PeopleSoft Financials Upgrade to PUM 51 Delta

Version Date: October 16, 2025

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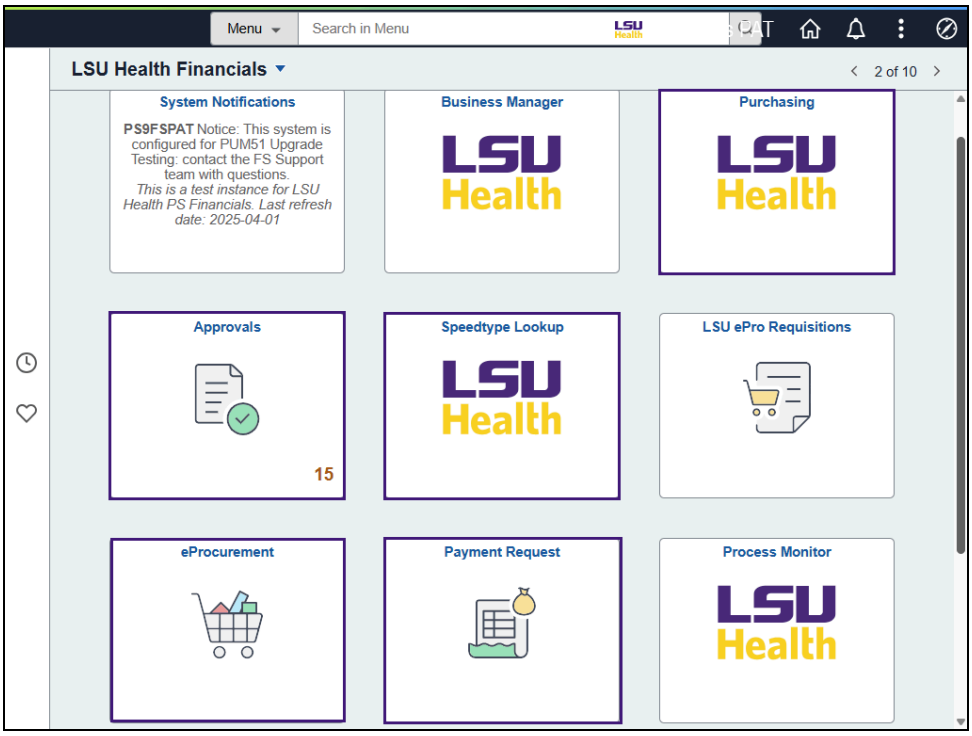
PeopleSoft Financials Upgrade to PUM 51 - Delta

Overall Look and Feel Changes for PUM 51

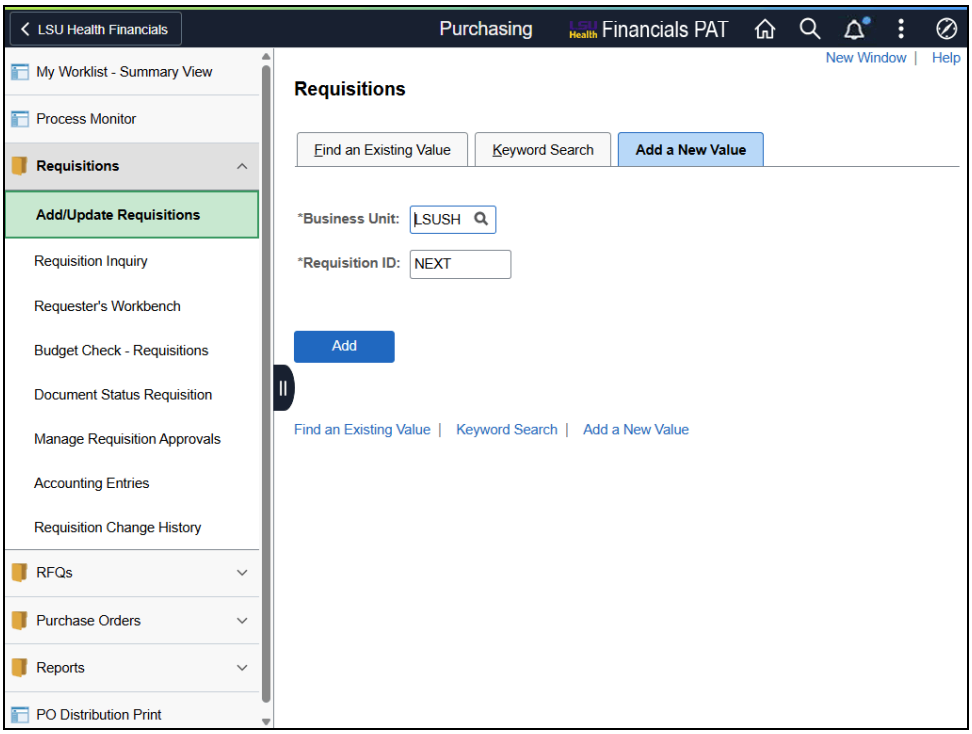
Procedure

In this topic you will learn about the Overall **Look and Feel Changes for PUM 51**.

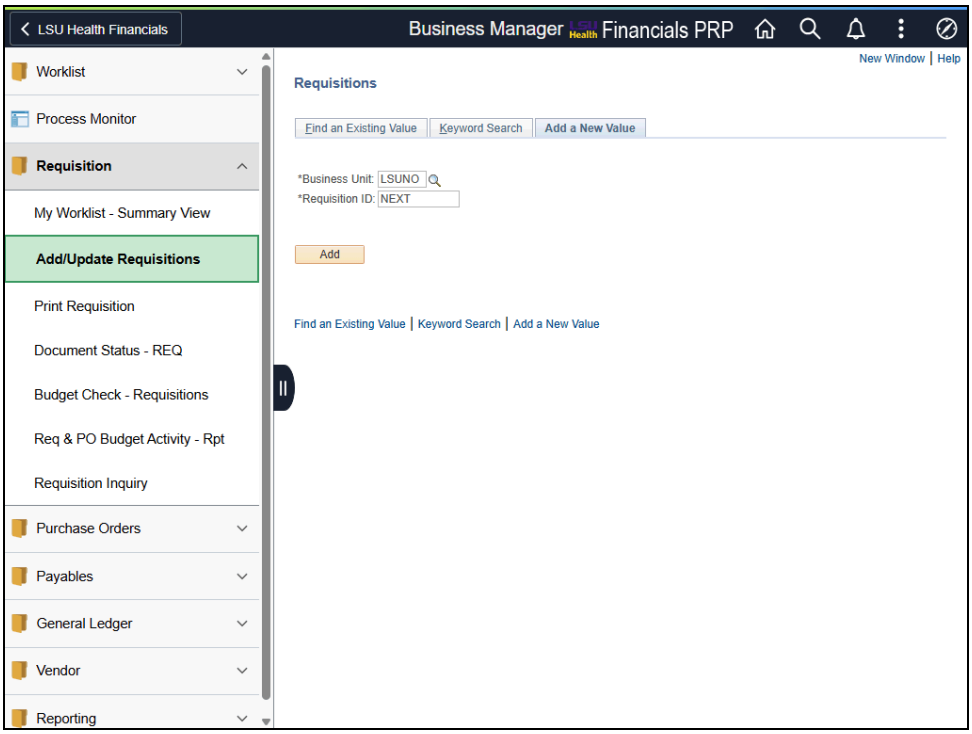
Step	Action
1.	***NOTE: This topic was completed using the PS9FSPAT database for training purposes only. Normally, these actions will be performed by users in the PS9FSPRD (Production) database.***
2.	***The purpose of this document is to share differences in the look and feel of the PeopleSoft Financials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



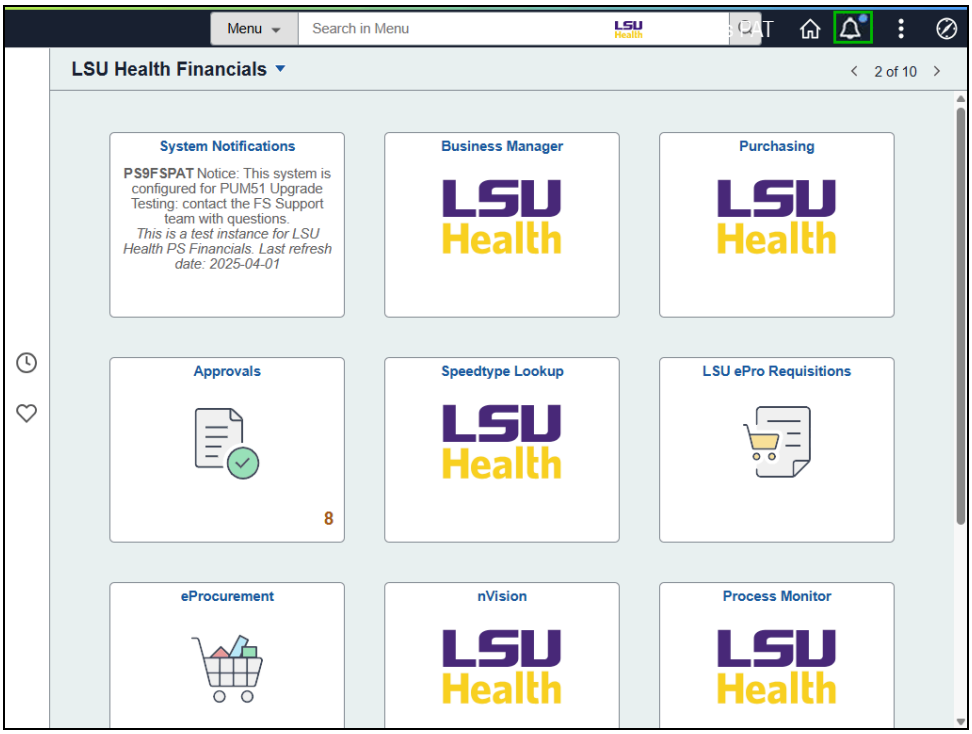
Step	Action
3.	**LSU Health Financials Home Updates** Several *tiles* are *added* to the **LSU Health Financials** homepage for your use as desired. We've included an *Approvals Tile*, *Payment Request Tile*, *Speedtype Lookup*, *eProcurement*, *Purchasing*, and will include *Expenses* when we *go-live*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



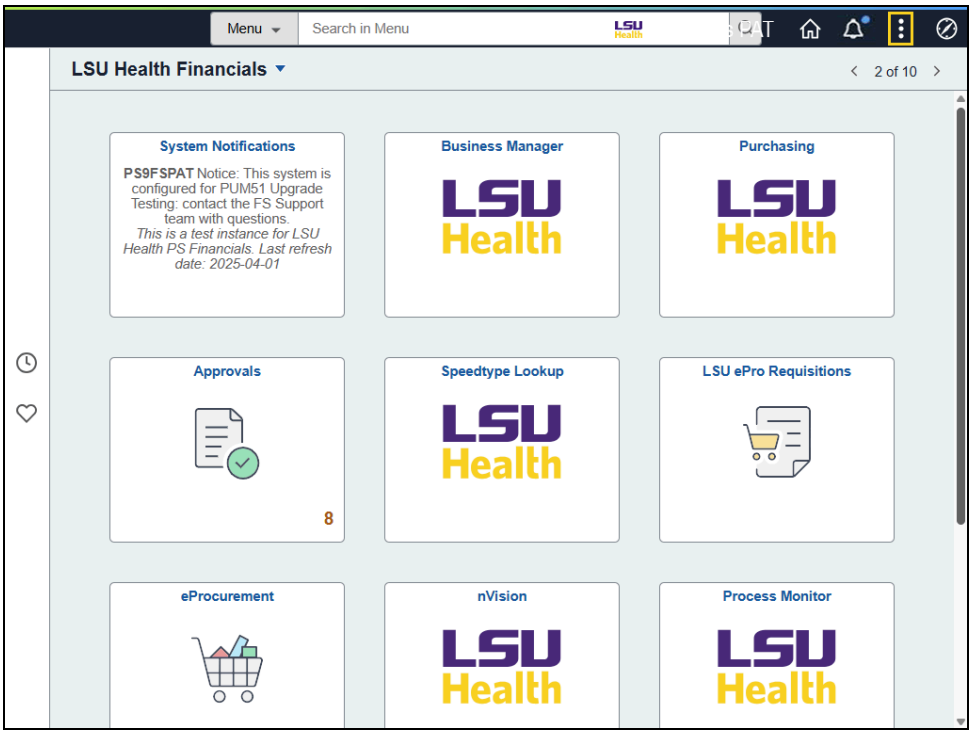
Step	Action
4.	**Larger View** ***<u>PAT Upgraded</u>*** Users will notice that the *screen display appears larger* in the upgraded environment. This is due to the use of the PeopleSoft *Fluid stylesheet* that allows form *factor adjustment* based on the *device used*.



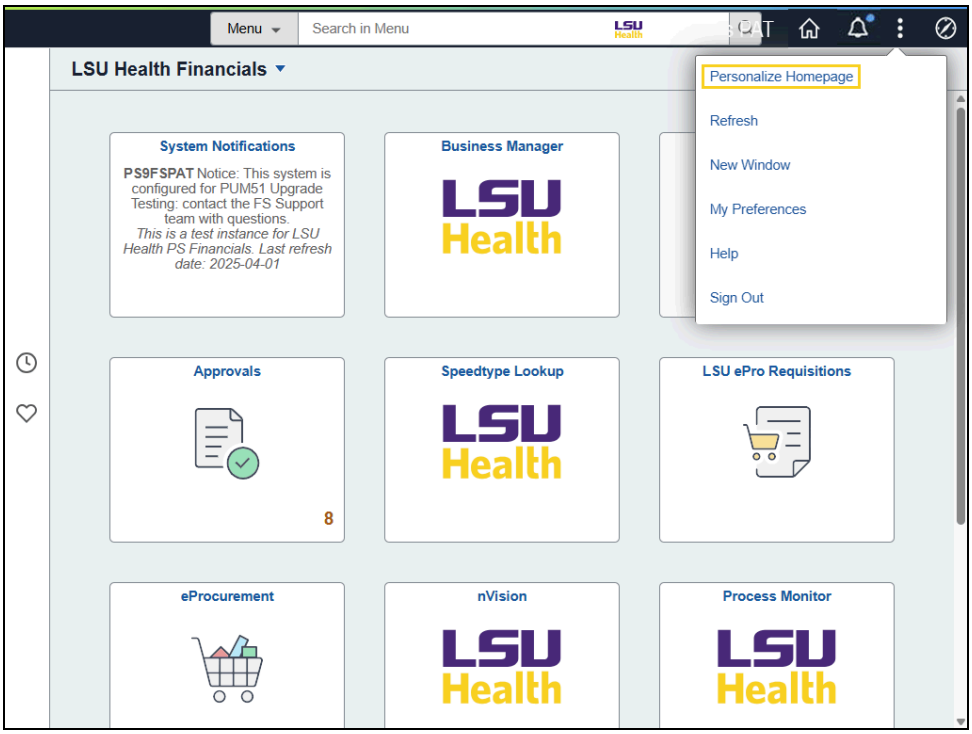
Step	Action
5.	**Larger View** ***PRP - Not Upgraded*** The *buttons, tabs and fields* on the **Add/Update Requisitions** page are *substantially smaller* on the ***PRP - Not Upgraded*** page.



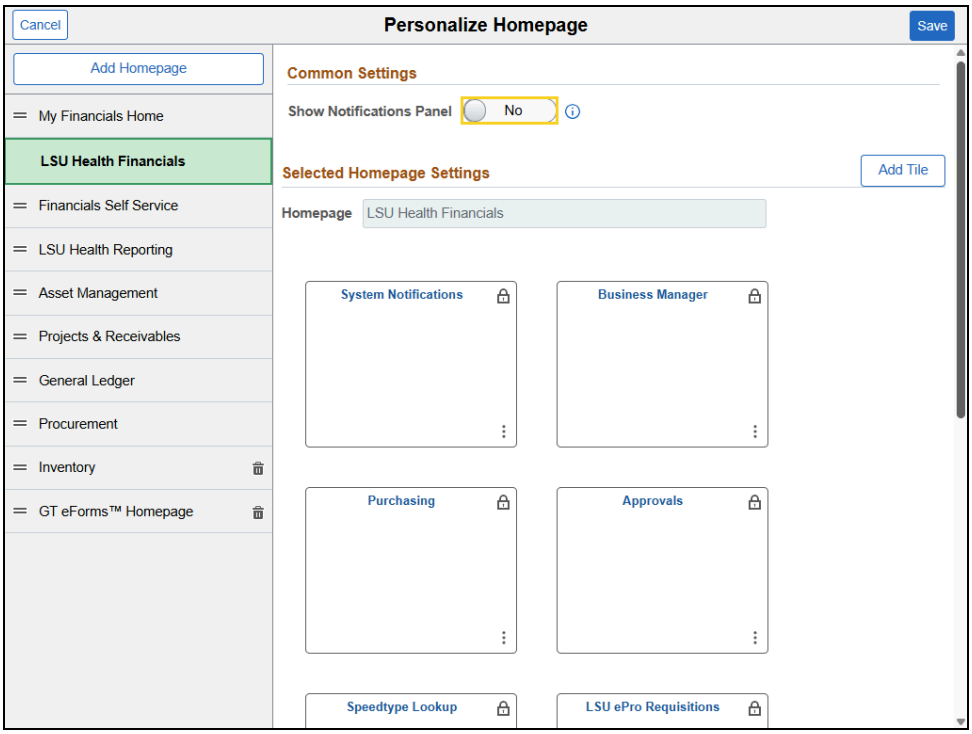
Step	Action
6.	**Notification Bell and the Notification Pane** ***<u>PAT - Upgraded</u>*** Users will see the **Notification Bell** on all home and transactional pages. The ***blue dot*** indicates that notifications are available. However, if the user elects to turn on the ***Notification Pane***, the **Notification Bell** will <u>not</u> <u>show</u> on the <u>homepages</u>. The **Notification Bell** displays at the *top right* of the page *between* the *Home* and *Actions icons*. From the **Notification Bell**, users can view tasks that require attention. ************WARNING************* ***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</u> <u>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.***

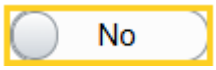


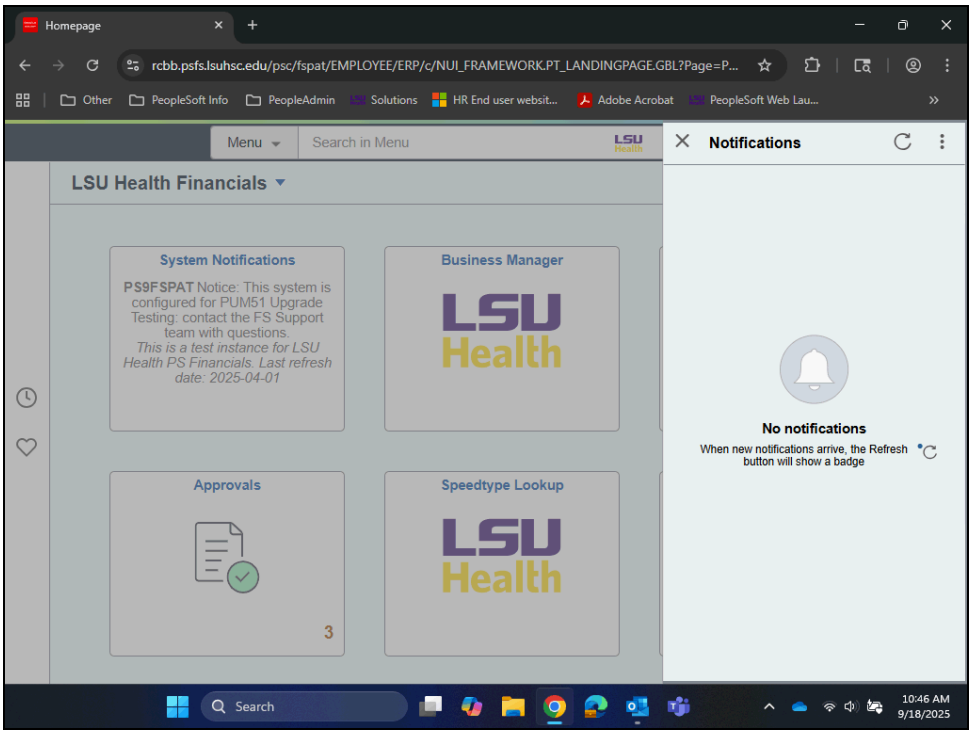
Step	Action
7.	**Notification Bell and the Notification Pane** ***<u>PAT - Upgraded</u>*** When a *Home* such as **My Financials Home** or **LSU Health Financials**, the ***Notification Pane*** can be always turned on the display. This pane allows the user to view tasks that require attention directly from that home. And, for the *homepages*, the *pane replaces the Notification icon*, the *Bell*. 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************* ***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.*** Click the **Actions** menu to turn on the ***Notification Pane***.



