
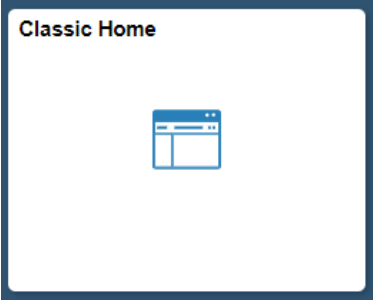


What's New in 9.2?

PeopleSoft Financials 9.2

Changes effective January 2021...

Description	Pre-Update 9.2 Version	Post-Update 9.2 Version
The color scheme has changed		
<p>PeopleSoft no longer supports classic navigation; so, the classic home tile has been removed</p>		<p>If you don't use Classic Home, continue business as</p> <p>If you use the Classic Home tile, here are several options to access this former menu path:</p> <p>OPTION 1: Do nothing now. After the upgrade, begin</p> <p>OPTION 2: Do nothing now. After the upgrade, continue</p> <p>OPTION 3: Prior to the upgrade, save menu paths in</p> <ol style="list-style-type: none"> 1) Navigate to the screen you frequently use 2) Click on Favorites > Add to Favorites 3) After the upgrade, you will find your Favorites in <p>OPTION 4: Prior to the upgrade, save a tile to My Home</p> <ol style="list-style-type: none"> 1) Navigate to the screen you frequently use 2) Click on the 3 dots button and select Add to Home 3) In the pop-up window, choose My Homepage 4) Navigate to My Homepage to use your new tile

Changes effective April 2017...

Within this document, take me to...

Purchasing	Expense Reports	Central Services
Budget Management	Approvals	

Navigation

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Old 9.1 Version







New 9.2 Version

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Clarkson PEOPLESOFT FINANCIALS 9.1 Version [Home](#) | [Worklist](#) | [Add to Favorites](#) | [Sign out](#)

Clarkson PEOPLESOFT FINANCIALS

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-  AP Voucher
-  Account Inquiry
-  Adhoc Grant Detail Report
-  Adhoc Grant Scope
-  Approve Vendor
-  Associated Budgets

▼ Expense Report
Purchasing
Budget Management
Central Services
User Preferences
My Homepage

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Favorites Main Menu

Recently Used

- Query Manager
- Project/Grant Budget Dashboard
- Travel and Expense Center
- Add/Update Requisitions
- Budgets Overview

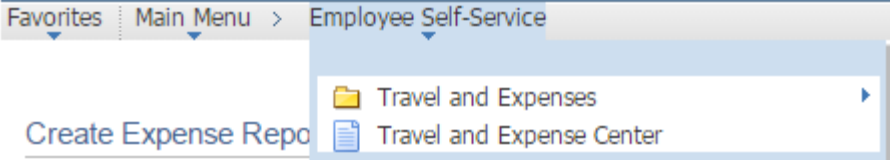
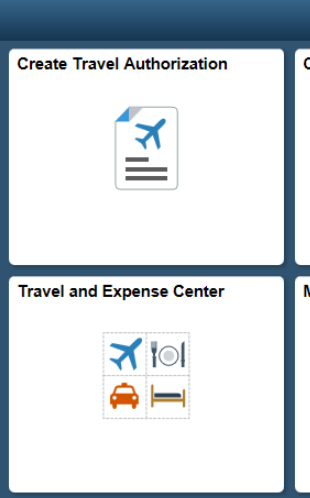
My Favorites

- Add to Favorites
- Edit Favorites
- AP Voucher
- Account Inquiry
- Adhoc Grant Detail Report

NavBar: My Fav

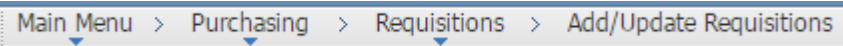
NavBar

- Classic Home
- Recent Places
- My Favorites
- My Favorites

M e n u p a t h n a v i g a t i o n r e p l a c e d w i t h t i l e l i n k s	 <p>Favorites Main Menu > Employee Self-Service</p> <p>Travel and Expenses</p> <p>Travel and Expense Center</p> <p>Create Expense Repo</p>	 <p>Create Travel Authorization C</p> <p>Travel and Expense Center M</p>

[top](#)

Purchasing

D e s c r i p t i o n	Old 9.1 Version	New
N a v i g a t i o n	 <p>Main Menu > Purchasing > Requisitions > Add/Update Requisitions</p>	

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T h e r m V e n d o r h a s b e e n r e p l a c e d w i t h S u p p l i e r	Vendor	Supp
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The location of some of the fields has changed

Maintain Requisitions

Requisition

Business Unit: CLKSN [University PCARD Program](#) Status: Open
 Requisition ID: NEXT Budget Status: Not Chkd
 Requisition Name: [Copy From](#) Hold From Further Processing

▼ Header

*Requester: [Requester Info](#) [Requisition Defaults](#)
 *Requisition Date: 04/13/2017 [Requisition Activities](#)
 Accounting Date: 04/13/2017 [Amount Summary](#)
 Total Amount: 0.000 USD

Line	Description	*Restrictions	Quantity	*UOM	Price	Merchandise Amount	Status
1			0.0000		0	0.000	Open

[View Printable Version](#)

*Go to: ...More...

