

Welcome to the Financials 9.2 Upgrade Delta Guide! As with all upgrades, PeopleSoft has implemented a few performance improvements. While all of the familiar navigations and features within PeopleSoft Financials are still available, a new '**Fluid Navigation**' is introduced as an alternative means of accessing the system menus and data. The new concepts associated with the **Fluid** interface are introduced first, but that is not all that is in store for this upgrade.

There are also some noteworthy changes to the system as well. The **Search** functionality has been expanded to include the Grants module through the **GM Award Search**. The expanded **Search** feature also enables you to delve for Vouchers, Requisitions, Purchase Orders, Journals, etc. The **Document Status** pages have also been enhanced with the addition of icons to assist in your document review. If you are curious as to what is around the corner, the **Coming Soon** section provides a glimpse of what you can expect to see in the next few months. For more information on these topics, see the *Notable Changes* section of this document.

It is important to note you can still navigate and use the Financials application by utilizing the Classic menu across the top of the application screen. Also, please be aware that not all users will see each of the items noted in these examples; your access is directed by your security permissions.

Let's Talk Terminology

With new performance improvements comes new terminology. The definitions below are provided to assist you in understanding the **Fluid** enhancements made to the system. While the definitions are termed here, the functionality of each will be discussed in other sections of this document.

Fluid – Fluid is a new interface where tiles are added to portal homepages for navigational ease instead of the Classic cascading pagelets/menus. Fluid also allows PeopleSoft to scale from small mobile devices to large desktop screens. The navigational changes will be available to users with this upgrade however, the scaling features will be rolled out at a later time.

Homepage – Homepages are the starting point for PeopleSoft navigation. The system defaults you into *Classic Homepage* when you login. A second page, *LSU Health Homepage*, has been configured to facilitate Fluid navigation.

Workcenters – Workcenters are a collection of links, reports, queries, navigations, and analytics geared to core users of each module. Access to workcenters will be phased for each module post-upgrade.

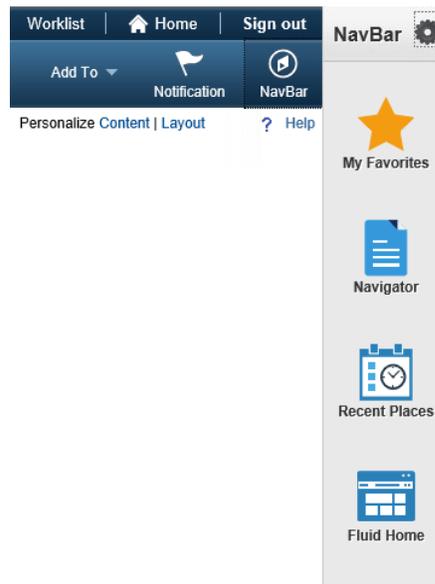
Tiles – Tiles are a fluid navigation component, so are used to navigate to fluid menu items. Tiles are located on the *LSU Health Homepage*.

Navigation Collections – Navigation Collections are accessed through tiles and provide function-related navigational access.

NavBar – The NavBar is an alternative navigation structure to using the Classic Menus for process-oriented tasks. Fluid Menus are accessed via the NavBar. Users are encouraged to utilize this new feature, and will reach the same navigational pages retrieved through the Classic Menu structures.

The NavBar

The NavBar is a new feature in version 9.2 and is used in conjunction with Fluid features. Navigation is similar to the Classic menu, but displays on the right of the page. The NavBar provides navigation options to *My Favorites*, *Navigator* (which expands to show the classic menu hierarchy), *Recent Places*, and *Fluid Home*.



