PeopleSoft

KUMC

PeopleSoft Financials 8.9 Upgrade Fundamentals Tips and Tricks

Table of Contents

Page

Overview 3

Logging in 4

Browser Settings 5

Displaying Navigation Icons 8

Search Features
- Using Criteria Operators 9
- Saving Search Criteria 11
- Using a Saved Search 12

User interaction changes
- Button differences 13
- Ending a transaction 14
- System feedback 14
- Signing out 15
- Working with multiple lines 16
- Query Manager 18

Run Controls and Running Reports
- Check for existing run controls 20
- Creating a run control 21
- Running the report 22
- Process Monitor 23

Appendix
- Assistance 24

Overview

PeopleSoft Financials is moving from version 7.5 to version 8.9, a web based system. While the user's interaction with the system has changed in some regard, the use of many of the modules remains the same. This manual contains the main function and feature changes of the new version of PeopleSoft Financials 8.9.

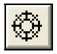
New operating environment

PeopleSoft Financials 8.9 is a web based system. It is compatible with either Internet Explorer version 6 or version 7. After logging in to PeopleSoft, avoid the use of the browser's back and forward buttons since they may cause loss of data or inadvertent logout of the user. The focus of the user interaction should remain in the PeopleSoft window with the use of navigation icons and panel buttons. In addition, the user should sign out of PeopleSoft before closing the browser window.

New search features

PeopleSoft has always allowed users to locate existing transactions through an Update/Display dialog box. In PeopleSoft Financials 8.9, searches are more flexible and search criteria can be saved for future use.

Changes in user interaction

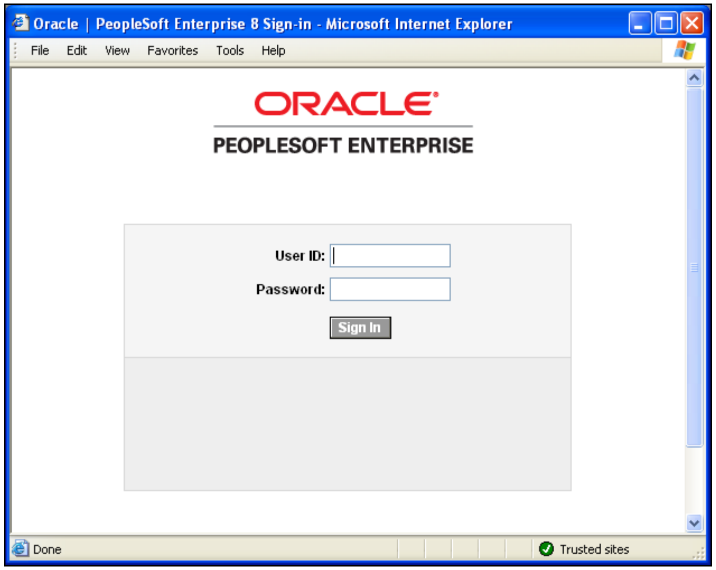
- There is no toolbar. As a result, the Save, Insert Row, and Run buttons appear on the panels. There is no  (cancel) button. When finished with a transaction, simply navigate away from the panel.
  There is no  (change window content) button for redisplaying the navigation icons. Use the KU_PROCESSES link instead.
- PeopleSoft Financials 8.9 does not display an hourglass while processing. Instead, the word "Processing" flashes in the upper right corner of the screen.
- The save button does not turn gray as an indication that the transaction has been saved. The word "Saved" appears briefly in the upper right corner of the screen.
- Working with multiple lines in a transaction has changed in two ways: adding and removing lines and viewing multiple lines.
- Query Manager is accessed from the main menu, under Reporting Tools.

Run controls and running reports

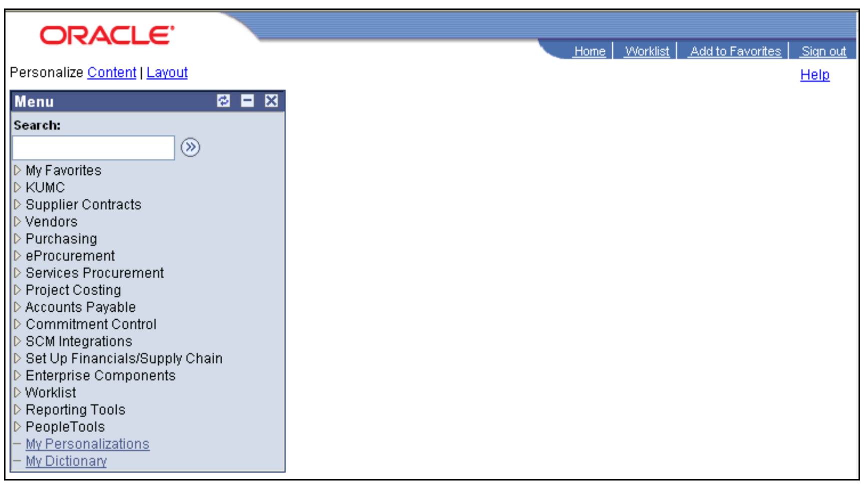
Run controls are still used in PeopleSoft Financials 8.9, and they provide the same information to the system as in Financials 7.5: what data to include in a report and how to run it. You might need to create new run controls after the upgrade. The rules for naming run controls have not changed - the name cannot contain spaces or special characters. All reports will be emailed as they were in Financials 7.5.

Navigation

1. Double-click the icon on the desktop.



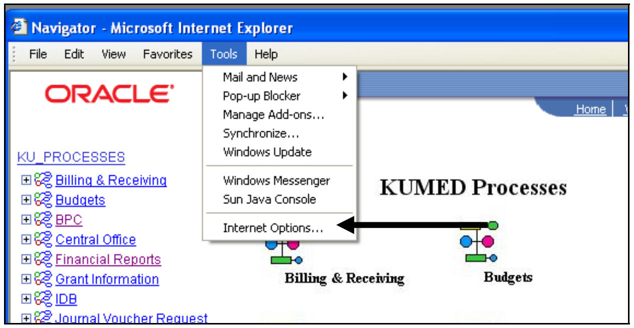
2. Using your network sign-on, enter your **User ID** and **Password**.
3. Click  .

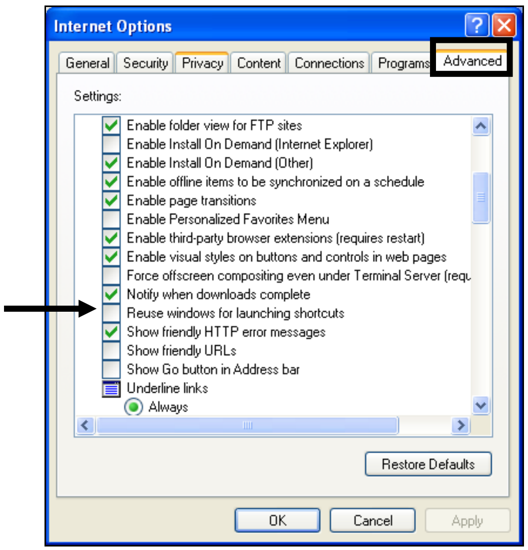


PeopleSoft displays the main menu.

The browser setting "Reuse windows for launching shortcuts" needs to be turned off under Internet Options. This is true whether you are using Internet Explorer version 6 or version 7.