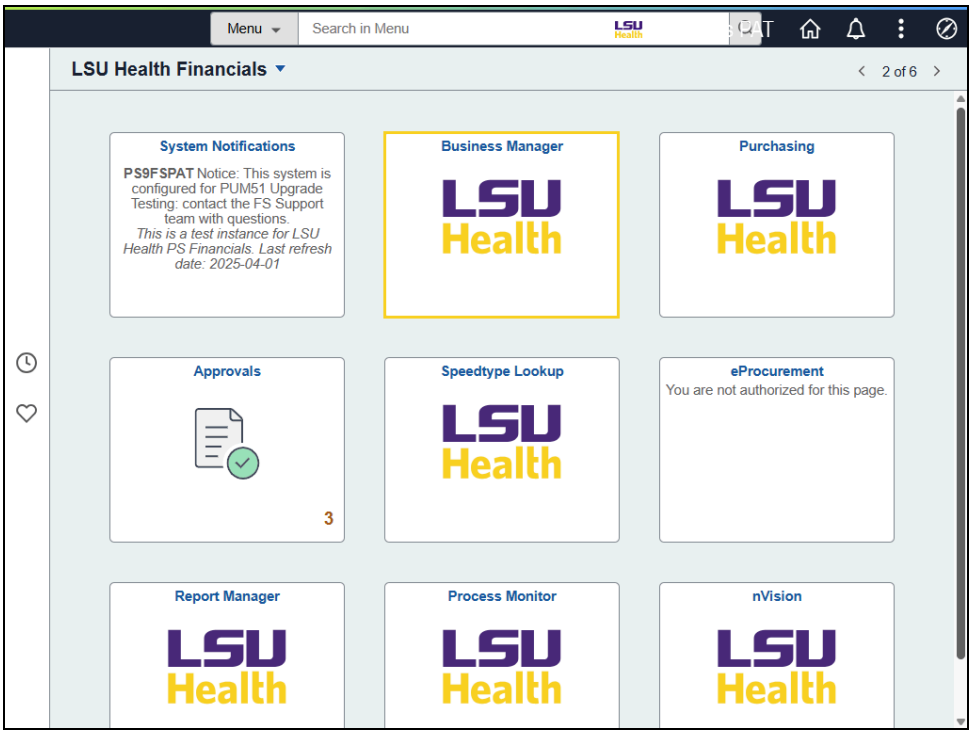
Step	Action
8.	**Notification Bell and the Notification Pane** ***<u>PAT - Upgraded</u>*** Click the **Personalize Homepage** list item. Personalize Homepage



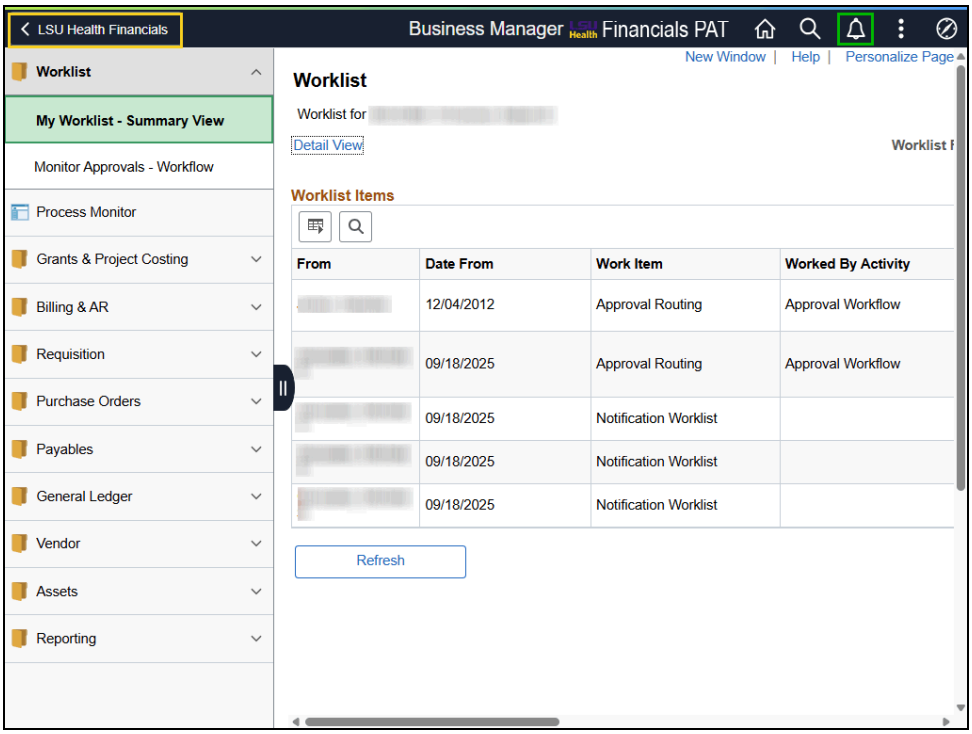
Step	Action
9.	**Notification Bell and the Notification Pane** ***PAT - Upgraded*** Click the **Show Notifications Panel** option. 
10.	**Notification Bell and the Notification Pane** ***PAT - Upgraded*** The user must **Save** to complete the process. Click the **Save** button.



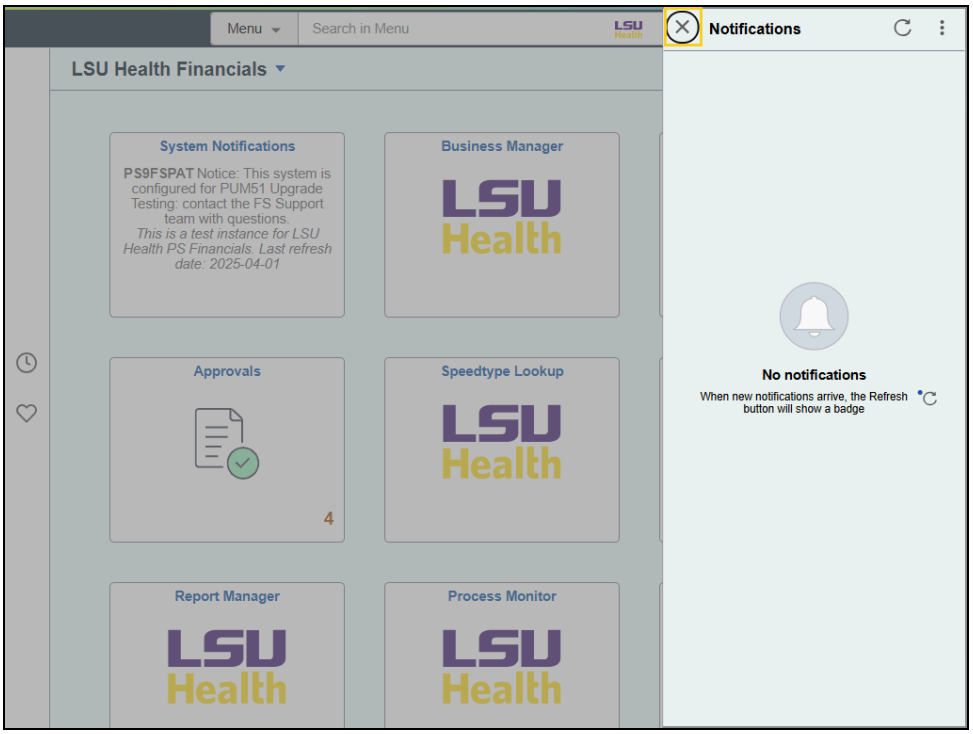
Step	Action
11.	**Notification Bell and the Notification Pane** ***<u>PAT - Upgraded</u>*** Notice that the **Notification Bell** does <u>not</u> display when the **Notification Pane** is active.



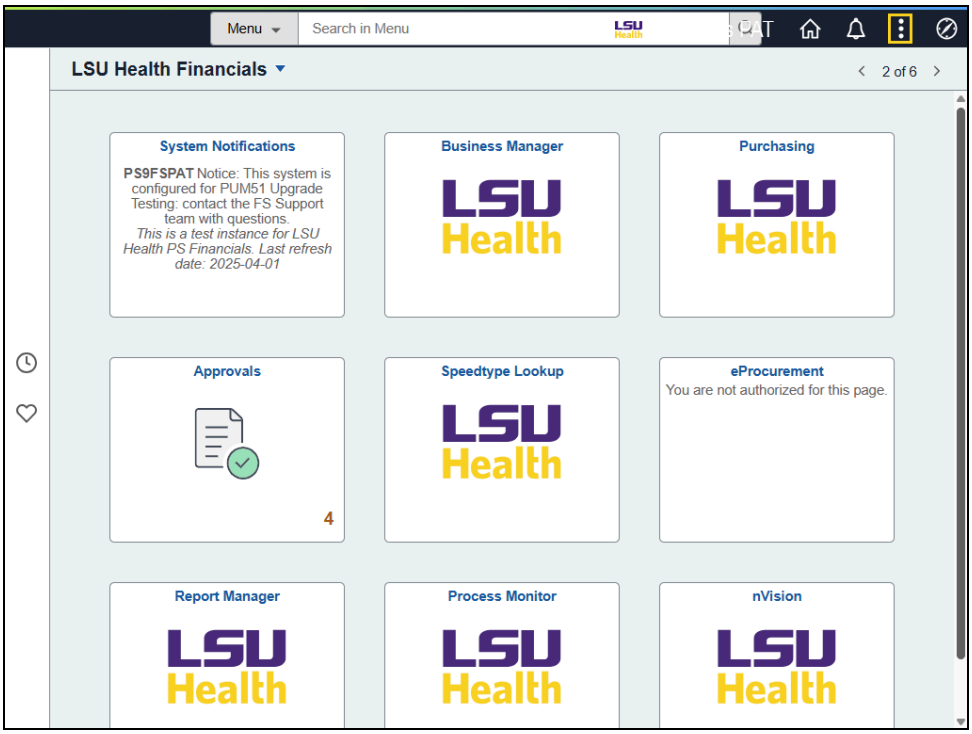
Step	Action
12.	**Notification Bell and the Notification Pane** ***PAT - Upgraded*** Click the **Business Manager** button.



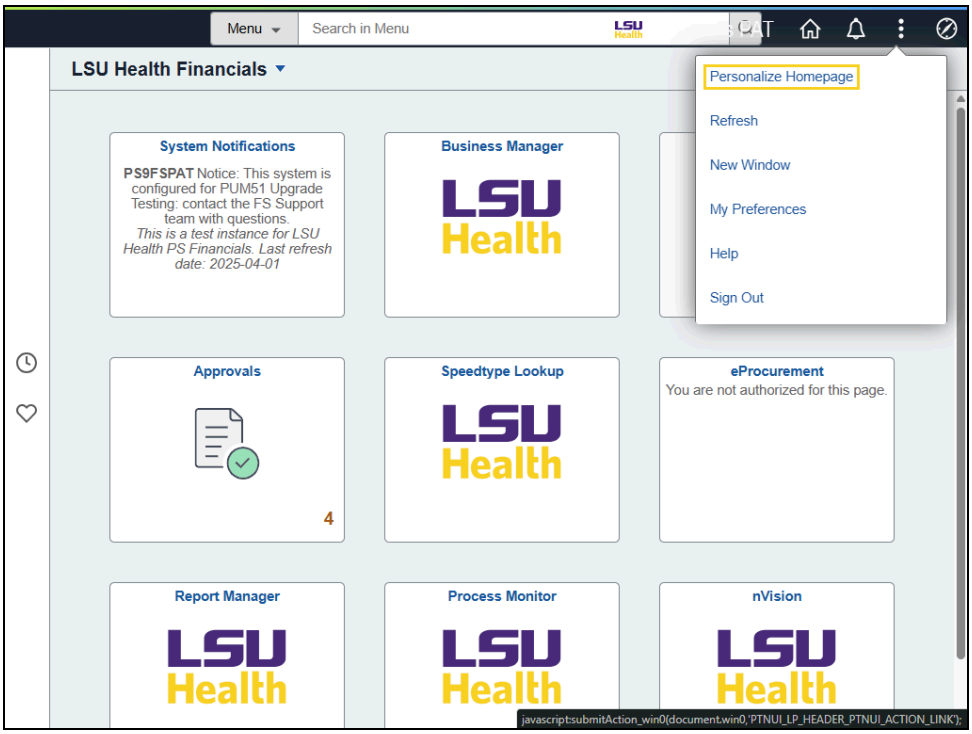
Step	Action
13.	**Notification Bell and the Notification Pane** ***PAT - Upgraded*** *When users access transactional pages, the **Notification Bell** is displayed.* Click the **LSU Health Financials** button.



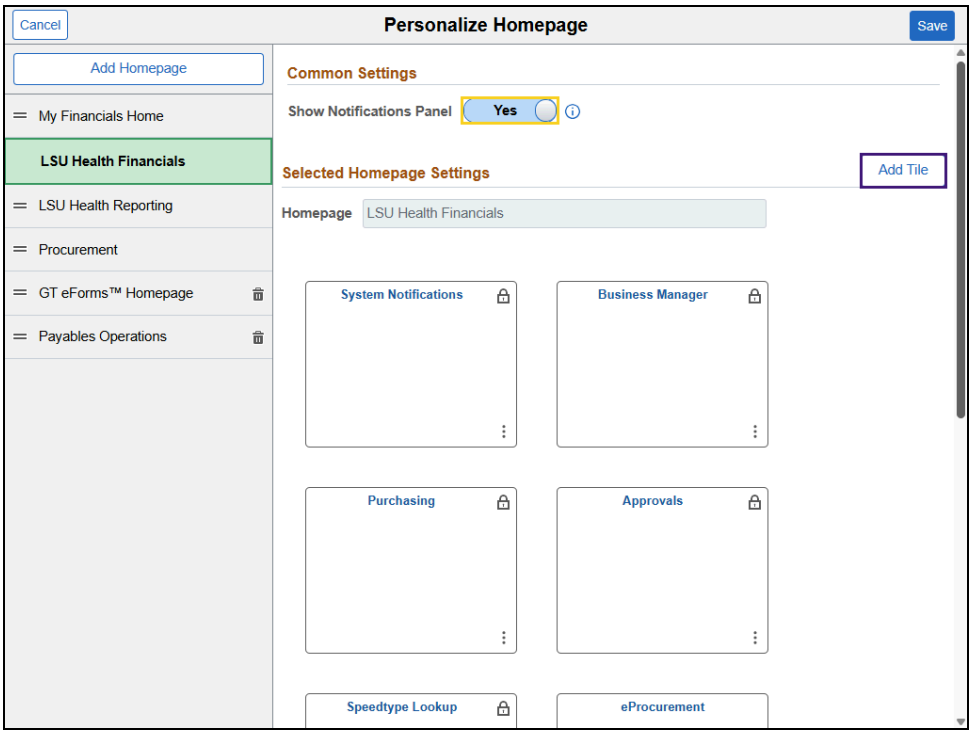
Step	Action
14.	**Notification Bell and the Notification Pane** ***<u>PAT - Upgraded</u>*** Users may choose to *hide* the *Notification Pane* from displaying on their **My Financials Home** and **LSU Health Financials**. Click the **Close Notifications** button.

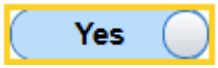


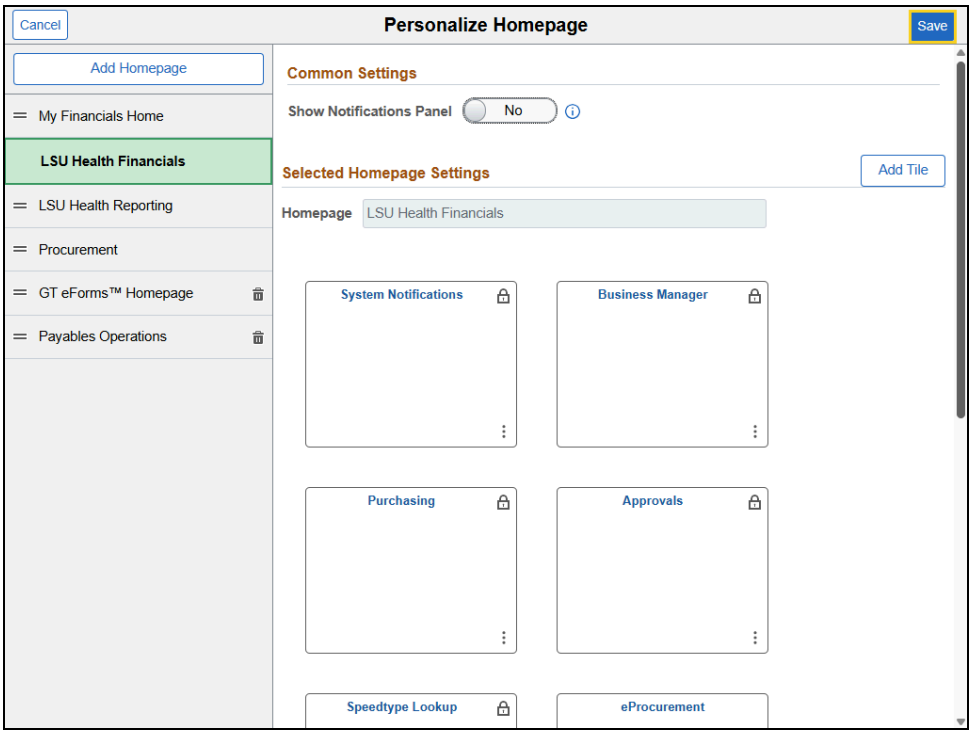
Step	Action
15.	**Notification Bell and the Notification Pane** ***PAT - Upgraded*** Select the **Actions** icon, 3 ellipses at the *top right* of the screen, and then select ***Personalize Homepage***. Click the **Actions** menu.

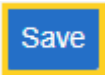


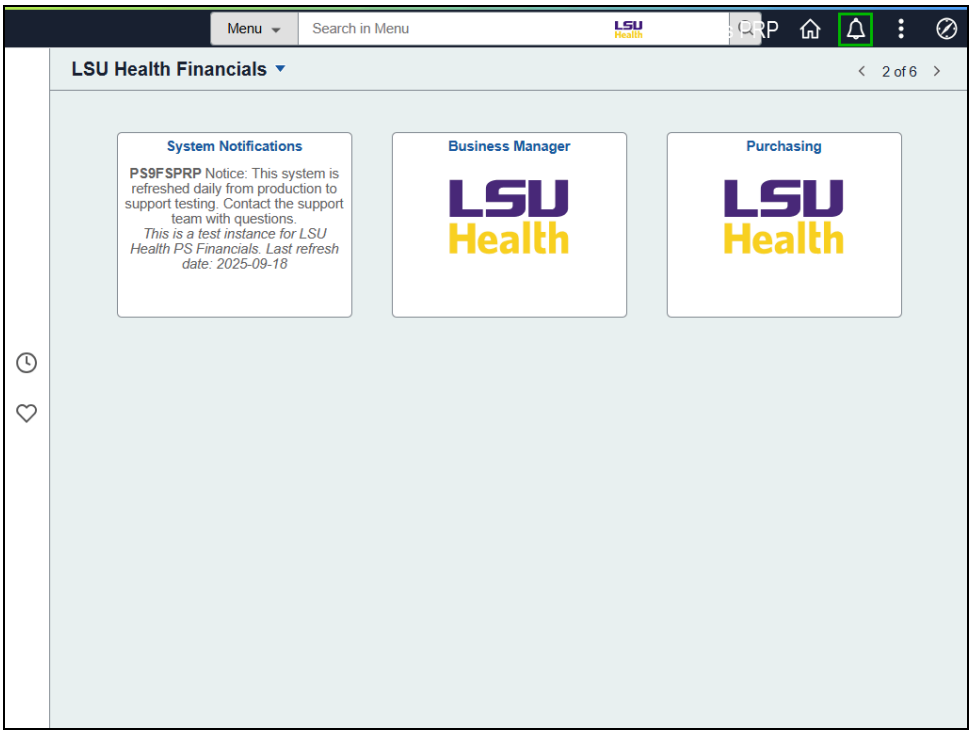
Step	Action
16.	**Notification Bell and the Notification Pane** ***PAT - Upgraded*** Click the **Personalize Homepage** link. Personalize Homepage



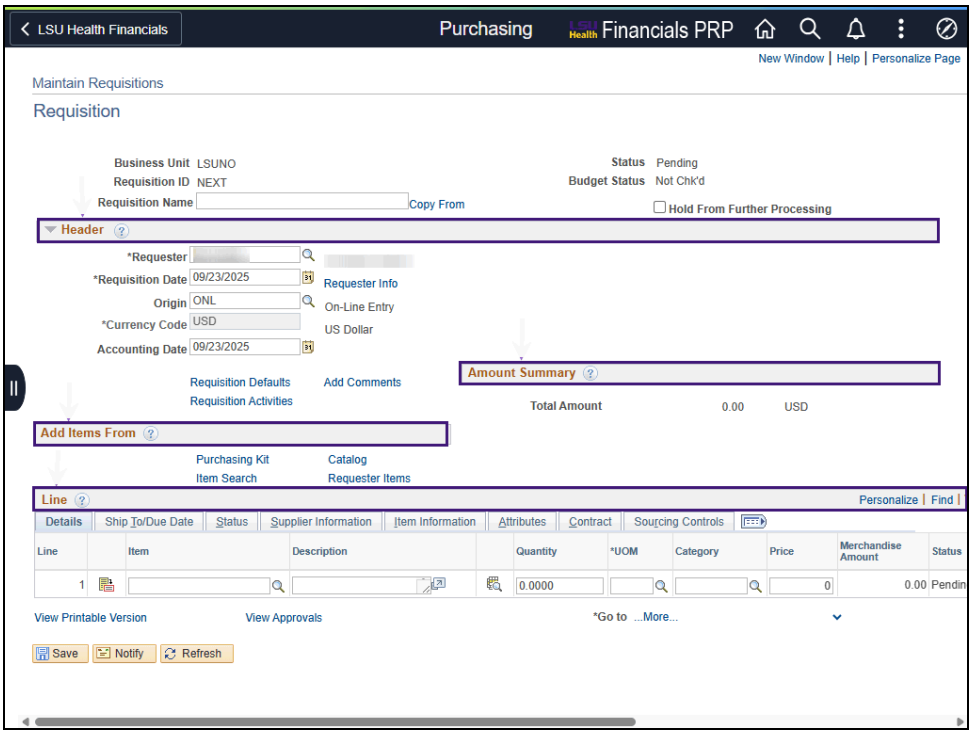
Step	Action
17.	**Notification Bell and the Notification Pane** ***<u>PAT - Upgraded</u>*** On the ***Personalize Homepage*** screen, the *green colored highlight* on the left *indicates* the *homepage*, e.g., LSU Health Financials. If the user wanted to *add a tile*, s/he could do so on this page. Or,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



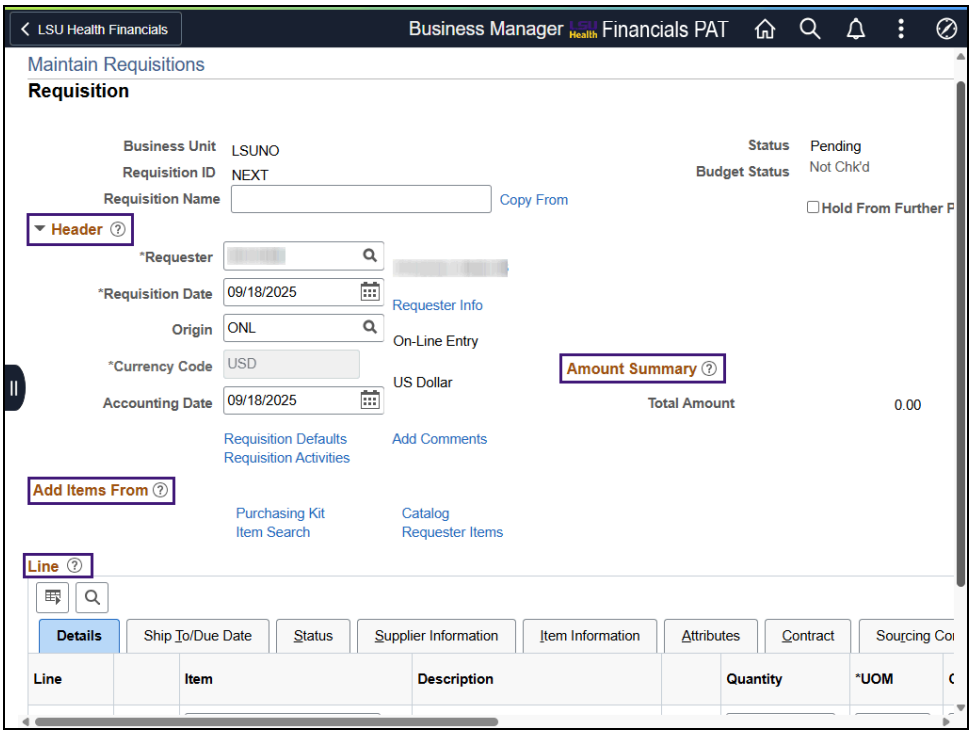
Step	Action
18.	**Notification Bell and the Notification Pane** ***PAT - Upgraded*** Click the **Save** button. 



