



**PeopleSoft\_Financials\_Upg  
rade\_to\_PUM51\_Delta  
Download to Excel  
Find Icon  
Personalize**

**Version Date: October 22, 2025**

**Training Guide**  
**PeopleSoft\_Financials\_Upgrade\_to\_PUM51\_Delta**

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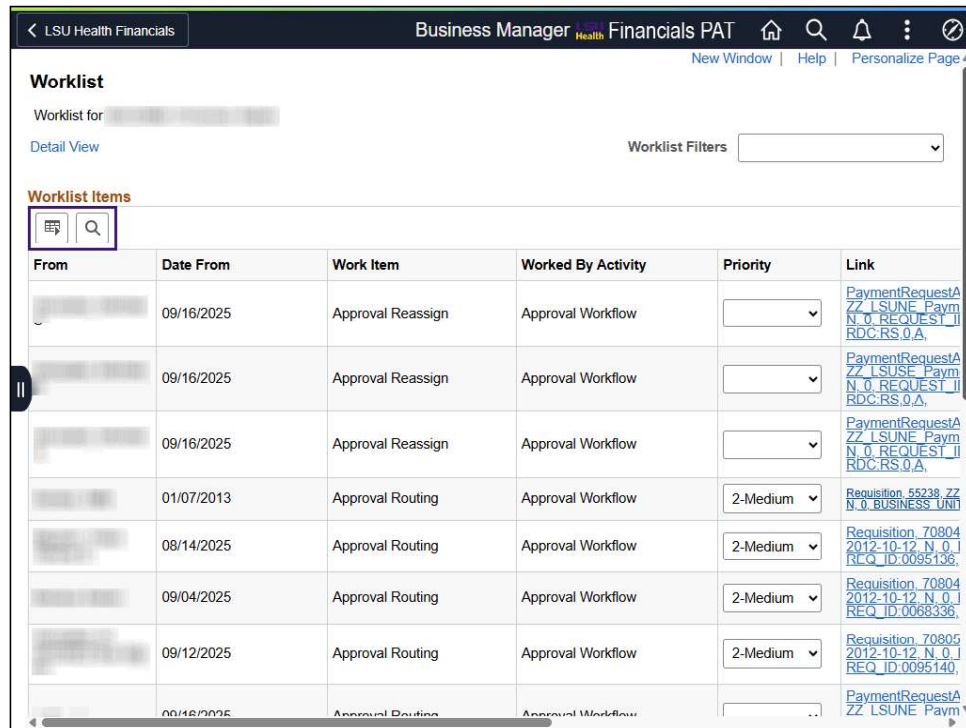
|                                                               |          |
|---------------------------------------------------------------|----------|
| <b>PeopleSoft_Financials_Upgrade_to_PUM51_Delta.....</b>      | <b>1</b> |
| <b>Download to Excel, Find, and Personalize Buttons .....</b> | <b>1</b> |