Browser Settings





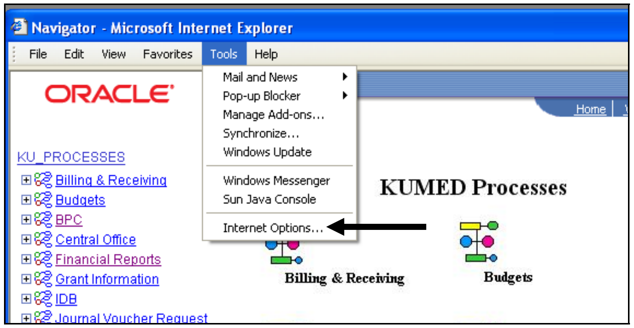
1. Select the **Tools** Menu, then **Internet Options**.
2. Select the **Advanced** tab.
3. Scroll down to “Reuse windows for launching shortcuts.”
4. Uncheck the box for this option. If the box is already unchecked, no changes are needed.
5. Click 

.

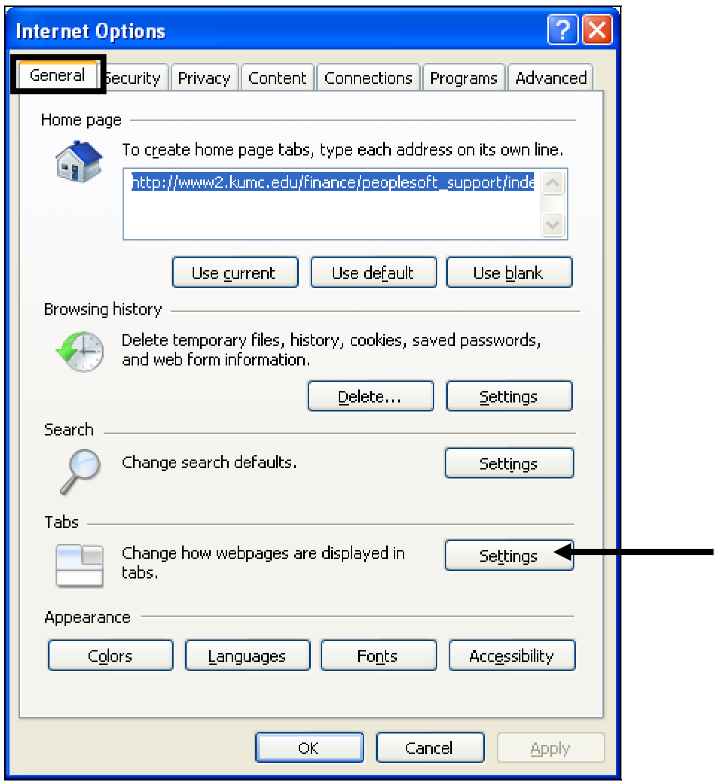
BROWSER SETTINGS

If you are using Internet Explorer version 7 with tabbed browsing enabled, you must also set the "Open links from other programs in:" setting to either "*A new tab in the current window*" or "*A new window*".

Browser settings for Internet Explorer 7

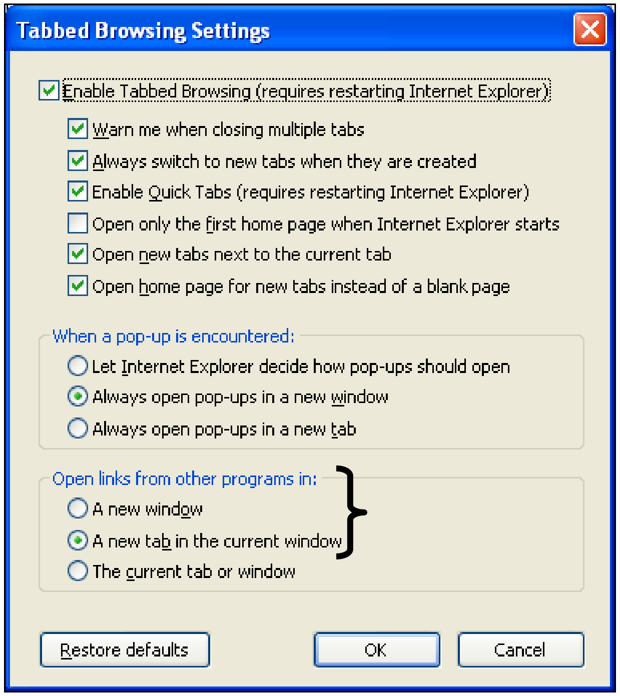


1. Select the **Tools** Menu, then **Internet Options**.



2. On the **General** tab, click the **Settings** button.

Browser settings for Internet Explorer 7 *(continued)*



3. Set **Open links from other program in:** to either

   A new window

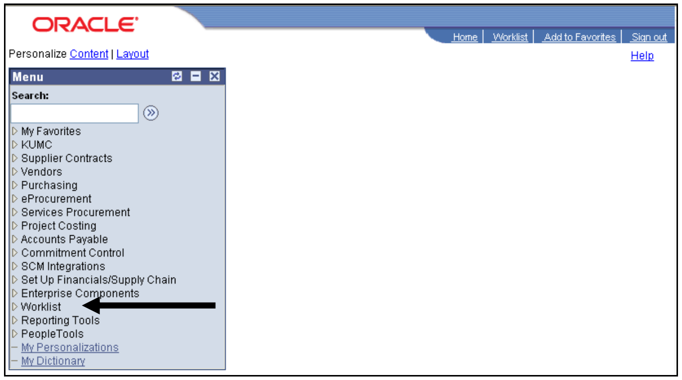
   OR

   A new tab in the current window

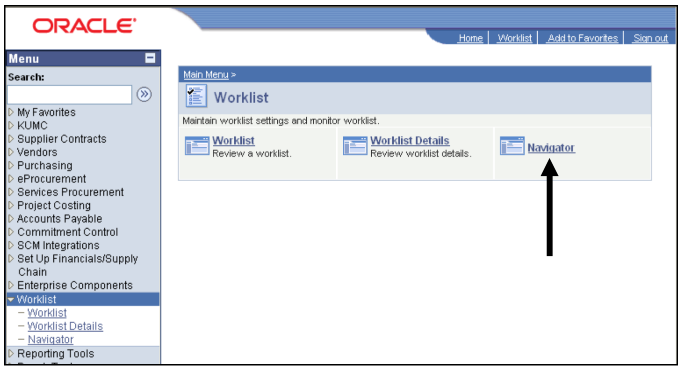
4. Click OK twice.

NOTE: Do not use tabbed browsing to open multiple PeopleSoft sessions including PeopleSoft HR.

