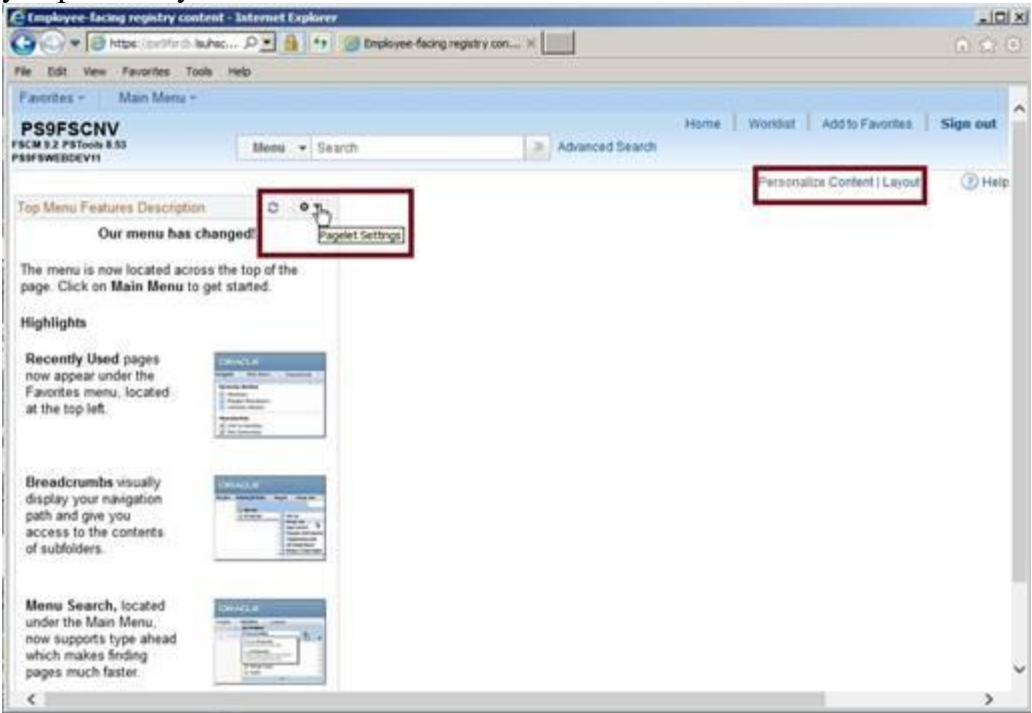


After the upgrade you will continue to use the PeopleSoft 9.1 launcher; however, you will select and choose the 9.2 version of the Financials database from the launcher.



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:

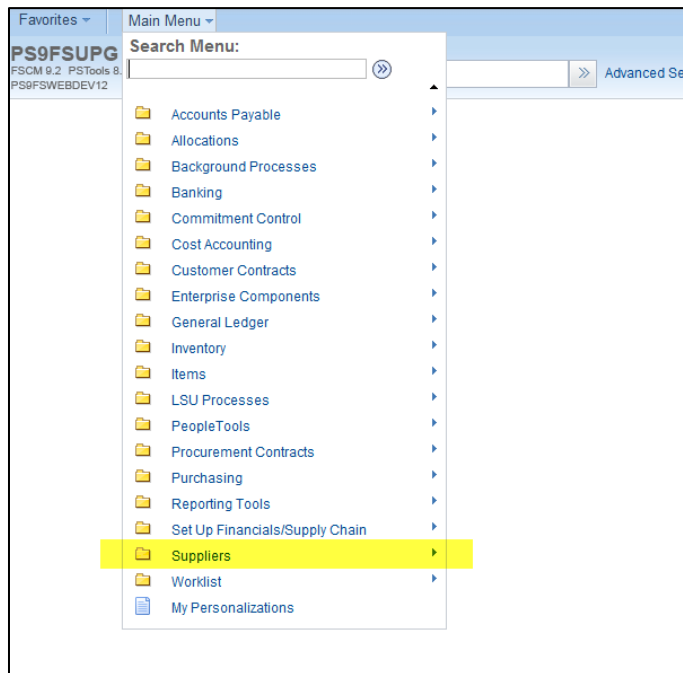


The PeopleSoft 9.2 upgrade provides several enhancements to the Financials Application. In addition to upgrade “look and feel” type changes, the following are items of note.

