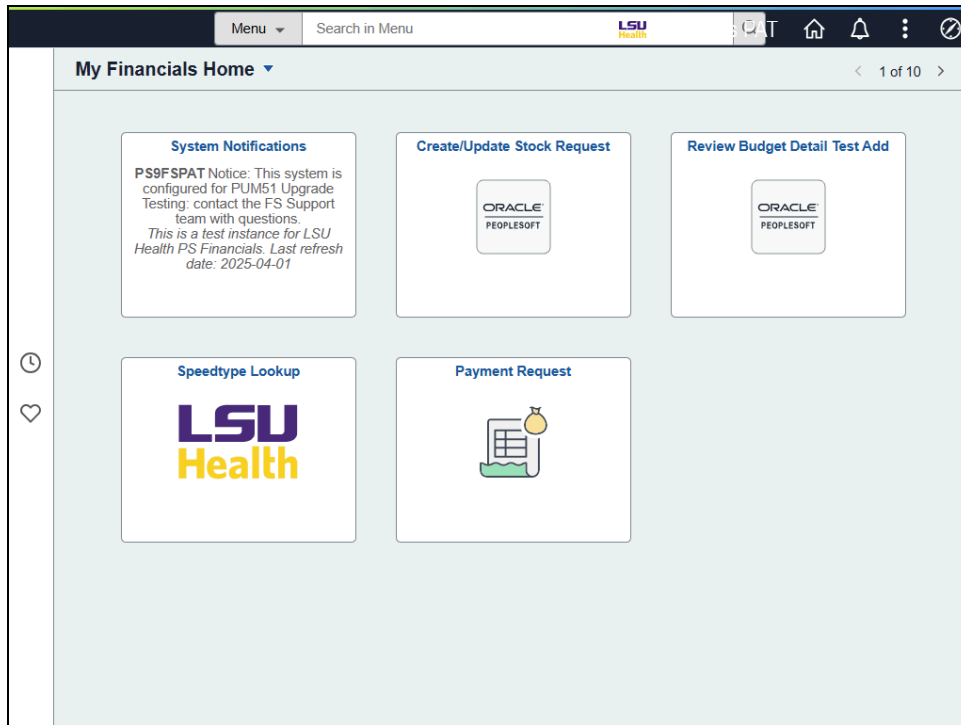
Training Guide

Delta

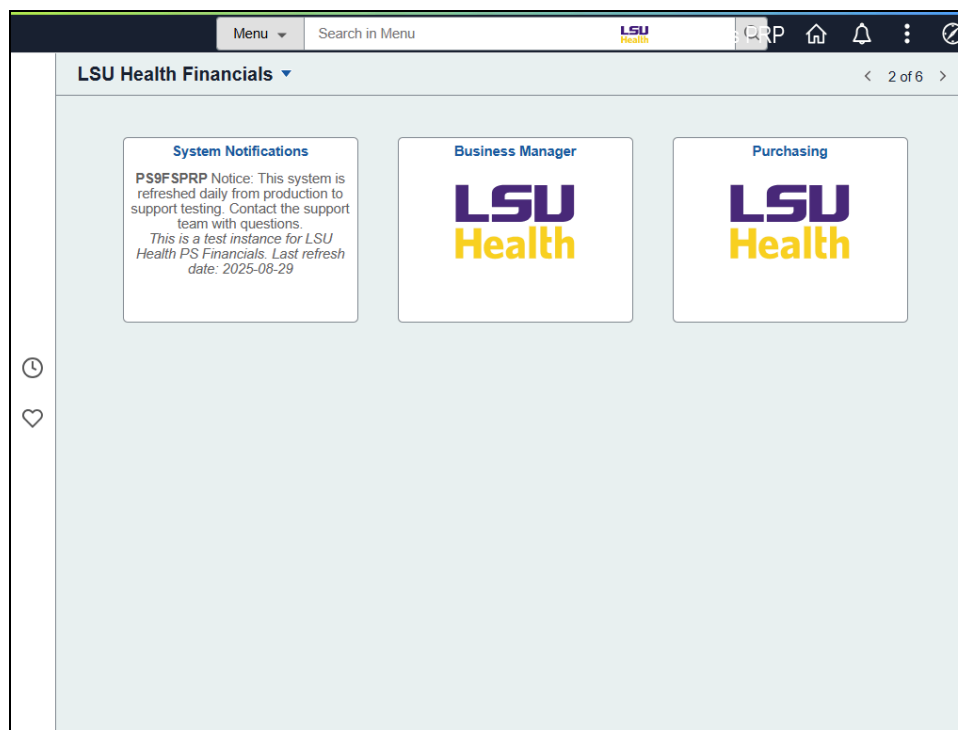
Payment Request Enhancements

Procedure

In this topic you will learn about **Payment Request Enhancements**.



