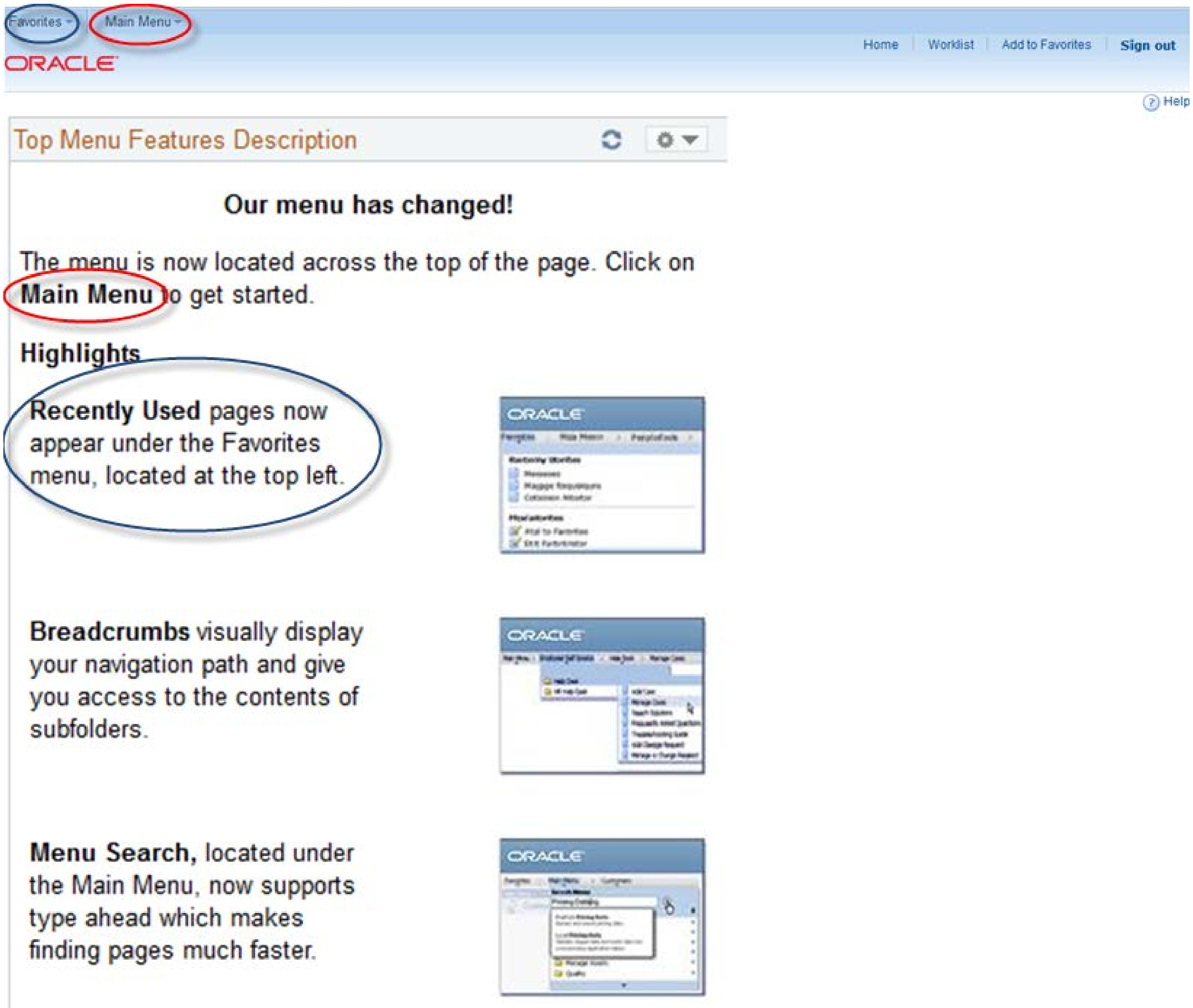