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

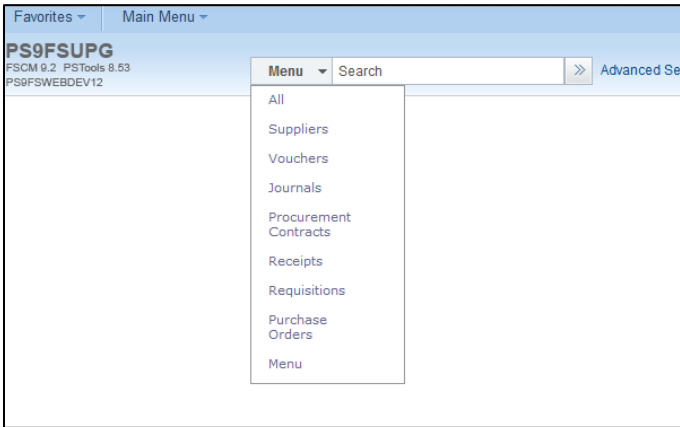
Vendors are now called Suppliers within PeopleSoft. This is noted within the menu navigation, page information and report.



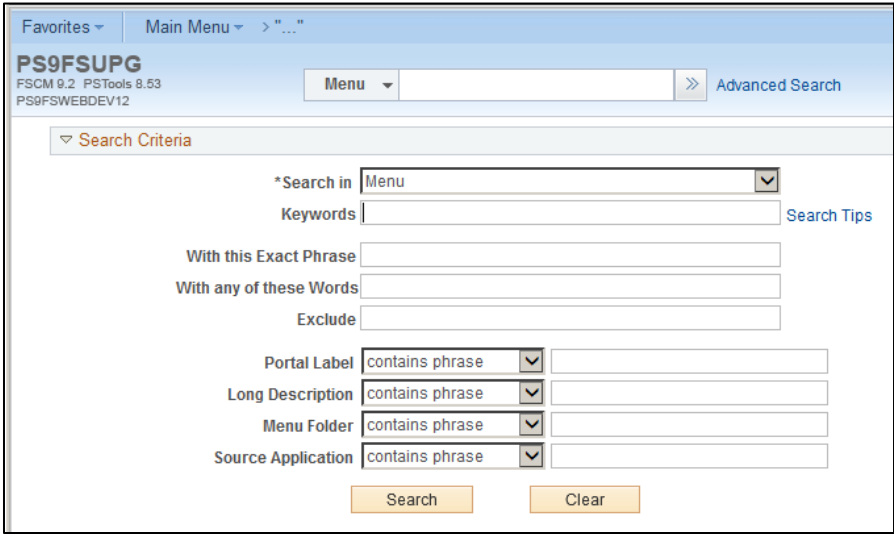
2. SES Search

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.

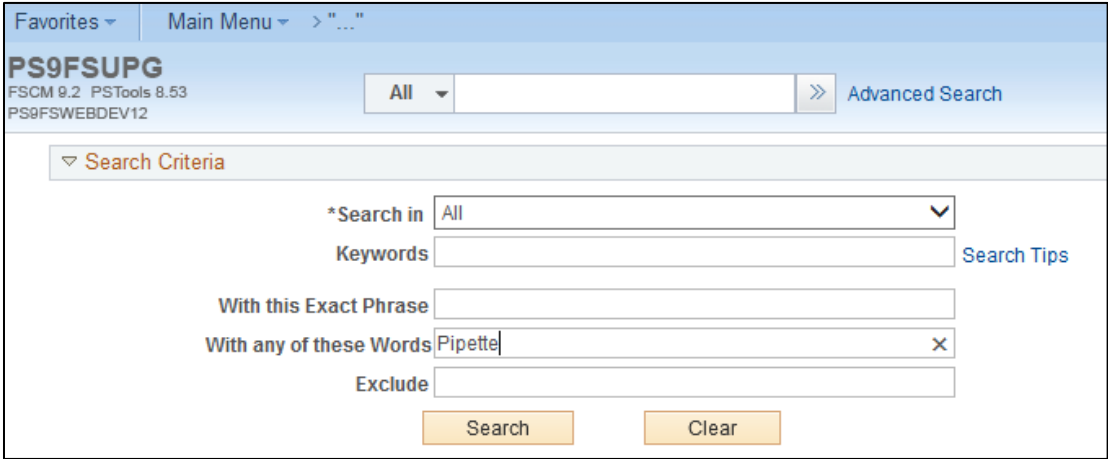
NOTE: The SES Search functionality requires several new Indexing processes. It will only be available in the PRD database and will be made available to users beginning Tuesday, April 19.