Step	Action
1.	Payment Requests <u>PAT - Upgraded</u> Payment Requests include several enhancements with the upgrade. The Support Team has created an <i>updated Payment Request User Guide</i> for the New Orleans and Shreveport campuses. The Payment Request Center, to create or review requests, is accessible from the My Financials Home or LSU Health Financials. • Added the <i>Payment Address</i> field in the Supplier page. • Added an option to <i>edit the supplier payment address</i> while <i>creating or updating payment request transactions</i>. • <i>Validate duplicate invoice numbers</i> before submission, review and approval of a request. • Fluid Payment Request template includes <i>new fields</i>: <i>Payment Handling</i>, <i>Payment Message</i>, and <i>Separate Payment</i>. • <i>Requesters</i> can now <i>update</i> payment requests until the transaction has been <i>fully approved</i>. • <i>Requesters</i> can now create a <i>new request</i> by <i>copying</i> from an existing request. • <i>Save For Later</i> button <i>changed to access</i> from the Actions menu.



Step	Action
2.	Payment Request - Save For Later <u><i>PRP - Not upgraded</i></u> In fluid payment requests, the ability to <i>'Save For Later'</i> still exists. However, there is <u>no</u> longer a <i>button</i> on the page. Users will need to <i>select</i> the <i>Actions ellipses</i> to be able to <i>'Save For Later'</i> from the Payment Request entry page.

Training Guide

Delta

✕ Exit
Payment Request
Health Financials PAT

1
2
3
4

Summary
Supplier
Invoice Details
Review and Submit

Next >

Step 1 of 4: Summary

Attachments (1)

*Business Unit
LSUNE
LSU New Orleans Employee BU

Entered Datetime
09/24/25 4:23PM
Request ID

*Invoice Number
1256

*Invoice Date
09/24/2025

*Cost Sub-Total
523.82

Other Cost

Total Amount
523.82

*Currency
USD

Description

Notes/Comments
Please enter information below.
Payee Name:
90 characters remaining

Step	Action
3.	Payment Request - Save For Later <u>PAT - Upgraded</u> Three (3) fields <u>must</u> contain data before a Save For Later can be initiated: *Invoice Number *Cost Sub-Total - Attachments Click the Actions (3 dots) menu.

Payment Request Financials PAT

1 Summary 2 Supplier 3 Invoice Details

Step 1 of 4: Summary

Attachments (1)

*Business Unit: LSUNE
LSU New Orleans Employee BU

Entered Datetime: 09/24/25 4:23PM
Request ID

*Invoice Number: 1256

*Invoice Date: 09/24/2025

*Cost Sub-Total: 523.82

Other Cost

Total Amount: 523.82

*Currency: USD

Description:

Notes/Comments: Please enter information below.
Payee Name:
90 characters remaining

Save For Later

Step	Action
4.	Payment Request - Save For Later <u><i>PAT - Upgraded</i></u> Click the Save For Later link. Save For Later

Training Guide

Delta

Payment Request Financials PAT

1 Summary 2 Supplier 3 Invoice Details 4 Review and Submit

Next >

Step 1 of 4: Summary

Attachments (1)

*Business Unit: LSUNE
LSU New Orleans Employee BU

Entered Datetime: 09/24/25 4:23PM
Request ID: 0000043774

*Invoice Number: 1256

*Invoice Date: 09/24/2025

*Cost Sub-Total: 523.82

Other Cost

Total Amount: 523.82

*Currency: USD

Description:

Notes/Comments: Please enter information below.
Payee Name:
90 characters remaining

Step	Action
5.	Payment Request - Save For Later <u>PAT - Upgraded</u> <i>NOTE: A green bar displays at the top of the page stating the save is in progress. When completed, the Payment Request number is provided.</i> Click the Exit button. 

Training Guide

Delta

Payment Request Center
Payment Request
Financials PAT

Attachments (1)

Summary Information

Business Unit
LSUNE
LSU New Orleans Employee BU

Invoice Number
1256

Invoice Date
09/24/2025

Total Amount
523.82 USD

Description

Notes/Comments
Please enter information below: Payee Name:
Address: Emplid (LSUHSC direct deposit):
Personal Email(for non-employee direct deposit):
Message to appear on payment:

Entered By

Entered Datetime
09/24/2025 4:23PM

Request ID
000043774

Request Status
New

Payment Handling

Separate Payment
No

Payment Message

Supplier Information

Supplier ID
9999999999

Supplier

Payment Address

Update
Cancel
Copy

Step	Action
7.	Payment Request - Update <u>PAT - Upgraded</u> To continue working on the <i>Payment Request</i> , the user <u>must</u> scroll to the <i>bottom</i> of the <i>Summary Page</i> and select the <i>Update button</i> .