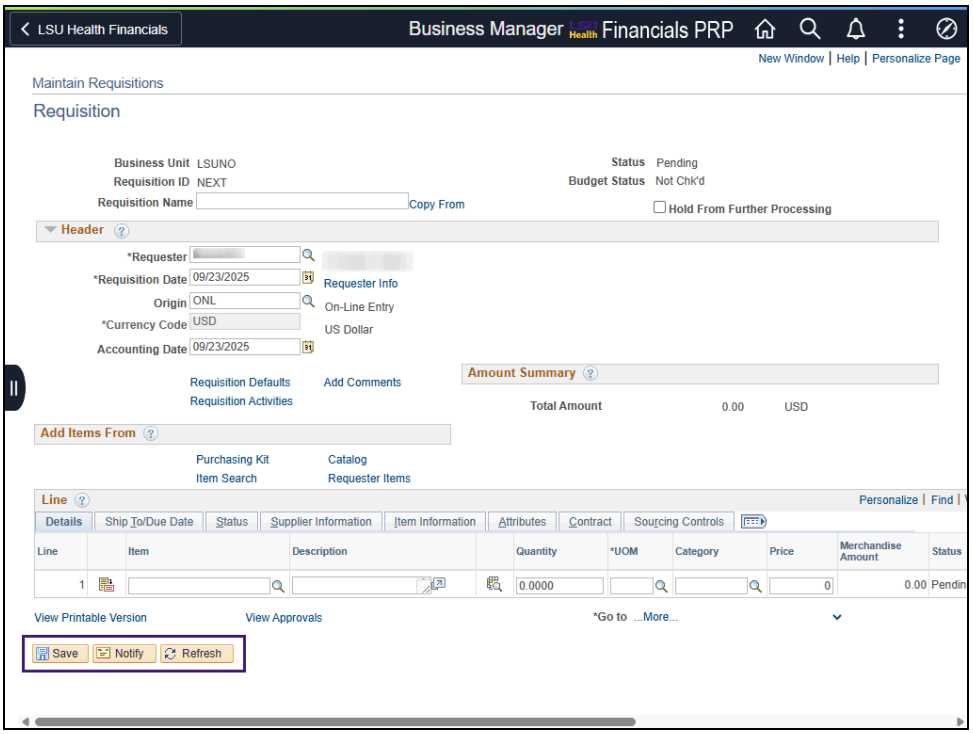
Step	Action
19.	**Notification Bell and the Notification Pane** ***PRP - Not Upgraded*** The Homepage displays, now *excluding* the ***Notification Pane***. The ***Bell*** icon is once again displayed.



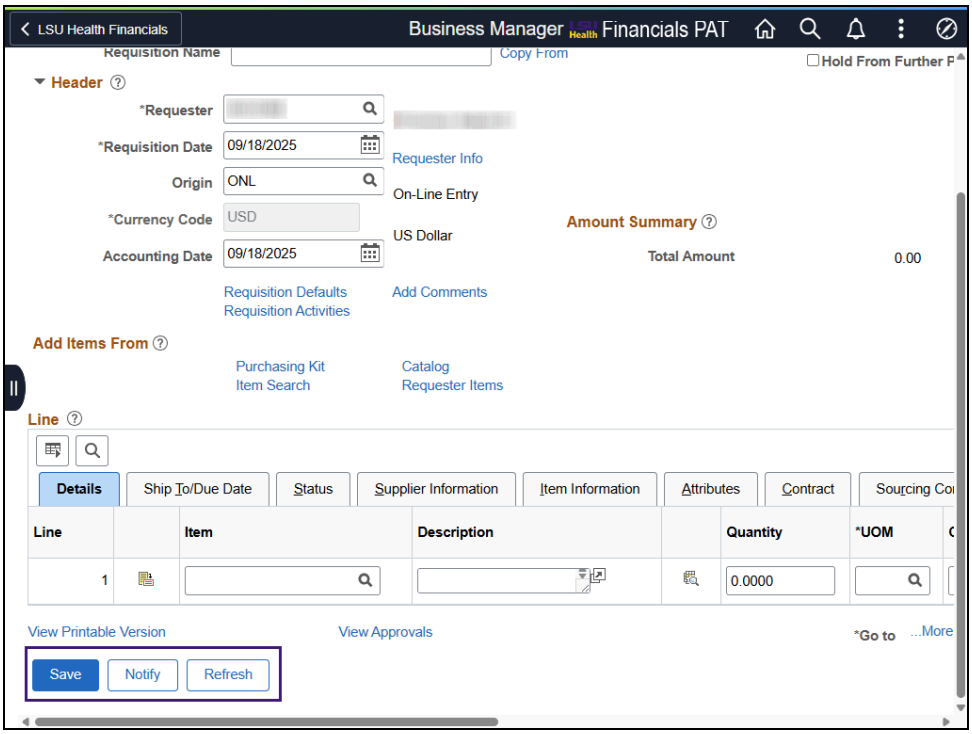
Step	Action
20.	**Grid Lines and Section Dividers** ***PRP - Not Upgraded*** In the upgraded version of PeopleSoft Financials, the Fluid display *style* of the pages *excludes* the *colored section dividers and section grid lines*. This will more closely resemble the views users are accustomed to seeing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



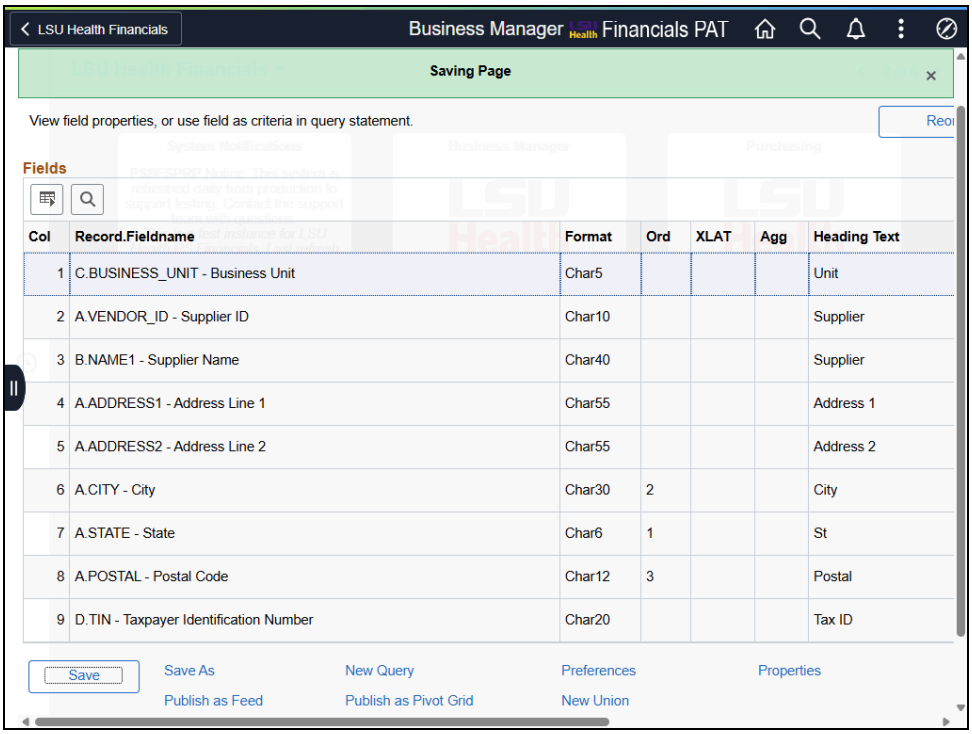
Step	Action
21.	**Grid Lines and Section Dividers** ***<u>PAT - Upgraded</u>*** *Grid lines and section dividers* are **<u>not</u>** displayed on the ***PAT - Upgraded*** page. The section dividers of *Header*, *Amount Summary*, *Add Items From*, and *Line* do **<u>not</u>** have *grey highlight bars*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



Step	Action
22.	**Button Color Change** The *Save, Return to Search, Notify, Refresh, Add a New Value, and Update/Display* buttons displayed at the *bottom* of many transaction pages have changed color. Instead of the yellow buttons, they are now blue or white. ***PRP - Not Upgraded*** The traditional *yellow Save*, *Notify*, *Refresh*, *Add*, and *Update/Display* are displayed on the *Maintain Requisitions* 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.***

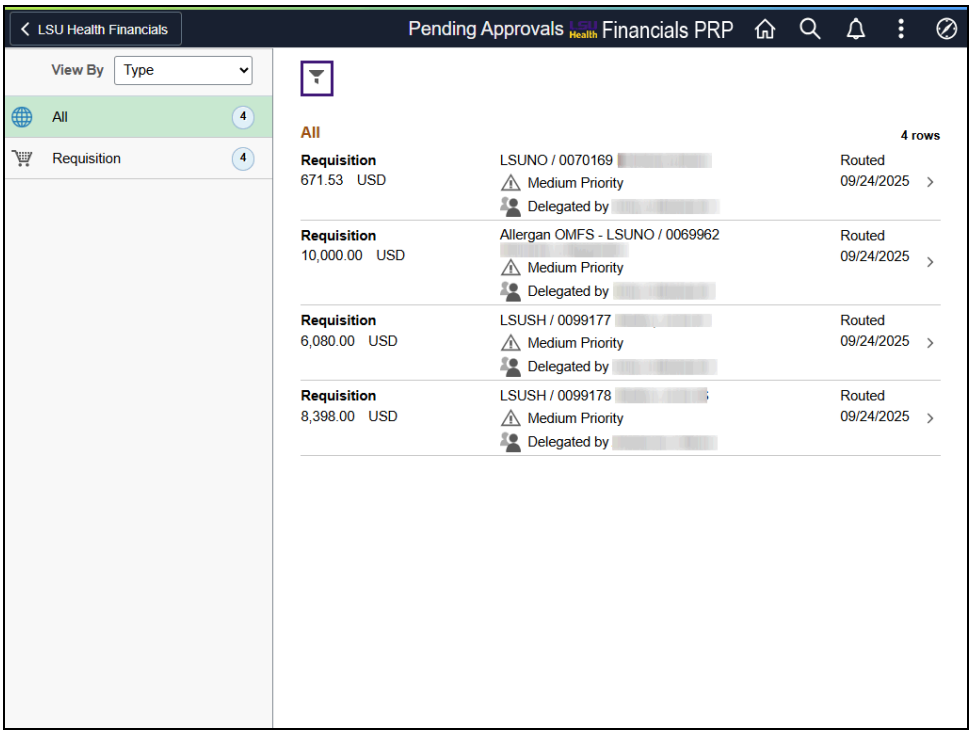


Step	Action
23.	**Button Color Change** ***PAT - Upgraded*** *Save*, *Notify*, and *Refresh* buttons are now *blue* and *white*. ***NOTE: Scroll to the right to view the Add and Update/Display buttons.***

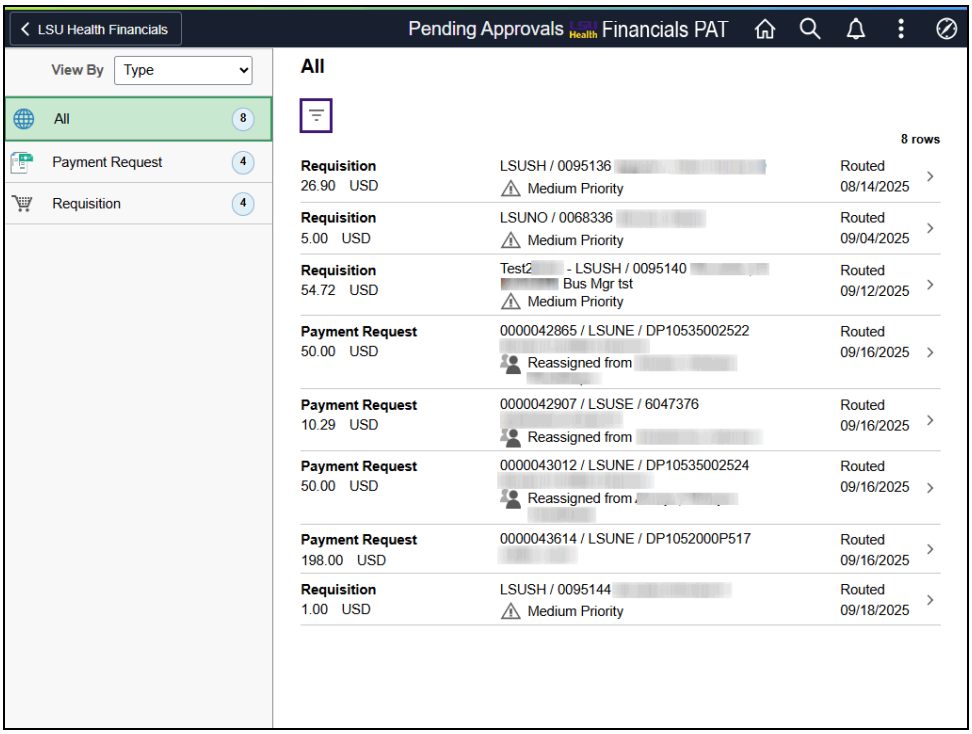


Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text
1	C.BUSINESS_UNIT - Business Unit	Char5				Unit
2	A.VENDOR_ID - Supplier ID	Char10				Supplier
3	B.NAME1 - Supplier Name	Char40				Supplier
4	A.ADDRESS1 - Address Line 1	Char55				Address 1
5	A.ADDRESS2 - Address Line 2	Char55				Address 2
6	A.CITY - City	Char30	2			City
7	A.STATE - State	Char6	1			St
8	A.POSTAL - Postal Code	Char12	3			Postal
9	D.TIN - Taxpayer Identification Number	Char20				Tax ID

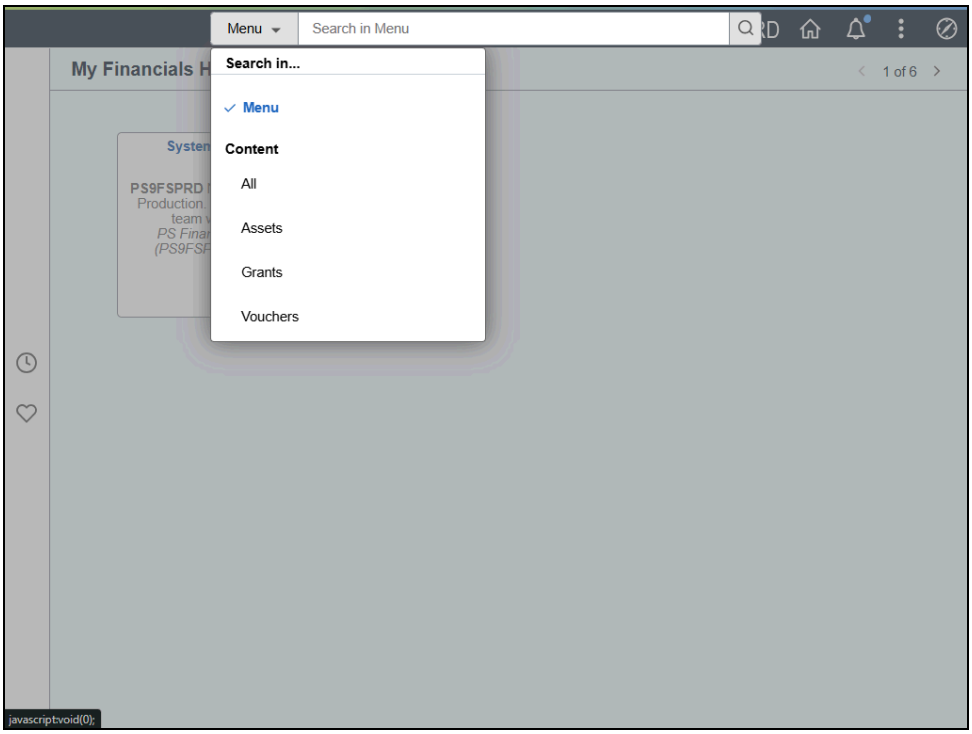
Step	Action
24.	**Save** ***PAT - Upgraded*** When a *document or page* is *saved*, a *green bar* will display at the top of the page *indicating* the *save* is *in progress*.



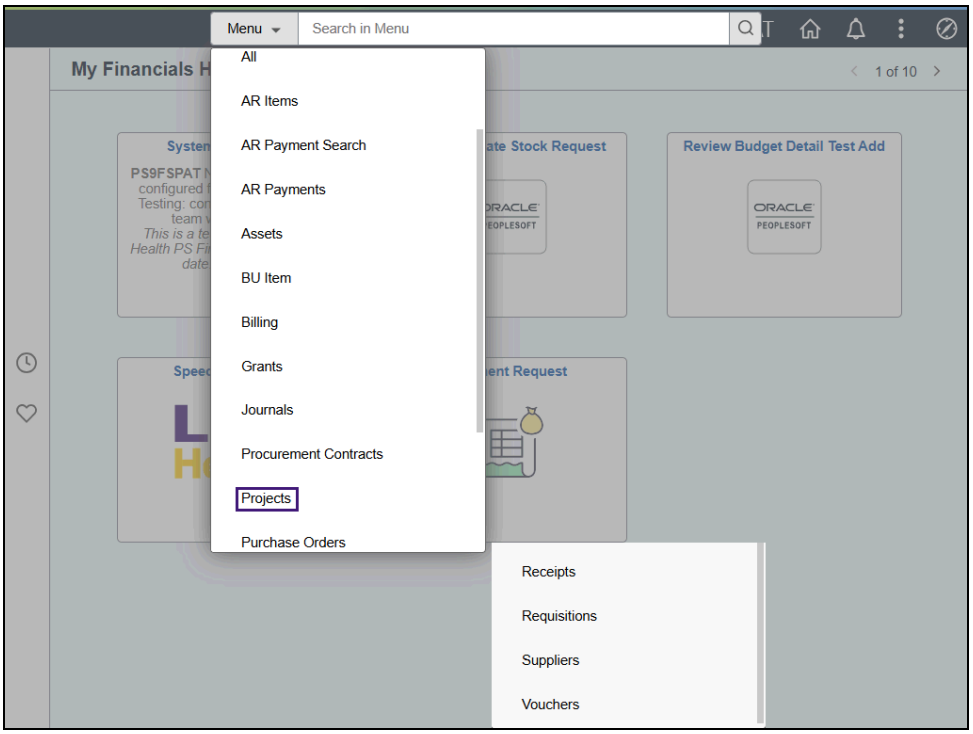
Step	Action
25.	**Filter Button Appearance** ***PRP - Not Upgraded*** The ***Filter*** button changes to a *funnel shaped lined display* instead of a more *traditional looking funnel*.



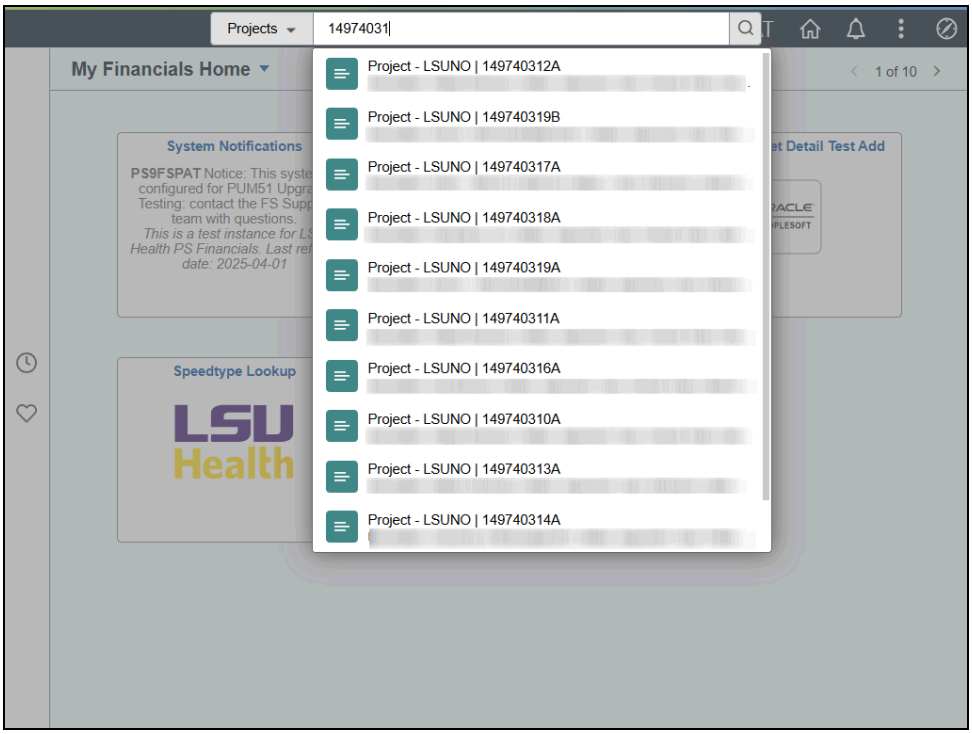
Step	Action
26.	**Filter Button Appearance** ***<u>PAT - Upgraded</u>*** The new **Filter** button displays in the *same place on the page*. In the upgraded database displays as a more *graphic representation* of a *funnel*.



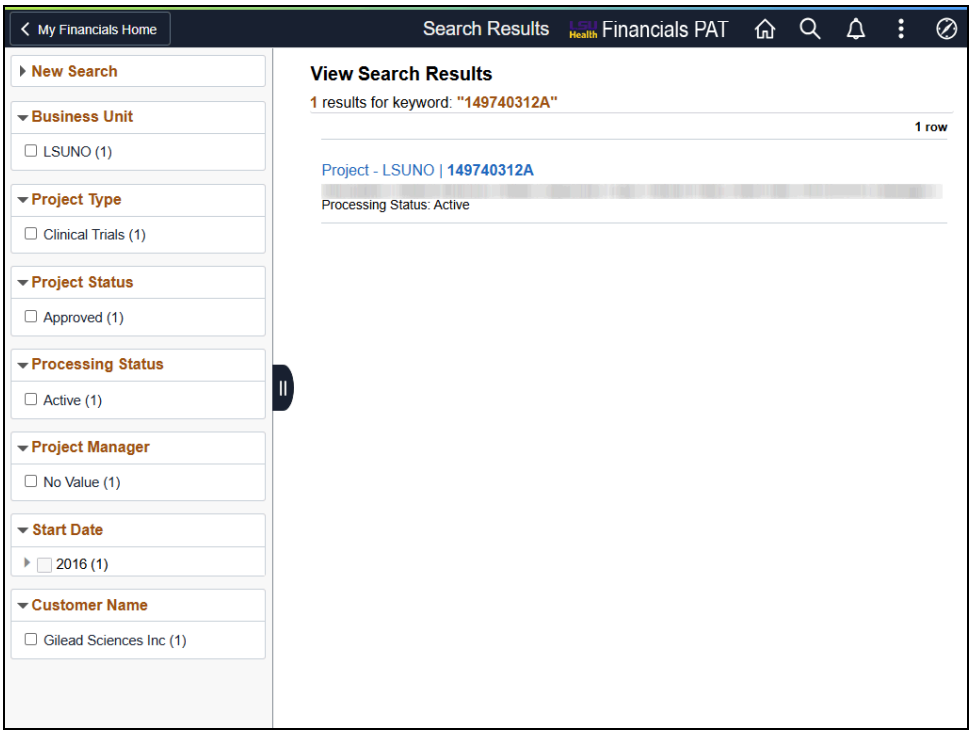
Step	Action
27.	**Key Word Search Expansion** Users now can use the Search for Content in Account Receivable, Billing, Journals, and Projects in addition to all the existing search features. ***PRD - Search Options***



Step	Action
28.	**Key Word Search Expansion** ***<u>PAT - Upgraded</u>*** To *search* for *content* in ***Projects*** for example, *select* the *module* 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.