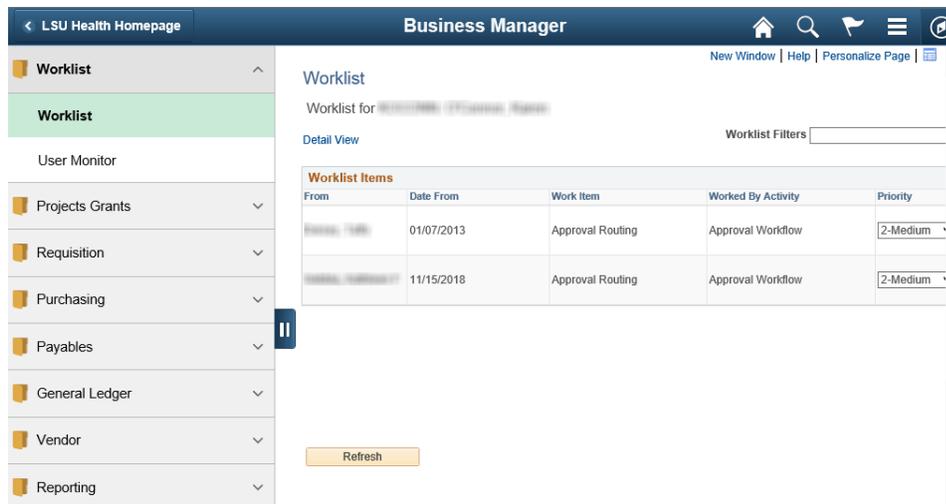
Getting Started with Fluid Home

Clicking the *Fluid Home* button routes you to the *LSU Health Homepage*. The *LSU Health Homepage* is comprised of tiles that provide access to the application and the performance of routine tasks within the Production environment. Tiles, also called grouplets, can be purpose (i.e., a Navigation Collection) or role specific, and can be compared to pagelets of a classic homepage. A user will simply click the tile to view additional task or information options associated with the application.

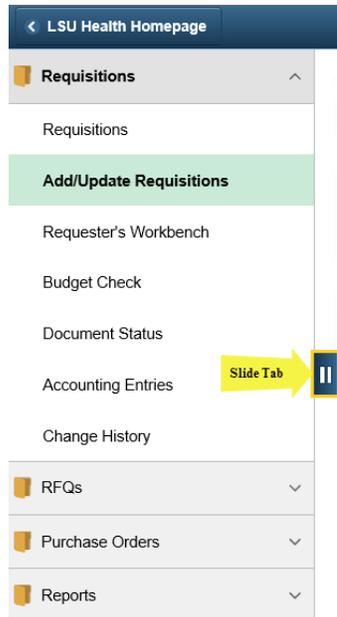


At this time the *LSU Health Homepage* contains two tiles from which the user can select to view information or complete a task: the **Business Manager** tile and/or the **Purchasing** tile. The user’s *security access determines tile availability*, so some users may have both tiles while others may have only one or none at all.

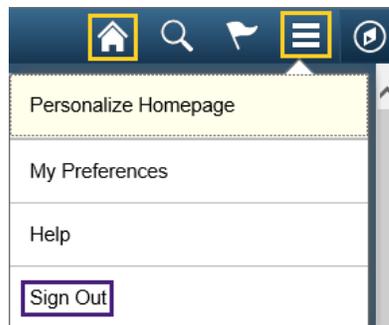
The **Business Manager** tile groups tasks and functions most commonly used by Business Managers in one easy access place. Navigation collections for Requisitions, Purchasing, Project Grants, etc. are accessible from the menu located on the left side of the page. When a task or function is selected on the left side, it opens on the right side of the page. The first item in a navigation collection always opens by default.



The **Purchasing** tile displays Requisition and Purchase Order tasks and information options. *The navigation options displayed will vary based on security access and job role*. Use the slide tab to minimize/maximize the menu panel.

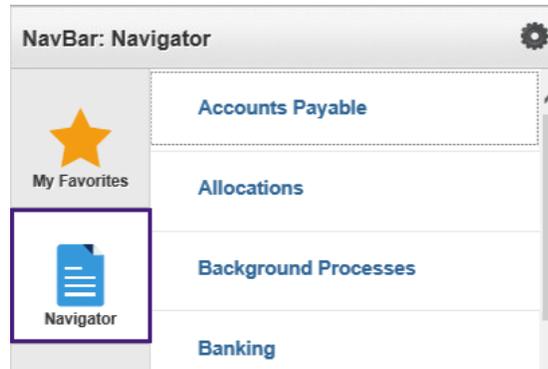


When working in fluid pages, the user will not see the **Worklist** or **Sign Out** links at the top of the page. Select the **Actions List** icon to display the options and locate the **Sign Out** link. Alternatively, the user may select the **Home** icon from the blue bar and the traditional **Sign Out** link displays.