Payment Request

LSU Health Financials PAT

- Summary
- Supplier
- Invoice Details
- Review and Submit

[Next >](#)

Step 1 of 4: Summary

[Attachments \(1\)](#)

*Business Unit	LSUNE	Entered Datetime	09/24/25 4:23PM
	LSU New Orleans Employee BU	Request ID	
*Invoice Number	1256		
*Invoice Date	09/24/2025		
*Cost Sub-Total	523.82		
	Other Cost		
Total Amount	523.82		
*Currency	USD		
Description			
Notes/Comments	Please enter information below. Payee Name: 90 characters remaining		

Step	Action
8.	Payment Request - Update <u>PAT - Upgraded</u> The system will <i>default</i> the user onto the Payment Request page at <i>Step 1 of 4: Summary</i>. The <i>Save For Later</i> option can be <i>utilized as often as needed</i>.

Training Guide

Delta

Payment Request Center
Payment Request
Financials PAT

Attachments (1)

Summary Information

Business Unit
LSUNE
LSU New Orleans Employee BU

Entered By

Entered Datetime
09/24/2025 4:23PM

Invoice Number
1256

Request ID
000043774

Invoice Date
09/24/2025

Request Status
New

Payment Handling

Separate Payment
No

Payment Message

Total Amount
523.82 USD

Description

Notes/Comments
Please enter information below: Payee Name:
Address: Emplid (LSUHSC direct deposit):
Personal Email(for non-employee direct deposit):
Message to appear on payment:

Supplier Information

Supplier ID
9999999999

Supplier

Payment Address

Update Cancel Copy

Step	Action
9.	Payment Request - Copy <u>PAT - Upgraded</u> Users may <i>copy</i> an <i>existing</i> Payment Request (PR) to <i>create</i> a <i>new</i> one. To perform this action, the user will <i>select</i> the Payment Request tile and then <i>search</i> for the <i>desired</i> Payment Request . At the <i>right end</i> of the <i>Payment Request</i> list, select the <i>arrow</i> to view the <i>PR</i> . Then, <i>once in the PR</i> , scroll down to the <i>bottom</i> of the page. <i>Select</i> the <i>Copy</i> button.

Payment Request

Financials PAT

1 Summary 2 Supplier 3 Invoice Details 4 Review and Submit

Next >

Step 1 of 4: Summary

Attachments (1)

*Business Unit LSUNE
LSU New Orleans Employee BU

Entered Datetime 09/24/25 4:23PM
Request ID

*Invoice Number 1256

*Invoice Date 09/24/2025

*Cost Sub-Total 523.82

Other Cost

Total Amount 523.82

*Currency USD

Description

Notes/Comments Please enter information below.
Payee Name: Address
90 characters remaining

Step	Action
10.	Payment Request - Copy <u>PAT - Upgraded</u> <i>All the data will be copied into the new PR EXCEPT the <i>Supplier ID</i> and the <i>Attachments</i>. The user then <i>updates</i> the <i>date, invoice number, supplier, amounts</i> and <i>attachments</i> to <i>complete</i> and <i>submit</i> the PR.</i>
11.	*****WARNING***** Payment Request - Cancel <u>PAT - Upgraded</u> The Cancel button works as a DELETE button. Cancel cannot be <i>undone</i>. If the user selects the Cancel option, a <i>cancellation confirmation message</i> will be displayed.

Training Guide

Delta

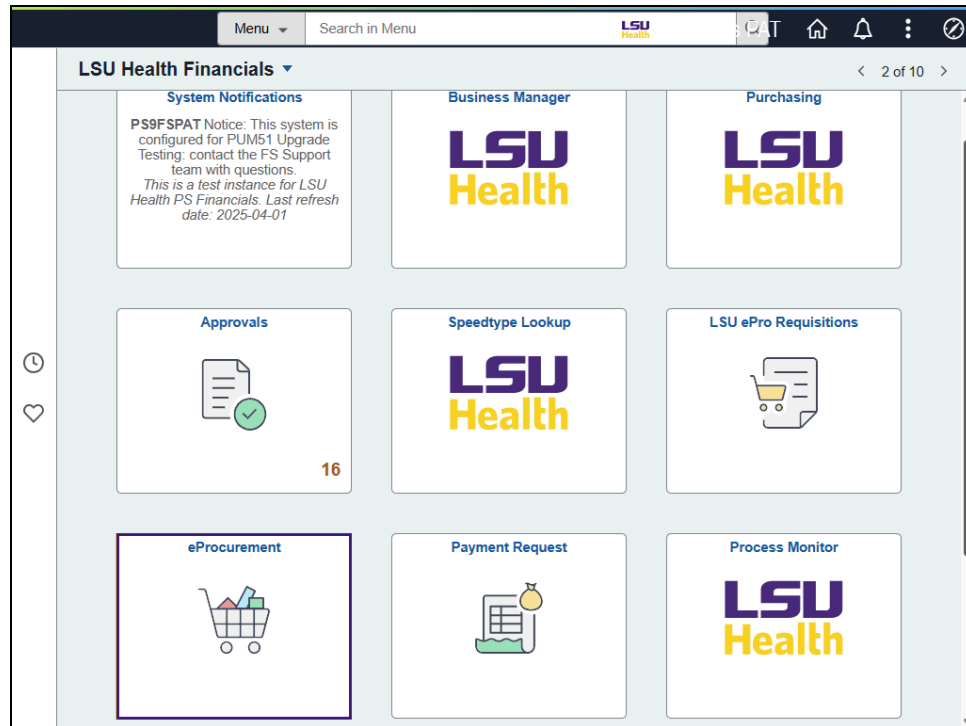
Step	Action
12.	*****WARNING***** Payment Request - Cancel <u>PAT - Upgraded</u> If the user wishes to <u>Cancel</u> the payment request, s/he will select OK. If the user does not wish to <u>Cancel</u> the Payment Request, s/he will select the Cancel button to <i>return</i> to the Payment Request page. In this example, the OK button is <i>selected</i>.
13.	*****WARNING***** Payment Request - Cancel <u>PAT - Upgraded</u> The user is <i>returned</i> to the Payment Request Center, and the <i>payment request</i> displays a Request Status of Cancelled.
14.	This completes <i>Payment Request Enhancements</i>. End of Procedure.