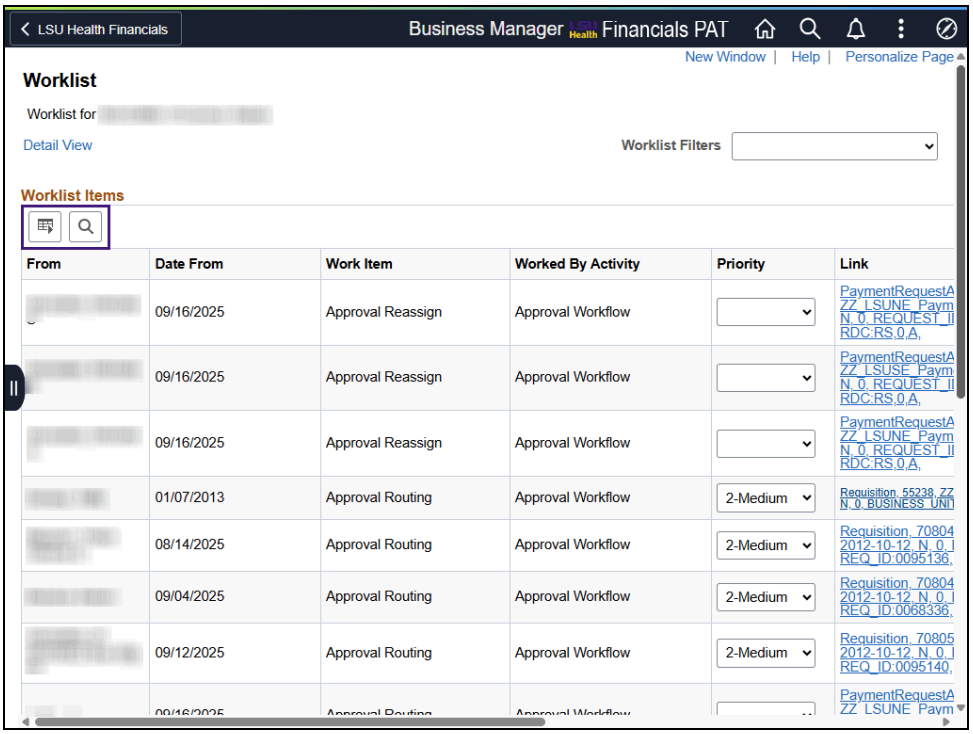


Step	Action
30.	**Key Word Search Expansion** ***PAT - Upgraded*** Results of the search display by search criteria on the left. Select and review as desired.
31.	This completes ***Overall Look and Feel Changes for PUM 51***. **End of Procedure.**

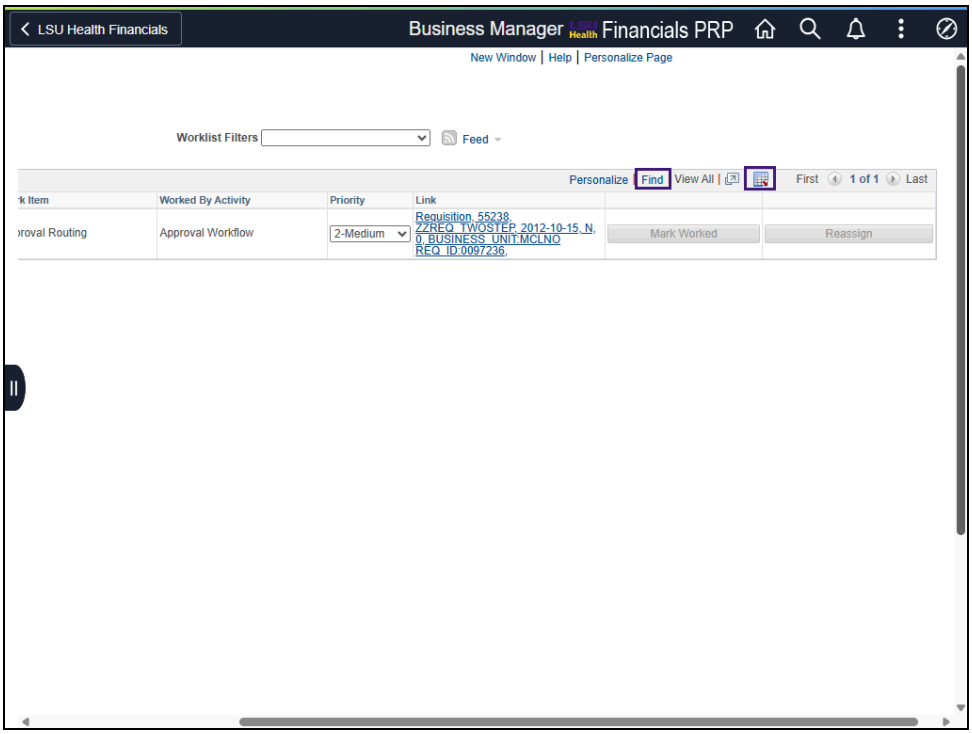
Download to Excel, Find, and Personalize Buttons

Procedure

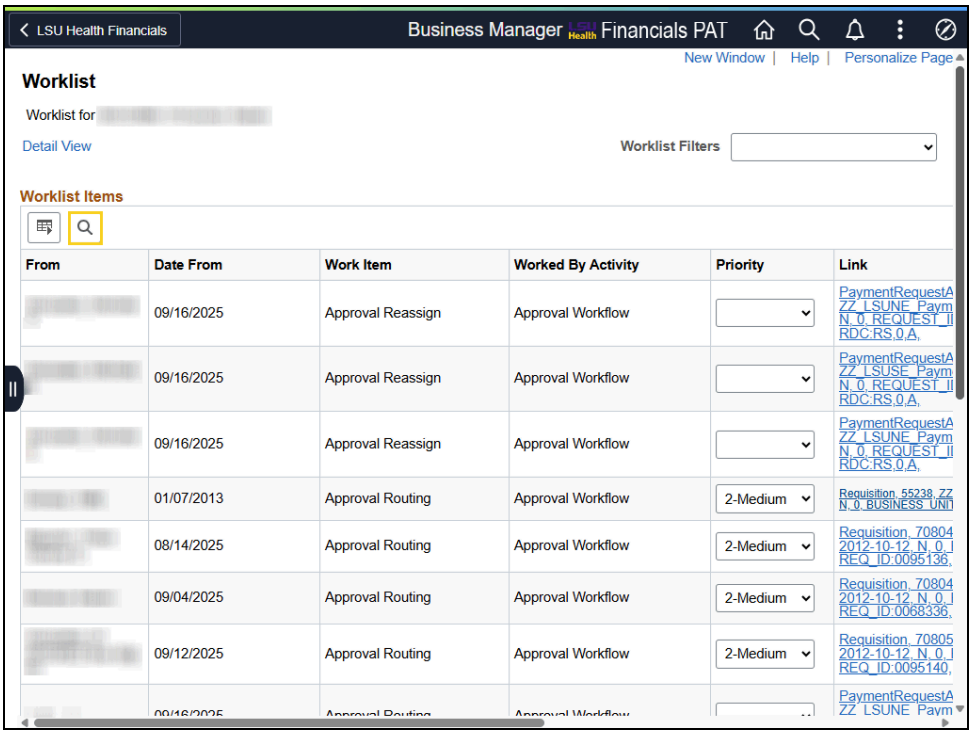
In this topic you will learn how to **Download to Excel, Find, and Personalize Buttons**.



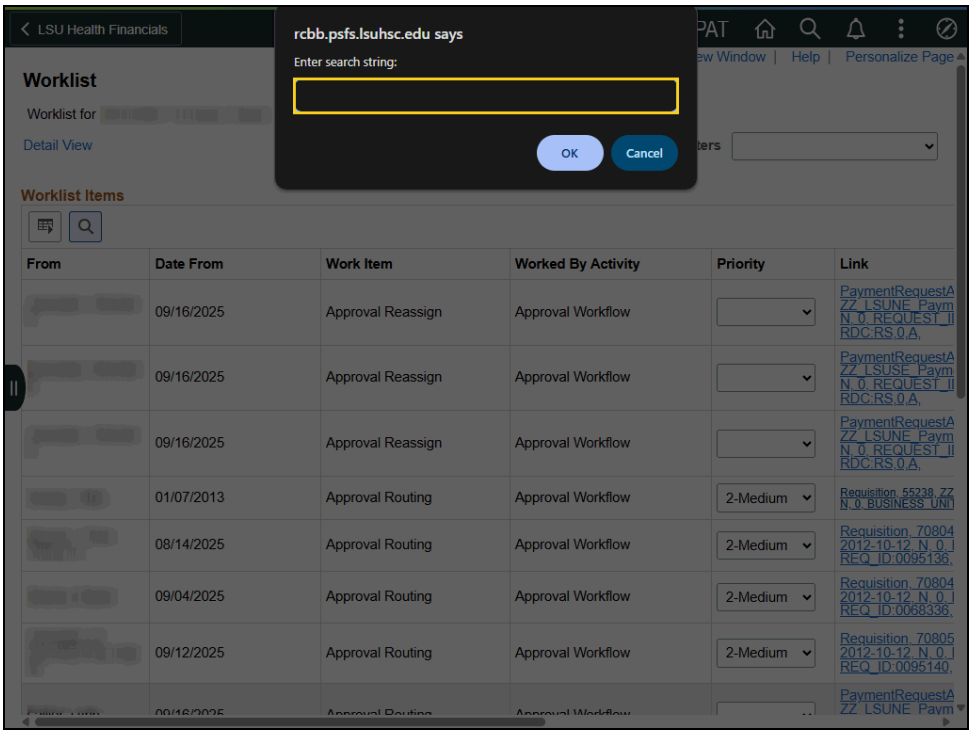
Step	Action
1.	**Download to Excel, Find, Personalize Buttons** ***<u>PAT - Upgraded</u>*** With the upgrade, the *Find link*, *Personalize*, and *Download to Excel* grid links are *moved from* the *right* of the page *to the left* of the grid list and are *buttons* instead of links.



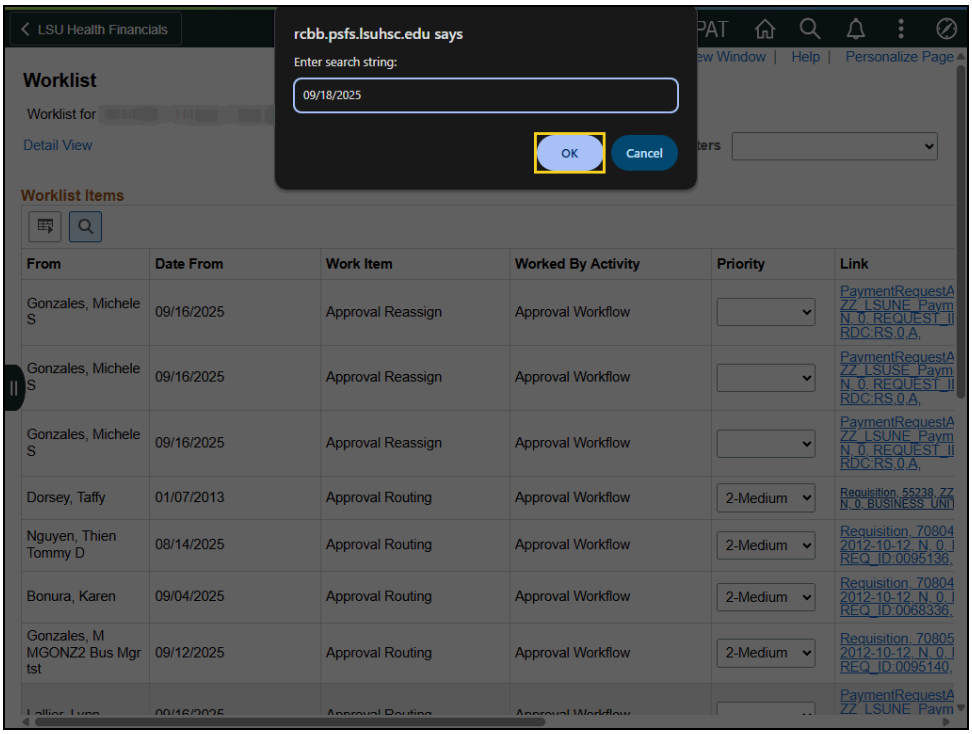
Step	Action
2.	**Download to Excel, Find, Personalize Buttons** As you can see from the screenshot, **Find** and **Download to Excel** both appear on *top*, *right* of the *grid list bar*. ***PRP - Not Upgraded*** The ***Find*** link and the ***Download Worklist Items Table to Excel*** appear on the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



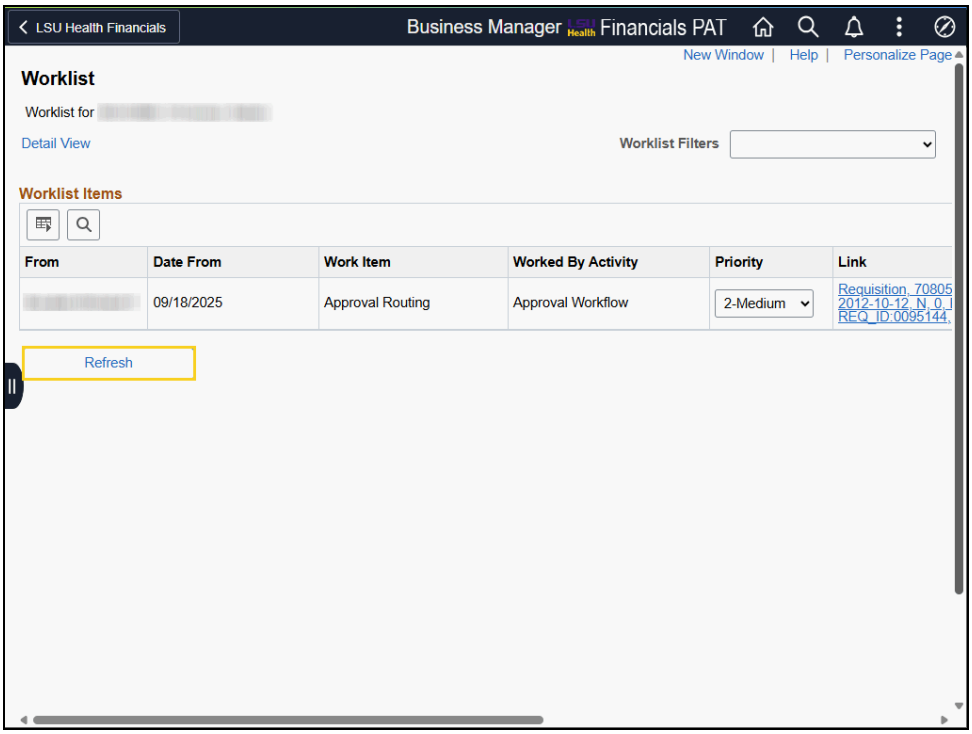
Step	Action
3.	**Download to Excel, Find, Personalize Buttons** ***PAT - Upgraded*** **Find** is designated by the *magnifying glass button*. In this example, the user will search for the LSUSH requisition that is dated **09/18/2025**. Click the **Find** button.



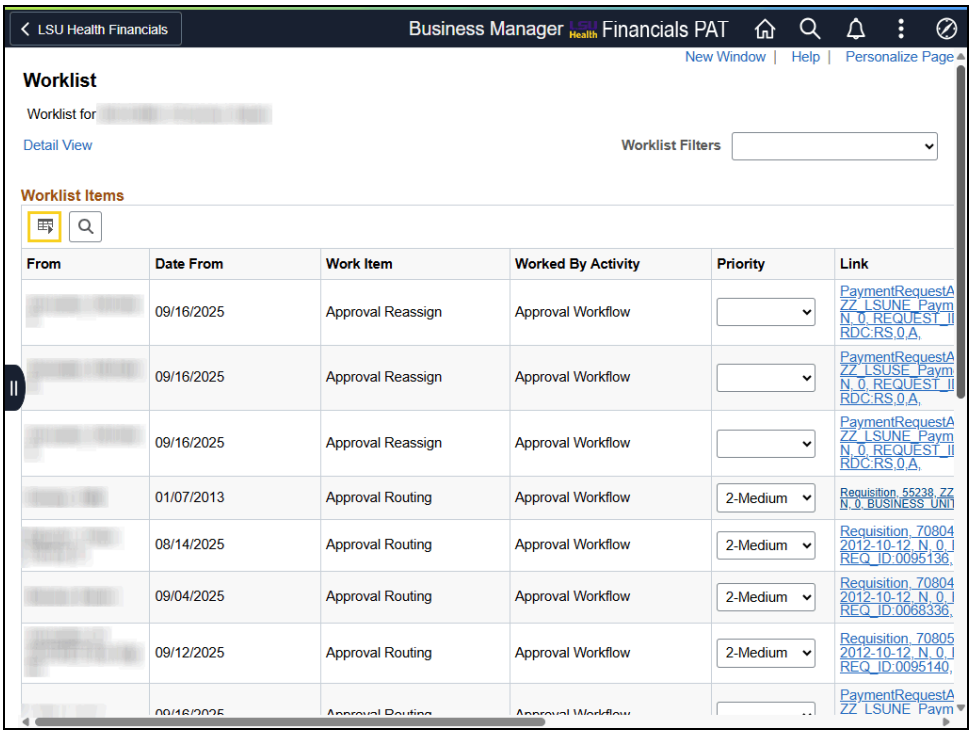
Step	Action
4.	**Download to Excel, Find, Personalize Buttons** ***<u>PAT - Upgraded</u>*** Users must enter the date using the correct ***date format: MM/DD/YYYY***. Enter the desired information into the **Search** field. Enter "**09/18/2025**".



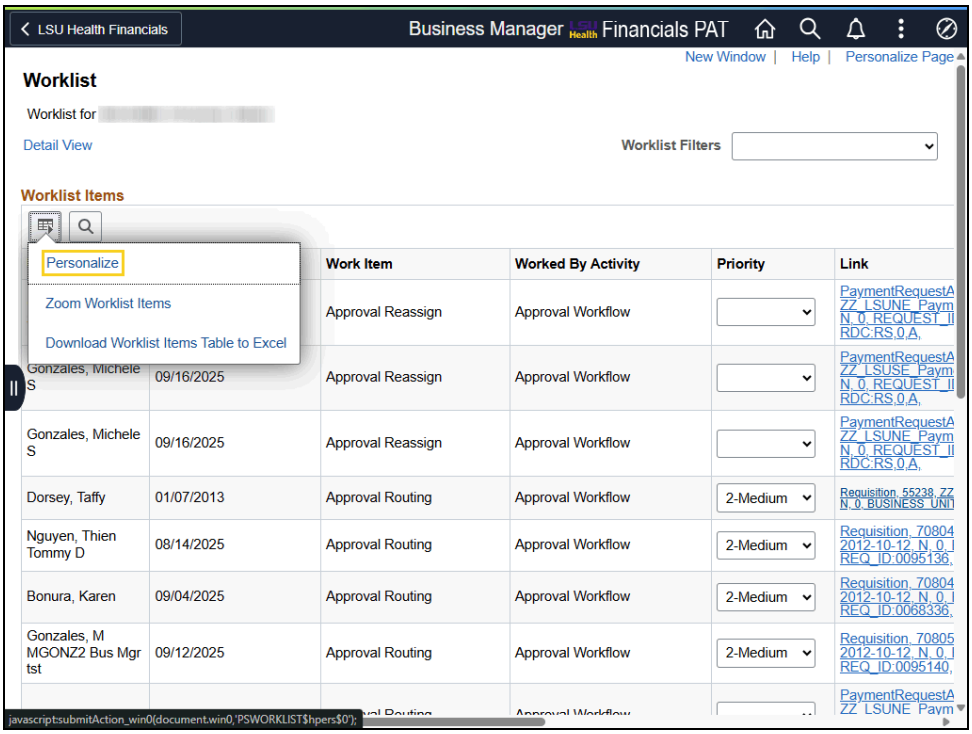
Step	Action
5.	**Download to Excel, Find, Personalize Buttons** ***<u>PAT - Upgraded</u>*** Users must enter the date using the correct ***date format: MM/DD/YYYY***. Click the **OK** button.



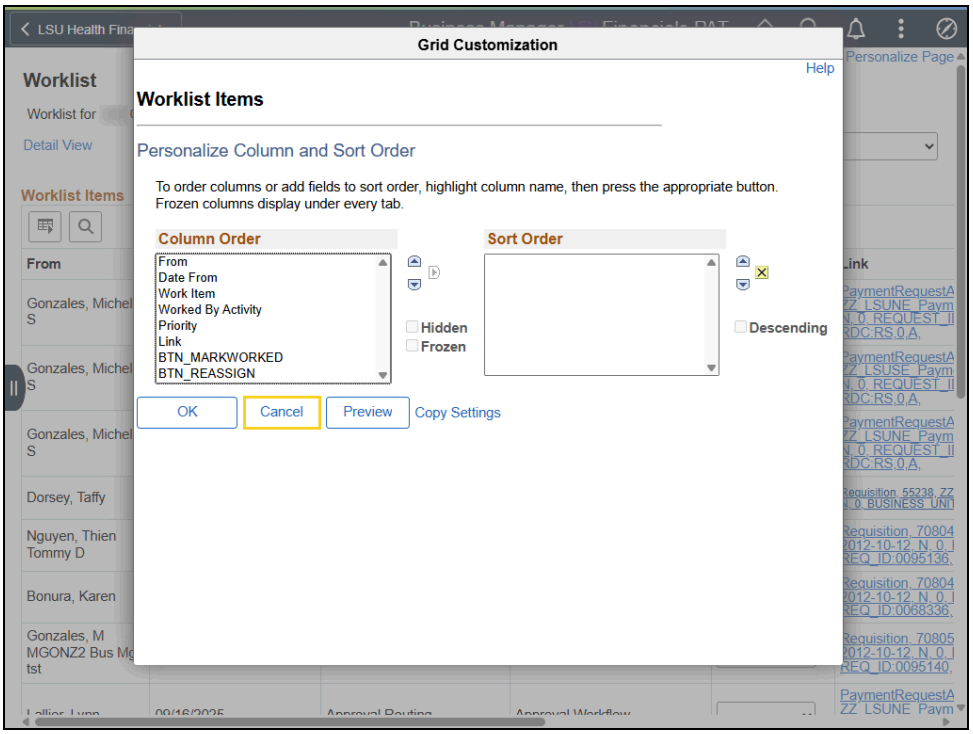
Step	Action
6.	**Download to Excel, Find, Personalize Buttons** ***PAT - Upgraded*** The 09/18/2025 Worklist Item is displayed by itself on the page. Click the **Refresh** button.



