After the upgrade you will continue to use the PeopleSoft 9.1 launcher; however, you will select and choose the 9.2 version of the Financials database from the launcher.

As a reminder, whenever there is an upgrade, the system will start in a default status the first time you launch it. You must reset any personalizations you may have had prior to the upgrade. For example, changing Pagelets or adding menu layout customizations that you previously set in PS Financials 9.1:
The PeopleSoft 9.2 upgrade provides several enhancements to the Financials Application. In addition to upgrade “look and feel” type changes, the following are items of note.

Please note that not all users will see each of the items noted in these examples; your access is directed by your security permissions.

1. SUPPLIERS
Vendors are now called Suppliers within PeopleSoft. This is noted within the menu navigation, page information and report.

2. SES Search
The SES search replaces the older Verity Search functionality within PeopleSoft. The new feature is more robust and allows users to search within the menus and for documents matching the search criteria. Additional filters provide flexibility in locating the object of choice. The search box is located at the “header” or top of the page. It includes a basic search, advanced search and a selection box to narrow the search to several specific components within PeopleSoft.

NOTE: The SES Search functionality requires several new Indexing processes. It will only be available in the PRD database and will be made available to users beginning Tuesday, April 19.
Display of the Advanced Search from the Header

Example of using a Search in “All” for the Word “Pipette”: 
As you can see, there are 980 matching results for Pipette. You may use the category filters to narrow down the search, scroll through the results or, use the related actions arrow to the right of certain results.

3. SES Keyword Search
The keyword Search is an additional SES Search feature released within the Purchase Requisition, Purchase Orders, Procurement Contracts, Suppliers, Receipts, Asset Entry, Voucher Entry, and Journal Entry components. When adding a new value or searching for an existing one, the new Keyword Search tab appears. It provides additional fields on which you may search to locate the desired document. The following screenshot displays the Keyword “Advanced Search” tab for requisitions.

4. Pop-Up Windows after selecting a link
In PeopleSoft 9.2, when you select a link from a page, instead of always directing the user to a new page, PeopleSoft now opens a pop-up window over the existing page. The user is then able to review the information and/or make a selection. Once completed, the information is populated onto the original window and the pop-up window closes. Although the screenshot displayed is an example from query manager, this feature is used throughout all of PeopleSoft.
5. **Users that run Crystal Reports from the launcher:** Please note there are no changes to how you access or run Crystal Reports.

Users that run system delivered Crystal Reports from within a module: The Crystal Reports tool is replaced with BI Publisher versions of the reports.

PeopleSoft has updated the tool utilized for the delivered system reports from Crystal to BI Publisher. The Crystal versions are no longer available from the menu navigation. Users should expect to see the same output. The Process Name and Type are updated to BI Publisher as noted in the screenshot below.

The nVision Report Book feature includes a slight change on the Process Scheduler page. When a user creates a Report Book to combine multiple nVision
reports into one process run, the reports must be run to the Web (Report Manager). Upon selecting the Run button, the user is directed to the Process Scheduler Request page. On this page, in the selection box called “*Type”, users MUST change the Default to Web prior to pressing the Ok button. If the user does not perform this change, the reports will not post to the Report Repository.

7. **Cancelling a Requisition Differences:** In 9.2 there are two new screens the Requester will see when canceling a requisition. If a requester has security access to cancel a requisition they can click the RED X on the Requisition header to cancel. If the requester does not have cancel access they can request that their buyer cancel the requisition for them.
   a. There is no change in 9.2 when canceling a Requisition that has been sourced to a PO; the requester will see the same message they currently see in 9.1, “Requisition has been sourced and cannot be canceled”.

   b. The new screens displayed depend on the requisitions’ budget check status. Examples:
      i. **NOT BUDGET CHECKED:** If the Requisition has not been budgeted checked; the requester will see this screen that lets the requester know the cancellation was successful. Click the OK button to continue.
ii. **BUDGET CHECKED:** If the Requisition has been budget checked; the requester will see the following screen that indicates the cancellation was successful. The requester can click the Budget Check button to budget check the Requisition which will reverse the pre-encumbrance or they can click the OK button and let the process that runs nightly budget check the requisition which will also reverse the pre-encumbrance.

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8. **View Printable of Requisitions created in version 9.1**

There are two extra steps involved when printing 9.1 requisitions using the View Printable Version link. This is a temporary measure and only affects requisitions created in version 9.1 (**requisitions created prior to noon on 4/15/2016**), and not requisitions created in 9.2.

a. Click the View Printable Version Link
b. This message appears as it does now in 9.1 – Click the Yes button to save the current document and print

![Message dialog]

Do you wish to save the current document? (10250,274)

Document cannot be printed if it is not saved. If you choose Yes, document will be saved and printed. If you choose No, document cannot be printed.

Yes  No


c. This is a new message – Click the OK button.

![Message dialog]

Field is Required: REQ_VAL_ADJ_P - ADJ_METH (124,54)

OK


d. Click the View Printable Version link again, and the requisition will queue to print as it does now in 9.1. Once the requisition prints successfully, you will not be required to do steps 3-4, if you decide to print the same requisition from View Printable Version.

**NOTE:** Navigating from Main Menu > Purchasing > Requisitions > Reports > Print Requisition and selecting a run control to print works as it does now in 9.1, there is no change in 9.2.

9. **Save Warning when Printing a Stock Request**

After creating and saving a Material Stock request, the user selects the printer icon to print the document. Next, the user selects the Report Manager link. Upon doing so, a new “Save Warning” message appears in version 9.2 indicating that there is unsaved data on the page. The user may click cancel to continue or press ok to go back and save the request again before proceeding.
NOTE: The Material Stock Request Document is one of the many old Crystal reports replaced with the BI Publisher version. The name that appears on the Report Manager differs. Instead of IN Material Document INC6501, users will see INX6501 – INX6501.htm

10. Purchase Orders and Requisition Document Status Inquiry
The voucher payment information in 9.2 has been moved from the Document Status page to the Voucher Inquiry Page.
a. Click the Voucher Link on the Document Status page to access the Voucher Inquiry page

![Document Status](image)

b. Click the Actions link on the Voucher Inquiry page, and select Payment Information

![Voucher Inquiry](image)

c. From the Voucher Payment Inquiry page, you can drilldown to payment details by clicking the Payment Reference ID link.
11. Reminder: Current Features extended into version 9.2

- **Personalizations** – Upgrades bring the system to a “default” status. **You must reset any personalizations you may have had prior to the upgrade.**
- **Changes that became effective with the upgrade to IE11 and Office 2010 (October 2015).** These changes included the nVision web drill bug from Oracle/Microsoft that require users to open an IE11 session prior to launching PeopleSoft and running a nVision report.

12. “New Features” to be released at a later date
   a. **Workcenters** – Purchasing, AP, Asset Management, General Ledger, Accounts Receivable, Billing, and Grants
   b. **Payment Request Form and workflow process**
   c. **Voucher Approval Process**
   d. **Additional Metrics in Purchasing and Payables**
   e. **Supplemental Data for Grants and Contracts**
   f. **Post Award Administrator for Grants**