eProcurement Overall Look and Feel Changes

Procedure

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

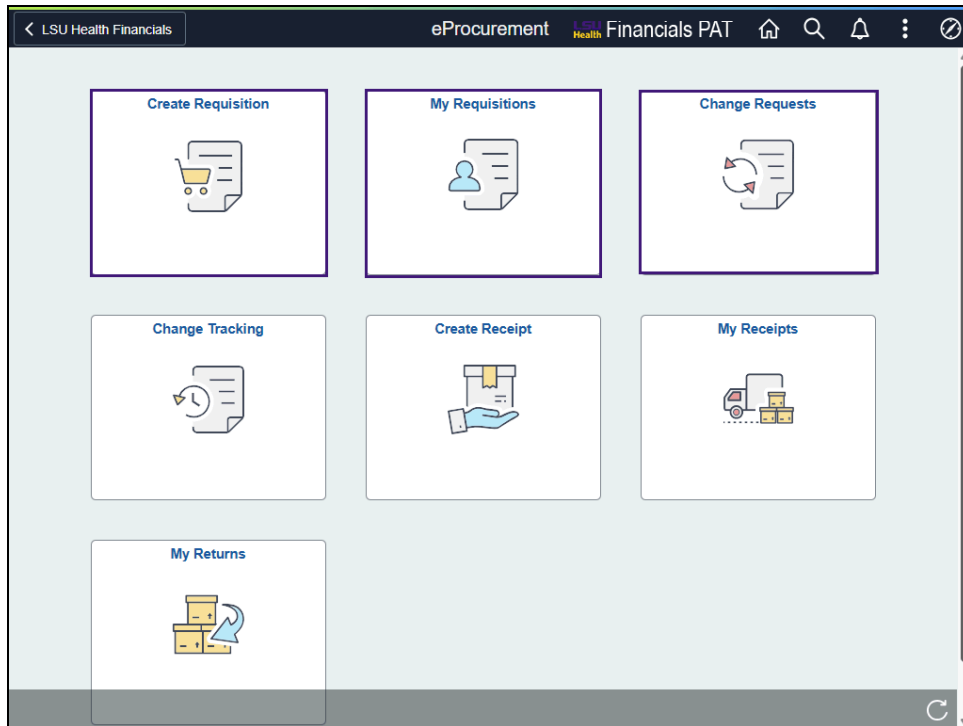
Step	Action
1.	<i>NOTE: The eProcurement section is for LSUSH users only.</i>
2.	eProcurement Requisition Changes ePro requisitions are now in the <i>Fluid style</i>. This <i>change</i> presents a <i>significant "look and feel" difference</i> to the user. But the <i>functionality</i> remains the <i>same</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</i> as <i>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



