

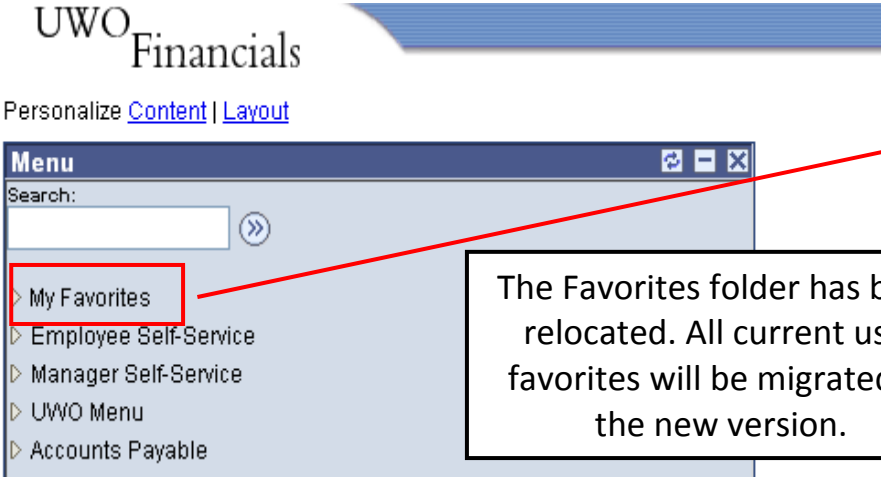

What's New in PeopleSoft Financials/Grants 9.1?

Most of the changes that users will immediately notice are with the “look and feel” of the new system. The overall functionality of the new system has not changed substantially, but users will notice changes in three areas:

1. An updated (yet still familiar) appearance
2. A new menu based navigation (with “breadcrumbs”) to supplement the current *classic* navigation
3. Improvements in the responsiveness of the system

A common question that is often asked is “Why did we upgrade?” The primary reason for upgrading is to maintain support from the application vendor (Oracle), but other reasons include keeping pace with changes to browsers & associated “helper” applications (e.g. Microsoft Excel), increased security, compatibility with other PeopleSoft/Oracle applications in use on campus (e.g. Human Resources, Higher Education), and the potential for enhanced functionality.

The following comparisons highlight some of the navigation changes between the current 8.8 version and the new 9.1 version.

Current System	New System
NEW LOOK ON THE “HOME” PAGE	
 <p data-bbox="630 1214 1129 1417">The Favorites folder has been relocated. All current user favorites will be migrated to the new version.</p>	

Current System

New System

AUTOMATIC MENU "COLLAPSE"

UWO Financials

Menu

Search:

- My Favorites
- Employee Self-Service
- Manager Self-Service
- UWO Menu**
 - UWO A/P Payment Processing
 - UWO A/P Special Reports
 - UWO Accounts Receivable
 - UWO Bank Reconciliation
 - UWO Capital Project Management

Main Menu >

- UWO Menu**
 - UWO Menu
 - UWO A/P Payment Processing**
 - UWO A/P Payment Processing
 - EFT Advices
 - Manual Cheque Register
 - Payment Processing Request
 - 2 More...
 - UWO Bank Reconciliation**
 - UWO Bank Reconciliation
 - A/P Sub-Ledger Balances
 - Foreign Bank Journal Detail

Left Menu still visible after clicking on UWO Menu

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Home

Favorites | Main Menu > UWO Menu

UWO Menu

- UWO Menu
 - UWO Accounts Receivable
 - UWO Accounts Receivable
 - UWO Financial Internal
 - UWO Financial Internal
 - UWO Journal Entry
 - UWO Journal Entry
 - Journal Print
 - UWO PO Requisitions
 - UWO PO Requisitions
 - Purchase Order Reprint

Left side Menu collapses and is no longer visible after clicking on any left side Menu item

Click on the Home button at any time to display the Left side Menu

BREADCRUMBS

UWO Financials

Menu

Search:

- My Favorites
- Employee Self-Service
- Manager Self-Service
- UWO Menu
 - UWO Accounts Receivable
 - UWO Financial Internal
 - UWO Financial Systems
 - UWO Inquiries**
 - GL Inquiry**
 - Journal Inquiry
 - SALCOM Inquiry
 - Salary Analysis

GL Inquiry

Enter any information you have and click Search. Leave fields blank if

Find an Existing Value | Add a New Value

Search by: Inquiry Name begins with

Search | Advanced Search

Find an Existing Value | Add a New Value

No Menu Breadcrumbs at final destination

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Favorites | Main Menu > UWO Menu > UWO Inquiries > GL Inquiry

GL Inquiry

Enter any information you have and click Search. Leave fields blank for a list of

Find an Existing Value | Add a New Value

Limit the number of results to (up to 300): 300

Search by: Inquiry Name begins with

Search | Advanced Search

Menu Breadcrumbs show recent path taken and provide for additional Navigation Options

Current System

New System

TREE NAVIGATION VS. FOLDERS

UWO Financials

Menu

Search:

- My Favorites
- Employee Self-Service
- Manager Self-Service
- UWO Menu 1
- UWO Accounts Receivable
- UWO Financial Internal
- UWO Financial Systems
- UWO Inquiries 2
 - GL Inquiry
 - Journal Inquiry
 - SALCOM Inquiry
 - Salary Analysis (Non-Rsrch)

Main Menu > UWO Menu >

UWO Inquiries

GL Inquiry

Salary Analysis (Non-Rsrch)

Salary Account Analysis Report (Non-Research)

Main Menu stays visible unless user minimizes it

Clicking on any Menu item with an arrow expands the "tree" beneath it. Here, the user has clicked on

1. UWO Menu
2. UWO Inquiries

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Home | Worklist

Favorites | Main Menu

Personalize Search Menu:

Menu

Search:

- Employee Self-Service
- Manager Self-Service
- UWO Menu
- Accounts Payable
- Accounts Receivable
- Billing
- Commitment Control
- Customers
- Grants
- Purchasing
- Travel and Expenses

Manager Self-Service

Travel and Expense


Accounts Receivable

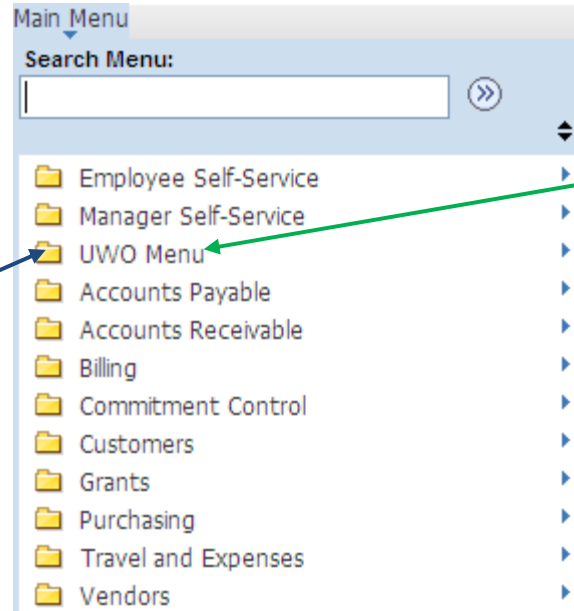
Access accounts receivable

In the new system, clicking on Main Menu provides a drop-down tree navigation


NEW NAVIGATION OPTIONS

From the Main Menu using the tree navigation, you have two options to navigate further.

Click on the yellow folder icon  to open a window containing all sub folders and pages



Or ...

Click on either the "text" or the arrow icon  to expand the tree structure to deeper levels