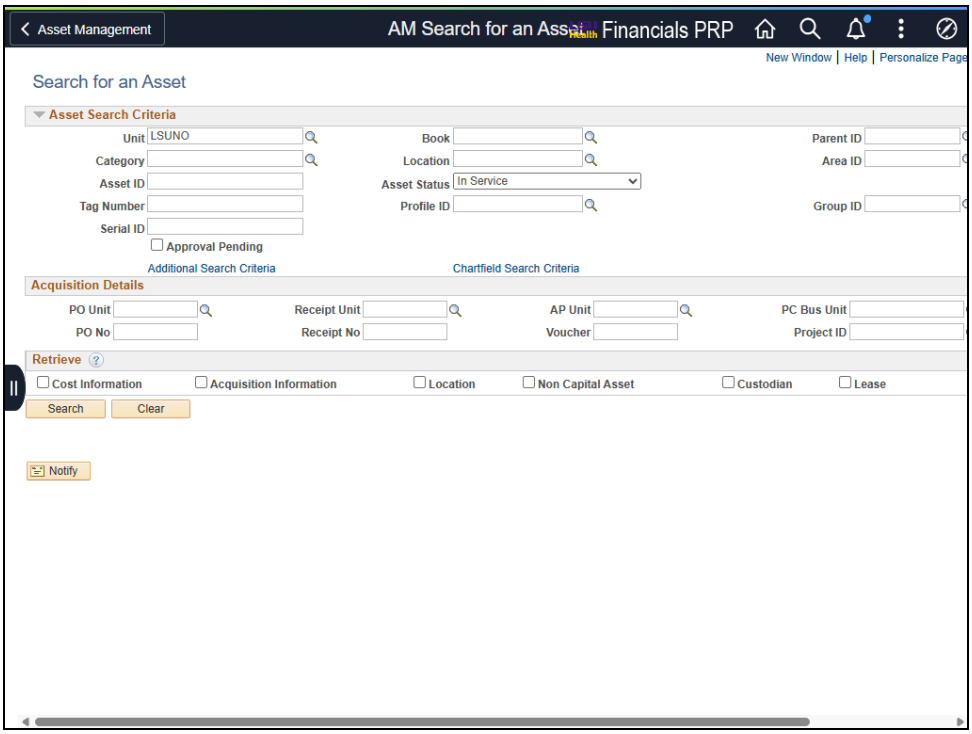
Step	Action
7.	**Download to Excel, Find, Personalize Buttons** ***PAT - Upgraded*** The button that looks like a *little spreadsheet* is the **Grid Actions Menu**. This allows the user to *download to Excel*, *zoom in* on the l*ist of items*, or *personalize* the *grid* for certain pages. Click the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



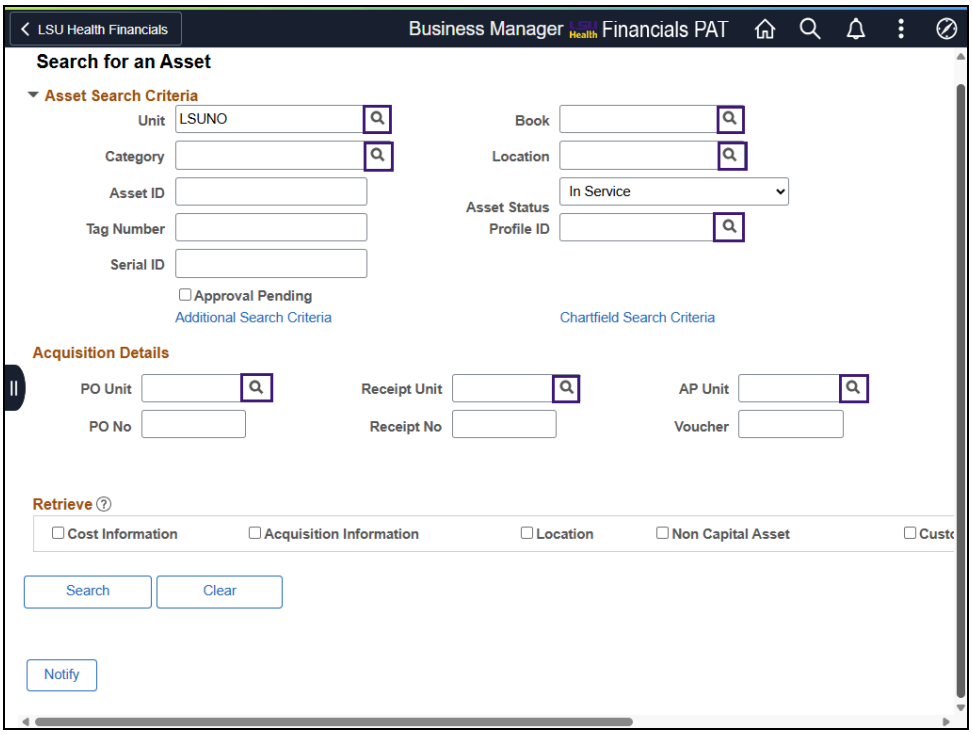
Step	Action
8.	**Download to Excel, Find, Personalize Buttons** ***<u>PAT - Upgraded</u>*** By selecting the **Grid Actions** button on the **Worklist grid**, the user *sees* the *menu options* shown in the screenshot. Click the **Personalize** link.



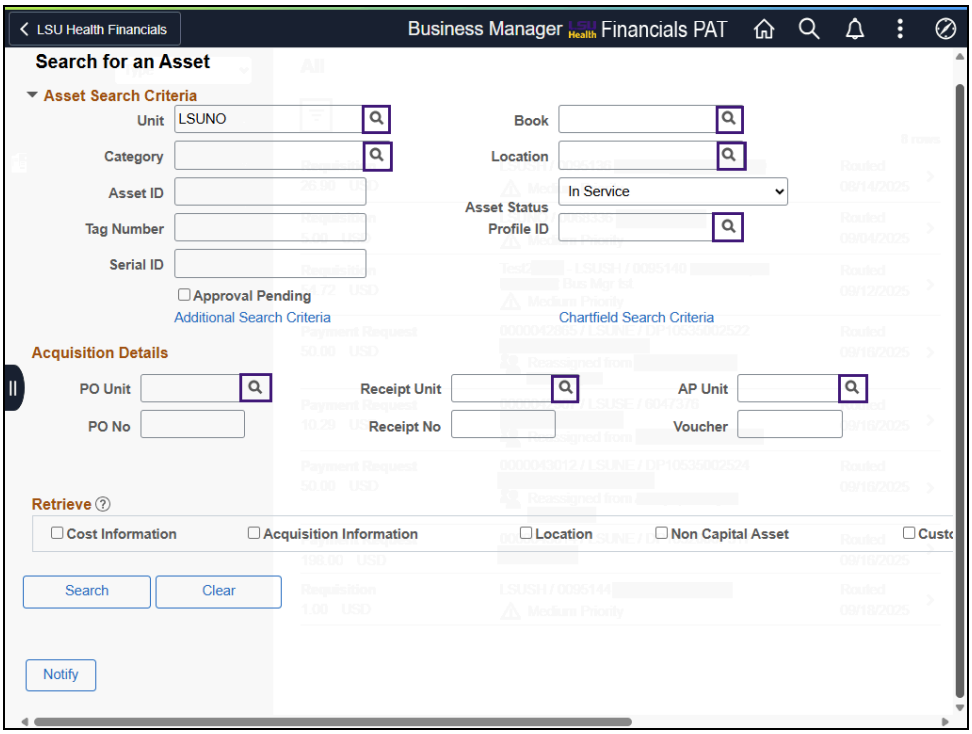
Step	Action
9.	**Download to Excel, Find, Personalize Buttons** ***<u>PAT - Upgraded</u>*** The Personalize page allows the user to order column or add field to the sort order. The user accomplishes this by clicking on the column name and then pressing the appropriate button. Click the **Cancel** button.



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



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

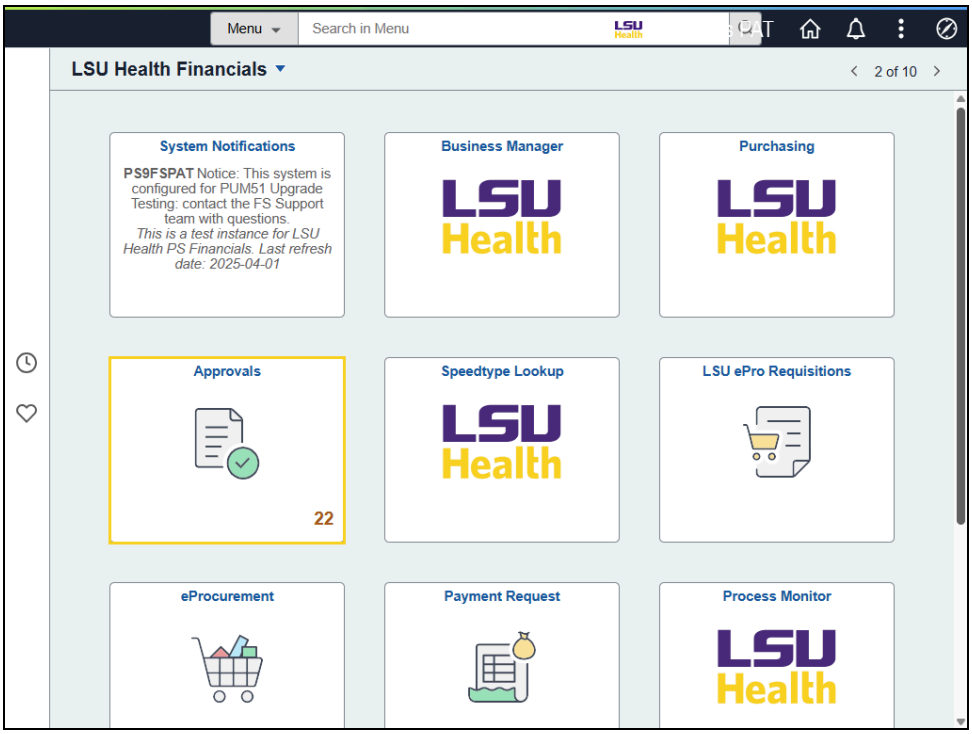


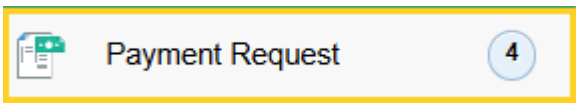
Step	Action
12.	This completes ***Download to Excel, Find, and Personalize Buttons***. **End of Procedure.**

Approvals Tile

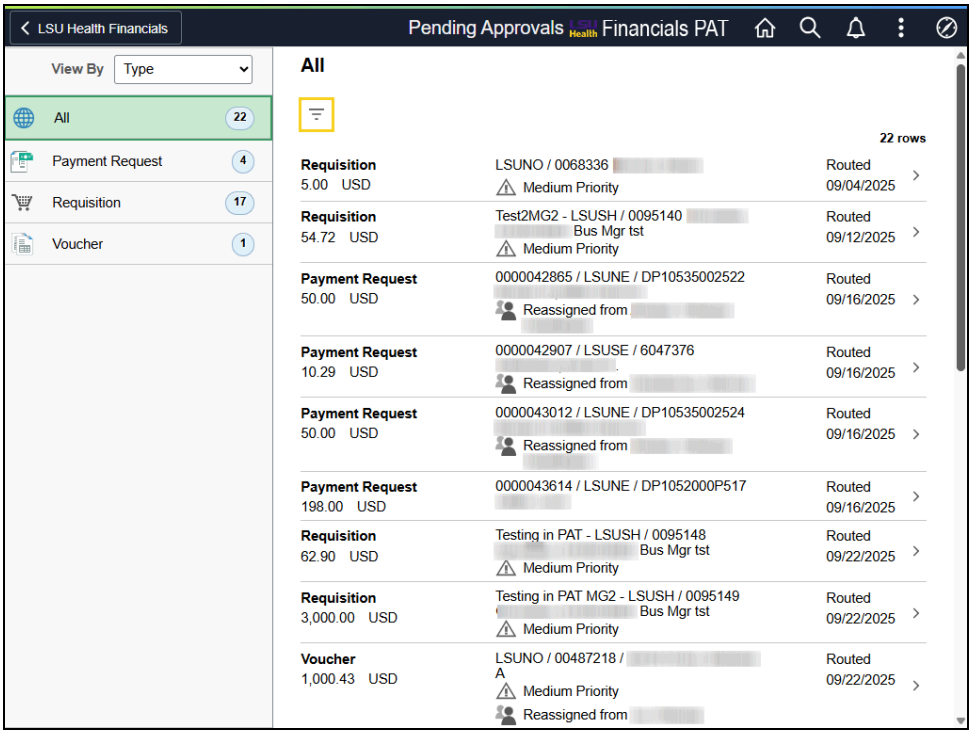
Procedure

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

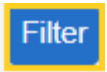


Step	Action
1.	Users with appropriate approval security will access the ***Approvals Tile*** from the **LSU Health Financials** homepage. Users will see any *requisitions*, *vouchers*, *payment requests*, *Journals (Shreveport)*, or *GTeForms* pending their approval. Click the **Approvals Tile** button.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

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



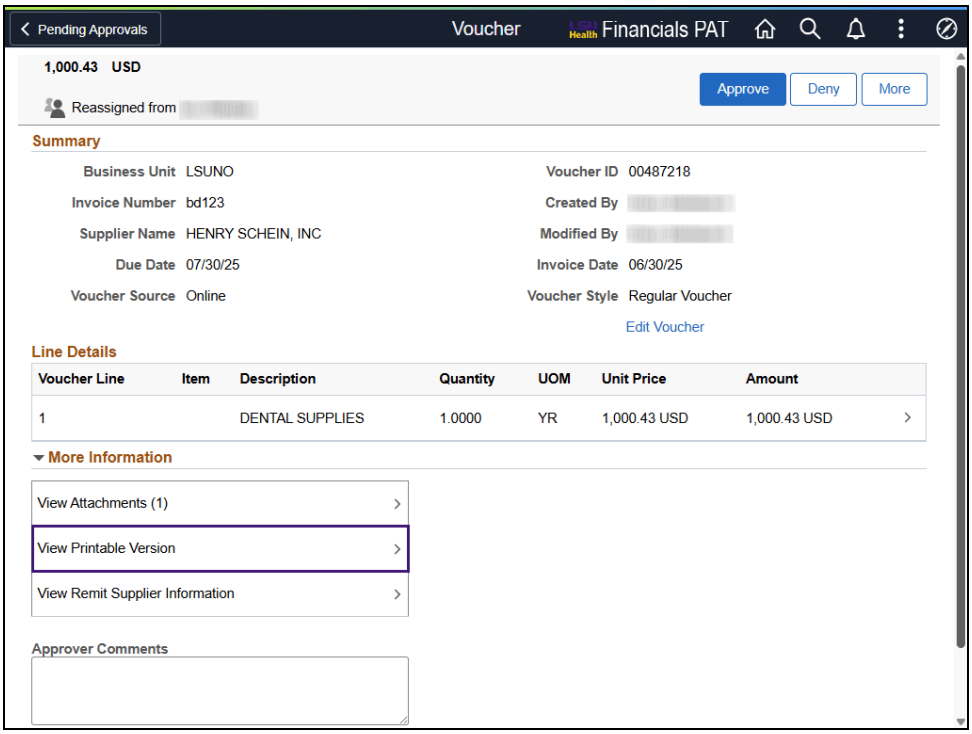
Step	Action
4.	Users may select the ***Filter*** option to *search* for a *specific approval option*. Click the **Filter** button.
5.	*Next* to *each Filter option* is a *drop-down arrow*. Each option will *display* its *list of options* from which the *user can choose*. In this example, the user will choose ***Barbara Doss*** from the list of ***Requesters***. 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 *Voucher approval request* displays as *Doss, Barbara A* is the *requester*.
9.	The **Approvals Tile** displays ***GTeForms*** *pending approval*. This includes *Internal Transaction Forms, Clincard Requests, and AP Special Meals & Entertainment Requests* that have been submitted for approval.
10.	Due to the *GTeForm special design* for ***Internal Transactions***, the **Approvals Tile** can only be *used after* the *debit chartstring* has been *entered*. The *GTeForm* will *appear* on the **Approval Tile** *even if* the *debit chartstring* has ***not*** been ***entered***.
11.	Use *either* of these *three options* to *approve GTeForm* ***Internal Transactions***: **(1)** use the ***IT GTeForm*** *email link to update the debit chartstring*, then *use* the **Approvals Tile** to *approve*, or **(2)** Use the **GTeForm** *homepage navigations* to *update and approve*, or **(3)** use the **IT GTeForm** *email links* to *update and approve*.
12.	This completes ***Approvals Tile***. **End of Procedure.**

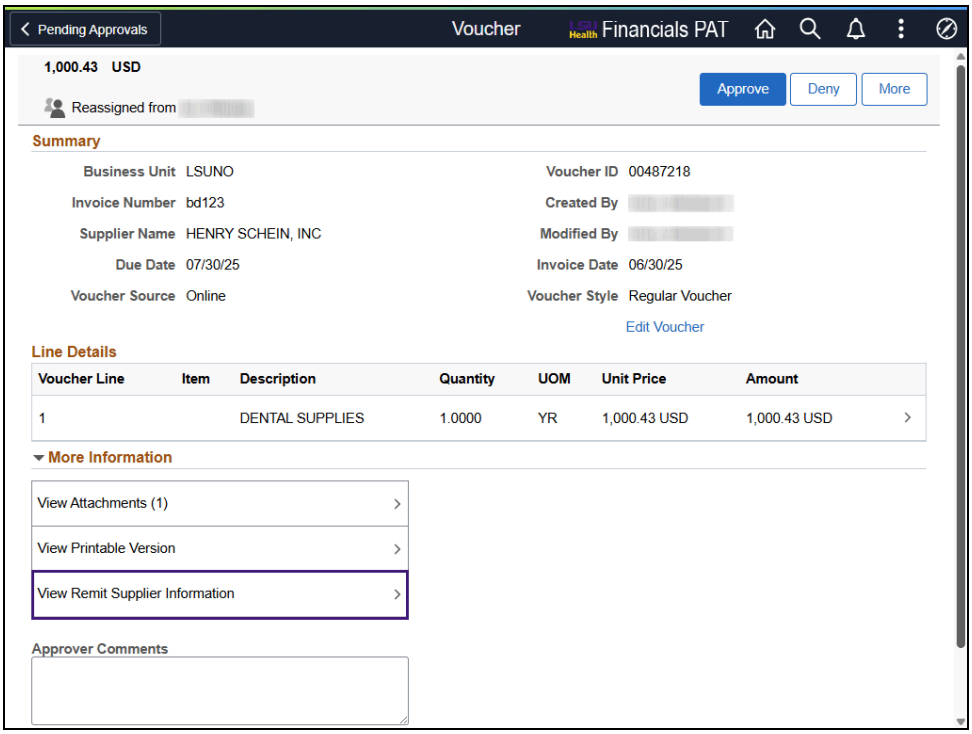
Voucher Approval Page Enhancements

Procedure

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



Step	Action
1.	**New - View Printable Version of the Voucher Approval Page** This is a *new option* available on ***Voucher Approval*** 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 *View Printable Version* option. ***PAT - Upgraded*** The screenshot shows the new button for *View Printable Version*.

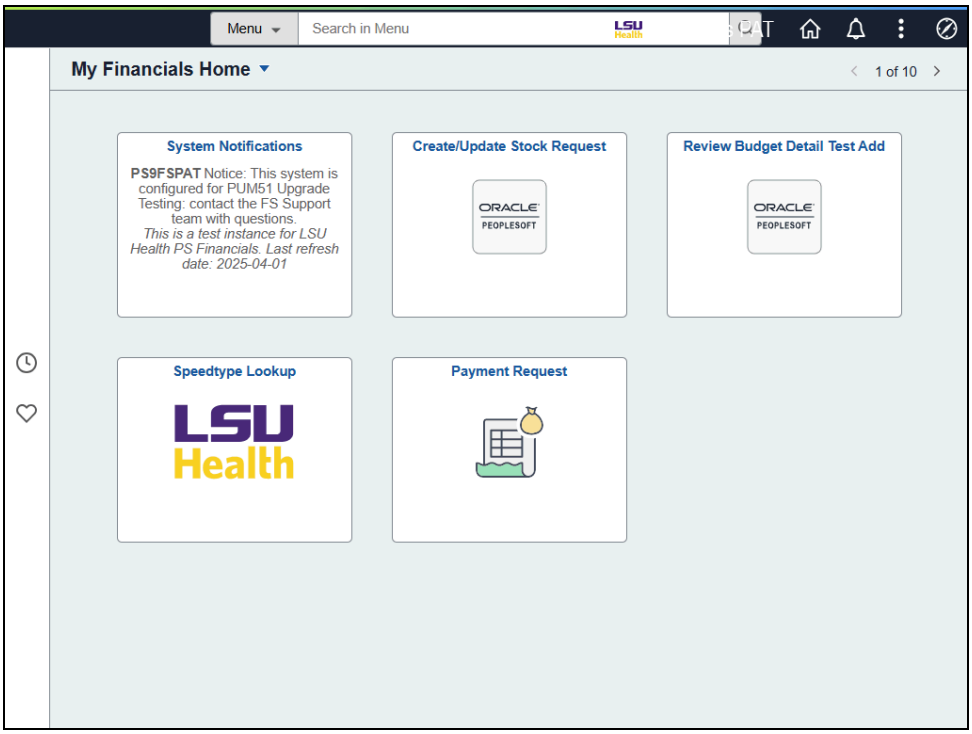


Step	Action
2.	**New - View Remit Supplier on Voucher Approval Page** This is a *new option* available on the Voucher Approval page that allows the user to ***View Remit Supplier Information***. ***PAT - Upgraded*** The screenshot shows the *new View Remit Supplier button* on the **Voucher Approval**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

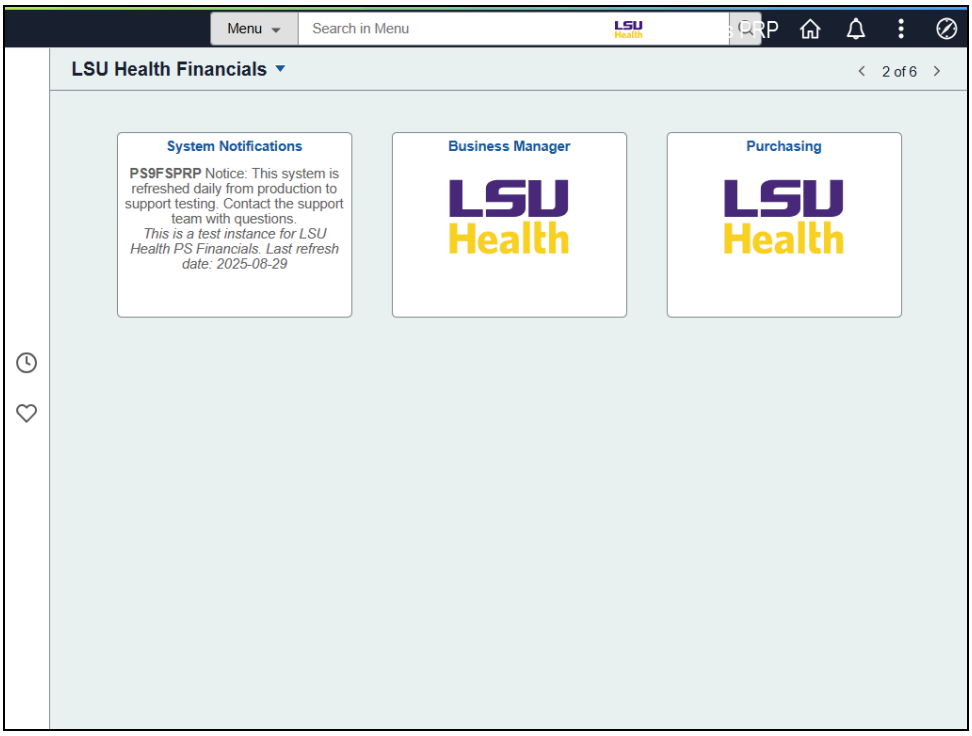
Payment Request Enhancements

Procedure

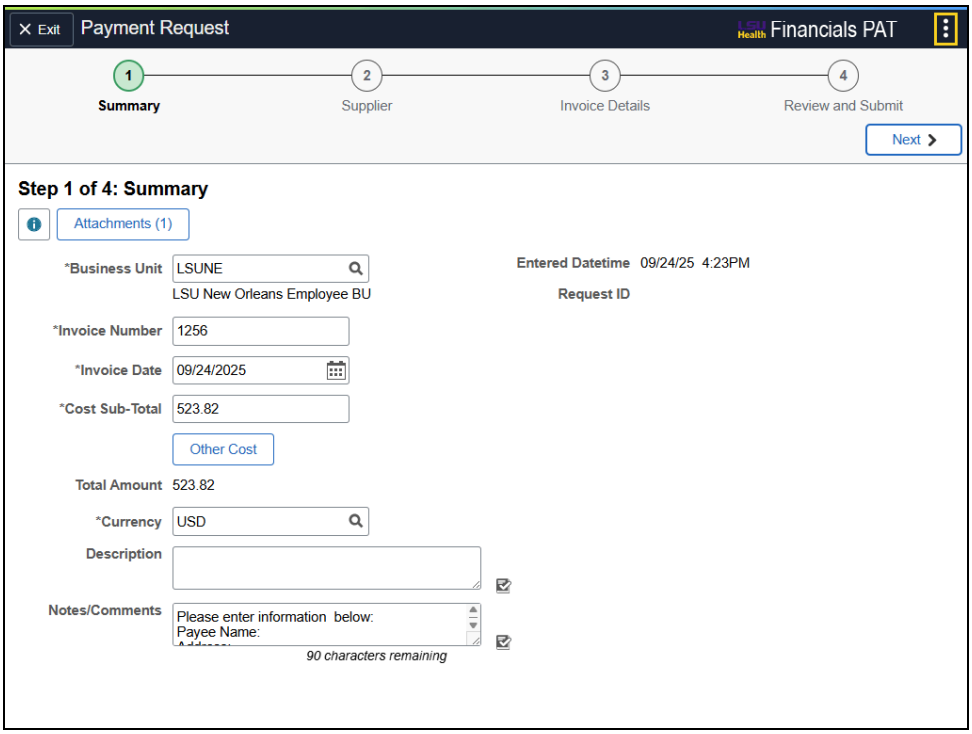
In this topic you will learn about **Payment Request Enhancements**.