## PeopleSoft\_Financials\_Upgrade\_to\_PUM51\_Delta

### Download to Excel, Find, and Personalize Buttons

#### Procedure

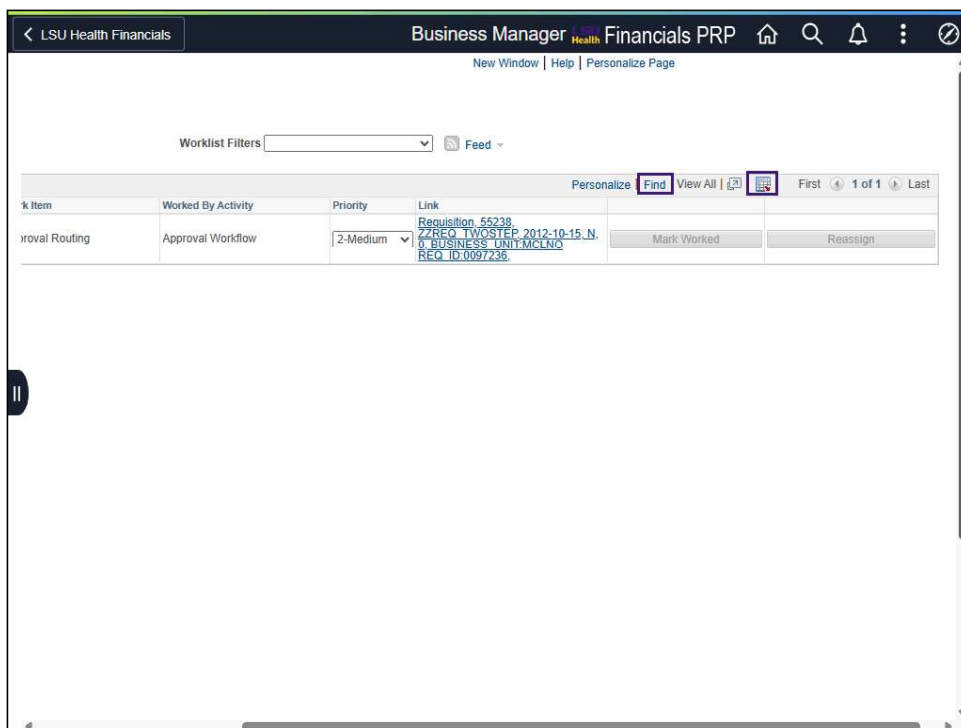
In this topic you will learn how to **Download to Excel, Find, and Personalize Buttons**.



| Step | Action                                                                                                                                                                                                                                                                                                                 |
|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.   | <b>Download to Excel, Find, Personalize Buttons</b><br><br><b><u>PAT - Upgraded</u></b><br><br>With the upgrade, the <i>Find link</i> , <i>Personalize</i> , and <i>Download to Excel</i> grid links are <i>moved from the right of the page to the left of the grid list</i> and are <i>buttons</i> instead of links. |

# Training Guide

## PeopleSoft\_Financials\_Upgrade\_to\_PUM51\_Delta



| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                             |
|------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 2.   | <p><b>Download to Excel, Find, Personalize Buttons</b></p> <p>As you can see from the screenshot, <b>Find</b> and <b>Download to Excel</b> both appear on top, right of the <i>grid list bar</i>.</p> <p><u><a href="#">PRP - Not Upgraded</a></u></p> <p>The <b>Find</b> link and the <b>Download Worklist Items Table to Excel</b> appear on the top, right of the page before <i>Worklist Item numbers</i>.</p> |

# Training Guide

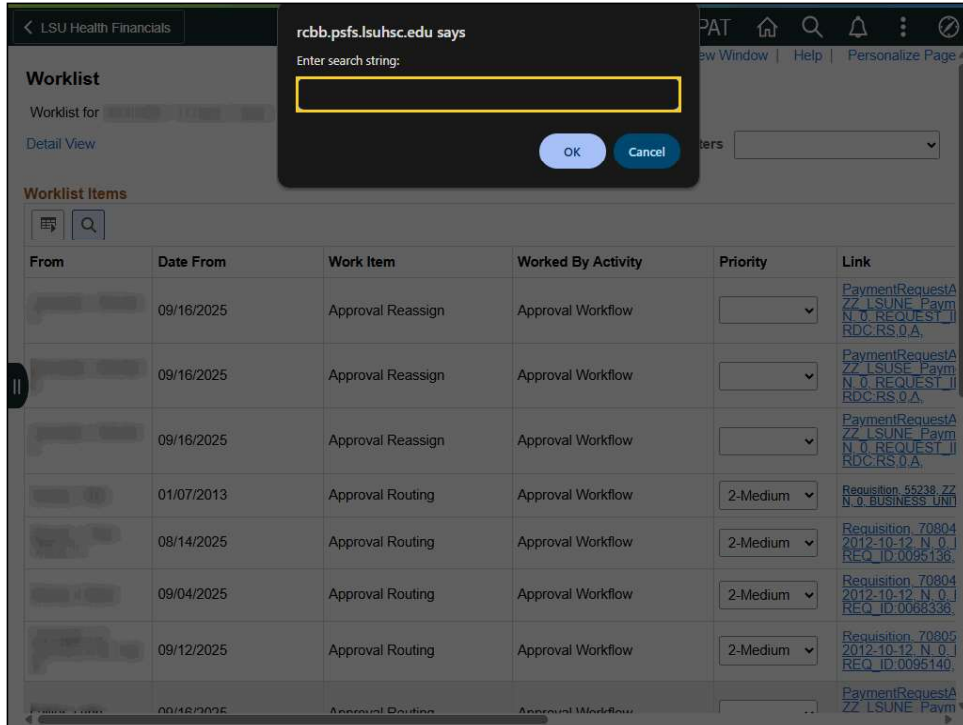
## PeopleSoft\_Financials\_Upgrade\_to\_PUM51\_Delta