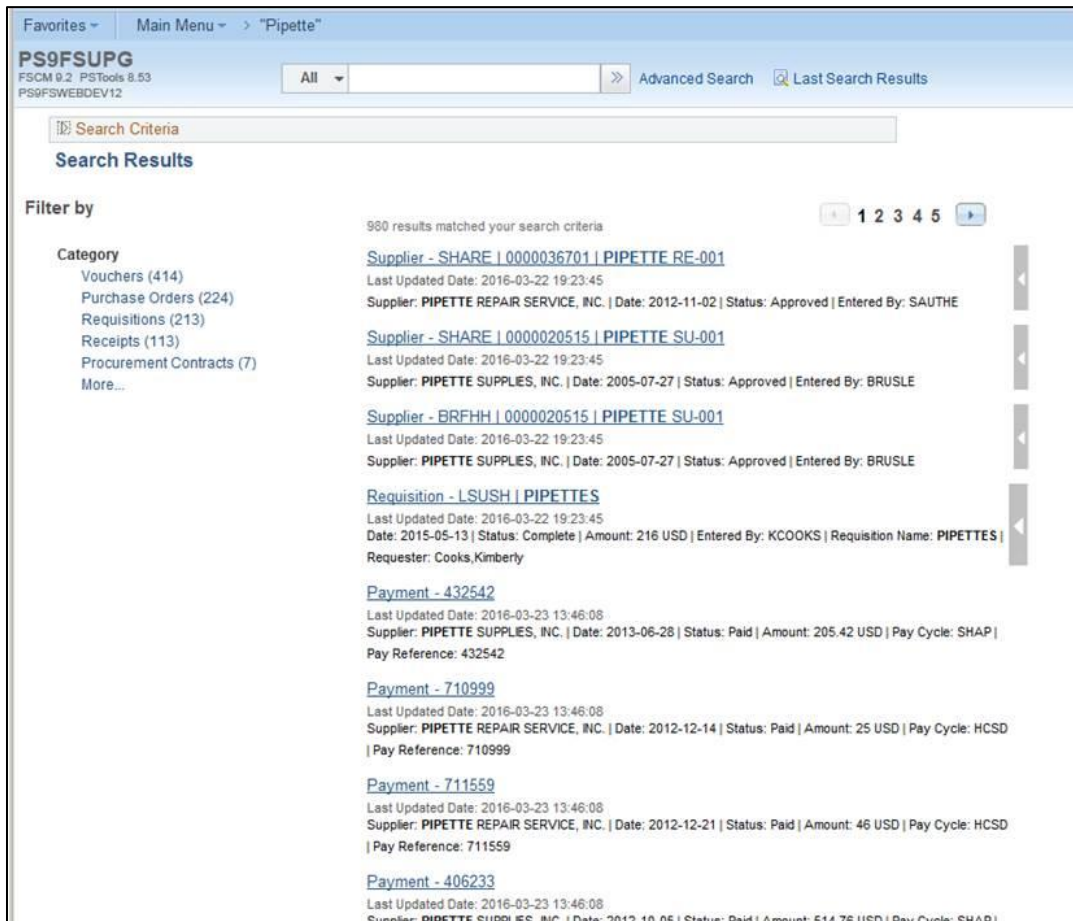


Display of the Advanced Search from the Header

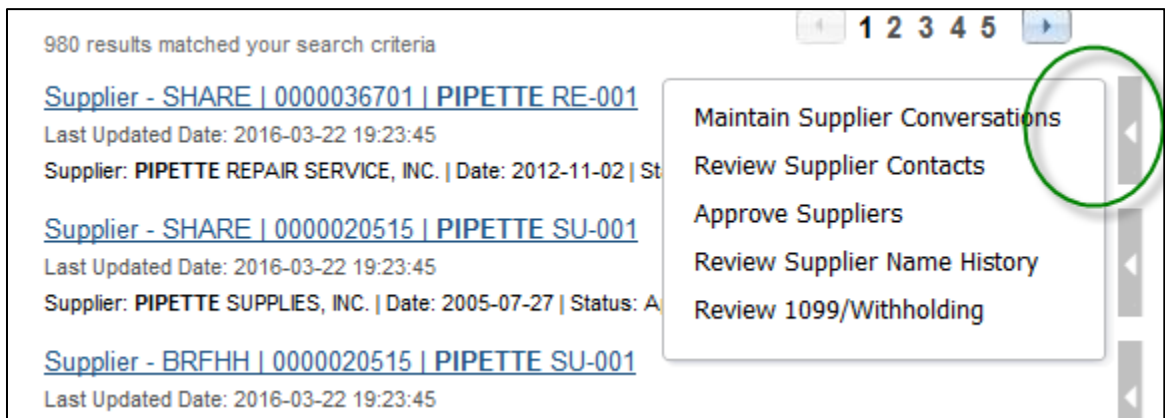


Example of using a Search in “All” for the Word “Pipette”:



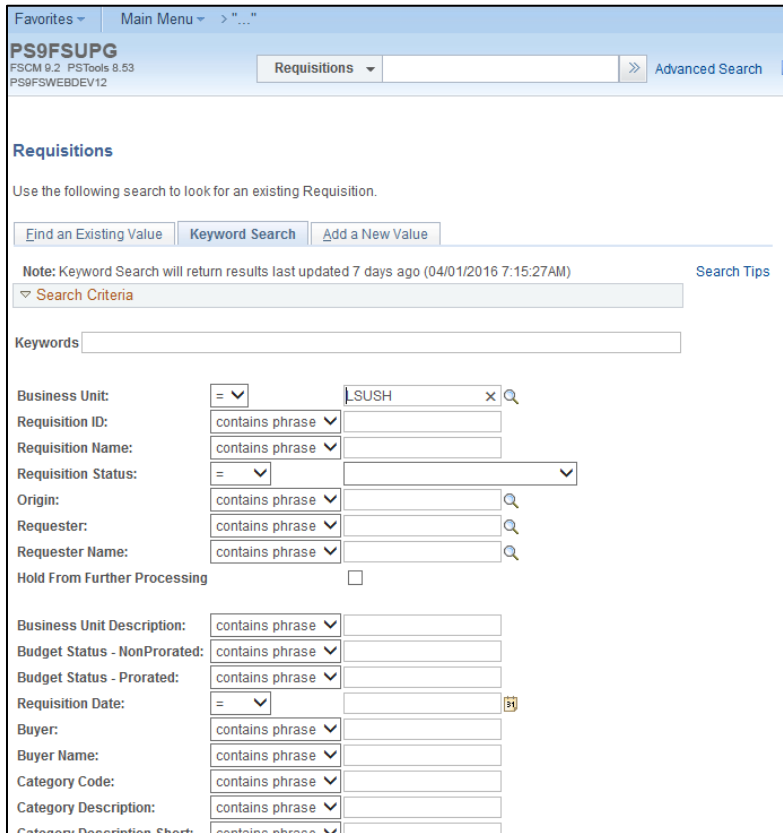


As you can see, there are 980 matching results for Pipette. You may use the category filters to narrow down the search, scroll through the results or, use the related actions arrow to the right of certain results.