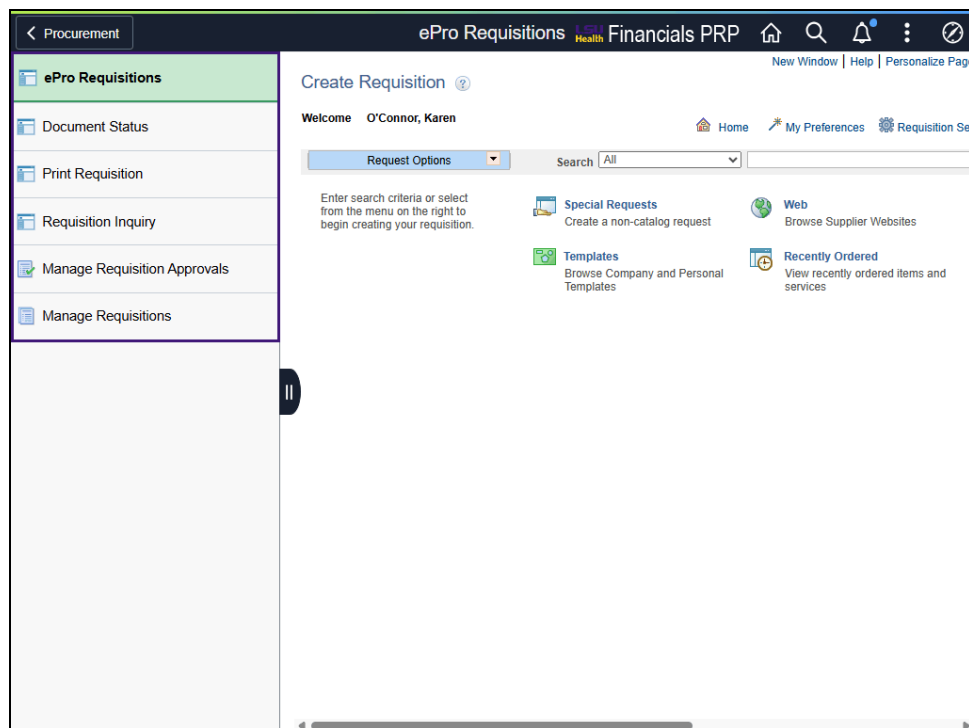
Step	Action
3.	New Tile with the Upgrade - eProcurement <u>PAT - Upgraded</u> The new eProcurement Tile includes several <i>tiles</i> available to the user.

Training Guide

Delta



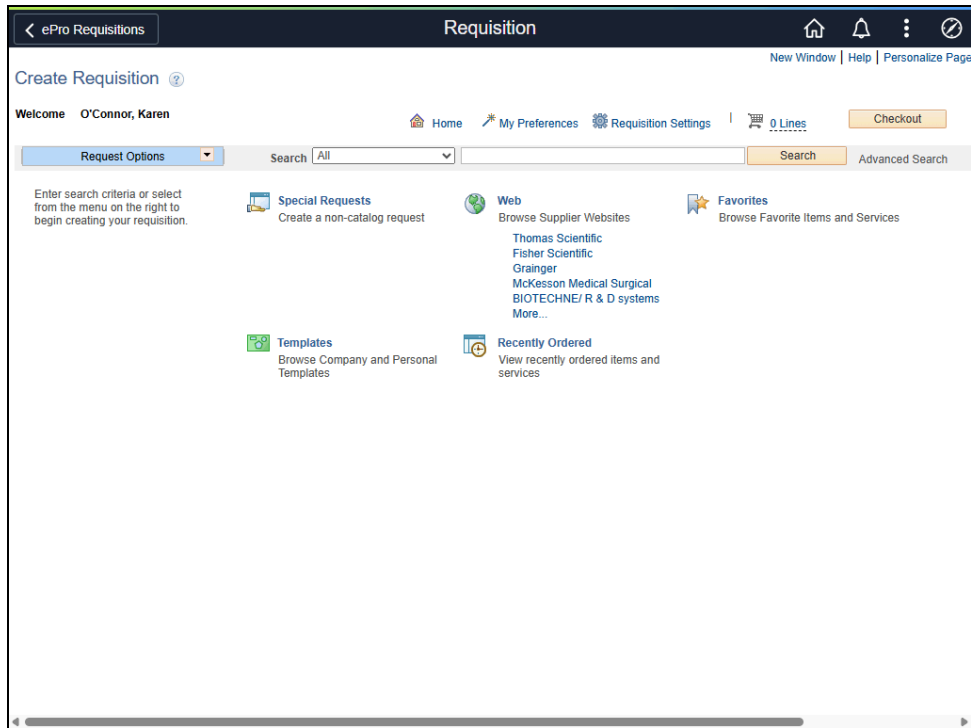
Step	Action
4.	New Tile with the Upgrade - eProcurement <u>PAT - Upgraded</u> The <i>Create Requisition</i>, <i>My Requisitions</i>, and <i>Change Requests</i> are the <i>tiles</i> that will be <i>most used</i>.