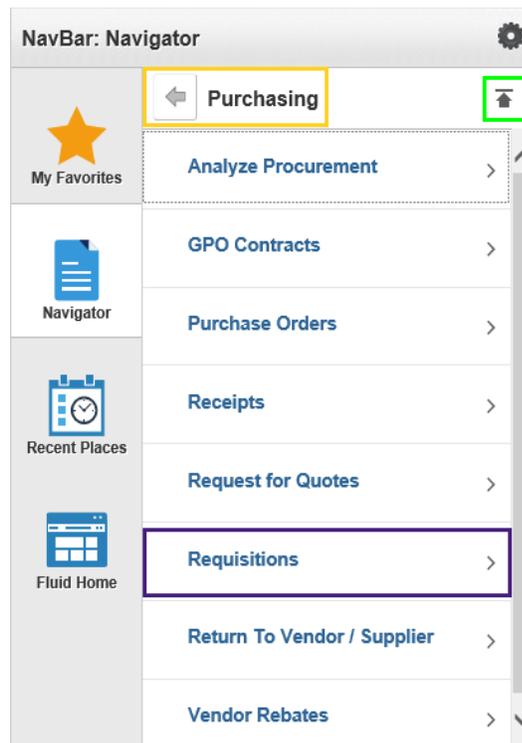


Navigating Navigator

The **Navigator** button, accessed on the NavBar, is an alternate method for navigating the system versus using the **Classic Menu**. You can still use the **Classic Menu** to navigate however, the **Navigator** offers an alternative way to navigate through menu items that can be easier to use on smaller screens. When you click on the **Navigator** button, menu options will display to the right.



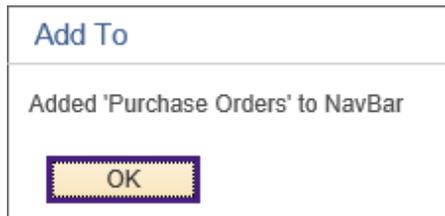
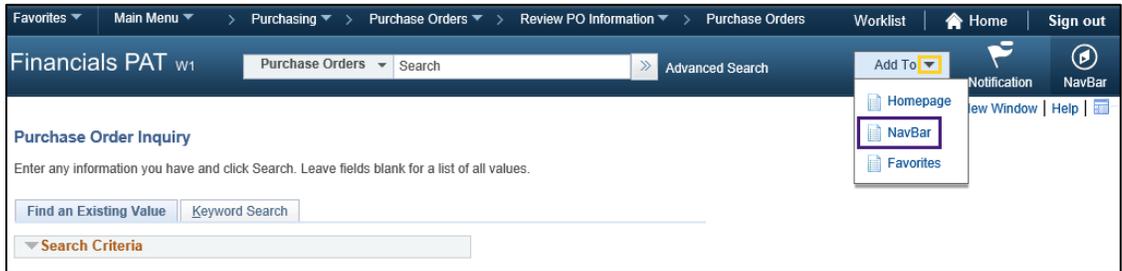
The *Navigator* functions the same as the *Classic Menu*. Simply click on the desired function link to either view additional options or a page. Unlike the *Classic Menu*, you do not have bread crumbs or cascading menus in the *Navigator*. As you click menu items they move to the top of the *NavBar* list. There are two **Back** buttons next to the last menu item clicked. The **Back** button to the *left of the menu item name* (highlighted in yellow) will take you to the *previous menu*. The **Back** button to the *far right* (highlighted in green) will return you to the *main Navigator menu*.