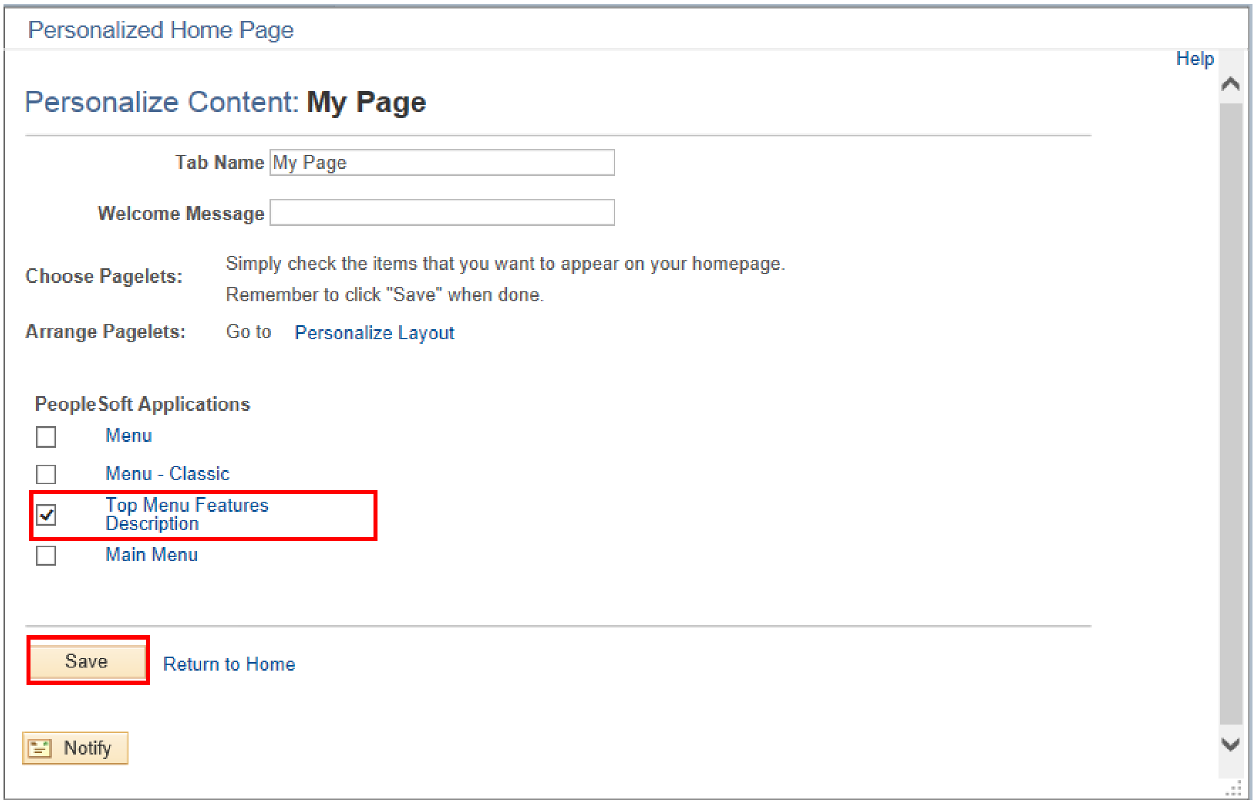
PeopleSoft Finance v8 vs. v9