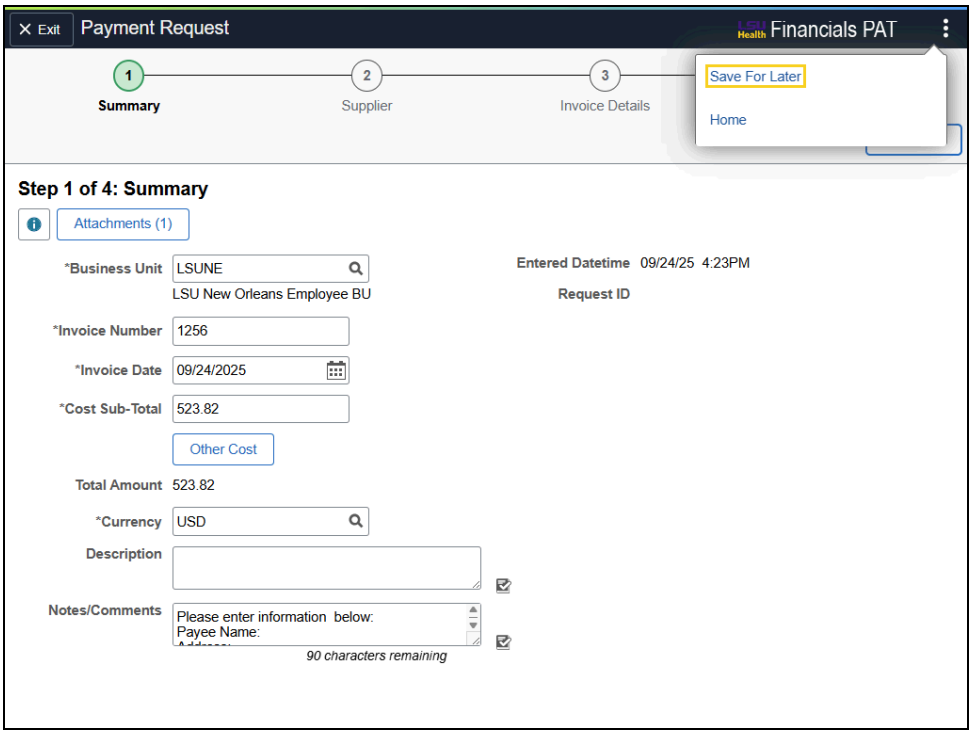
Step	Action
1.	**Payment Requests** ***<u>PAT - Upgraded</u>*** ***Payment Requests*** include several enhancements with the upgrade. The Support Team has created an *updated Payment Request User Guide* for the ***New Orleans*** and ***Shreveport*** campuses. The **Payment Request Center**, *to create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



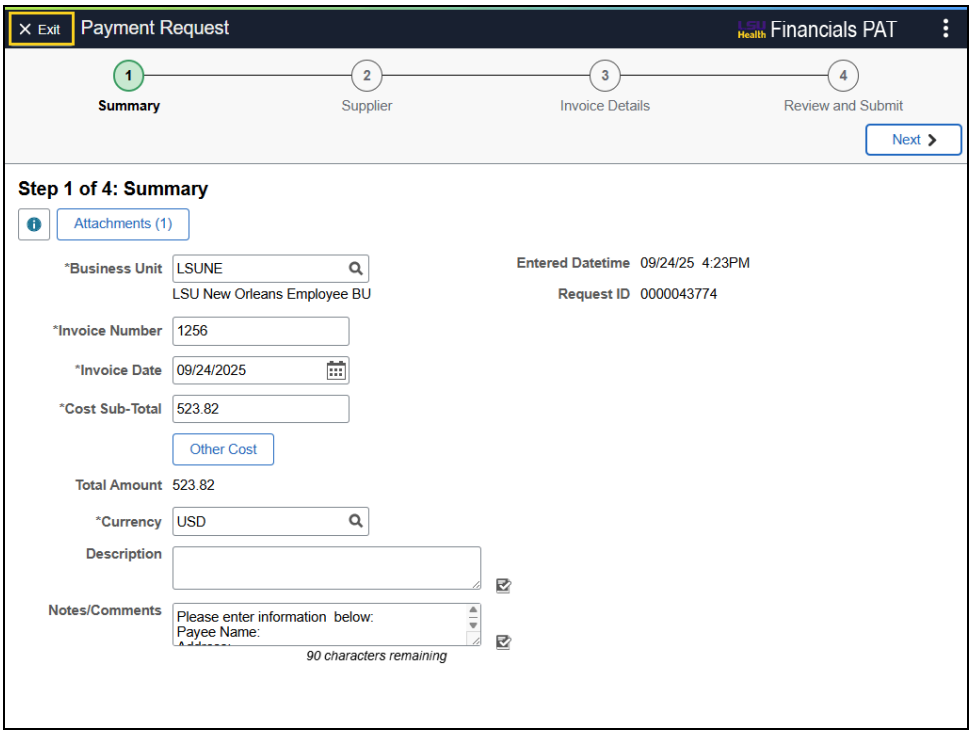
Step	Action
2.	**Payment Request - Save For Later** ***PRP - Not upgraded*** In fluid payment requests, the ability to ***'Save For Later'*** still exists. However, there is no longer a *button* on the page. Users will need to *select* the *Actions ellipses* to be able to ***'Save For Later'*** from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



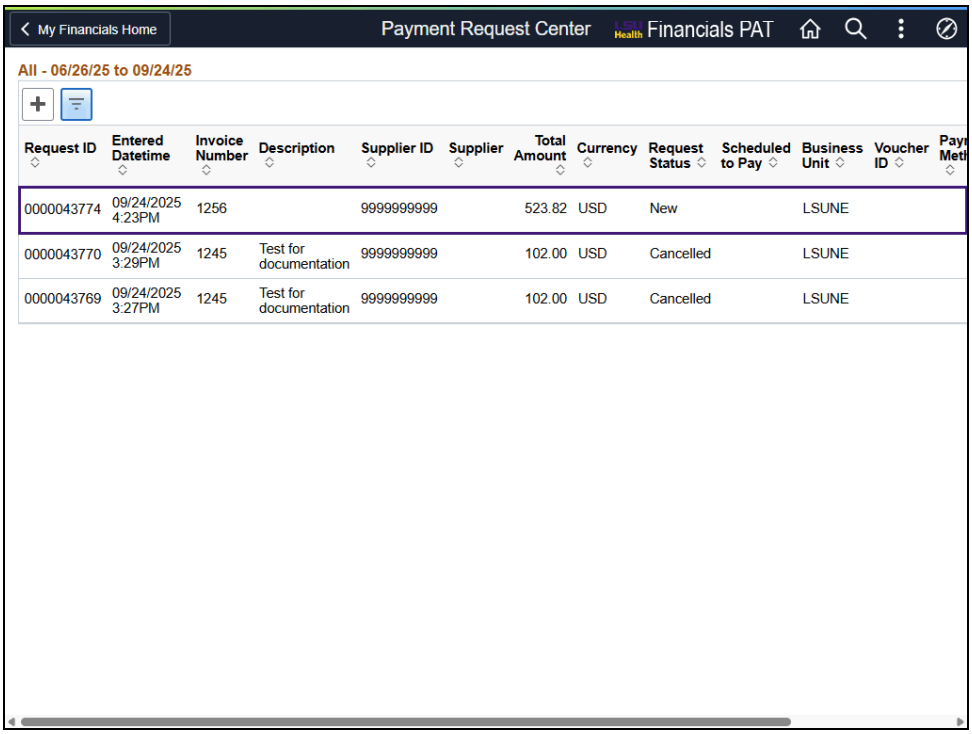
Step	Action
3.	**Payment Request - Save For Later** ***<u>PAT - Upgraded</u>*** Three **(3)** fields <u>must</u> contain data before a ***Save For Later*** can be initiated: 1. *Invoice Number 2. *Cost Sub-Total 3. Attachments Click the **Actions (3 dots)** menu.



Step	Action
4.	**Payment Request - Save For Later** ***PAT - Upgraded*** Click the **Save For Later** link. Save For Later

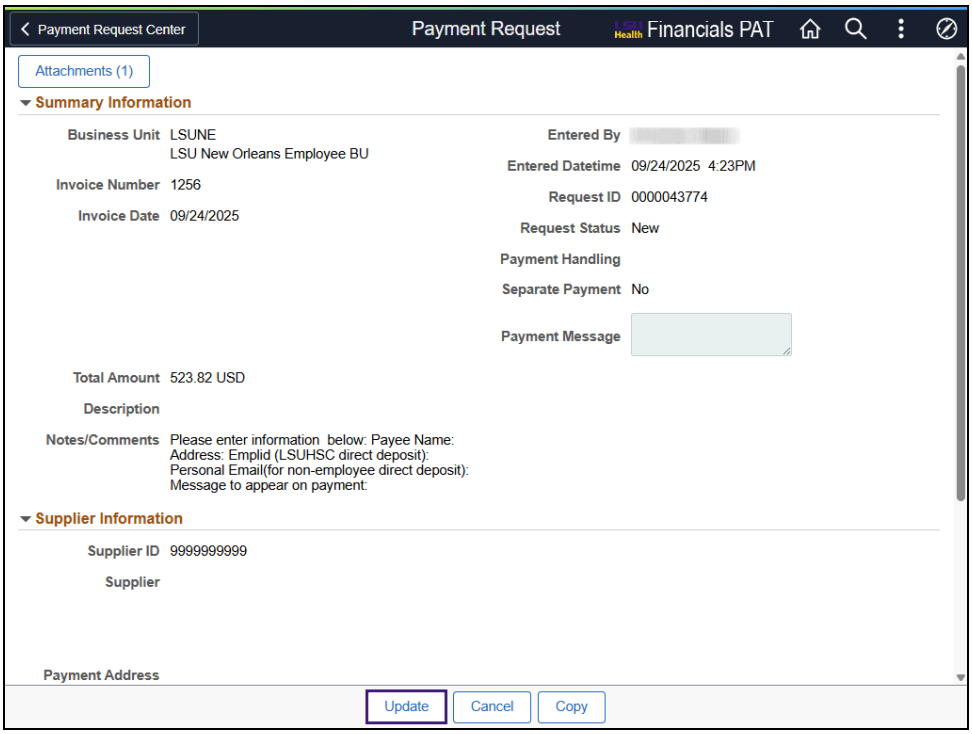


Step	Action
5.	**Payment Request - Save For Later** ***<u>PAT - Upgraded</u>*** ***NOTE: A green bar displays at the top of the page stating the save is in progress. When completed, the Payment Request number is provided.*** Click the **Exit** button.

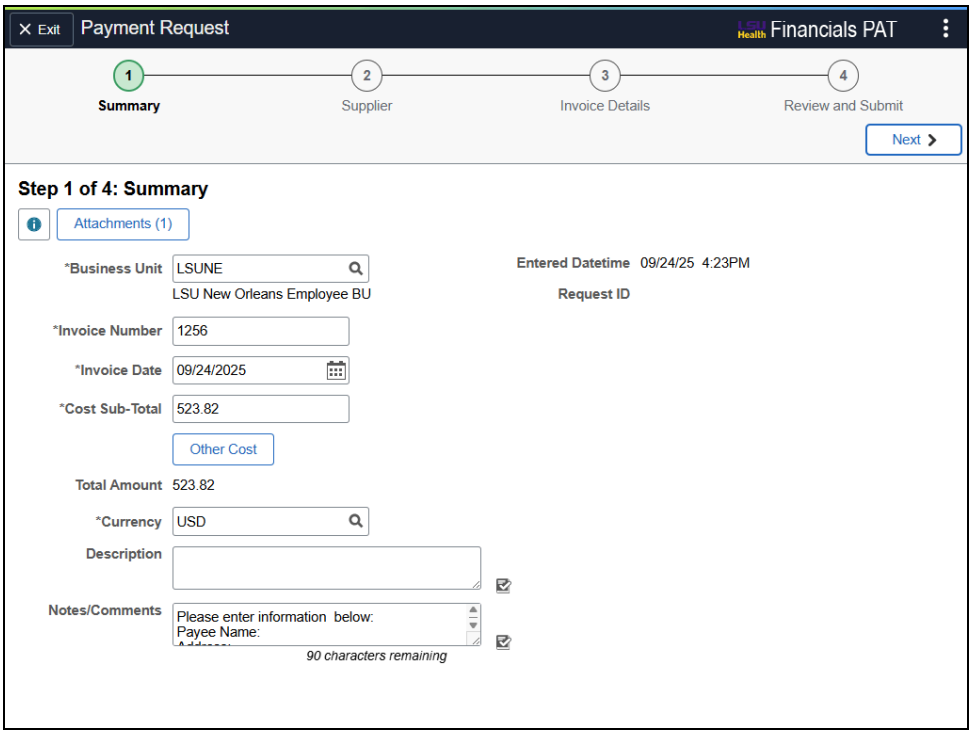


Request ID	Entered Datetime	Invoice Number	Description	Supplier ID	Supplier	Total Amount	Currency	Request Status	Scheduled to Pay	Business Unit	Voucher ID	Pay Meth
0000043774	09/24/2025 4:23PM	1256		9999999999		523.82	USD	New		LSUNE		
0000043770	09/24/2025 3:29PM	1245	Test for documentation	9999999999		102.00	USD	Cancelled		LSUNE		
0000043769	09/24/2025 3:27PM	1245	Test for documentation	9999999999		102.00	USD	Cancelled		LSUNE		

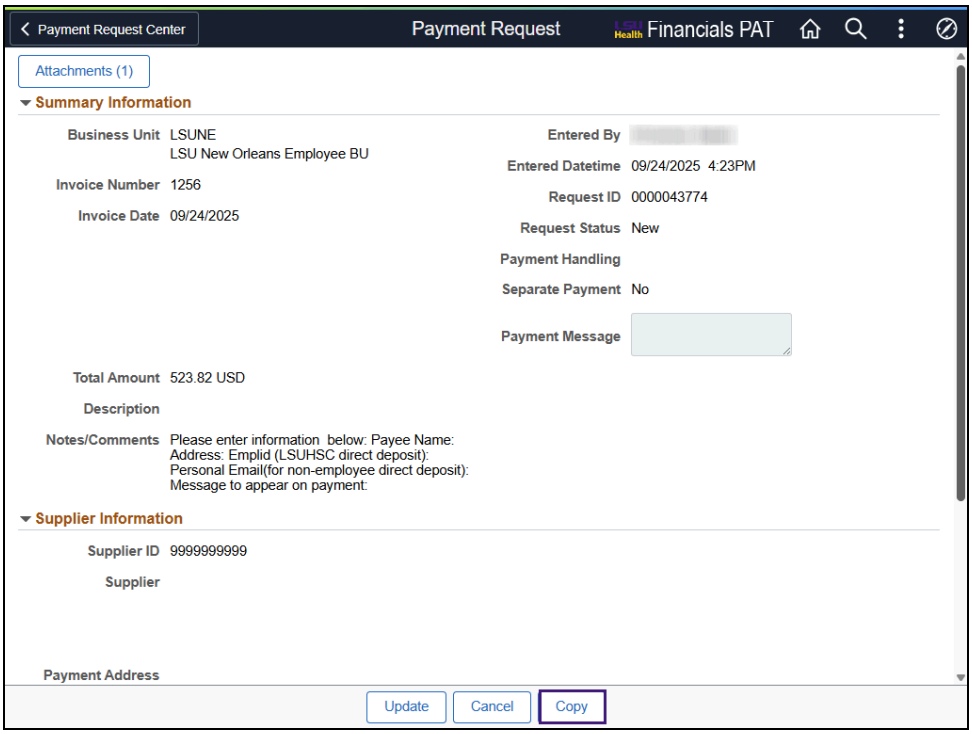
Step	Action
6.	**Payment Request - Update** ***PAT - Upgraded*** The *top line* is *always* the *most recent* request. *Select* the ***Payment Request*** you wish to continue with by *clicking* anywhere on the *desired line.*



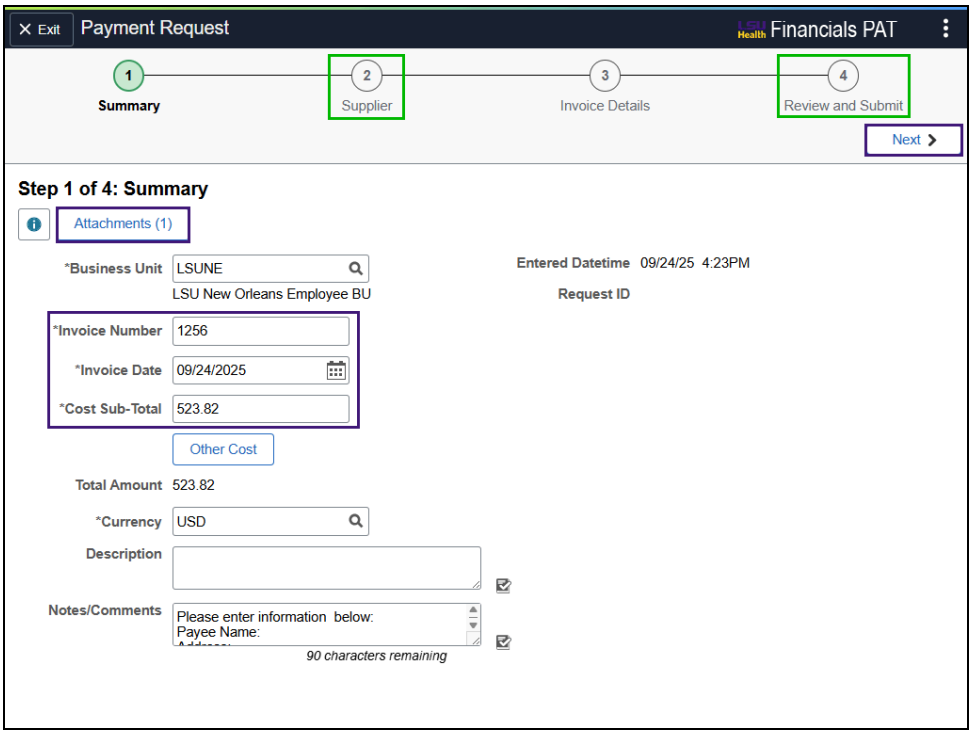
Step	Action
7.	**Payment Request - Update** ***PAT - Upgraded*** To *continue* working on the *Payment Request*, the user must scroll to the *bottom* of the *Summary Page* and *select* the ***Update button***.