Maintain Requisition

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▼ Header

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Line ?

Details

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[View Printable](#)

Approvers workflow status, former

▼ Related Content

CU_WF_REQUISITION_STATUS- Requisition Workflow Status

	Worklist Operator	Status	Last Modified
1	Karen Lee LaPoint	Entered	02/10/2015 1:00:56PM
2	Allison S. Aldrich	Approved	02/10/2015 1:16:06PM
3	Cinda S. Boyce	PO# 0000088239	02/11/2015 1:52:49PM

Dep

ly through Related Content, is now readily available through the View Approvals

Expense Reports

<p>Des crip tion</p>	<p>Old 9.1 Version</p>	<p>Ne</p>
<p>Navi gatio n to the vario us expe nse repo rt trans action s has chang ed from men u path to hom epag e/ tile links</p>		
<p>Expe nse Rep ort Head er</p> <ul style="list-style-type: none"> • T h e C o m m e n t 		

field is now located in the Summary and Submission section under Notes



- The location of some of the fields has changed

Expense Line Item (s)


- Selection of the Ex

Details ?							Personalize	Find	First	4-4 of 4	Last
Overview	Detail	Location	Merchant	Air/Hotel	Mileage	Per Diem	Currency				
Select	*Expense Type	*Expense Date	*Amount Spent	*Currency	Payment Type						
<input type="checkbox"/>	Mileage - US	04/14/2017	73.295	USD	Employee Paid						

Expense
Expand

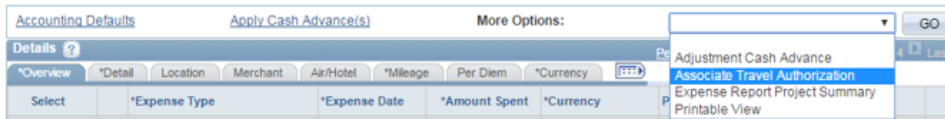
p e n s e T y p e w i l l n o w s h o w o n l y t h e r e q u i r e d f i e l d s . N o m o r e c l i c k i n g t h r o u g h m u

It i p le t a b s.

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You now have to enter at least 1 Expense Line before you have the opportunity to:



The screenshot shows a software interface with a dropdown menu. The menu items are: Adjustment Cash Advance, Associate Travel Authorization (highlighted), Expense Report Project Summary, and Printable View. The interface also includes tabs for Accounting Defaults, Apply Cash Advance(s), and More Options, along with a GO button and a Last button.

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You can now With draw Expense Report prior to 1st level approval; previously the Expense Report had to be Sent Back for Revision

Profile	Name	Action
	LaPoint,Karen Lee	Submitted
Department Budget Manager	Aldrich,Allison S	Sent Back For Revision

[top](#)

Budget Management

	Old 9.1 Version	New 9.2 Version
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Main Menu > Department Budget Dashboard

Main Menu > Project/Grant Budget Dashboard


Main Menu > Reporting Tools > Query > Query Viewer

Main Menu > Commitment Control > Review Budget Activities > Budgets Overview

Main Menu > Reporting Tools > PS/nVision > Define Report Book

Main Menu > Reporting Tools > Report Manager

Department Budget Dashboard



Budget Overview



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Show dashboard at login




Welcome to the Project/Grant budget dashboard.

**Due to the change in na
immediately upon acces**

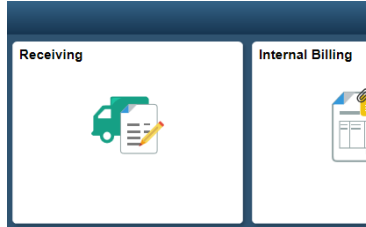
[top](#)

Approvals

Description	Old 9.1 Version	New 9.2 Version
<p>Navigation to Approvals has changed from Worklist to homepage / tile links</p> <p>(this tile also exists on the Expense Report homepage)</p>		

[top](#)

Central Services

Description	Old 9.1 Version	New 9.2 Version
<p>Navigation to Receiving and Internal Billing</p>	<p>Main Menu > Purchasing > Receipts > Review Receipt Information > Receipts</p> <p>Main Menu > CU Business Services > ADD / Update Transactions</p> <p>Main Menu > CU Business Services > Review Billing History</p>	

ing tools has changed from menu path to homepage / tile links

[top](#)