| From | Date From  | Work Item         | Worked By Activity | Priority | Link                                                                                |
|------|------------|-------------------|--------------------|----------|-------------------------------------------------------------------------------------|
|      | 09/16/2025 | Approval Reassign | Approval Workflow  |          | <a href="#">PaymentRequestA<br/>ZZ LSUNE Paym<br/>N 0 REQUEST II<br/>RDC-RS 0 A</a> |
|      | 09/16/2025 | Approval Reassign | Approval Workflow  |          | <a href="#">PaymentRequestA<br/>ZZ LSUNE Paym<br/>N 0 REQUEST II<br/>RDC-RS 0 A</a> |
|      | 09/16/2025 | Approval Reassign | Approval Workflow  |          | <a href="#">PaymentRequestA<br/>ZZ LSUNE Paym<br/>N 0 REQUEST II<br/>RDC-RS 0 A</a> |
|      | 01/07/2013 | Approval Routing  | Approval Workflow  | 2-Medium | <a href="#">Requisition 55238 ZZ<br/>N 0 BUSINESS UNIT</a>                          |
|      | 08/14/2025 | Approval Routing  | Approval Workflow  | 2-Medium | <a href="#">Requisition 70804<br/>2012-10-12 N 0<br/>REQ ID:0095136</a>             |
|      | 09/04/2025 | Approval Routing  | Approval Workflow  | 2-Medium | <a href="#">Requisition 70804<br/>2012-10-12 N 0<br/>REQ ID:0068336</a>             |
|      | 09/12/2025 | Approval Routing  | Approval Workflow  | 2-Medium | <a href="#">Requisition 70805<br/>2012-10-12 N 0<br/>REQ ID:0095140</a>             |
|      | 09/16/2025 | Approval Routing  | Approval Workflow  |          | <a href="#">PaymentRequestA<br/>ZZ LSUNE Paym</a>                                   |

| Step | Action                                                                                                                                                                                                                                                                                                                                                                                           |
|------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 3.   | <p><b>Download to Excel, Find, Personalize Buttons</b></p> <p><b><u>PAT - Upgraded</u></b></p> <p><b>Find</b> is designated by the <i>magnifying glass button</i>. In this example, the user will search for the LSUSH requisition that is dated <b>09/18/2025</b>.</p> <p>Click the <b>Find</b> button.</p>  |