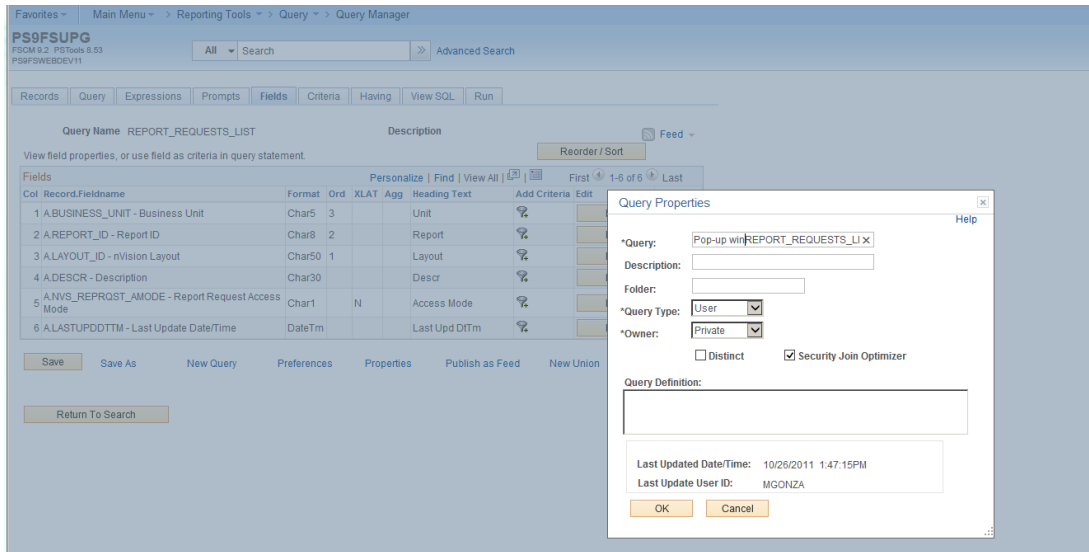
3. SES Keyword Search

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

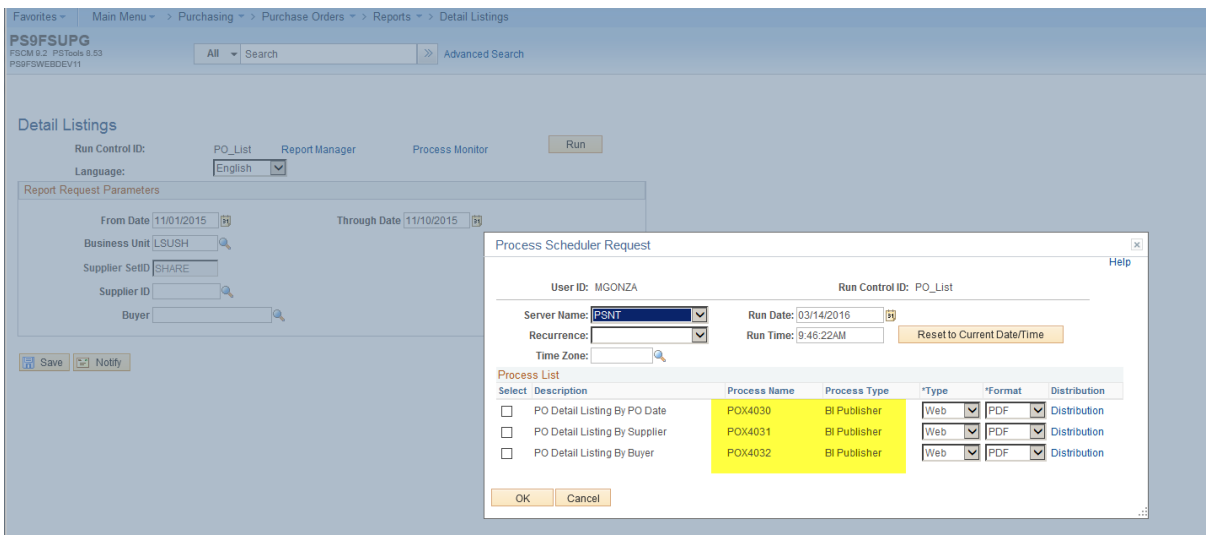
In PeopleSoft 9.2, when you select a link from a page, instead of always directing the user to a new page, PeopleSoft now opens a pop-up window over the existing page. The user is then able to review the information and/or make a selection. Once completed, the information is populated onto the original 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.