When you first log into PeopleSoft Finance v9, this is what you will see. This page explains some of the features of the new version.

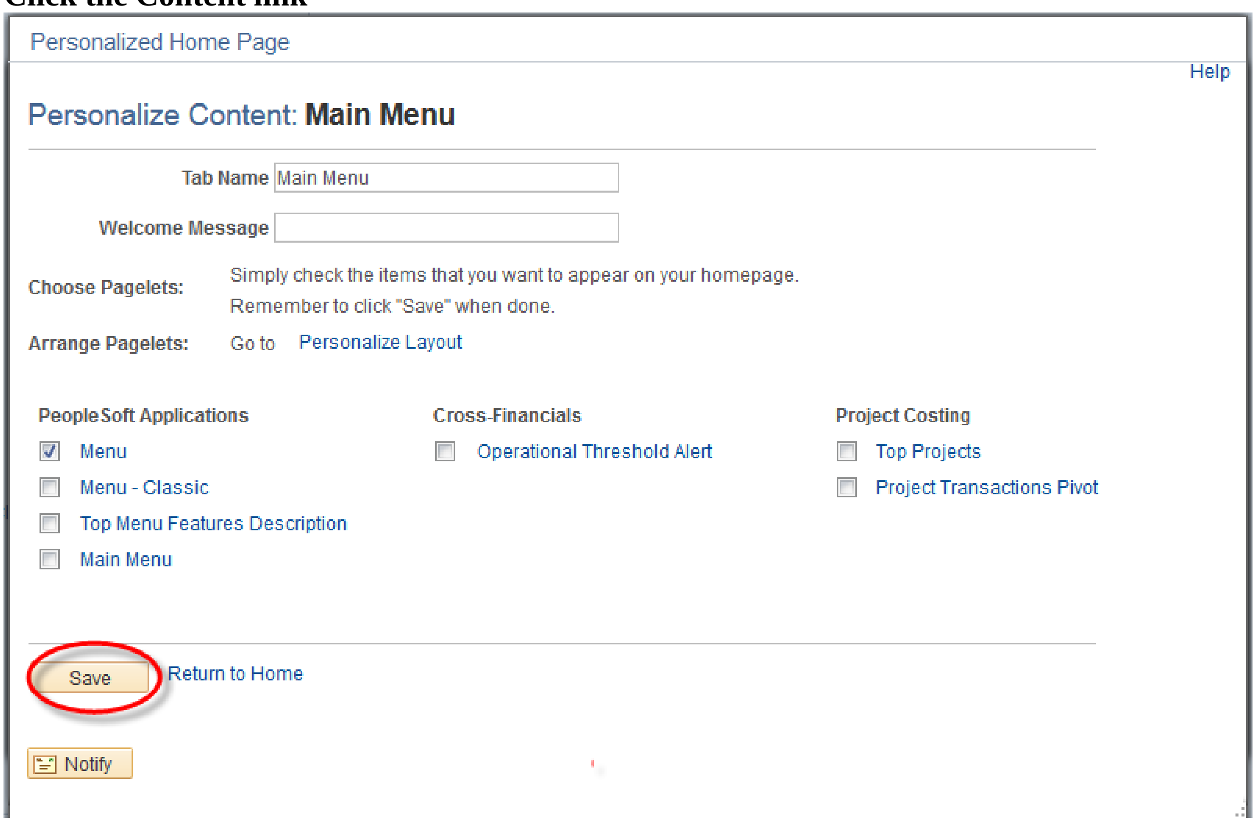


To remove Top Menu Features Description page: click on Content and uncheck Top Menu Features Description and click Save.