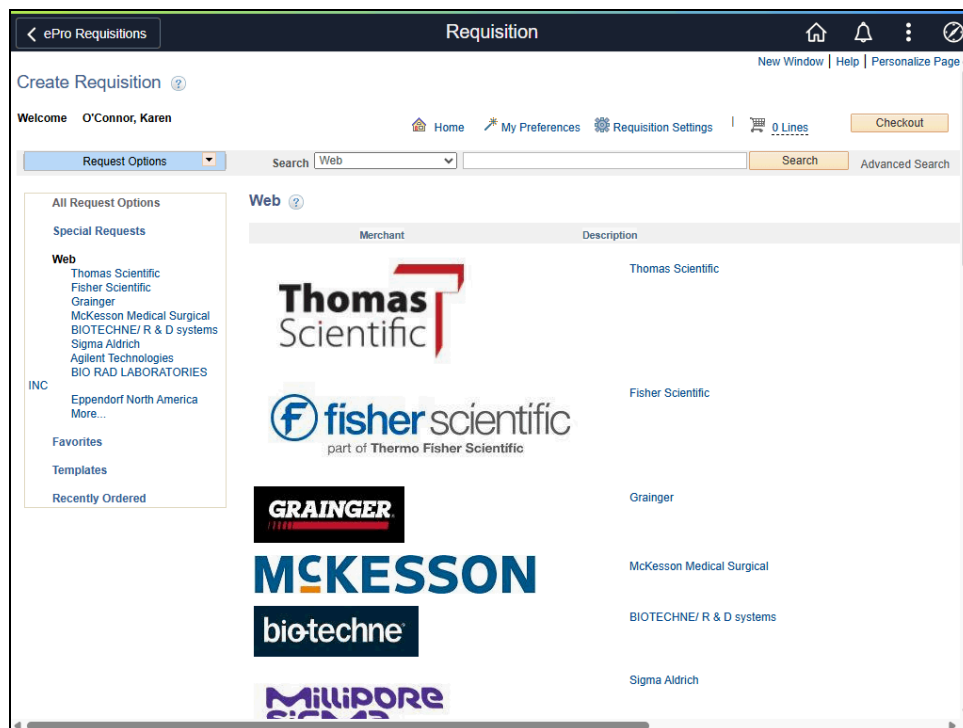
Step	Action
5.	LSU ePro Requisition Tile Changes <u><i>PRP - Not Upgraded</i></u> The LSU ePro Requisitions Tile may still be used to perform <i>Document Status Inquiry</i>, <i>Requisition Inquiry</i>, and <i>Manage Requisition Approvals</i> if desired. You may <u>no longer</u> access ePro Requisitions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

Training Guide

Delta



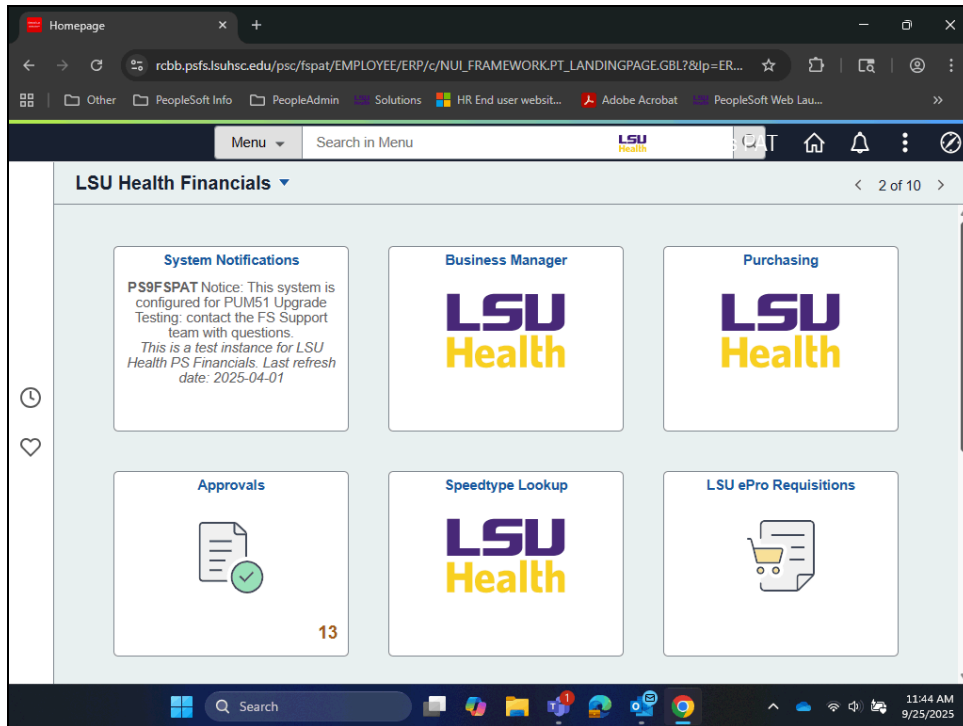
Step	Action
6.	LSU ePro Requisition Tile Changes <u><i>PRP - Not Upgraded</i></u> After completing Requisition Settings, users will see this screen.



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.

Training Guide

Delta



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

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	Tot
▶ 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 Chan

Total Amount

Shipping Summary

Edit for All Lines

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

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.