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



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



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

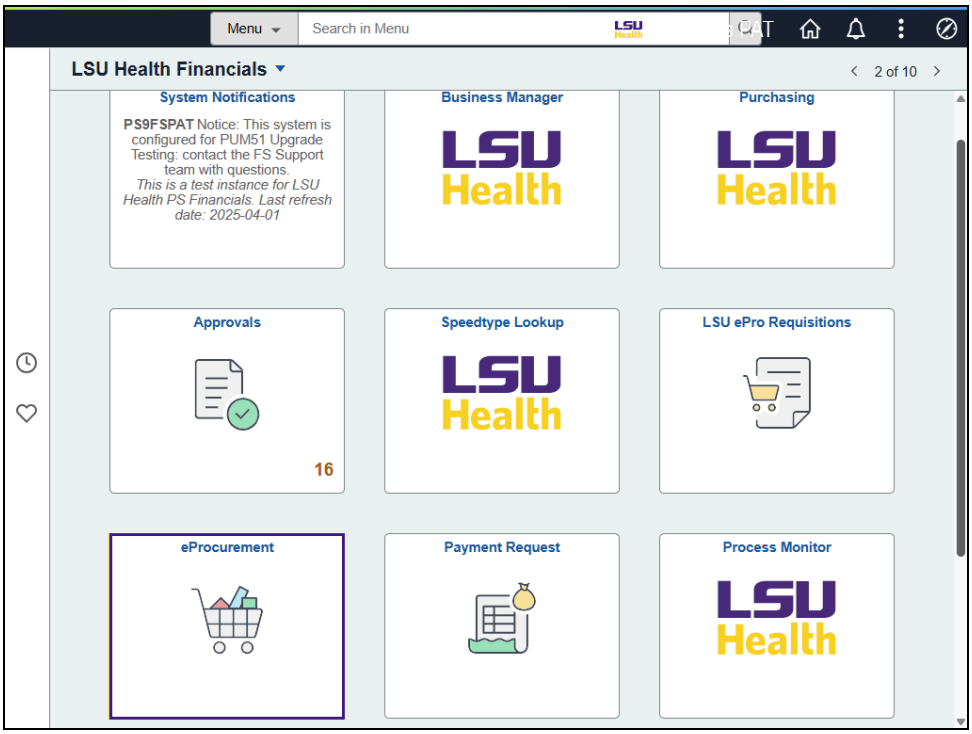
Step	Action
12.	************WARNING************ **Payment Request - Cancel** ***PAT - Upgraded*** If the user wishes to **Cancel** the payment request, s/he will select **OK**. If the user does **not** wish to **Cancel** the ***Payment Request***, s/he will select the ***Cancel*** button to *return*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

eProcurement Overall Look and Feel Changes

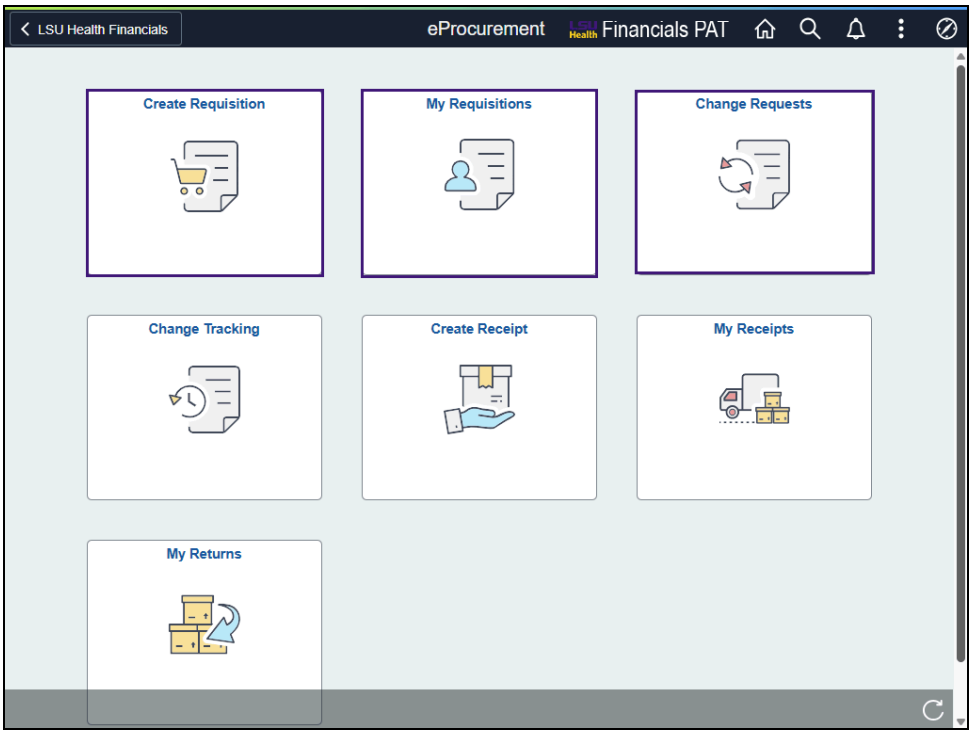
Procedure

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

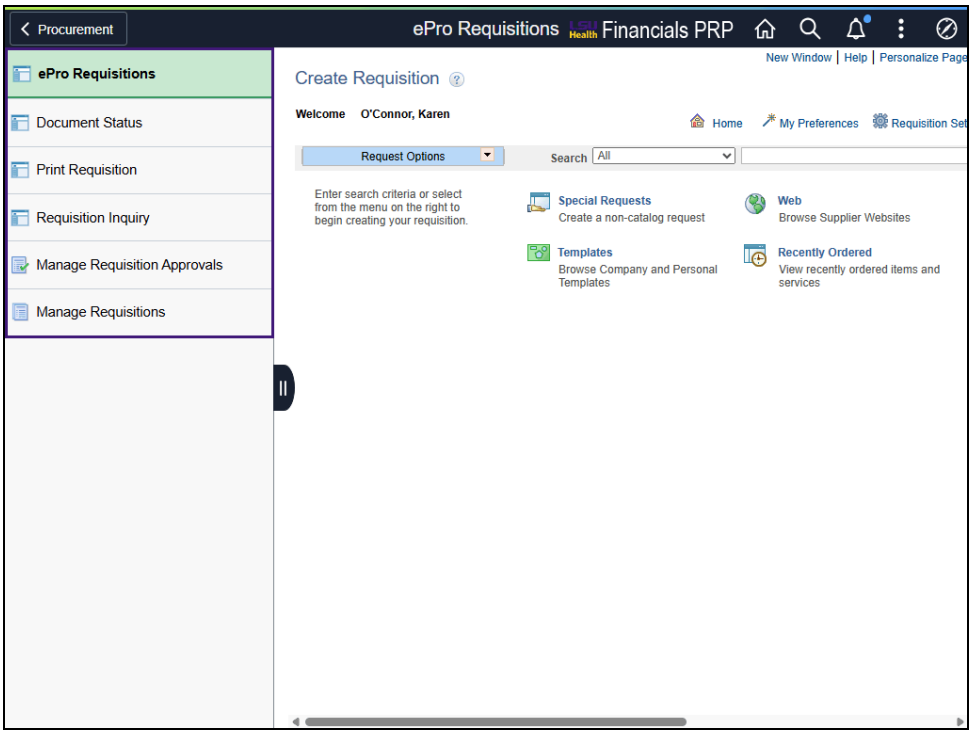
Step	Action
1.	***NOTE: The eProcurement section is for LSUSH users only.***
2.	**eProcurement Requisition Changes** ePro requisitions are now in the *Fluid style*. This *change* presents a *significant "look and feel" difference* to the user. But the *functionality* remains the *same*. There are a few 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 *equivalent* to the *Requisitions Settings* page in classic o **Line, Schedule and Distribution Defaults** sections *display* as *collapsed*. Users must expand them to enter default information. o The **Chartfield Distribution** section on the *defaults page includes all* the *chartfield options* and cannot be *personalized* to hide or reorder the fields. • **New icons** • **Justification Comments** – Users should enter the purpose of the purchase • **Mass Change**



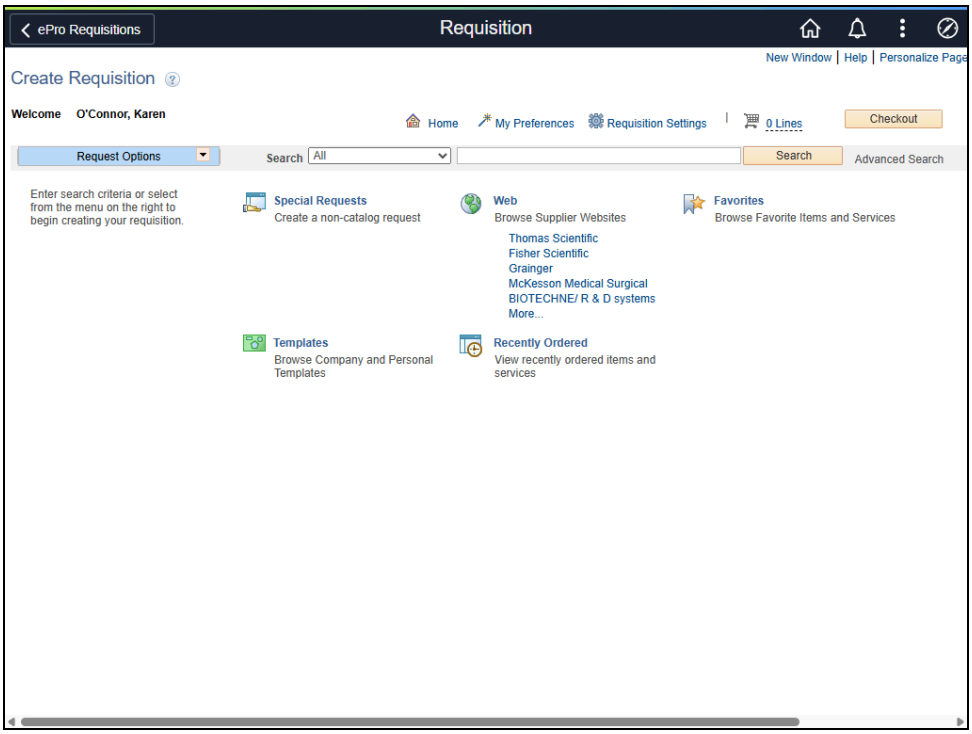
Step	Action
3.	**New Tile with the Upgrade - eProcurement** ***PAT - Upgraded*** The new ***eProcurement Tile*** *includes* several *tiles* available to the *user*.



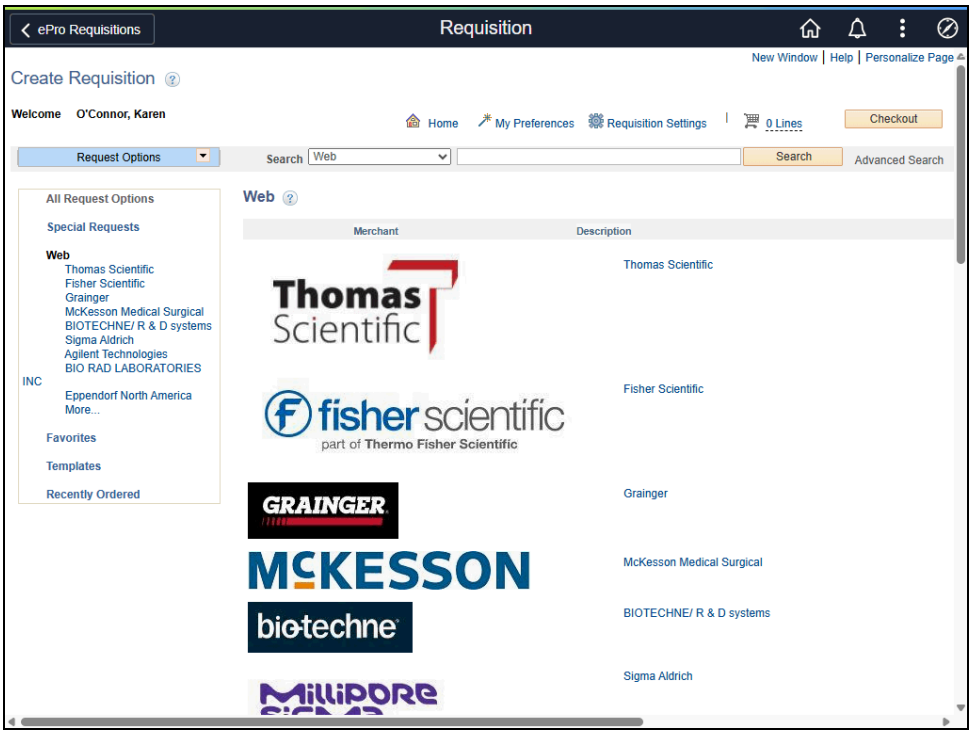
Step	Action
4.	**New Tile with the Upgrade - eProcurement** ***PAT - Upgraded*** The *Create Requisition*, *My Requisitions*, and *Change Requests* are the *tiles* that will be *most used*.



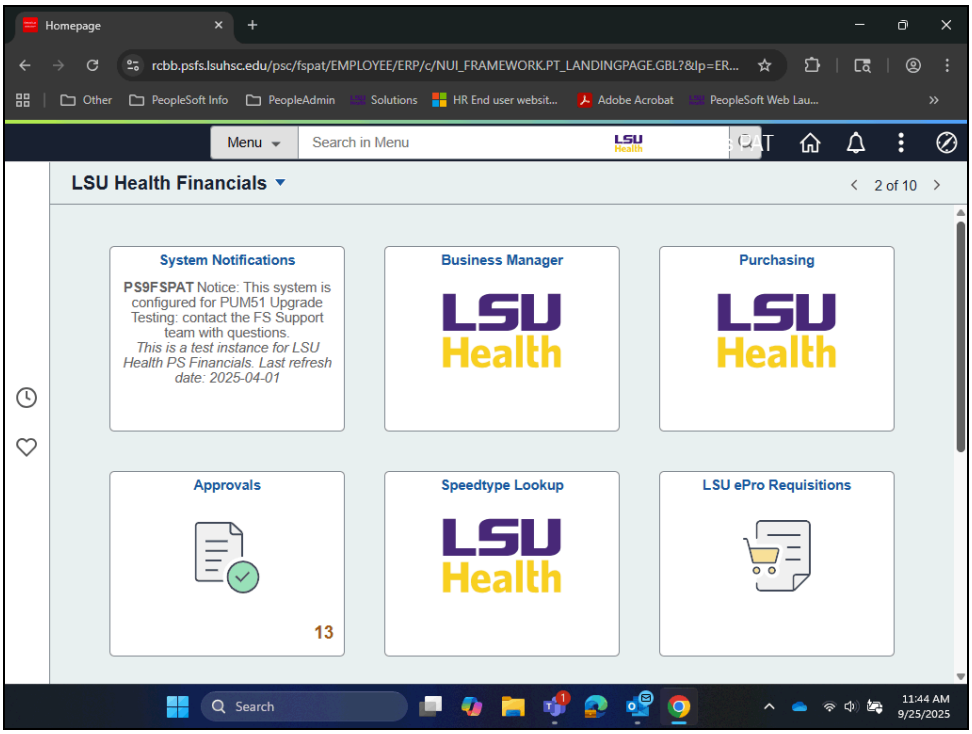
Step	Action
5.	**LSU ePro Requisition Tile Changes** ***PRP - Not Upgraded*** The **LSU ePro Requisitions Tile** may still be used to *perform Document Status Inquiry*, *Requisition Inquiry*, and *Manage Requisition Approvals* if desired. ***You may no longer access ePro Requisitions to create reqs from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



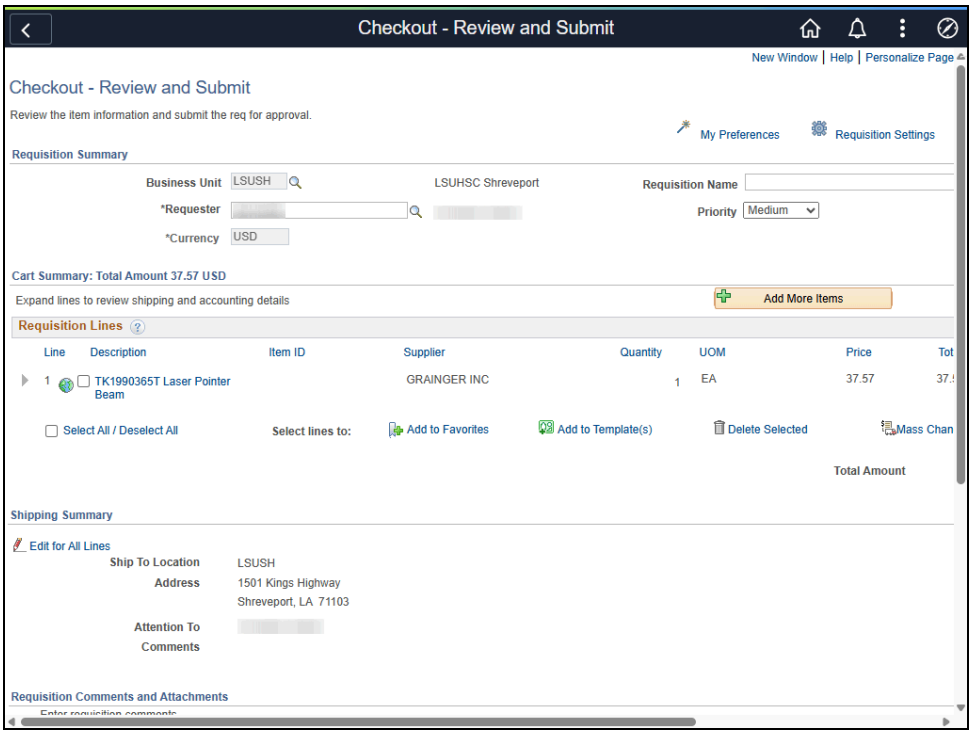
Step	Action
6.	**LSU ePro Requisition Tile Changes** ***PRP - Not Upgraded*** After completing **Requisition Settings**, users will see this screen.



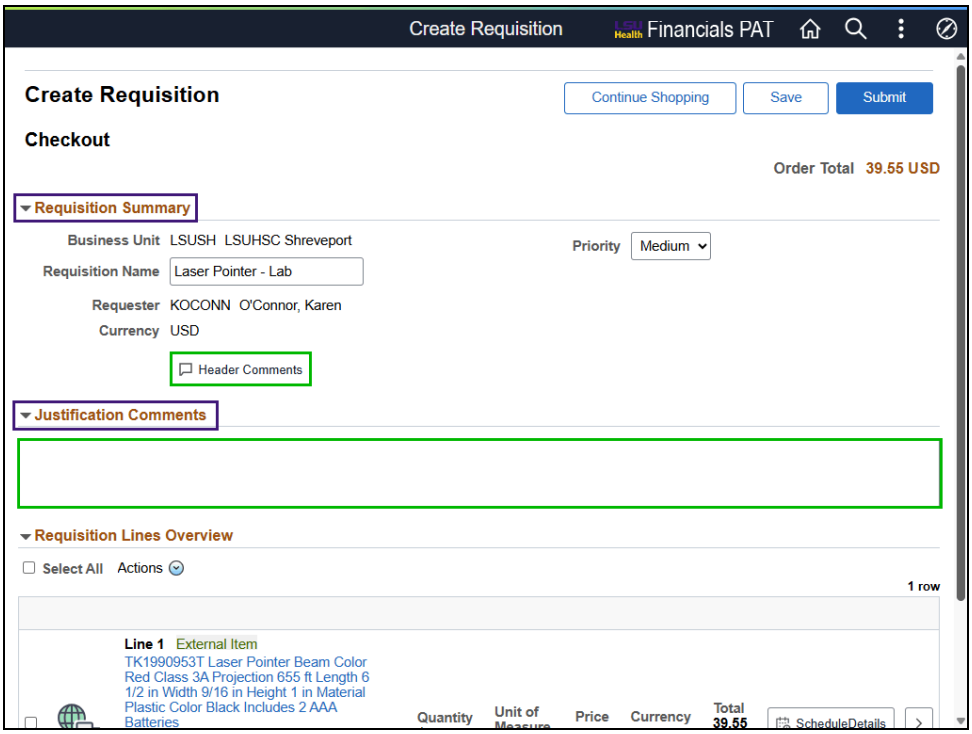
Step	Action
7.	**LSU ePro Requisition Tile Changes** ***PRP - Not Upgraded*** Once the user selects **Web**, s/he will see this page.



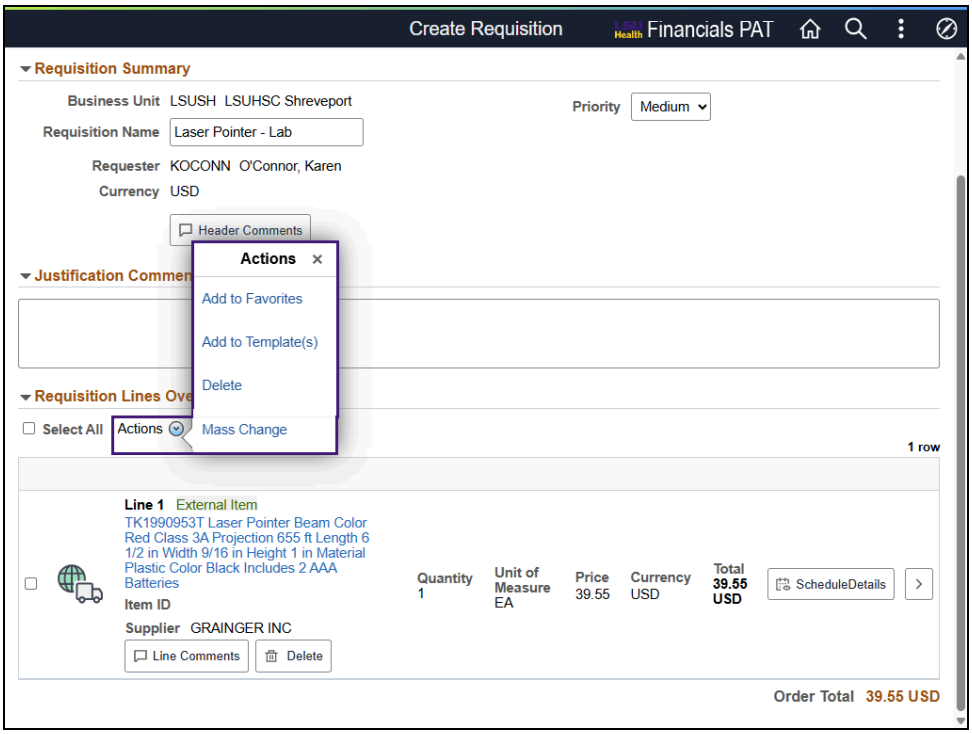
Step	Action
8.	**LSU ePro Requisition Tile Changes** ***<u>PAT Upgraded</u>*** Once the user *sets* the *default*, then the *main page displays*. ***NOTE: The Cart icon and the Cart section are located at the top of the page.***



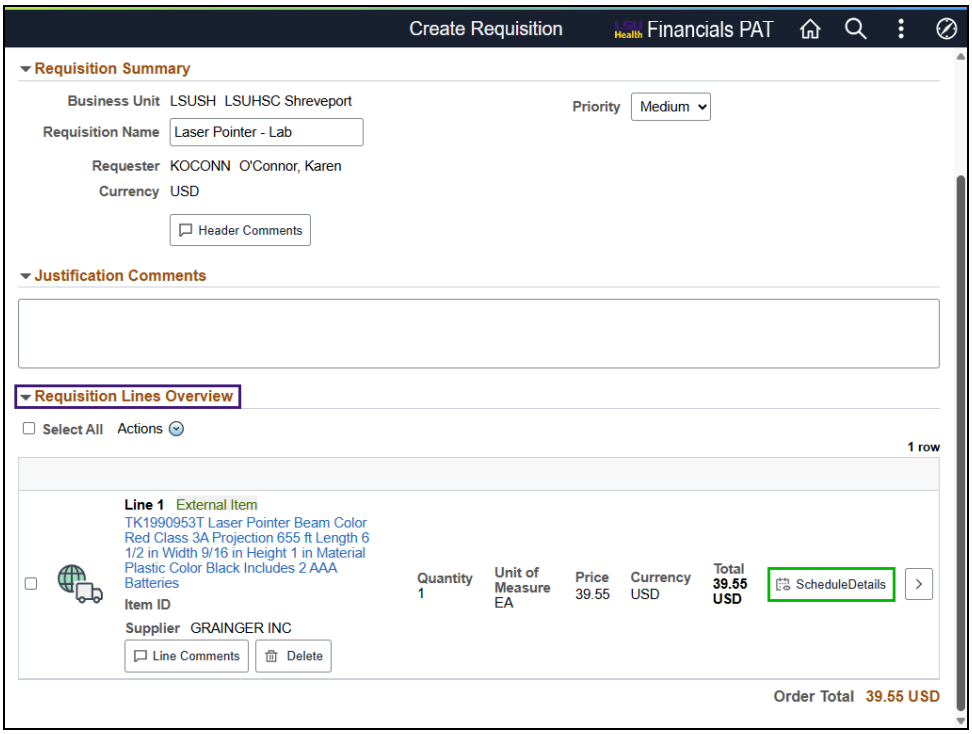
Step	Action
9.	**ePro Requisition Page** ***PRP - Not Upgraded*** There are *appearance changes* in the *ePro Req* page.



