PeopleSoft 9.1 – What you need to know for Go-Live.

✓ **Before** signing into PeopleSoft 9.1 every user will need to clear their web browser cache and reboot their computer. Instructions for recommended browsers and clearing cache are on the FMS Upgrade (when on the following link hit Ctrl and click your mouse) [website](#).

If your PeopleSoft Financial page is not appearing properly, a menu item that you previously had access to is not appearing, or if you run a process (such as opening your worklist) and the search is delivered, but the page keeps " | " in the upper right hand corner you may need to clear your web browser cache again. **Periodically, you should clear cache to help your browser function more efficiently.** (If you continue to have an issue, please contact FMS).

✓ Due to changes in various pages from 8.4 to 9.1 some Favorites (I.), Saved Search Criteria (II.) and Query Favorites (III.) may not copy over properly. Instructions below to delete and create.

✓ There are Budget details magnifier glass issues with existing saved searches (II). (See instructions below to remove Saved Searches).

✓ The Budget Transfer entry template (IV.) needs a quick, one-time update to personalize the selection and order of the columns.

(1.) **Menu – Favorites** - your personal list of navigation shortcuts.

• Favorites allow you to create your own list of bookmarks to commonly used pages in PeopleSoft. Establishing Favorites is a quick and easy way to save keystrokes and customize PeopleSoft to your individual needs. Below are the instructions for deleting and creating.

• **NOTE:** If you have saved menu items as a Favorite in 8.4, they may need to be deleted as the menu path has changed in 9.1. (For example, the page for Create an Expense Report has changed so this Favorite needs to be recreated). You can then remap as a Favorite in 9.1.

Delete Favorites by clicking on the left hand side above your menu Favorites > Edit Favorites.
• To delete unwanted Favorites, click on the Edit Favorites link under the Favorites menu.

• Click on the Delete button (-) to the right of each Favorite that you wish to delete.

• Each time a Favorite is selected for deletion, a confirmation message will appear to ensure that the item should be marked as such. Click OK.

• The Favorite(s) will disappear from the list but will not be deleted until you click on the Save button in the lower portion of the page. Click Save.

• To add Query Viewer to your Favorites, follow the instructions below:
  ▪ Navigate to the Query Viewer search screen (Reporting Tools > Query >Query Viewer)
  ▪ This will bring you the Query Viewer search screen shown below
• The Toolbar on the top right side of the page features several options: Home, Worklist, Add to Favorites and Sign out.

• Click “Add to Favorites” in the upper right of your browser. The following page appears.

• You may choose to keep the default description (the current page) or customize the description to your own preference. Click OK.
  - Once a new Favorite is added, click on the My Favorites menu option on top left of the PeopleSoft menu page to confirm that the new Favorite is stored.

(II.) Save Search Criteria - This feature is used to save your most common searches for Budget Details in Commitment Control.

Navigation: Commitment Control > Review Budget Activities > Budget Details

NOTE: You will need to DELETE all your ‘saved searches’ created in 8.4 and recreate and Save them in 9.1. The Magnifier Glass search functionality will not work properly unless this is done. As a result of the testing done over the last several months, it was discovered that there was a bug with the chartfield security functionality on the budget details page.

If you have a saved search under Budget Details in PeopleSoft 8.4, this will impact you. We have found that when a saved search does not specify a Department ID, the chartfield security does not work. When a user clicks on the magnifying glass, the entire department list will show. This issue has been reported to Oracle to resolve. For now, users will have to delete their saved searches from PeopleSoft 8.4 and recreate them in PeopleSoft 9.1. Going forward, any new saved searches will not impact Chartfield Security, even those that do not specify a Department ID.
**Delete Saved Search**

1. Select the Saved Search from the drop down box.

2. Click Delete Saved Search and choose the Saved Search to be deleted. Click Delete.

3. Click Delete.
Delete Saved Searches

Select the searches to be deleted, then click Delete.

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Delete  Return to Advanced Search

4. Click Delete.

Create Save Search Criteria

3. Type in the chartstring and click Save Search Criteria.
1. Name Search Criteria to be saved with no dashes or spaces and Click Save.

2. Click on Return to Advanced Search hyperlink.
3. You are returned to the search page where you are now given the option of using your saved search.

(III.) Adding Queries to Favorites - This feature is used to save keystrokes on your most common queries.

Navigate: Reporting Tools > Query > Query Viewer.

1. To add a query to your Favorites, enter in a query name and click on the Search button.
2. In the Query Search Results, click on Add to Favorites, under the Add to Favorite column, this query will be added to your favorites list.

3. The query now appears in My Favorite Queries.

4. Note: To remove a query click the icon in the Remove column.
(IV.) Budget Transfer Entry Template

1. Navigation: Commitment Control > Budget Journals > Enter Budget Transfer

2. Enter Budget Transfer Tab
   a. Click on Add tab.

3. Budget Header Tab
   a. Choose a Ledger Group: EXPBUDGETS (or REVBUDGETS for Revenue or PGBUDGETS for Projects or Grants)
   b. Select a Budget Entry Type from the drop-down: Temporary Transfer or Permanent Transfer.

   ![Budget Entry Type:]

   *Temporary Transfer
   *Permanent Transfer
   *Temporary Transfer

   c. Click the Budget Lines tab.

4. Budget Lines Tab
   a. Click Personalize (not to be confused with Personalize Page)

   ![Personalize]

   b. A new window opens that allows you to select and order your columns
   c. A pre-arranged template has already been created, on the bottom of this window, click Copy Settings
   d. Click on the looking glass to search for the Customized Setting

   ![Settings to Copy]

   Settings to Copy: [ ]

   e. Select the setting “KK Chartfield Order Transfer”

   ![Search Results]

   Search Results

   View 100 First 1 of 1 Last
   Setting Name
   KK CHARTFIELD ORDER TRANSFER

   f. Click OK to copy the settings
   g. Back on the “Personalize Column and Sort Order Window”, click OK.
h. To refresh the Budget Transfer Lines with the new Chartfield order click the Budget Header tab, then click back to the Budget Lines tab.

i. Click to show all the columns in the customized order.

j. The Budget Transfer page should now contain the new Chartfield order:
   i. Ledger, Budget Period, Dept, Fund, Fund Source, Program, Function, Property, Account, Amount, Ref, *Journal Line Description (the Chartfield will be different for RevBudgets and PGBUDGETS)

**NOTE:** Personalizations can be made to other PeopleSoft pages as well if you see Personalize. The above is one example.