Training Guide

Delta

Create Requisition

Financials PAT

Continue Shopping Save Submit

Checkout

Order Total 39.55 USD

Requisition Summary

Business Unit LSUSH LSUHSC Shreveport

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	Item	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					39.55

ScheduleDetails

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</i> and <i>attachments</i>. <i>Justification Comments</i> replaces <i>Approval Justification</i>. Users should <i>enter</i> the "5Ws" that Dr. Benefield has <i>requested</i> of <i>all Shreveport</i> users.

Create Requisition Health Financials PAT Home Search More Refresh

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

☐ Justification Comments

Requisition Lines Overview

☐ Select All **Actions** ☒ Mass Change

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

Item ID Supplier GRAINGER INC

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 it from the cart</i> or <i>make mass changes</i> to the requisition.

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Create Requisition

Financials PAT

Business Unit

LSUSH LSUHSC Shreveport

Requisition Name

Laser Pointer - Lab

Requester

KOCONN O'Connor, Karen

Currency

USD

Priority

Medium

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

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

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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</i> to <i>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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Action	Requisition Name	Business Unit/Requisition ID	Requisition Date	Requester	Request State	Budget Status	Total Amount	Details
	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 <i>Requisition Name</i> are two arrows, facing up and down. You see this <i>same icon</i> in the <i>header row across the display</i>. The <i>two arrows</i> mean that the <i>field may be sorted</i>. Selecting the arrows for any of the headers sorts all of the results by that field. Related Actions - At the <i>left side of each requisition</i>, 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 <i>right end of the row</i>, select the Details arrow to expand to the <i>ePro req</i>.

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>

Training Guide

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Details

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 Valid

Requisition Date 10/01/2025

Total Amount 39.55 USD

Request State PO(s) Dispatched

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
	Line 1 - TK1990953T Laser									

Step	Action
16.	eProcurement - My Requisitions Tile <u>PAT - Upgraded</u> Requisition <i>sourced to PO and Dispatched</i>. Notice the <i>differences</i> in the links under the icons. When <i>active and selectable</i>, that indicates that the <i>requisition</i> has been <i>processed through that phase of the lifeline</i>. Users may <i>select</i> the icon to <i>inquire</i> further. 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.