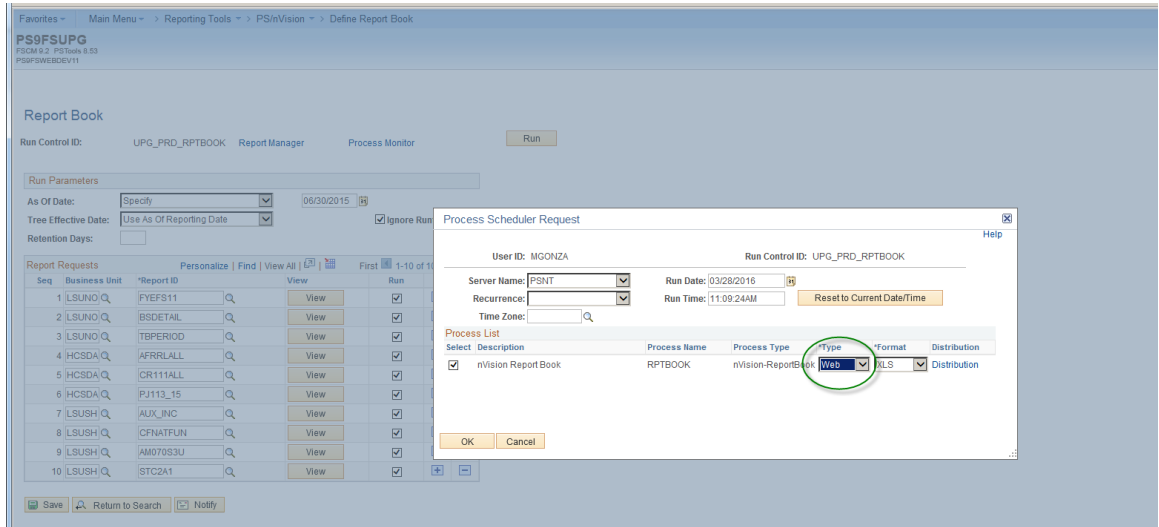
PeopleSoft has updated the tool utilized for the delivered system reports from Crystal to BI Publisher. The Crystal versions are no longer available from the menu navigation. Users should expect to see the same output. The Process Name and Type are updated to BI Publisher as noted in the screenshot below.



6. nVision Report Books – Process Scheduler Page Type Selection

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

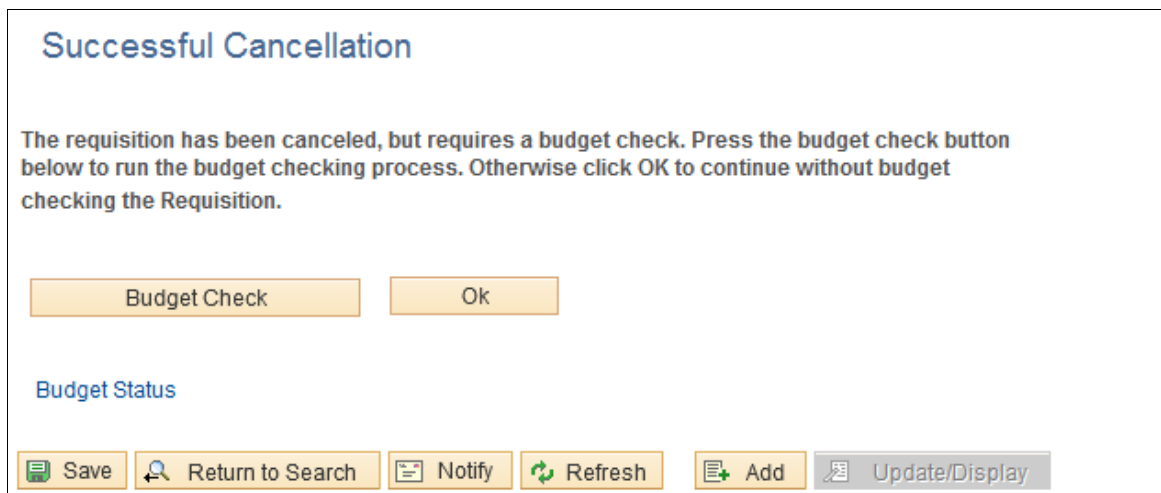
reports into one process run, the reports must be run to the Web (Report Manager). Upon selecting the Run button, the user is directed to the Process Scheduler Request page. On this page, in the selection box called “*Type”, users MUST change the Default to Web prior to pressing the Ok button. If the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



7. **Canceling 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.