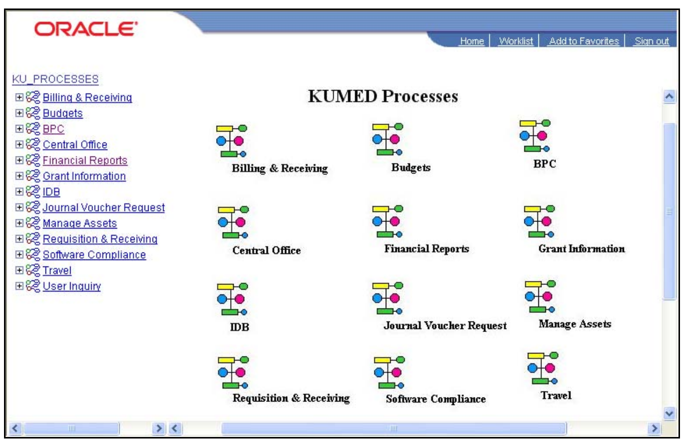
Displaying Navigation Icons



1. Click the **Worklist** menu.



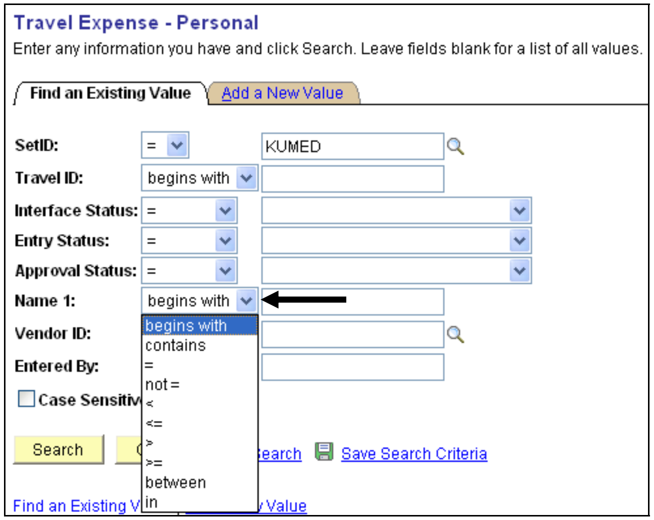
2. Click the **Navigator** link.

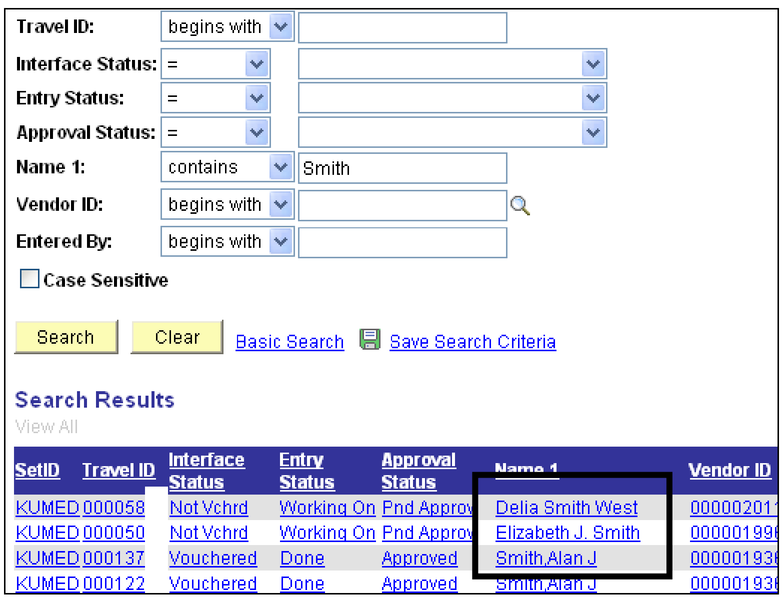


The navigation icons and tree structure are very similar to PeopleSoft Financials 7.5. The use of the icons is the same – single-click to access a process.

While we have always been able to locate existing transactions through an Update/Display dialog box, searches in PeopleSoft are now more flexible, and search criteria can be saved for future use.

Using Criteria Operators





When performing name searches in PeopleSoft 7.5, the % was used as the wildcard character to broaden the search. In PeopleSoft 8.9, most of the searches have drop-down boxes which allow flexibility in search criteria.

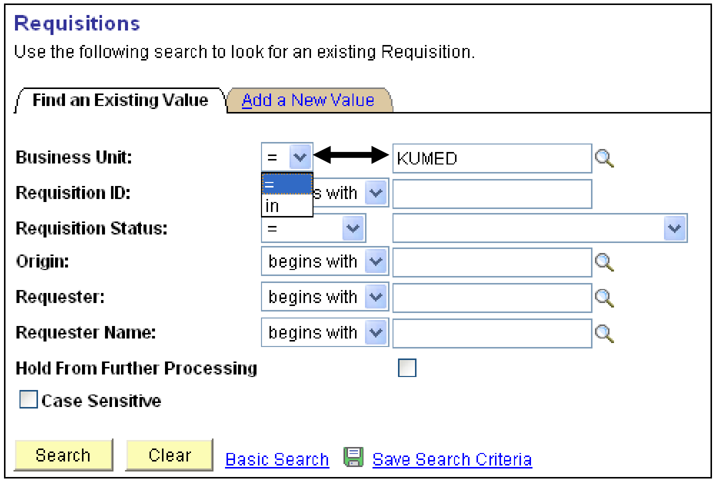
Here's an example of a name search in Travel.

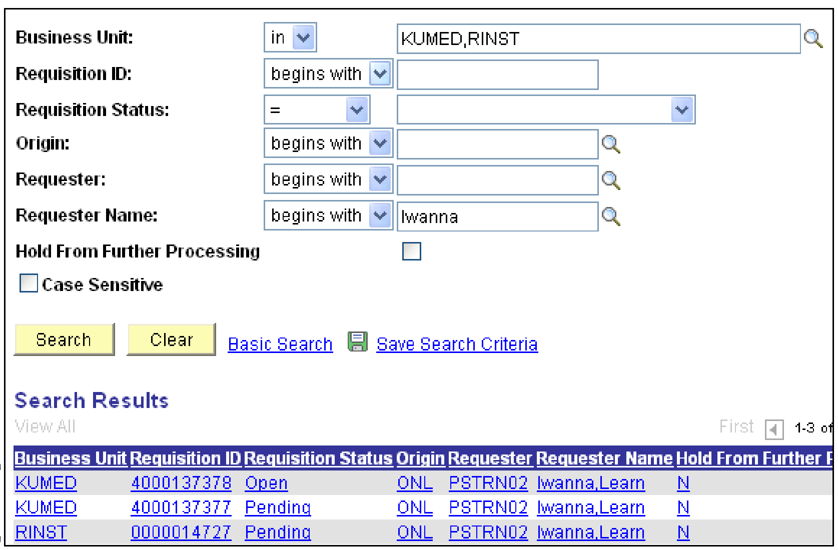
1. Click the **Name 1** operator drop-down arrow.
2. Choose *contains*.
3. In the **Name 1** field, enter the name to search for.
4. Click Search .

Note the search results displays transactions in which Smith appears in the middle, end and beginning of the traveler's name.

Using Criteria Operators *(continued)*

Using the "IN" operator for the **SetID** or **Business Unit** criteria allows a search across both KUMED and RINST business units. This is helpful if you enter travel requests or requisitions for both business units. Be sure to narrow the search by including another criteria such as Entered By or Requester Name.



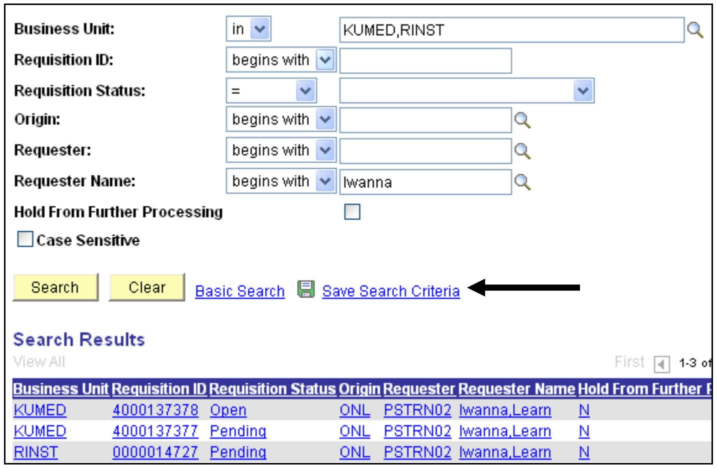


Here's an example of searching for requisitions.