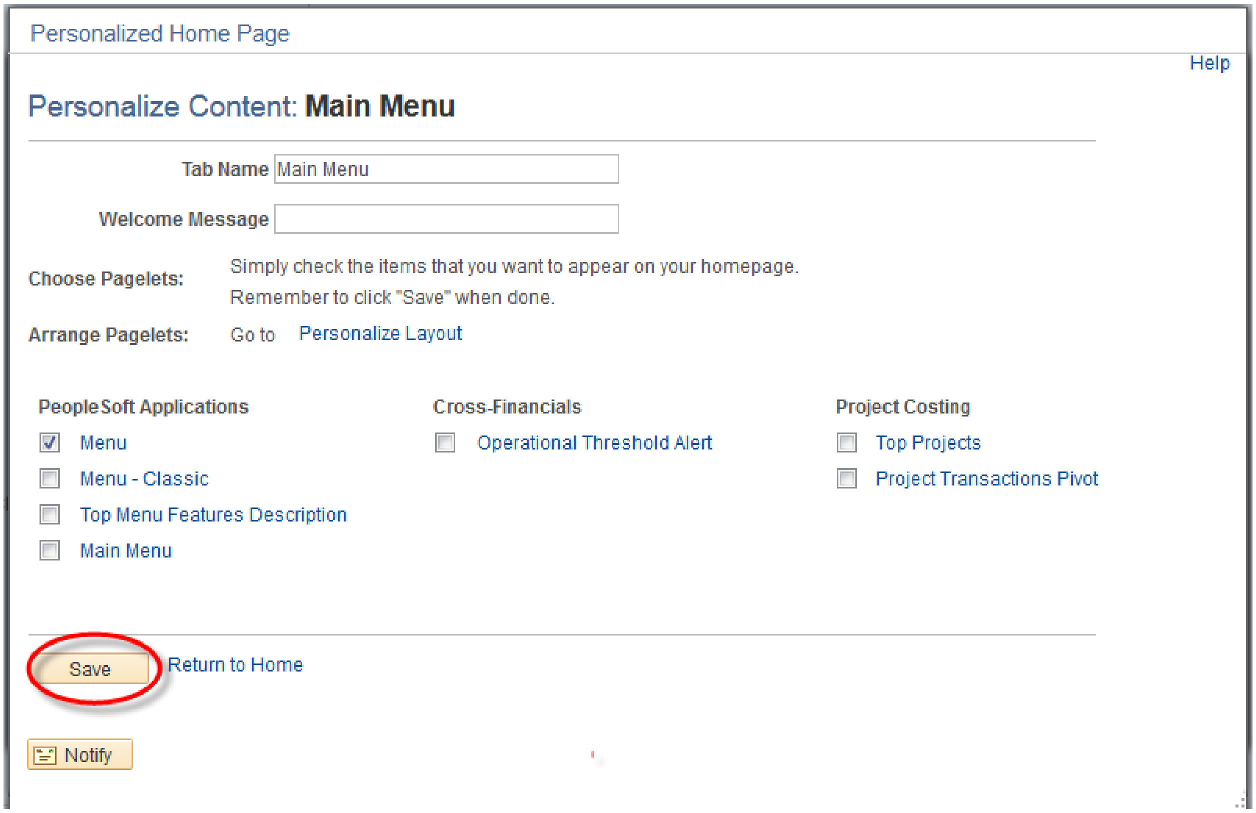


How to put the Main Menu back on the page:

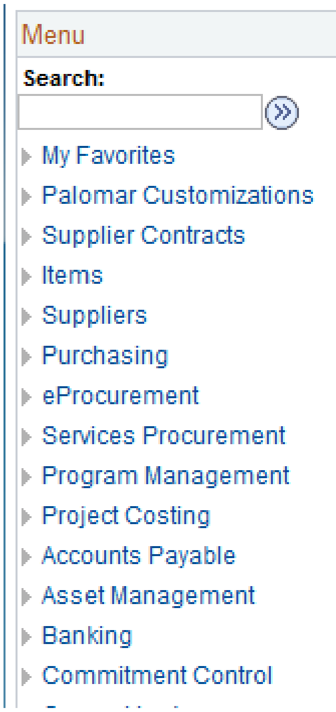
Click the Content link



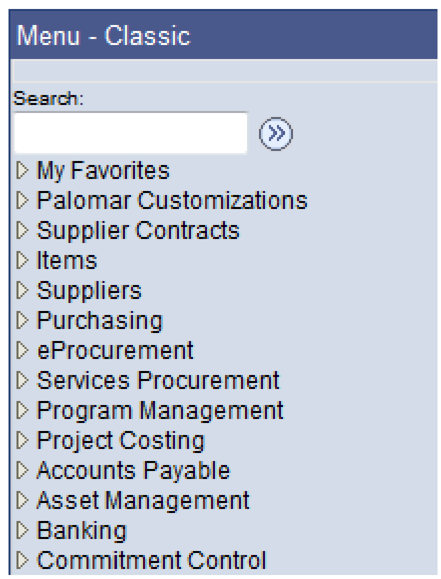
Choose Menu or Menu – Classic and Save. The Classic Menu looks like the old version



MENU:



CLASSIC MENU:



Approving a Requisition – when you have a requisition to approve you should receive an email with the link to the Financials system. If you don't receive the email in your Inbox check your junk email folder.

Subject: Approval is Requested for Requisition ID "0000008359" Business Unit "Palomar Community College Dist"

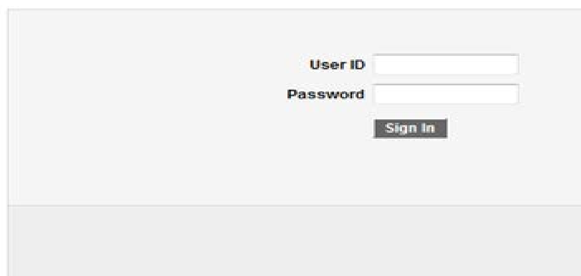
A requisition has been entered which requires your attention.