NavBar Basics

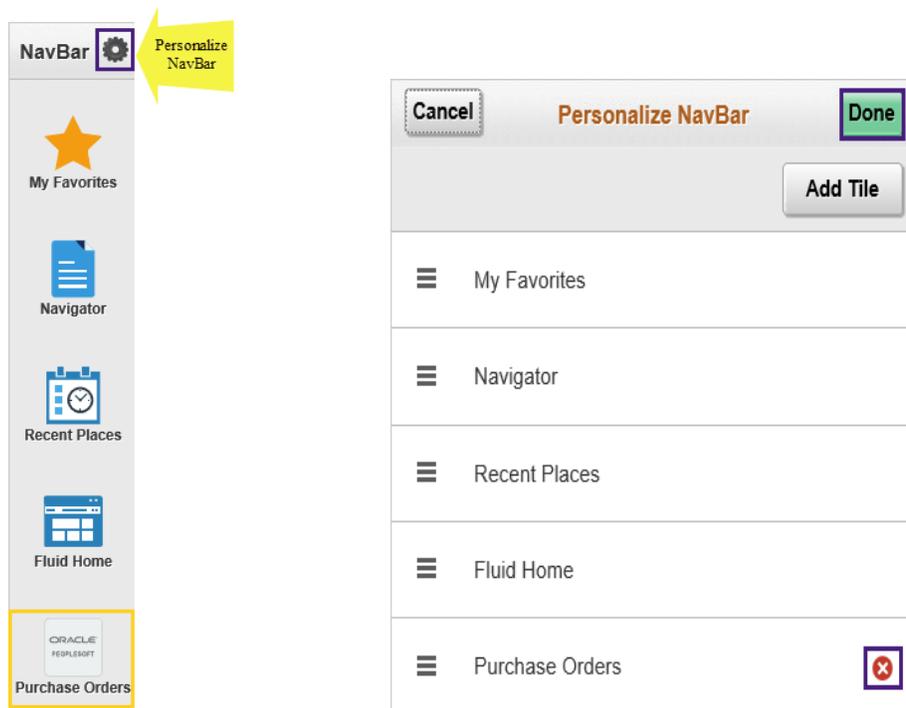
The **NavBar** can be personalized by adding tiles to the *NavBar* list. You must be on the page you wish to add as a tile. Click the *Add To* drop-down arrow and

select the *NavBar* option. A confirmation will display stating your tile has been added to the *NavBar* list.

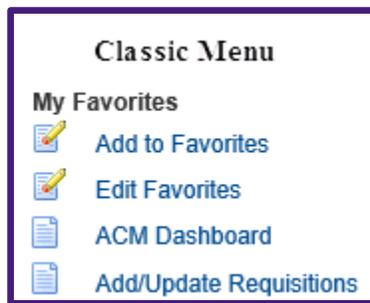
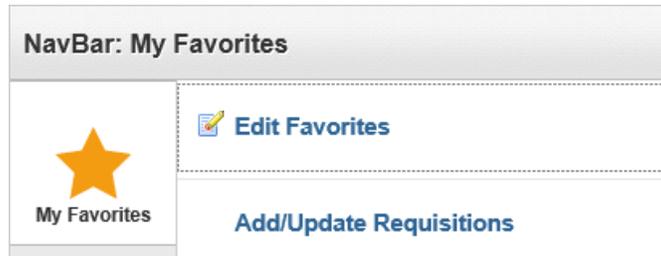


The new tile will display at the bottom of the *NavBar* list. You can remove an added tile by clicking the **Personalize NavBar** wheel. Click the **Delete** option and then press the **Done** button.

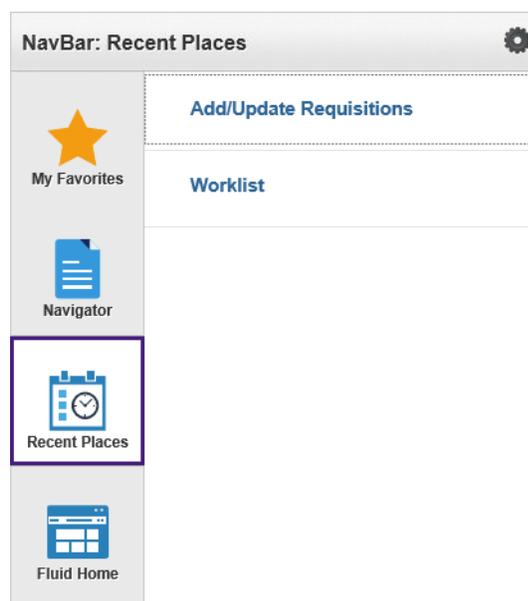
NOTE: While adding tiles to the *NavBar* is available and demonstrated here, users are encouraged to use the *My Favorites* option rather than adding tiles to the *NavBar*.



My Favorites displays your *previously* saved favorites. The **My Favorites** shown under the new NavBar come from any **My Favorites** you add via the **Classic Menu** and/or from a page. You cannot add favorites from the **NavBar**; you can *only* edit and view them.

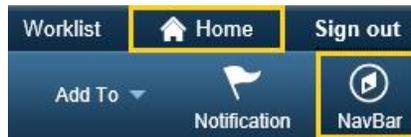


Recent Places are the five most recent pages you have viewed in the system. These pages are the same as those listed in the **Recently Used** section found when clicking on the **Favorites** link located in the top left corner of the page of the **Classic Menu**. Users can also access their worklist from here.