1. Click the **Business Unit** operator drop-down arrow.
2. Choose *IN*.
3. In the **Business Unit** field, enter "KUMED,RINST".
4. Enter another limiting criteria, such as Requester Name or Entered By (depending on criteria available).
5. Click Search .

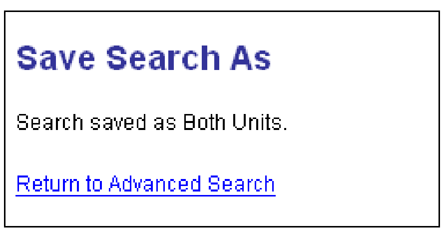
Note that requisitions from both business units appear in the list.

Saving Search Criteria



1. To save the search for future use, click Save Search Criteria .

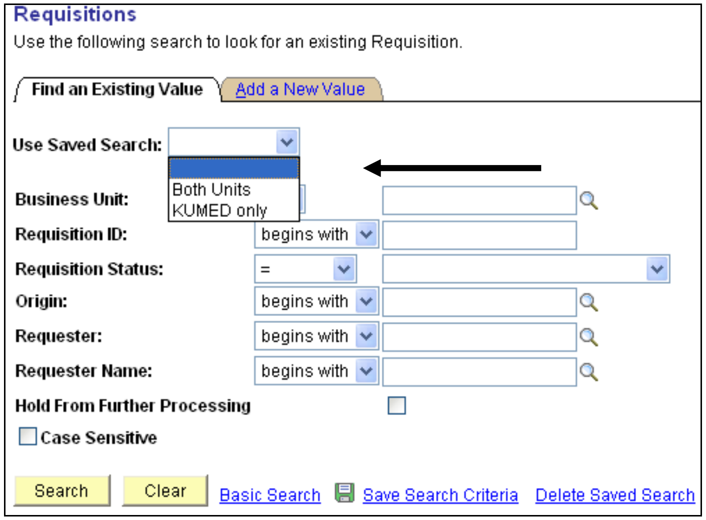
2. Enter a name for the search.
3. Click Save .



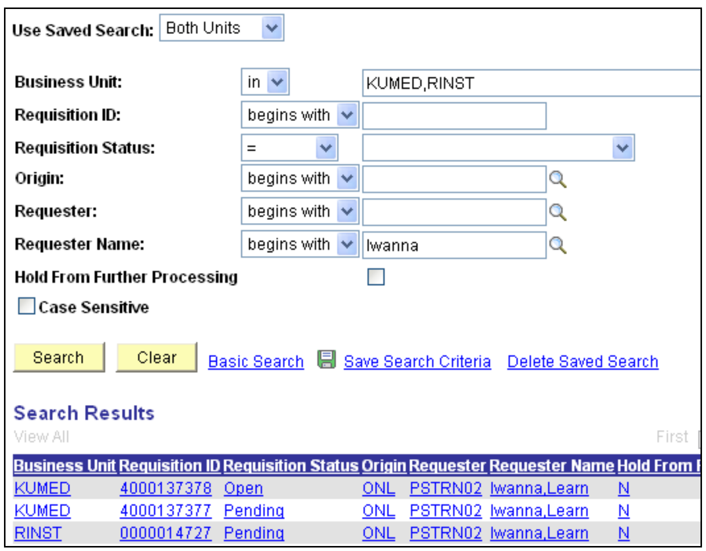
4. A confirmation of the save appears.

Once you have saved a search, you can use it again and again. An additional drop-down box appears at the top of the search criteria page. Simply choose the search you want to use and PeopleSoft automatically retrieves the results.

Using a Saved Search

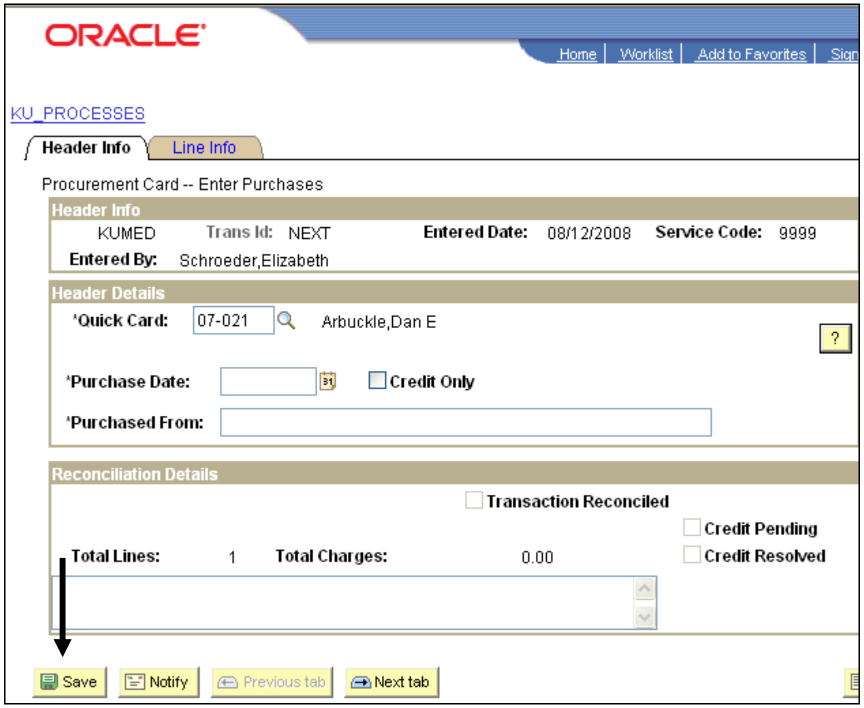


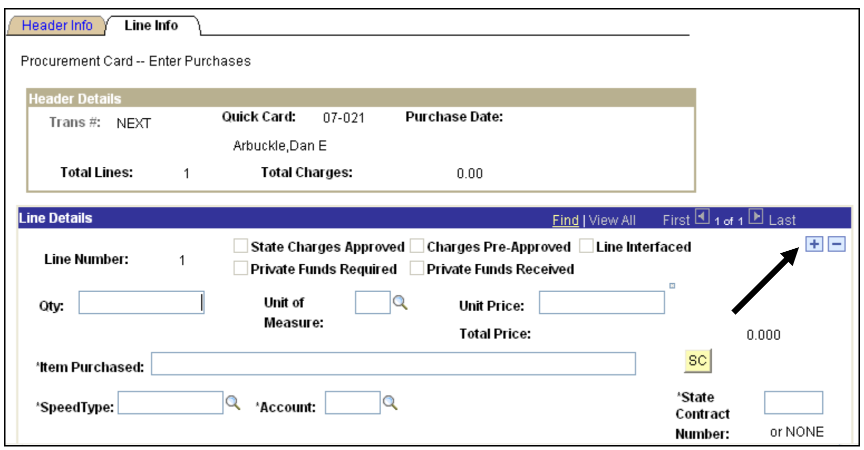
1. Navigate to the Find an Existing Value page for the module.
2. Click the **Use Saved Search** drop-down arrow.
3. Select the search to use.