Requester: KDAVIS
Business Unit: Palomar Community College Dist
Requisition ID: 0000008359
Requisition Name: 0000008359
Date: 2014-11-18

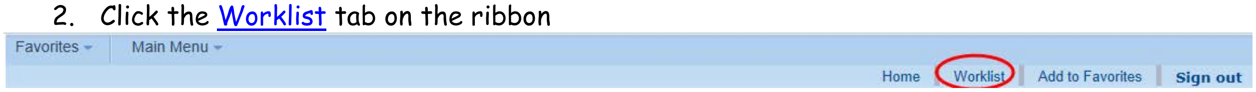
You can navigate directly to the approval page by clicking the link below.

http://pcpsftwb01.palomar.edu:8020/psp/palf9tst/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_REQ_APPROVAL.GBL?Action=U&BUSINESS_UNIT=PALMR&REQ_ID=0000008359

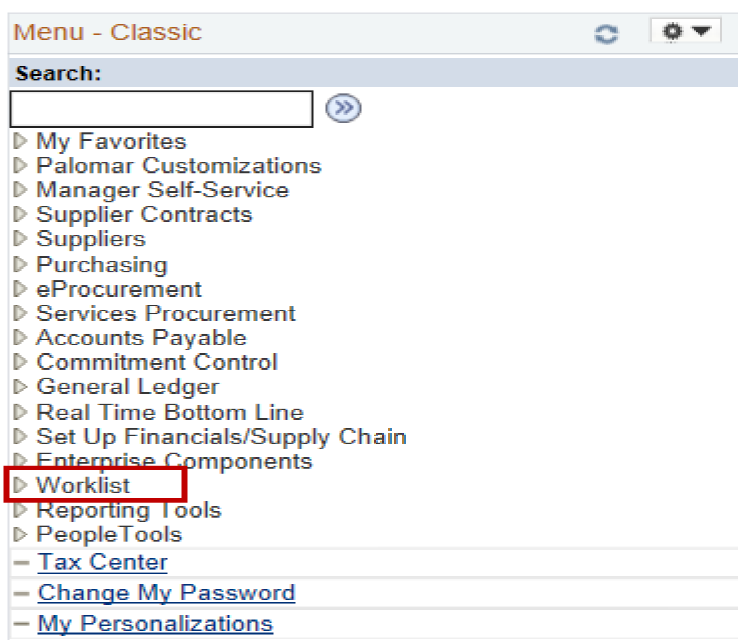
1. Log into PeopleSoft Financials.



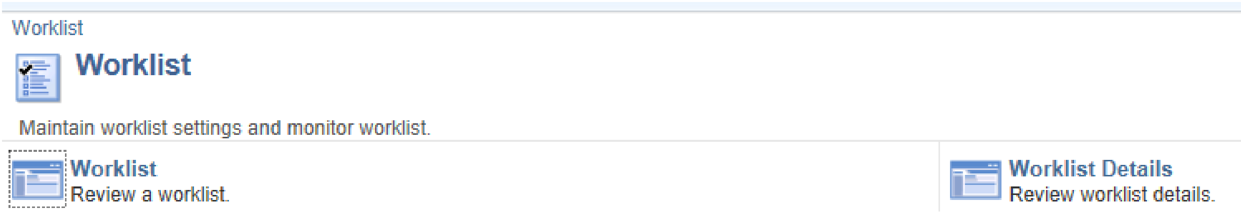
2. Click the Worklist tab on the ribbon



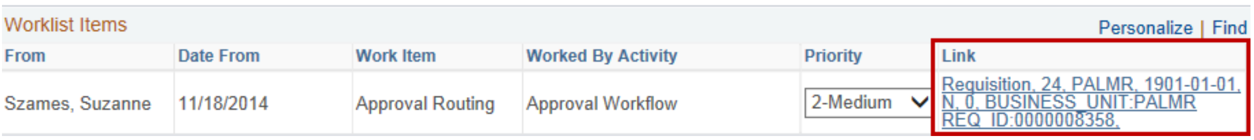
OR in the Menu.