# Training Guide

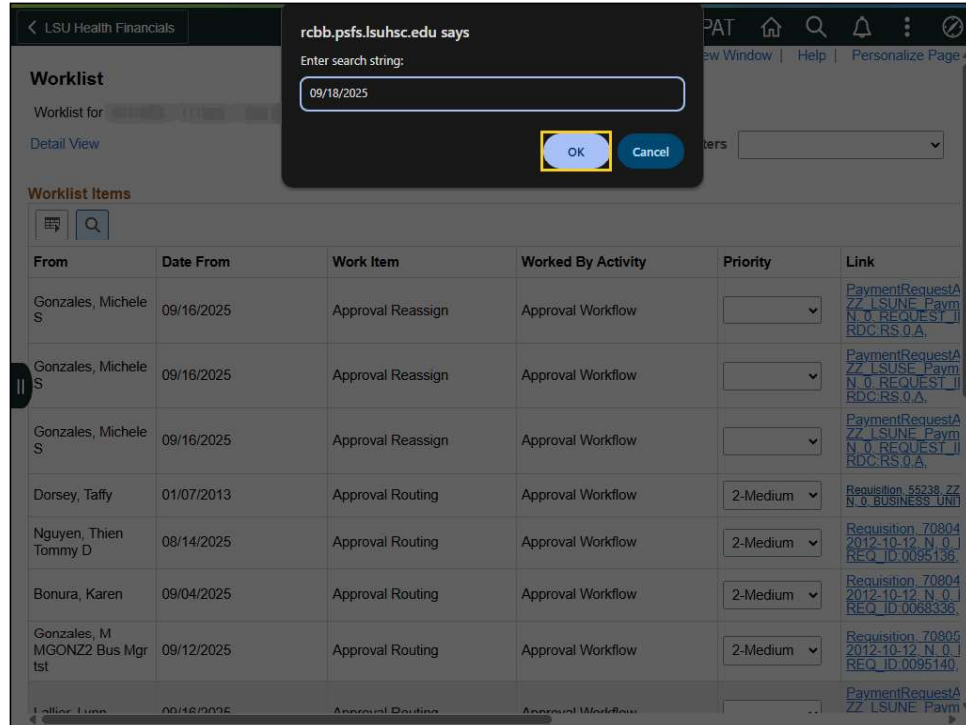
## PeopleSoft\_Financials\_Upgrade\_to\_PUM51\_Delta



| Step | Action                                                                                                                                                                                                                                                                          |
|------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 4.   | <p><b>Download to Excel, Find, Personalize Buttons</b></p> <p><b><u>PAT - Upgraded</u></b></p> <p>Users must enter the date using the correct <i>date format: MM/DD/YYYY</i>.</p> <p>Enter the desired information into the <b>Search</b> field. Enter <b>"09/18/2025"</b>.</p> |

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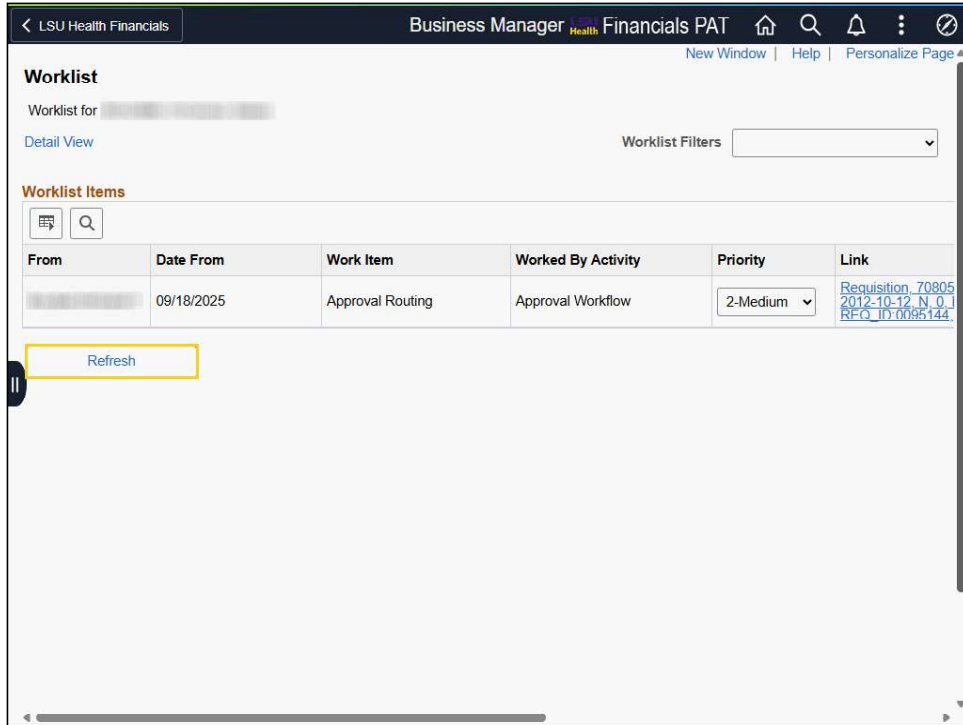
## PeopleSoft\_Financials\_Upgrade\_to\_PUM51\_Delta



