The University is upgrading its Finance PeopleSoft application. Updating the software will help position the university to be able to take advantage of new functionality and keep up-to-date with future software releases. PeopleSoft is introducing Fluid pages that improve the mobile interface. Also new is the “NavBar” and the left hand folders and links, which changes how users navigate through the application.

**What is changing**

- **Navigation and Overall Functionality**
  - New tile based home page; bread crumbs are no longer used.
  - Ability for users to add tiles to their home page (as security permits).
  - Navigating the application is now done via tiles or the “NavBar”.
  - Each tile has a unique collection of folders and links tailored to the user roles for that function.
  - The user interface is simpler and more intuitive.

- **Employee Self Service**
  - Ability to withdraw an expense report before it is approved.
  - ‘Comments’ are now called ‘Notes’.

- **Module**
  - Grants and Billing
    - Billing Limit – PeopleSoft has provided a useable solution.
    - Milestone page - We were able to use the delivered grid page and add some custom fields rather than creating our own custom page.
    - LOC Subaccount – PeopleSoft has delivered this new field, so we can eliminate ours.
    - Ability to Change Sponsor – PeopleSoft now delivers this functionality so we did not have to bring over our modification.

- **Reporting**
  - On the Report Manager List tab, there is now a back button to return to your list.

**Employee Self Service Processing**

- *All Expense documents (Cash Advance, Expense Reports & Travel Authorizations) must be approved or sent back by Thursday 05/24/18 at 5:00 PM.*
- All transactions should have a ‘Valid’ budget status, and ‘Posted’ (i.e., AP vouchers and corresponding Payments should be posted).

**Reference to job-aids on campus web sites**

- Accessibility Setting Job Aid.
- How to Add to Favorites Job Aid.
- NavBar and Left Hand Navigation Job Aid.
- How Add a Tile Job Aid.
- Customize Home Page Job Aid.
- Clearing Browser Cache and Disabling Popup Blockers for supported browsers.
System Downtime and Limitation

- Thursday 5 PM, May 24th to Wednesday 8 AM, May 30th.
- The Finance application will not be available after 5pm Thursday.
- Finance batch will be on hold after the Thursday night batch run.

Summit:
- Summit availability will not change during this time. Summit Finance data during the event will be as of Thursday, May 24th (post batch).
- Summit batch will resume on Tuesday so Finance data will be up to date on Wednesday morning, May 30th.

BuyWays:
- Requisitions can be created; however, if a user creates a requisition, or approves one, it will remain in workflow until PeopleSoft is available.
- Purchase Orders will not be processed on the days the PeopleSoft application is unavailable.
- Vouchers will not be processed on the days the PeopleSoft application is unavailable.
- Searching and reporting will continue to be available.

Supported Browsers

<table>
<thead>
<tr>
<th>Browser</th>
<th>Version</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chrome</td>
<td>58.x</td>
</tr>
<tr>
<td>Firefox</td>
<td>52.x, 53.x</td>
</tr>
<tr>
<td>Internet Explorer</td>
<td>11.x</td>
</tr>
<tr>
<td>Safari</td>
<td>10.x</td>
</tr>
</tbody>
</table>

** Microsoft Edge browser is not a supported browser **

To open a page in Internet Explorer from Edge, click on the ‘More’ button (the three dots button on the upper right) and select ‘Open with Internet Explorer’.

To set Windows 10 to use Internet Explorer by default, follow the steps outlined in the instructions below: https://www.pugetsystems.com/labs/support-software/How-to-Switch-to-Internet-Explorer-from-Microsoft-Edge-728/