

# 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.

The image shows a screenshot of the PeopleSoft Finance v9 interface. At the top, there is a navigation bar with 'Favorites' and 'Main Menu' links circled in red. Below this is the 'Top Menu Features Description' page, which has a title bar with a refresh button and a dropdown menu. The main content area has a heading 'Our menu has changed!' followed by a paragraph: 'The menu is now located across the top of the page. Click on **Main Menu** to get started.' Below this is a 'Highlights' section with three items: 'Recently Used pages now appear under the Favorites menu, located at the top left.' (circled in blue), 'Breadcrumbs visually display your navigation path and give you access to the contents of subfolders.', and 'Menu Search, located under the Main Menu, now supports type ahead which makes finding pages much faster.' To the right of each highlight is a small screenshot of the PeopleSoft interface showing the respective feature.

**Top Menu Features Description**

**Our menu has changed!**

The menu is now located across the top of the page. Click on **Main Menu** to get started.

**Highlights**

**Recently Used** pages now appear under the Favorites menu, located at the top left.

**Breadcrumbs** visually display your navigation path and give you access to the contents of subfolders.

**Menu Search**, located under the Main Menu, now supports type ahead which makes finding pages much faster.

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

Personalized Home Page

Help

## Personalize Content: My Page

Tab Name

Welcome Message

Choose Pagelets: Simply check the items that you want to appear on your homepage.  
Remember to click "Save" when done.

Arrange Pagelets: Go to [Personalize Layout](#)

PeopleSoft Applications

- ☐ Menu
- ☐ Menu - Classic
- ☒ Top Menu Features Description
- ☐ Main Menu

[Return to Home](#)

**How to put the Main Menu back on the page:**

**Click the Content link**

Personalized Home Page

Help

## Personalize Content: Main Menu

Tab Name

Welcome Message

Choose Pagelets: Simply check the items that you want to appear on your homepage.  
Remember to click "Save" when done.

Arrange Pagelets: Go to [Personalize Layout](#)

<p>PeopleSoft Applications</p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Menu</li> <li><input type="checkbox"/> Menu - Classic</li> <li><input type="checkbox"/> Top Menu Features Description</li> <li><input type="checkbox"/> Main Menu</li> </ul>	<p>Cross-Financials</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Operational Threshold Alert</li> </ul>	<p>Project Costing</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Top Projects</li> <li><input type="checkbox"/> Project Transactions Pivot</li> </ul>
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[Return to Home](#)

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

Personalized Home Page

Help

Personalize Content: Main Menu

Tab NameMain Menu

Welcome Message

Choose Pagelets:

Simply check the items that you want to appear on your homepage.  
Remember to click "Save" when done.

Arrange Pagelets:

Go to [Personalize Layout](#)

PeopleSoft Applications

☒ Menu  
☐ Menu - Classic  
☐ Top Menu Features Description  
☐ Main Menu

Cross-Financials

☐ Operational Threshold Alert

Project Costing

☐ Top Projects  
☐ Project Transactions Pivot

Save

Return to Home

Notify

MENU:

Menu

Search:

▶ My Favorites

▶ Palomar Customizations

▶ Supplier Contracts

▶ Items

▶ Suppliers

▶ Purchasing

▶ eProcurement

▶ Services Procurement

▶ Program Management

▶ Project Costing

▶ Accounts Payable

▶ Asset Management

▶ Banking

▶ Commitment Control

CLASSIC MENU:

Menu - Classic

Search:

▶ My Favorites

▶ Palomar Customizations

▶ Supplier Contracts

▶ Items

▶ Suppliers

▶ Purchasing

▶ eProcurement

▶ Services Procurement

▶ Program Management

▶ Project Costing

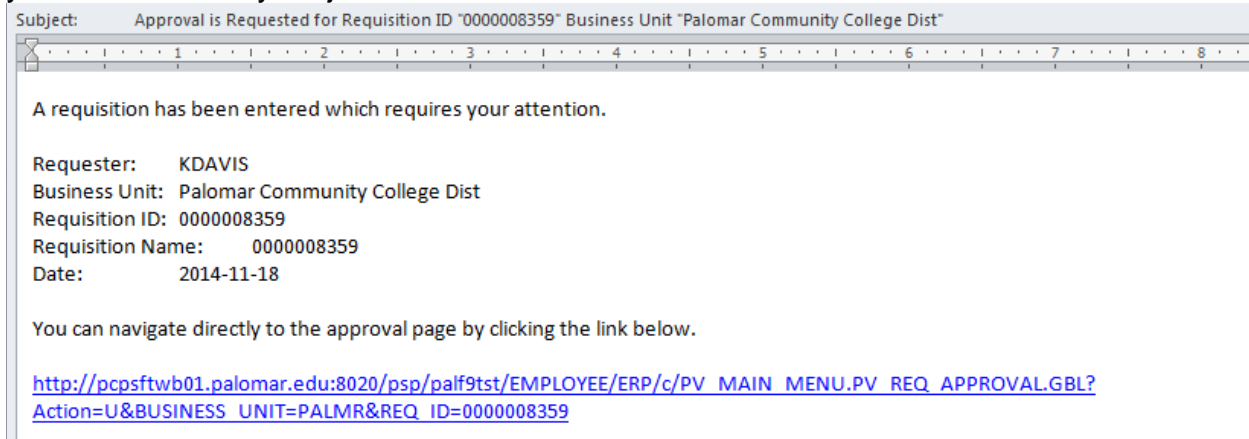
▶ Accounts Payable

▶ Asset Management

▶ Banking

▶ Commitment Control

**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.



1. Log into PeopleSoft Financials.

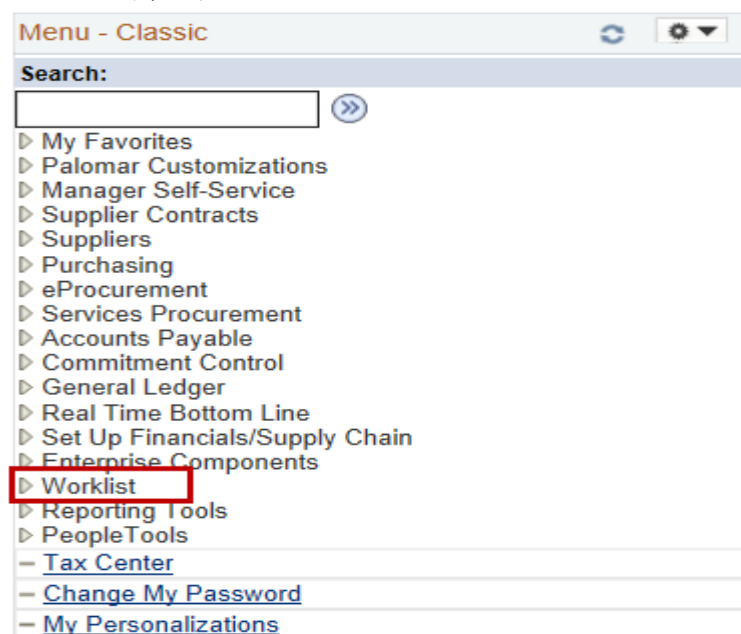


User ID   
Password

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.

**Worklist**

Maintain worklist settings and monitor worklist.

**Worklist**

Review a worklist.

**Worklist Details**

Review worklist details.

## 3. Your worklist will be displayed

Worklist Items						Personalize   Find
From	Date From	Work Item	Worked By Activity	Priority	Link	
Szames, Suzanne	11/18/2014	Approval Routing	Approval Workflow	2-Medium	<a href="#">Requisition, 24, PALMR, 1901-01-01, N.0, BUSINESS UNIT: PALMR, REQ ID: 0000008358.</a>	

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

## Requisition Approval

Business Unit PALMR  
 Requisition ID 0000008361  
**Requisition Name** TEST APPROVAL JUSTIFICATION  
 Requester Kathleen D. Davis  
 Entered on 11/19/2014  
 Status Pending  
 Priority Medium  
 Budget Status Valid

Total Amount 50.00 USD

**Requester's Justification**

SUPPLIES NEEDED FOR OFFICE STAFF



Edit Requisition

[View printable version](#)

## Line Information ?

## Line Information

Personalize | Find | First 1 of 1 Last

	Line	Item Description	Supplier Name	Quantity	UOM	Price	
<input type="checkbox"/>	1	OFFICE SUPPLIES	OFFICE D-001		1.0000 LOT	50.00000	USD

☐ Select All / Deselect All

View Line Details

## Review/Edit Approvers

## Enter Approver Comments



Approve



Deny



Hold

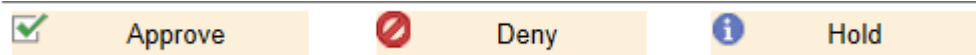
Information on this page includes:

**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** 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.