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 Menus. 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.
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.
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.

![Document Status Icons](image)

**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.