Switching from Fluid to Classic Navigation

Switching your navigations from *Fluid* to *Classic* is easily accomplished by clicking the **Home** link that appears at the top right of the screen. Revert back to using the *Fluid* navigations by simply pressing the **NavBar** icon, then selecting *Navigator*.



When navigating between *Classic* and *Fluid* navigation, *breadcrumb functionality may become compromised*. Clicking the **Home** link will clear your breadcrumbs, but also returns you to the **Classic Homepage**.

The Notification Flag

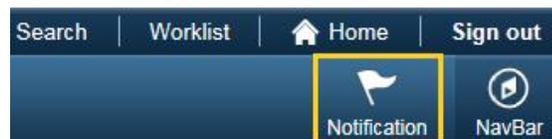
The *Notification* flag displays a number *count* on the flag icon in the banner to notify users of any new Actions.



Actions are links that allow you to navigate directly to an action needing your attention. Users will only receive notifications for Requisitions or Voucher approval items requiring their attention.

Notification Actions will include:

- Approve, Deny or Hold a Requisition or Voucher. Once Approved the Notification count is removed or reduced.

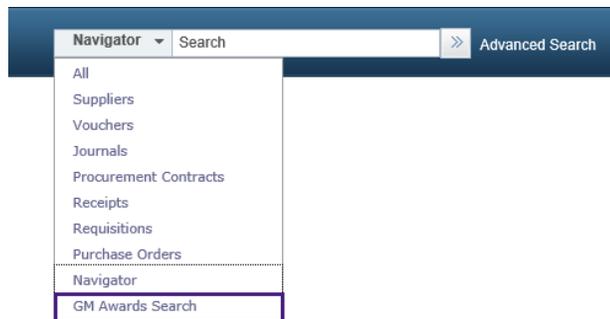


Notable Changes

Working With Expanded Search and GM Awards Search

The expanded **Search** feature enables a user to conduct a Global Search or a Search Pages search, thus providing a more robust search engine for delving into Vouchers, Requisitions, Purchase Orders, Journals, etc. Global Search allows users to search across all search indexes or a specific group of search indexes. The Search Pages feature adds a Keyword Search tab that lets users execute deeper, more free-form searches to access application data.

The GM Award Search provides a quick way for a user to navigate to information for grants/awards. Access to this search is assigned through security. The Search at the top of the screen defaults to the Navigator. If you have the needed access, using the drop-down selector arrow, you will choose the ‘**GM Awards Search**’ list option.



Enter a Department ID, Award Number, Project ID, or Sponsor ID, and then click the **Search** arrows.



The results of the search display. In this example, department 1495000 was selected and there are 150 results for the department. The *task area* of the search results (left side pane) gives links for Business Unit, Sponsor, Department, Administrator, Status, Award Type, PI, Contract Administrator, and Letter of Credit. Blue information lines that display a number behind it are links that may be selected to narrow down the results retrieved, and are displayed in the ‘work’ area which is the center part of the screen.

▶ New Search

▼ Business Unit

LSUNO (108)

LSUSH (42)

▼ Sponsor

Our Lady of the Lake (17)

LSUHSC Foundation NO (12)

Children's Hospital (10)

National Cancer Institute (10)

[More](#)

▼ Department

1495000 (150)

▼ Post Award Administrator

No Value (149)

0145669 (1)

▼ Award Status

View Search Results

150 results for keyword: "1495000"

150 rows

[LSUNO | 149500004 | SUPPORT FOR VOICE CLINIC | 1999-07-01 | 2099-12-31](#)
LSUHSC Foundation NO | Nuss, Daniel | Project: 149500004A | Reference Award: 673008 | FAIN:

[LSUNO | 149500007 | LIONS UNRESTRICTED GIFT | 1991-05-01 | 2099-12-31](#)
LSUHSC Foundation NO | Berlin, Charles I | Project: 149500007A | Reference Award: 673000 | FAIN:

[LSUNO | 149500023 | FACIAL NERVE REGENERATION | 2001-01-01 | 2001-12-31](#)
AO North America | Steele, Matthew | Project: 149500023A | Reference Award: | FAIN:

[LSUSH | 149501033 | LSU System:Nathan LIFT | 2014-07-15 | 2015-07-14](#)
LSU System | Nathan, Cherie-Ann O. | Project: 149501033A | Reference Award: LIFT-14A-15 | FAIN:

[LSUNO | 14976027A | OLOL \(Prev_EKL\) - Hospital Services | 2013-04-15 | 2013-06-30](#)
Our Lady of the Lake | Nelson, Steve | Project: 14976027NA | Reference Award: | FAIN:

[LSUSH | 149501007 | MISC DONORS DEVELOPMENT FUND | 1998-05-22 | 2099-12-31](#)
Miscellaneous Donors | Stucker, Frederick J | Project: 149501007A | Reference Award: | FAIN:

[LSUNO | 158200080 | JUVENILE JUSTICE PROGRAM - BRIDGE CITY | 2004-07-01 | 2008-06-30](#)
LSUHSC Juvenile Justice Sys | Deprato, Debra K | Project: 158200080L | Reference Award: | FAIN:

[LSUNO | 15820077A | JUVENILE JUSTICE - JETSON MEDICAL | 2004-07-01 | 2008-06-30](#)
LSUHSC Juvenile Justice Sys | Deprato, Debra K | Project: 15820077AA | Reference Award: | FAIN:

In the **Sponsor** section of this example, select the line displaying *National Cancer Institute (10)*. The center work pane will display the 10 awards meeting this criterion. Select the **first** result in the list to display the Award information.

Favorites ▾ Main Menu ▾
Worklist | Home

Financials PAT W1
GM Awards Search

Advanced Search Add To ▾

| New Window | Help | F

Award
Funding
Certifications
Terms
Milestones
Key Words

Award ID 149501040

Reference Award Number R01CA217180
Federal Award Identification Number

Title R01CA217180 Nathan

Long Description NIH/NCI R01CA217180
Targeting fibroblast growth factor receptor-2b in prevention and treatment of cutaneous squamous cell carcinoma
85 characters remaining

Award PI Nathan, Cherie-Ann O.
Reporting Role

Sponsor National Cancer Institute

Post Award Administrator White, Valarie M.

Purpose RSRCH

Status Accepted

Award Type Grant

CFDA 93.393

Proposal ID

Version ID

Start Date 01/15/2018

End Date 12/31/2022

[View Contract](#)
[View Proposal](#)
[Additional Information](#)
[Grant Administrator](#)
[Sponsor Website](#)

Primary Project PI Nathan, Cherie-Ann O.

Associated Project
Personalize | Find | 1 of 1 | Last

Document Status Icons

The Document Status pages for *Requisitions*, *Purchase Orders*, and *Accounts Payable* now include icons as visual guides to assist in your document review. The document status inquiry page icons act as filters for the information presented. In the example below, the LSUSH requisition 06679035 was selected for review. On the Document Status page, the Associated Documents section at the bottom of the screenshot includes all of the documents related to that requisition, and the links for those documents may be selected to navigate to the particular choice. The icons displayed include all Supply Chain points. Those that have an associated document for this requisition appear in color and will display the number of documents in that category, e.g., 1 purchase order, 1 payment etc. Selecting the icon will filter the associated documents list at the bottom to only display those in the particular category. To access the document, users must select the document from the list at the bottom of the page just as you do now.

Business Unit LSUSH Req ID 06679035
 Document Date 05/02/2016 Status Complete
 Currency USD Document Type Requisition
 Requester Frazier,Cheltzi C. Merchandise Amt 115.00
 Budget Status Valid

Requisitions Inventory Sourcing Events **Purchase Orders(1)** Service Work Orders **Receipts(1)** Returns **Vouchers(1)** **Payments(1)**

Show All

Associated Document									
Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location	
▼ Actions		LSUSH	Purchase Order	06679035	Compl	05/10/2016	0000004983	0000000001	
▼ Actions		LSUSH	Receipt	0237462	Closed	05/12/2016	0000004983	0000000001	
▼ Actions		LSUSH	Voucher	00595795	Posted	01/28/2016	0000004983	0000000001	
▼ Actions	SHARE		Payment	481516	Posted	05/13/2016	0000004983	0000000001	

Return to Search

Coming Soon...

There will be several new features presented in the coming months. As always a user’s security will determine what access, if any, a user has to the new features. So be on the lookout for...

- Payment Request Process for Direct Pay Vouchers

- New Tiles/Navigation Collections for the RPT database to include Query, nVision, and BI Publisher
- Module-specific Navigation Collections for General Ledger, Grants, Projects, Billing, Accounts Receivable and Inventory
- My Homepage
- Module-Specific Workcenters for the core user groups.