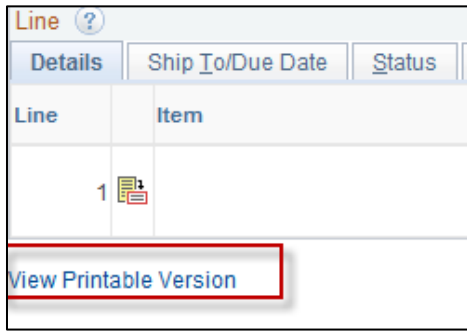
- ii. **BUDGET CHECKED:** If the Requisition has been budget checked; the requester will see the following screen that indicates the cancellation was successful. The requester can click the Budget Check button to budget check the Requisition which will reverse the pre-encumbrance or they can click the OK button and let the process that runs nightly budget check the requisition which will also reverse the pre-encumbrance.



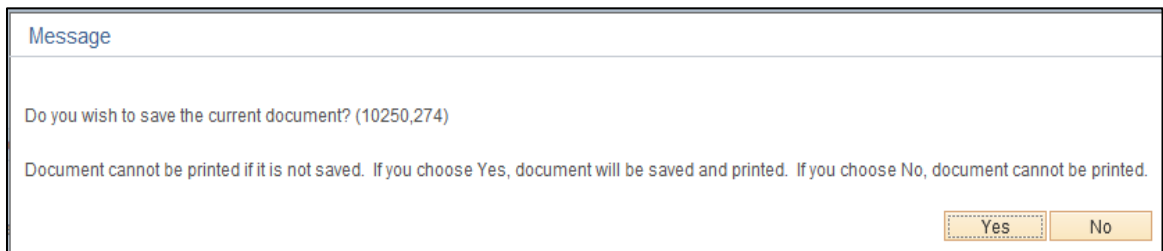
8. View Printable of Requisitions created in version 9.1

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.

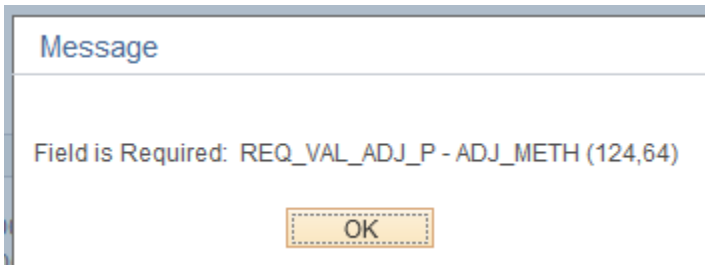
- a. Click the View Printable Version Link



- b. This message appears as it does now in 9.1 – Click the Yes button to save the current document and print