4. PeopleSoft automatically returns the search results.

Button Differences





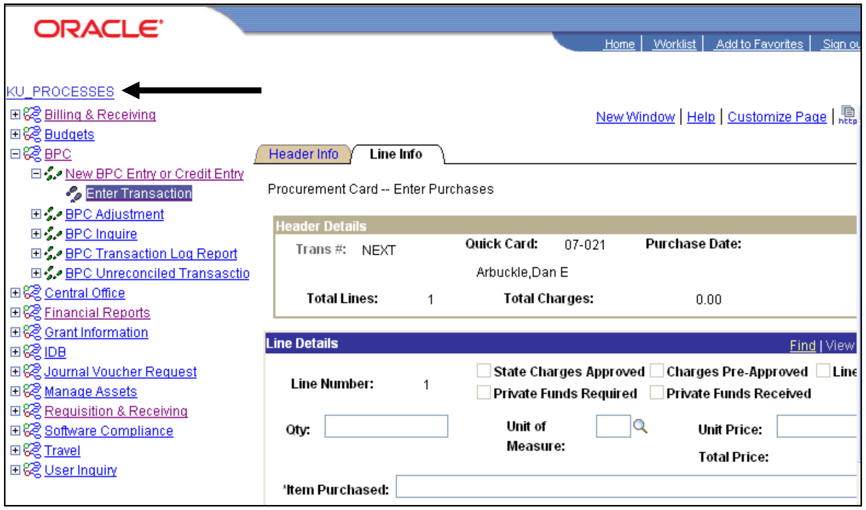
Since there is no toolbar, the save button appears on individual panels. The screen at the left shows the BPC panel.

Instead of Insert Row and Delete Row toolbar buttons, panels contain Add row and Delete row buttons.

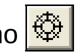
The keystroke to add a row is now Alt-7.

The keystroke to delete a row is now Alt-8.

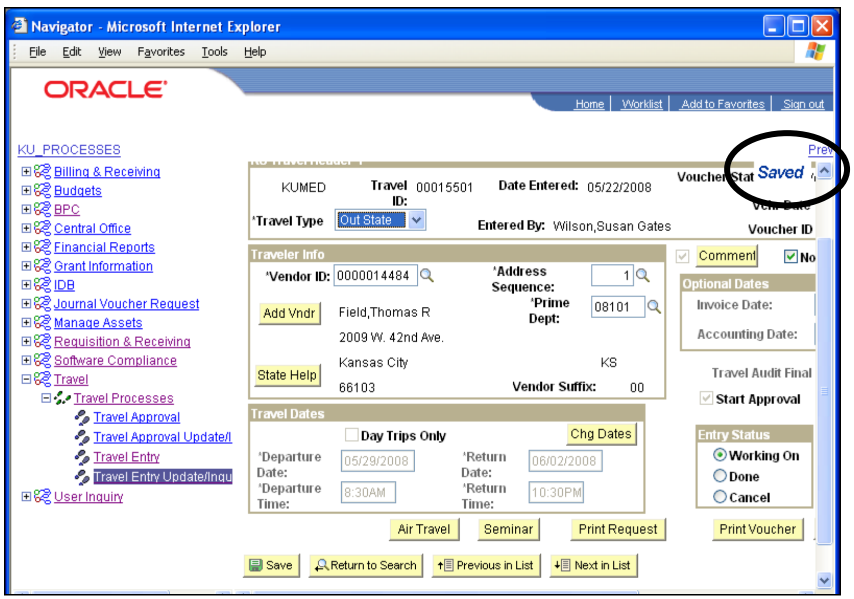
Ending a Transaction



There is no  (cancel) button. When finished with a transaction, simply navigate away from the panel.

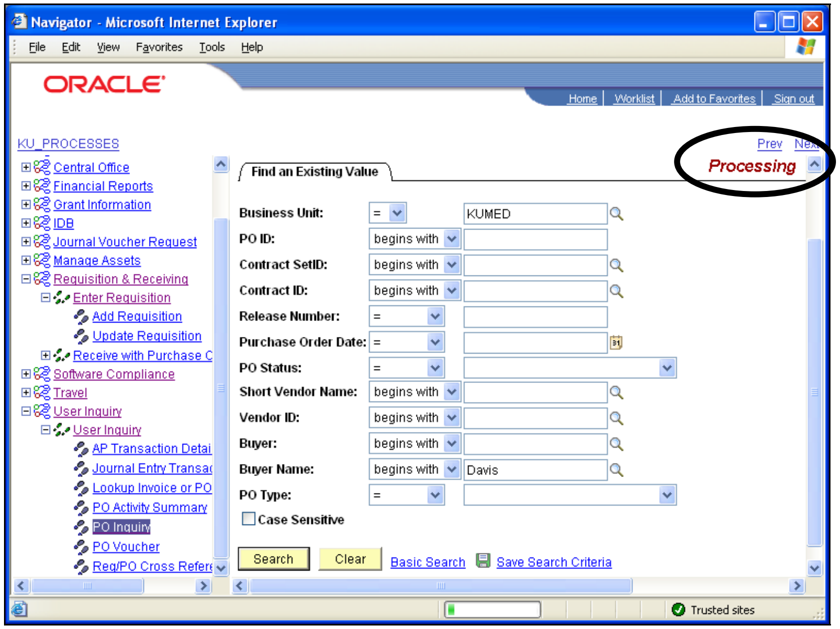
There is no  (change window content) button for redisplaying the navigation icons. Use the KU_PROCESSES link instead.

System Feedback



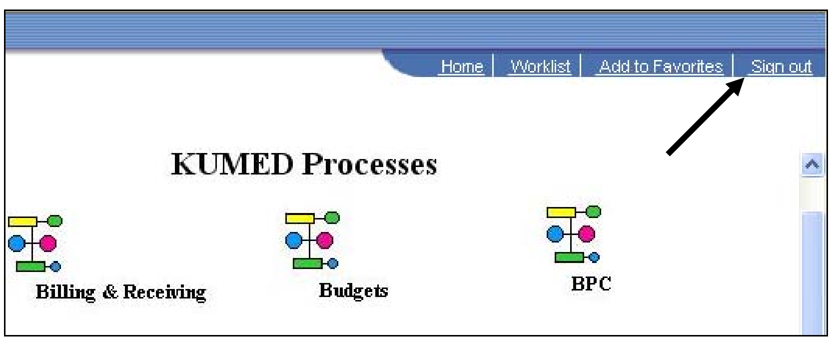
The save button does not turn gray as an indication that the transaction has been saved. The word “Saved” appears briefly in the upper right corner of the screen.

System Feedback *(continued)*



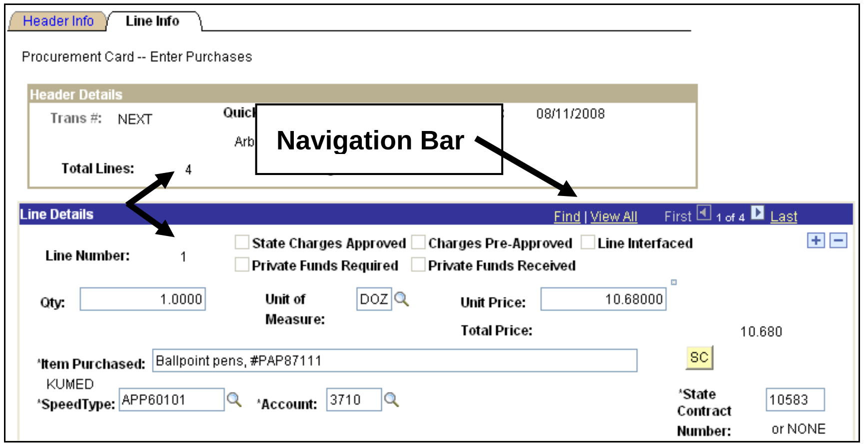
PeopleSoft Financials 8.9 does not display an hourglass while processing. Instead, the word "Processing" flashes in the upper right corner of the screen.