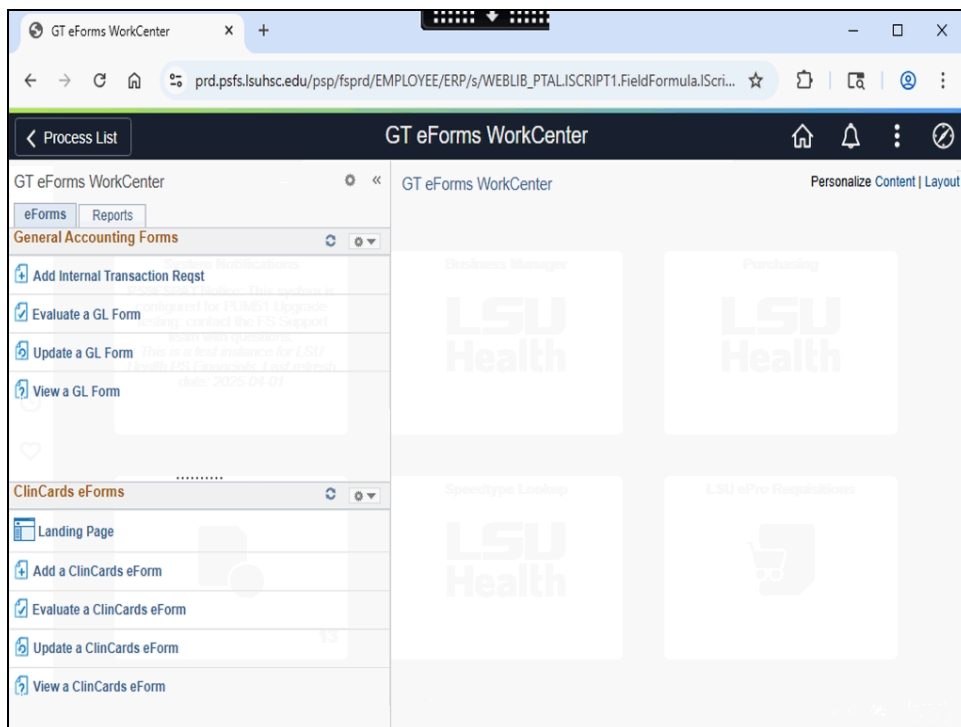
Training Guide

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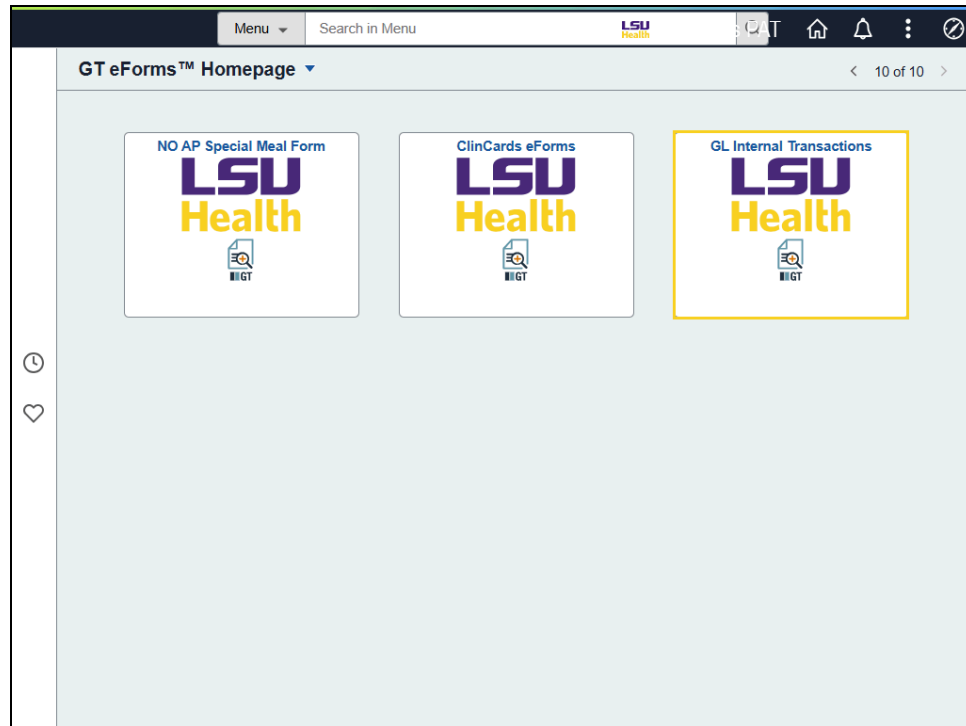
eForms

Procedure

In this topic you will learn about **eForms**.



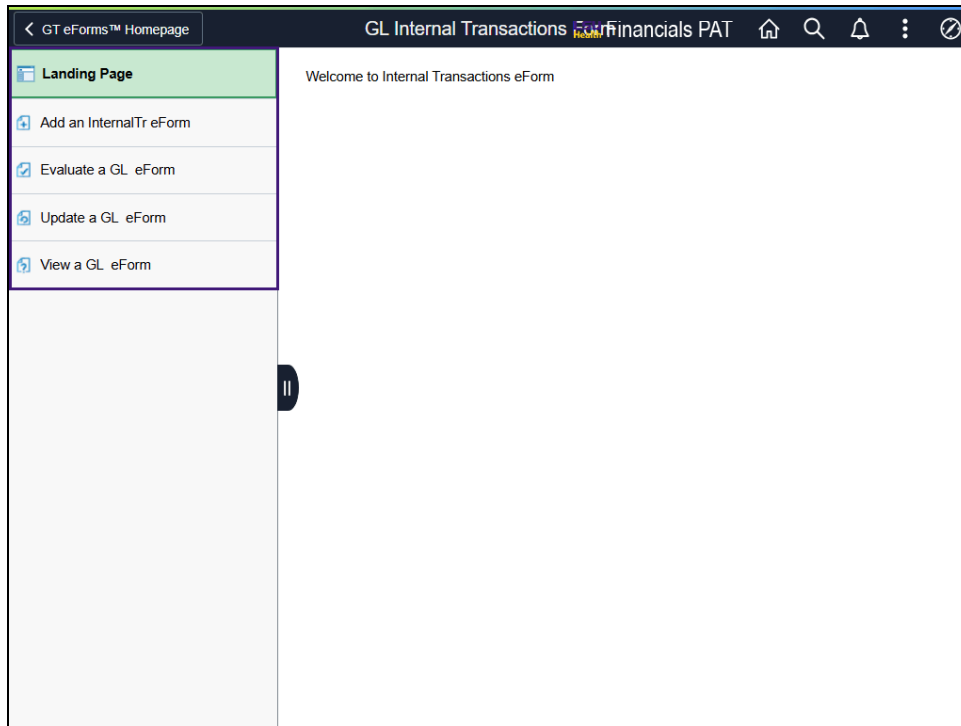
Step	Action
1.	eForms <i>eForms are custom forms created for LSUHSC that are interfaced or imported upon approval into the Financials data tables. Current forms include AP Special Meals and Entertainment Request, Clincard Request, and GL Internal Transactions. In the upgrade environment, users will access these forms from the GT eForms Home and not from the NavBar menu.</i> <u>PRP - Not Upgraded</u> <i>Accessing eForms from eForm Workcenter.</i>



Step	Action
2.	eForms <u><i>PAT - Upgraded</i></u> GT eForms Homepage Click the GL Internal Transactions button.

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Step	Action
3.	eForms <u>PAT - Upgraded</u> After selecting a tile, the user will see the menu options.
4.	This completes eForms . End of Procedure.