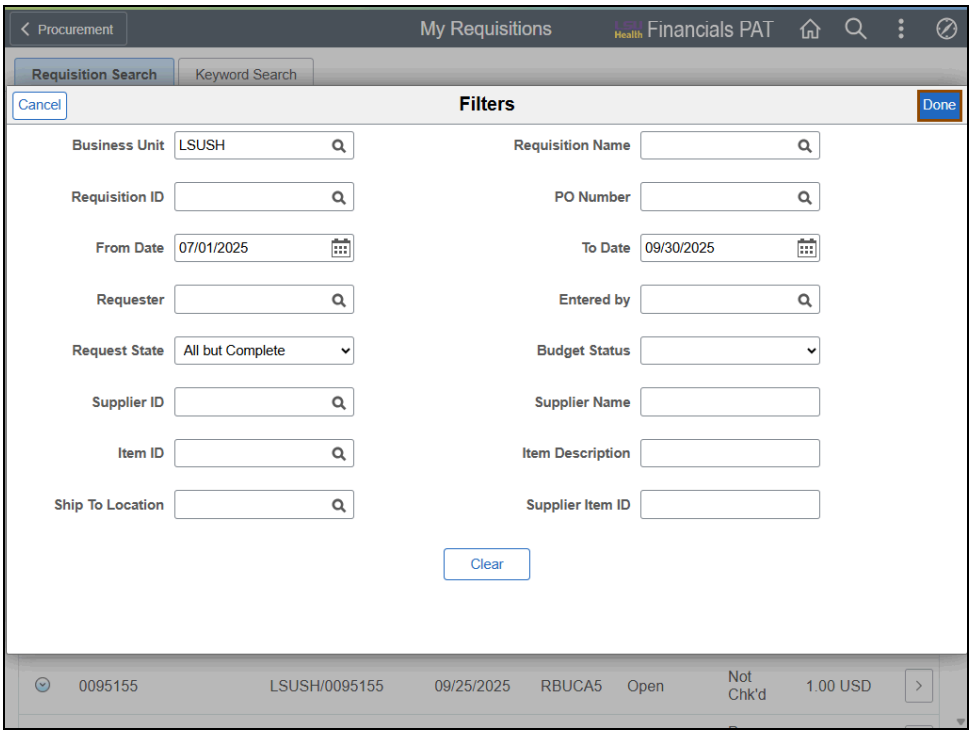
Step	Action
10.	**ePro Requisition Page** ***<u>PAT - Upgraded</u>*** Notice that the *Header Comments* is a *button* in the ***Requisition Summary*** section. *Select* the button to *add comments* and *attachments*. *Justification Comments replaces Approval Justification*. Users should *enter* the **"5Ws"** that Dr. Benefield has *requested* of *all Shreveport users*.



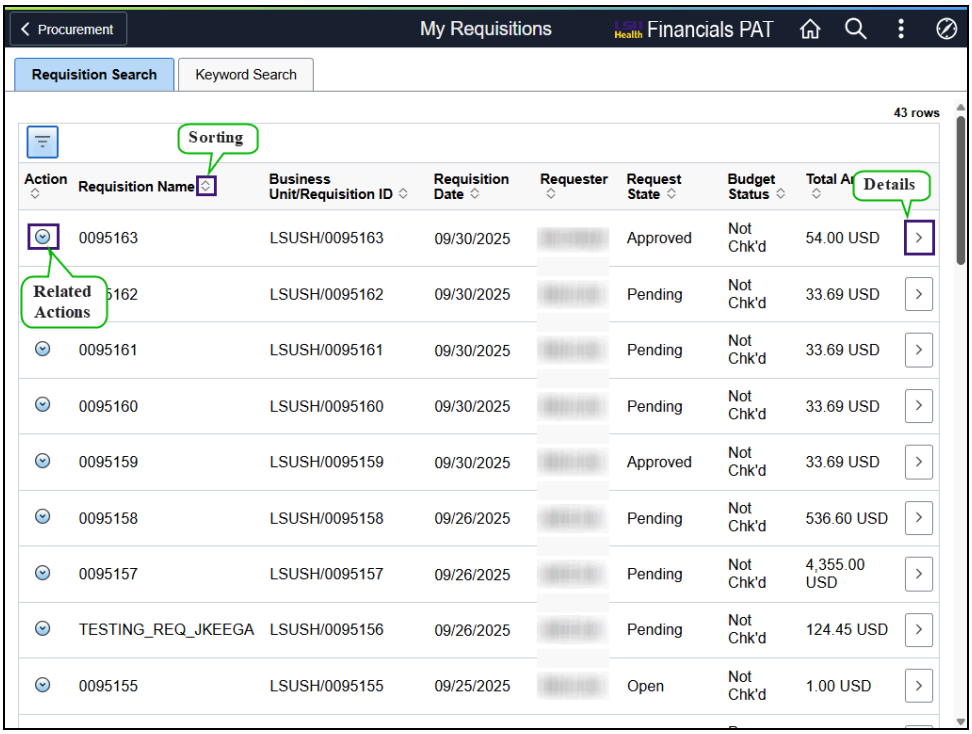
Step	Action
11.	**ePro Requisition Page** ***<u>PAT - Upgraded</u>*** Notice the *Action* icon in the ***Lines*** section. This is where a user may *add* the *item* to their *Favorites*, a *template*, *delete it from the cart* or *make mass changes* to the requisition.



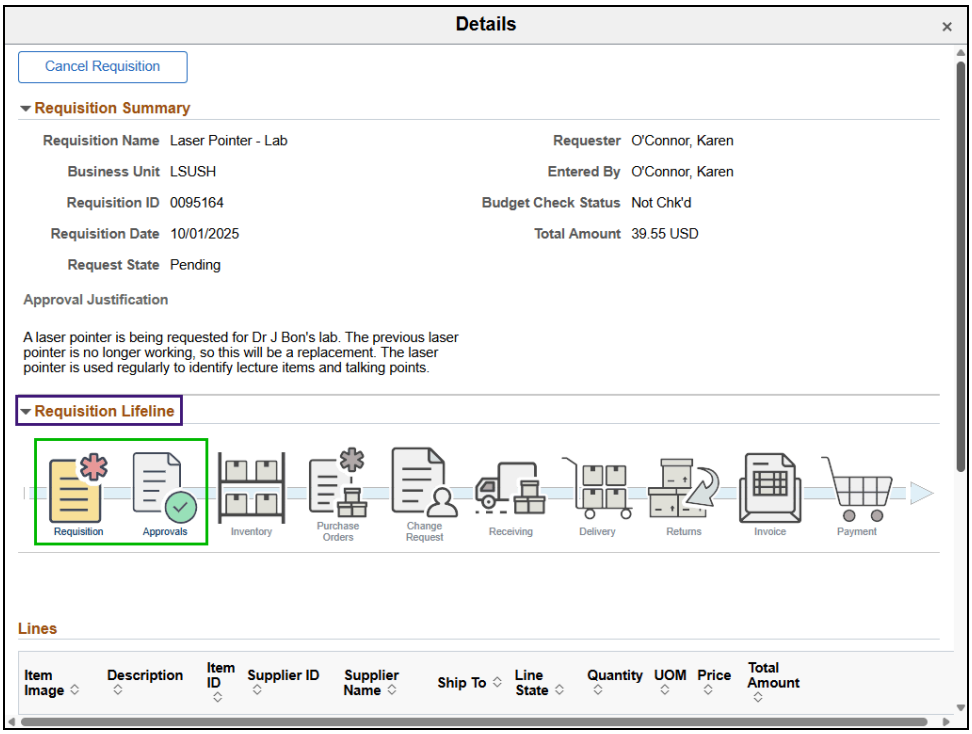
Step	Action
12.	**ePro Requisition Page** ***<u>PAT - Upgraded</u>*** In the ***Lines section***, notice the *Schedule Details* button and the *arrow* at the *far right* of the line. That is *where* the *chartfields* for the *line and* the *schedule display* may be updated. Users would be able to *select Amount Only* in the ***Line Details***, select the *Ship To location* in the ***Schedule Details***, or even *split* the *chartfield accounting tags*. ***NOTE: The eProcurement Delta Document and the eProcurement Training Guide detail all information on the ePro module.***



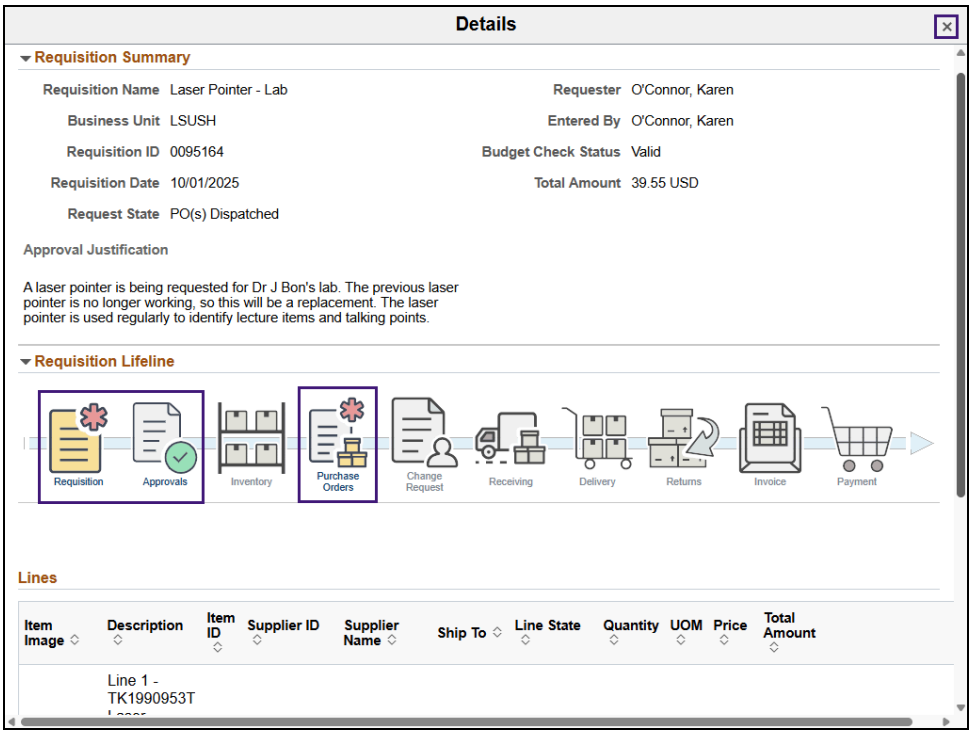
Step	Action
13.	**eProcurement - My Requisitions Tile** ***<u>PAT - Upgraded</u>*** Using **eProcurement Home** and the **eProcurement Tile**, users have *access* to the ***My Requisitions Tile***. This tile *grants* the user *access to review*, *update*, and *manage inquiries*. After selecting the ***My Requisitions Tile***, the user will need to *set filters* the *first time* they *access* the page. The following *fields* <u>must</u> be *entered* at a minimum: *Business Unit*, *From Date*, *To Date*, and *Request State*. The user may also wish to *enter* the *Requester* to *focus results*. Once the *filters* are *set*, the user should *select* the ***Done*** button. The **My Requisitions** page *displays requisitions meeting the filter criteria.*



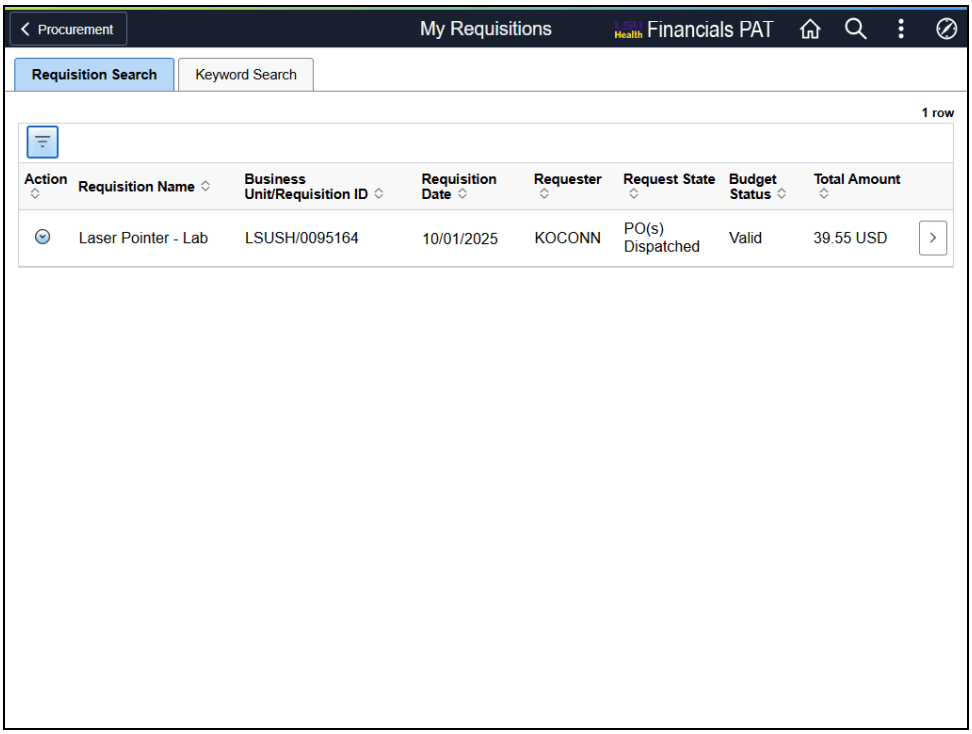
Step	Action
14.	**eProcurement - My Requisitions Tile** ***<u>PAT - Upgraded</u>*** In this screenshot, notice the *three icons highlighted* by the *purple* outline. **Sorting** - *Next to the Requisition Name* are ***two arrows***, *facing up and down*. You see this *same icon* in the *header row across the display*. The *two arrows* mean that the *field may be sorted*. *Selecting* the *arrows* for any of the *headers sorts all* of the *results* by that *field*. **Related Actions** - At the *left* side of *each requisition*, the ***Related Actions*** Icon displays. Selecting the ***Related Actions*** icon *produces* a *menu* that allows the user to *navigate* to *Details*, *Copy*, *Budget Check*, *View/Print*, *Create Receip*t, *View Approvals*, and *Inquiry*. The ***Related Actions*** *available* depend on the ***Requisition Status***. **Details Arrow** - At the *right end of the row*, select the ***Details*** arrow to *expand* to the *ePro req*.



Step	Action
15.	**eProcurement - My Requisitions Tile** ***<u>PAT - Upgraded</u>*** *Requisition pending Approval and Budget Check.*



Step	Action
16.	**eProcurement - My Requisitions Tile** ***<u>PAT - Upgraded</u>*** Requisition *sourced* to *PO and Dispatched*. *Notice* the *differences* in the *links under* the *icons*. When *active and selectable*, that indicates that the *requisition* has been *processed through that phase of the lifeline*. Users may *select* the *icon* to *inquire* further. To *close* out the *page* and *return* to the ***My Requisitions*** list, *select* the small **'x'** at the *top right* of the *inquiry* page.

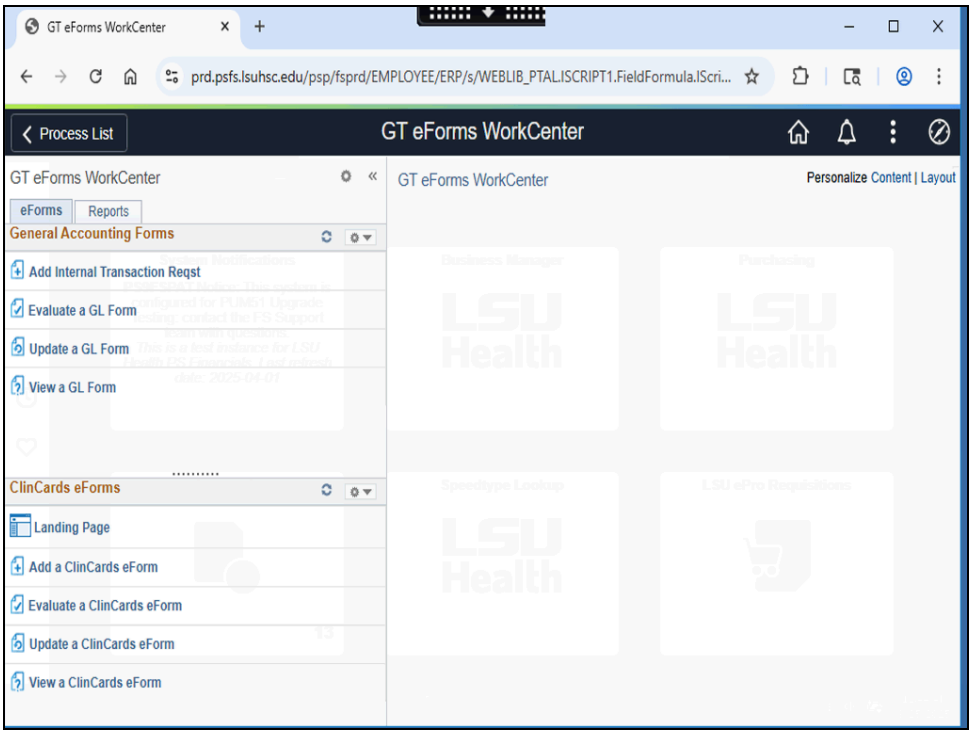


Step	Action
17.	This completes ***eProcurement Overall Look and Feel Changes***. **End of Procedure.**

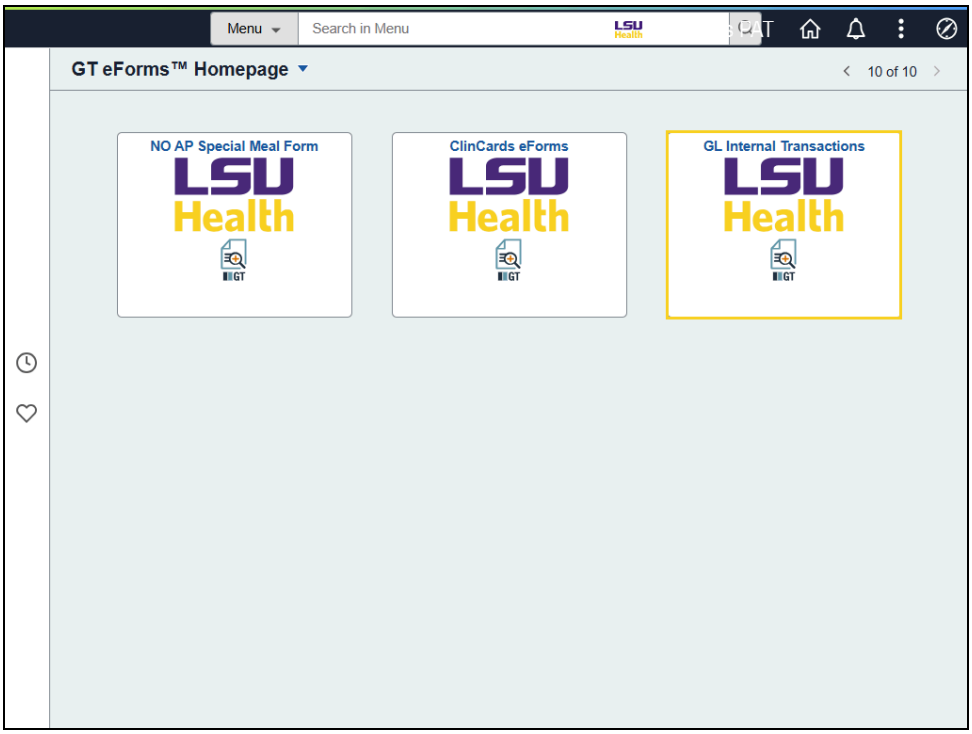
eForms

Procedure

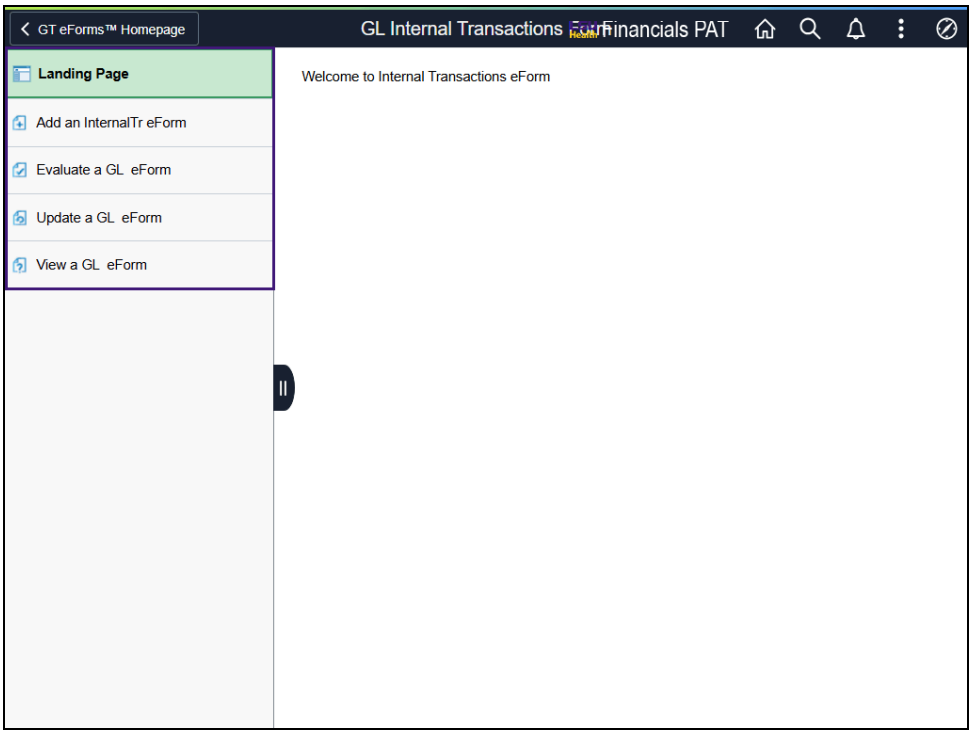
In this topic you will learn about **eForms**.



Step	Action
1.	**eForms** *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*. ***PRP - Not Upgraded*** *Accessing eForms from eForm Workcenter.*



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



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