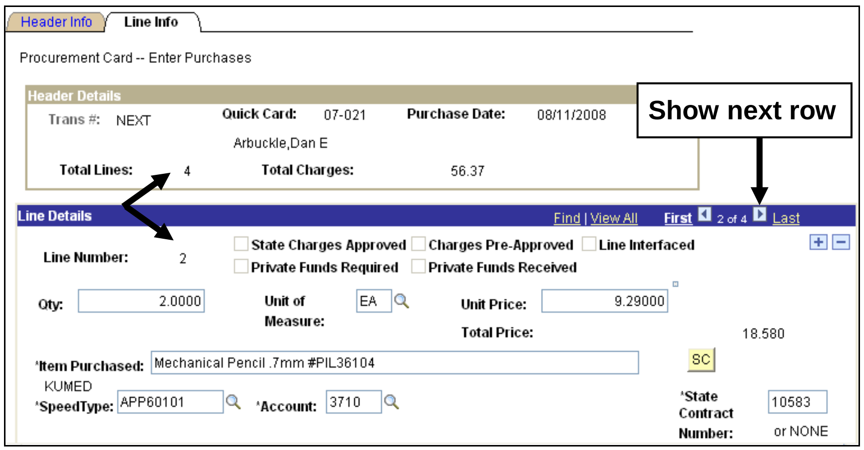
Signing Out



When finished using PeopleSoft Financials 8.9, click the **Sign out** link before closing the browser window.

Working with Multiple Lines



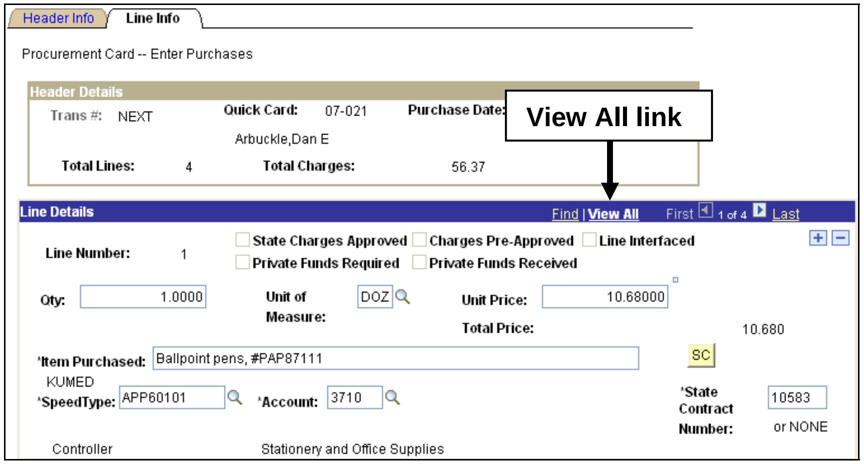


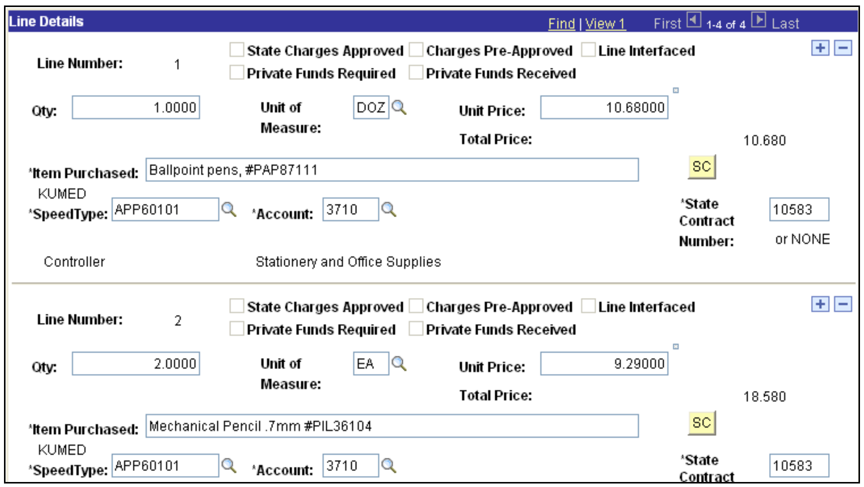
When there are multiple rows in a transaction, use the navigation bar to move from line to line.

Note the transaction to the left has 4 lines, and the first line is currently displayed.

Clicking the (Show next row) button displays the next line of the transaction.

Working with Multiple Lines *(continued)*

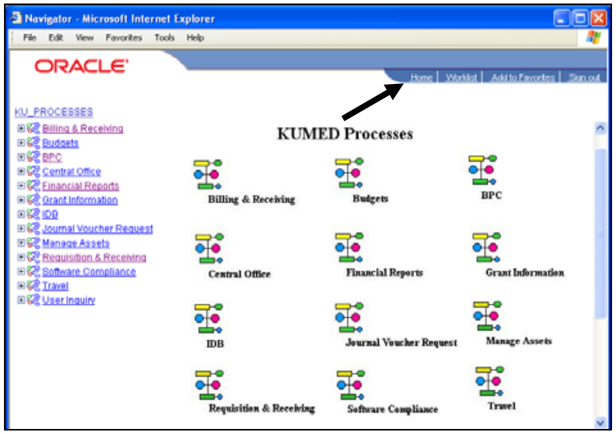




To see all of the lines of the transaction at the same time, click the **View All** link.

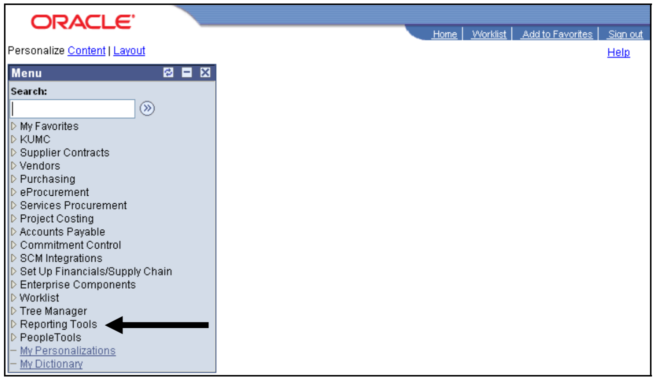
Note that after scrolling down on the screen both lines 1 and 2 are currently visible.