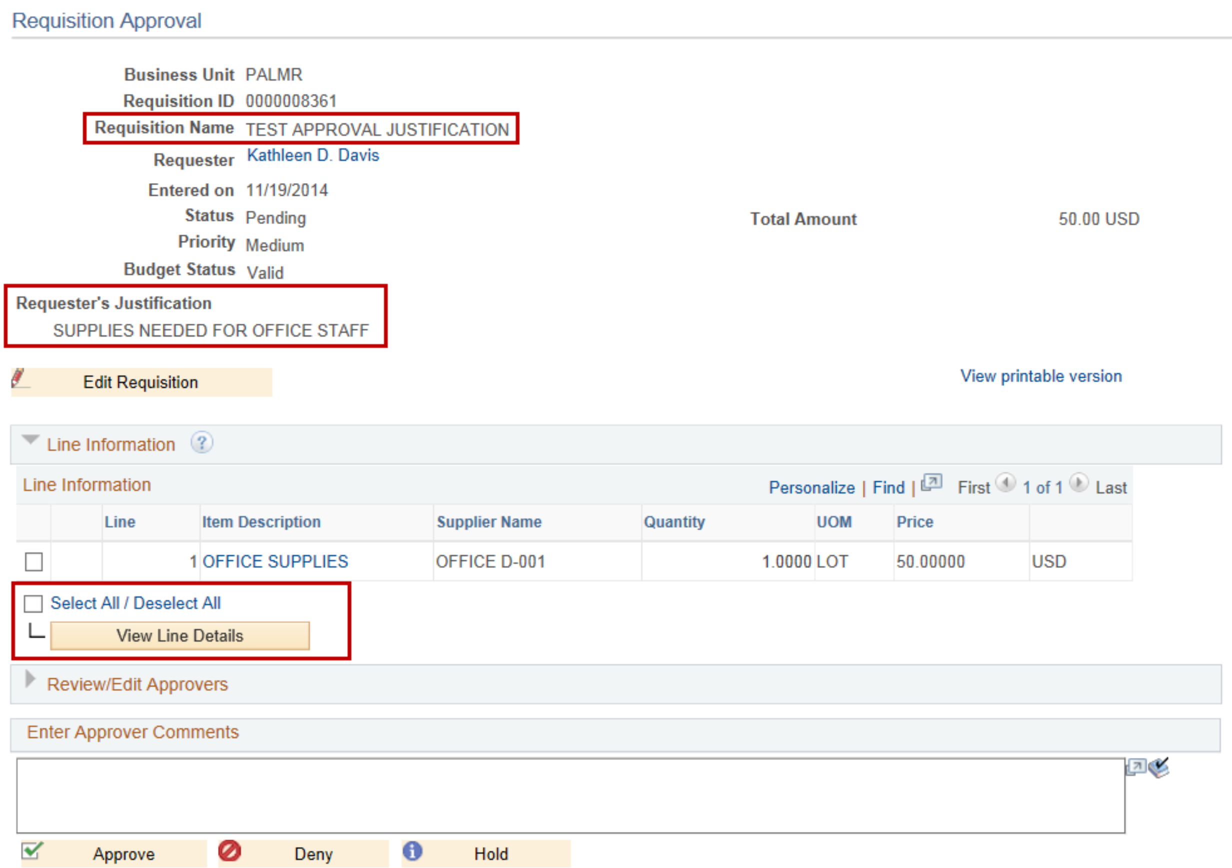
If you choose the option from the menu you will get these options.



3. Your worklist will be displayed



4. Click on the link for each Req. This will open the Requisition Approval page:



Information on this page includes: **New features**

- **Requisition ID**: This is the Requisition ID number. Reqs are sequentially numbered.

- **Requisition Name:** The requester can name the requisition. If the requisition is not given a name the default is the requisition number.
- **Requester**: The person who entered the requisition into the system.
- **Entered on**: The date the requisition was entered by the requester.
- **Requester's Justification:** The requester can include information to the approver for clarification.
- **Line Information – View Line Details:** Includes Item Description, Supplier Name (Vendor), Quantity, Unit of Measure (UOM) Price and Distribution/Chartfields.
- **Enter Approver Comments:** Use this text box to give more information to the next level approver.
- **Total** The total amount of the Requisition.

5. Approval Action:

Approve	Deny	Hold

Approve If the Requisition meets with your approval, click the Approve button in the lower left corner of the page. The Requisition is now approved. If you are the final approver for this req, the **Approval Status** will change to Complete. Otherwise, it will remain In Process and will be automatically routed to the next level approver.

Deny If you change the Approval Action to Deny, then click Deny. The Requester will get an e-mail stating that the Req has been denied (with your comments if you add them). No further changes may be made to the Req.

Hold If the approver requires further information from the requester, click on Hold and enter comments explaining why you are requesting information, then click "Hold" again. Comments are required explaining why information is being requested for this requisition, so the requester knows why this requisition will not be approved. If appropriate, please include details of what the requester can change to get the requisition approved. Once the requester makes the changes you will receive another email for you to approve the req.