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

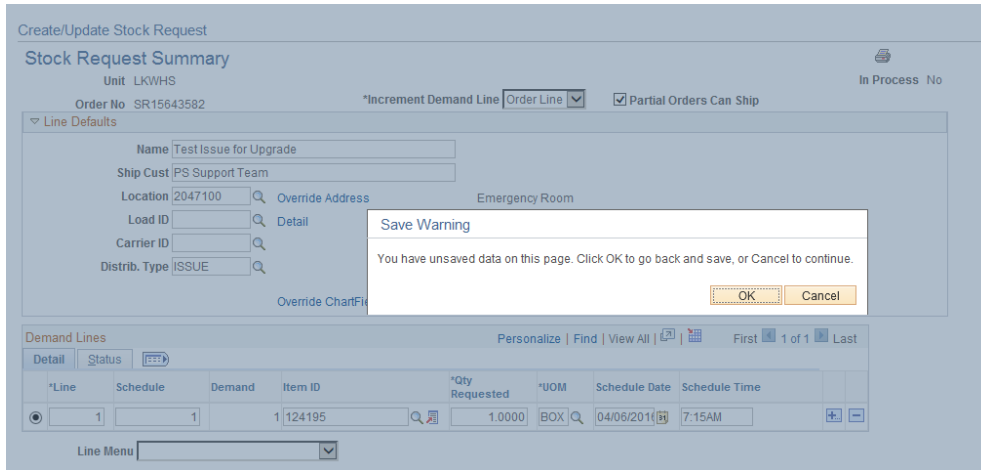


- d. Click the View Printable Version link again, and the requisition will queue to print as it does now in 9.1. Once the requisition prints successfully, you will not be required to do steps 3-4, if you decide to print the same requisition from View Printable Version.

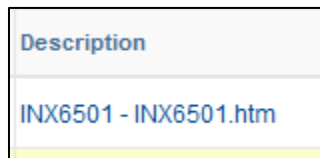
NOTE: *Navigating from Main Menu > Purchasing > Requisitions > Reports > Print Requisition and selecting a run control to print works as it does now in 9.1, there is no change in 9.2.*

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.

Associated Document							
SetID	Business Unit	Document Type	Doc ID	Status	Document Date	Vendor ID	Location
	LSUSH	Requisition	0062351	Approved	06/12/2015		
	LSUSH	Voucher	00587930	Posted	08/01/2015	0000020900	000000
	LSUSH	Voucher	00589044	Posted	09/01/2015	0000020900	000000
	LSUSH	Voucher	00590013	Posted	10/01/2015	0000020900	000000
	LSUSH	Voucher	00590676	Posted	11/01/2015	0000020900	000000
	LSUSH	Voucher	00591761	Posted	12/01/2015	0000020900	000000
	LSUSH	Voucher	00593588	Posted	02/01/2016	0000020900	000000
	LSUSH	Voucher	00594675	Unposted	04/01/2016	0000020900	000000
SHARE		Payment	470269	Posted	08/14/2015	0000020900	000000

- a. Click the Voucher Link on the Document Status page to access the Voucher Inquiry page

Document Status

Business Unit LSUNO
 Document Date 07/20/2015
 Currency USD
 Buyer Desimone, Gary

PO ID 00378128
 Status Dispatched
 Document Type Purchase Order
 Merchandise Amt 5,000.00
 Budget Status Valid

9.2 Document Status

Associated Document

Actions	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location
▼ Actions	LSUNO	Requisition	0045726	Approved	06/24/2015		
▼ Actions	LSUNO	Voucher	00309268	Posted	08/14/2015	0000004983	9999999

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

Voucher Inquiry

Search Criteria
 Sort Criteria
 Display Currency Criteria
 Late Interest Analysis

Voucher Inquiry Results

Actions	Business Unit	Voucher ID	Invoice Number	Invoice Date	Supplier ID	Entry Status	Incomplete	Match Status	Show
▼ Actions	LSUNO	00309270	900812044	07/30/2015	0000004983	Postable	<input type="checkbox"/>	Matched	BIO

Review Accounting Entries
 Match Workbench
Payment Information
 Voucher Details

- c. From the Voucher Payment Inquiry page, you can drilldown to payment details by clicking the Payment Reference ID link.

Voucher Payment Inquiry.

Business Unit LSUNO Voucher ID 00309270 Invoice Number 900812044

Supplier Name BIO RAD LABORATORIES INC Supplier Location 9999999999

Gross Invoice Amount 178.00 Transaction Currency USD

Details Personalize | Find | View All | [Print] | [Grid] | First

Bank SetID	Bank Code	Bank Account	Payment Reference ID	Applied Business Unit	Applied Voucher ID	Payment Date	Payment Amount	Payment Currency	Voucher Paid Amount	Paym
SHARE	BKOL	BKOL	006694			09/04/2015	1,968.70	USD	178.00	Paid

Cancel

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**