Query Manager

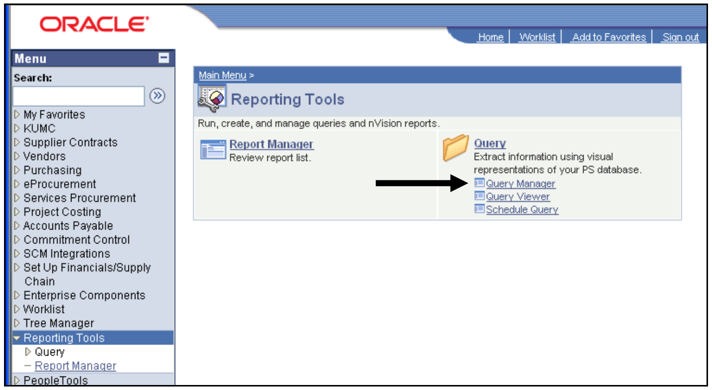


Query Manager is accessed from the main menu.

1. If the navigation icons are displayed, click the Home link.

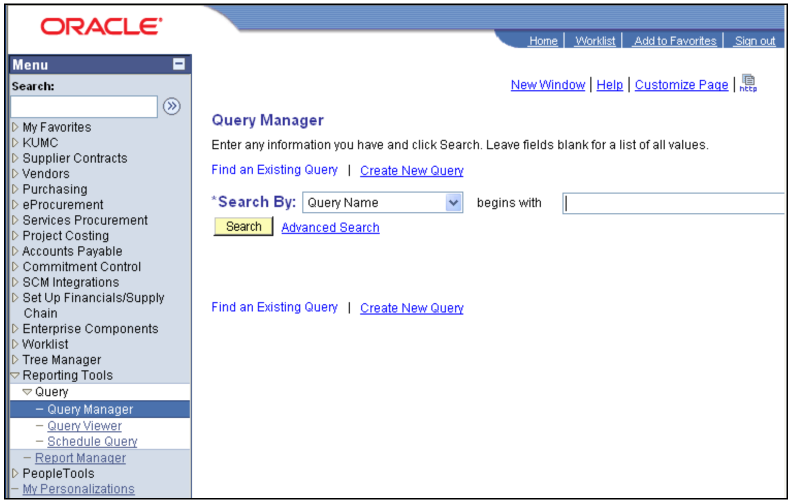


2. Click **Reporting Tools**.

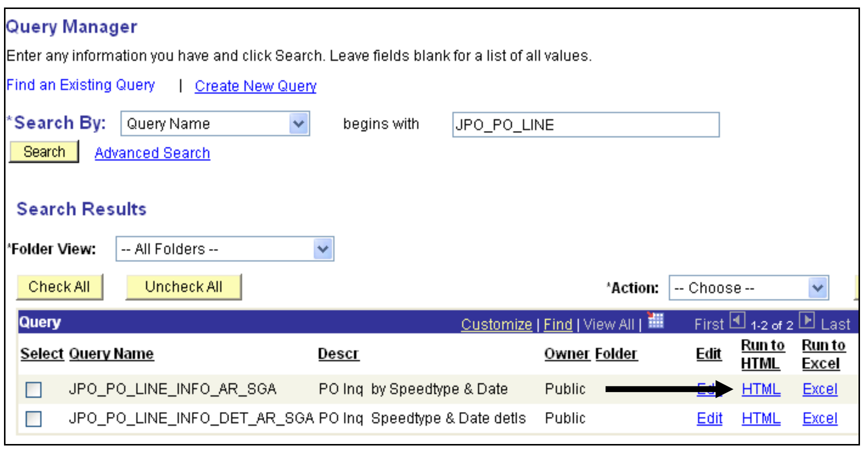


3. Click **Query Manager** link.

Query Manager *(continued)*



Step 4 Can also change **Search By** criteria to search by description. Use % as the wildcard character to broaden the search.



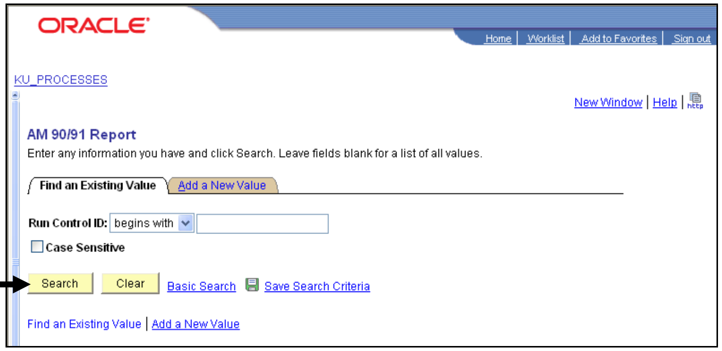
4. Enter the name of the query to run.
5. Click Search .
6. Click HTML link to run the query and view the results in a browser window.

   OR

   Click Excel link to run the query and view the results Excel.

Run controls are still used in PeopleSoft Financials 8.9, and they provide the same information to the system as in Financials 7.5: what data to include in a report and how to run it. You might need to create new run controls after the upgrade. Some of your FIN7.5 run controls might come forward after the upgrade.

Checking for Existing Run Controls

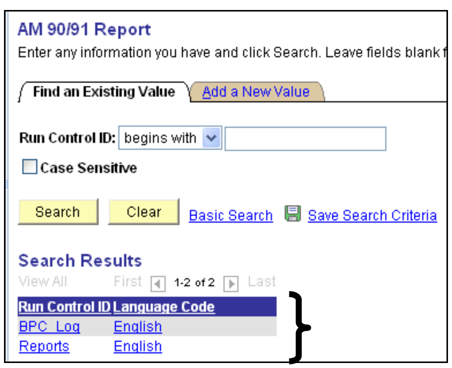


After choosing the report you want to run, PeopleSoft displays a set of pages - one for finding an existing run control, and one for adding a new run control.

To check for existing run controls, click Search.

PeopleSoft displays the message “No matching values were found” if there are no existing run controls.

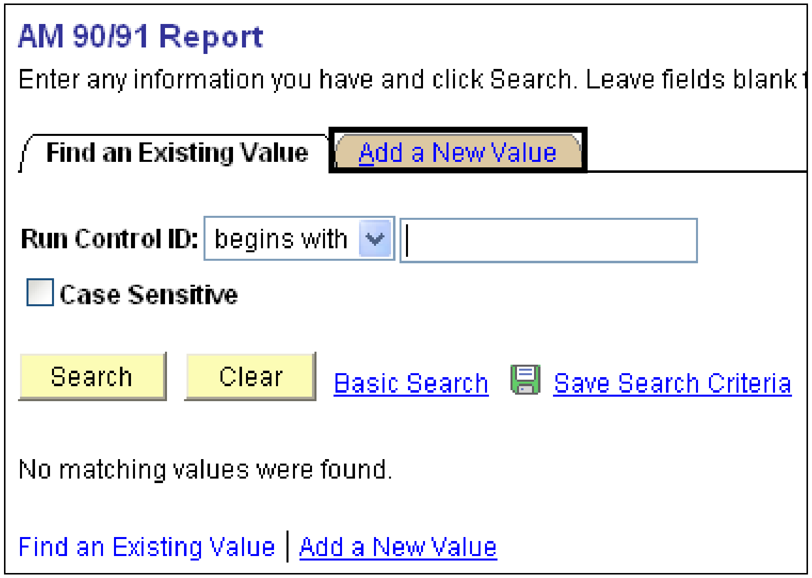
See the next page for steps to create a run control.



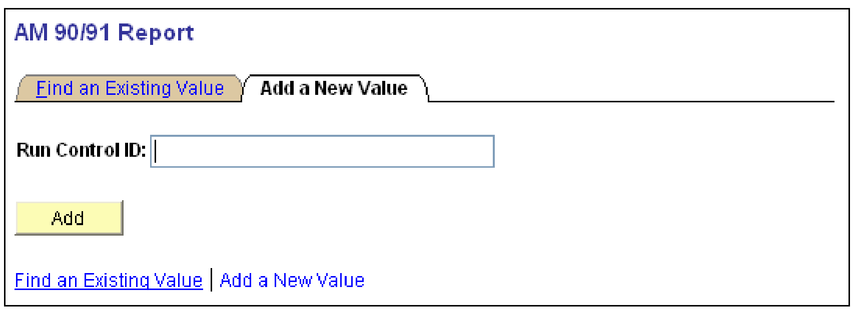
If there are existing run controls in the system, PeopleSoft displays a list of Search Results. Simply click the run control you want to use and PeopleSoft will continue to the criteria page for the report.

Regardless of whether you have existing run controls in the system, you can always create a new one. However, since there is no way to delete a run control, you will want to limit the number of new ones you create.

Creating a Run Control



1. Click the **Add a New Value** tab.

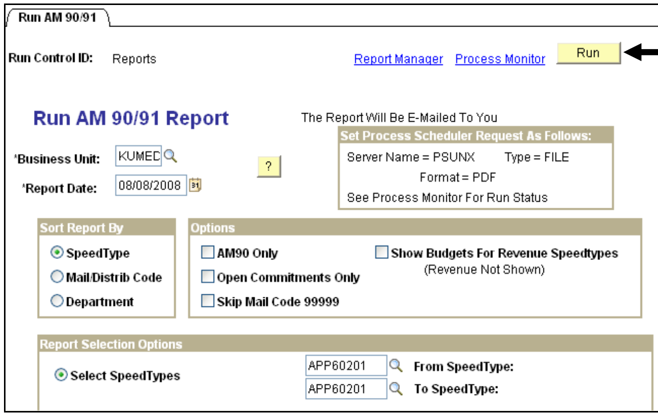


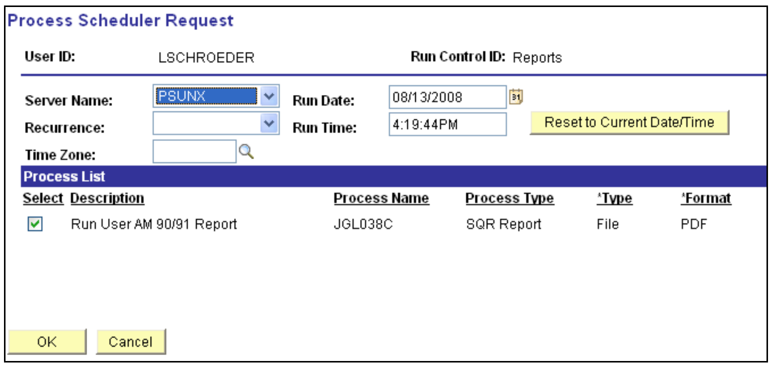
2. Enter a name for the run control.
3. Click 

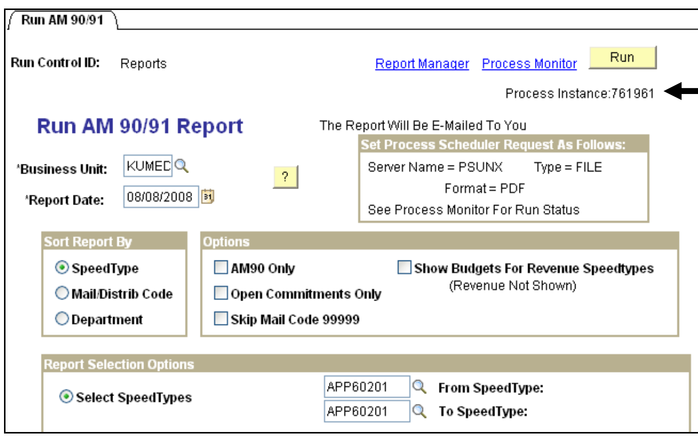
.

Step 2 Run control names cannot contain spaces or special characters.

Running the Report







1. After entering the criteria for the report, click Run.

2. No changes are needed on this page. The default settings are correct for any report that you run.

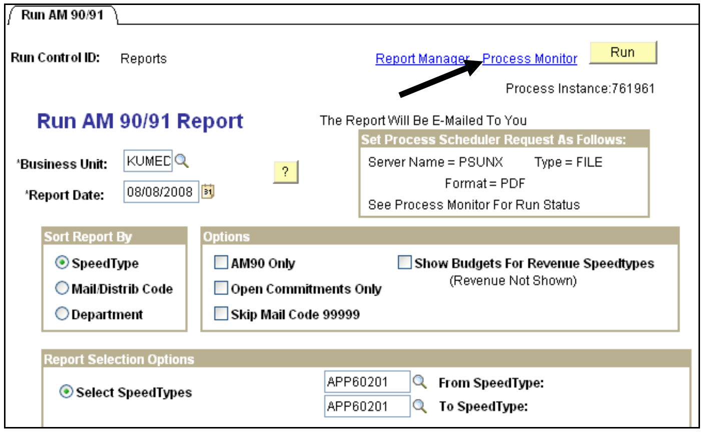
   Server Name = PSUNX

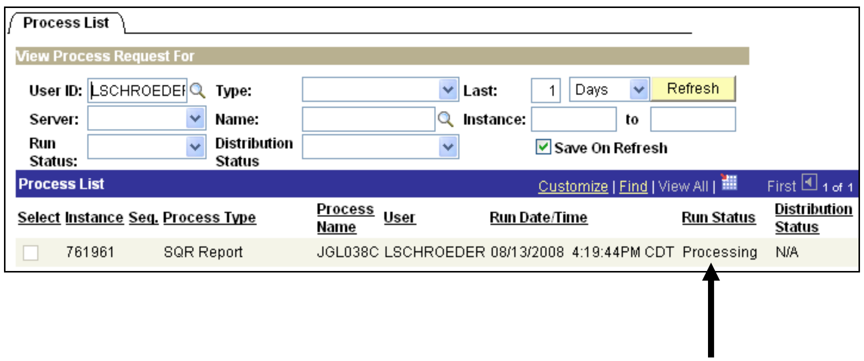
3. Click OK.

PeopleSoft returns to the criteria page. You know that you have run the report because the **Process Instance** number appears below the Run button.

An optional step is to check the progress of the report through the Process Monitor. This is optional because the report will be emailed to you automatically when it is complete.

Process Monitor





1. To check the progress of the report, click the **Process Monitor** link.

2. Note the **Run Status**.

Run Status	Description
Queued	Report is in line to be processed
Initiated	Report has started
Processing	Report is in process
Posting	Report is being finalized
Success	Report has been emailed

Click Refresh until Run Status displays *Success*. Expect to see the report in your email.

Click KU_PROCESSES to return to the navigations icons, or click Sign out to end your PeopleSoft session.

Assistance

Using PeopleSoft

Questions regarding how to utilize PeopleSoft, how to navigate within PeopleSoft, and how to add or change your access to PeopleSoft modules should be directed to PeopleSoft Support at ext. **8-1121**.

The office is usually staffed from 7:30 AM to 4:30 PM. In the event no one is available to assist, you may leave your question on the office Audix voice mail system, and we will return your call.

Computer Problems

Questions regarding PeopleSoft installation or network and printer connectivity issues should be directed to the IT Helpdesk at ext. **8-7995**.