| Step | Action                                                                                                                                                                                                                                                                                                   |
|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 5.   | <p><b>Download to Excel, Find, Personalize Buttons</b></p> <p><b><u>PAT - Upgraded</u></b></p> <p>Users must enter the date using the correct <i>date format: MM/DD/YYYY</i>.</p> <p>Click the <b>OK</b> button.</p>  |

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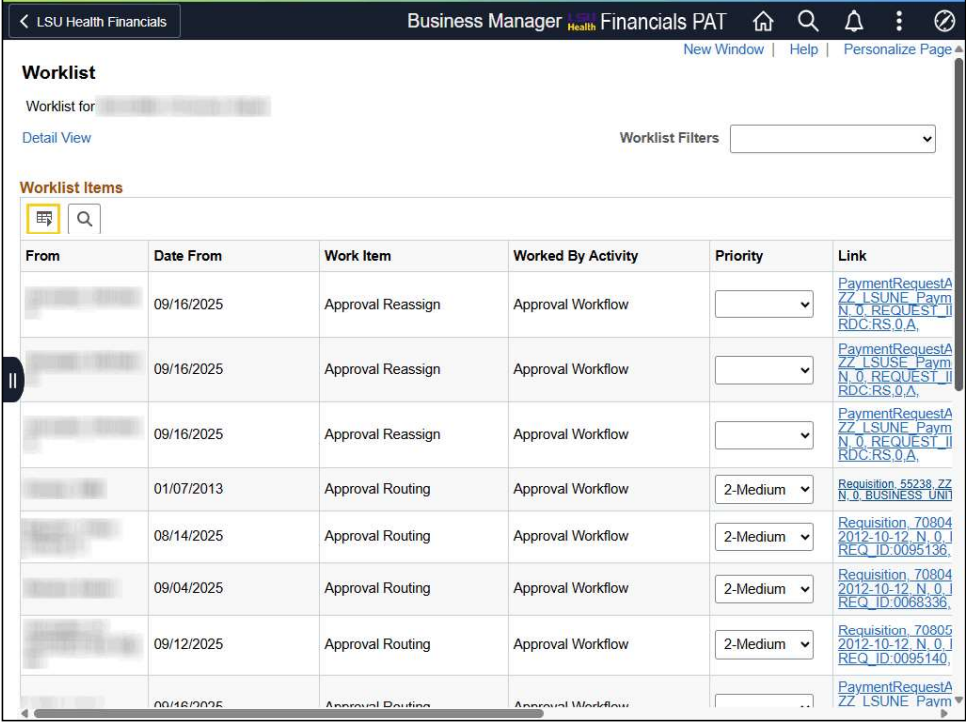
## PeopleSoft\_Financials\_Upgrade\_to\_PUM51\_Delta



| Step | Action                                                                                                                                                                                                                                                                                             |
|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 6.   | <p><b>Download to Excel, Find, Personalize Buttons</b></p> <p><b><u>PAT - Upgraded</u></b></p> <p>The 09/18/2025 Worklist Item is displayed by itself on the page.</p> <p>Click the <b>Refresh</b> button.</p>  |

# Training Guide

## PeopleSoft\_Financials\_Upgrade\_to\_PUM51\_Delta

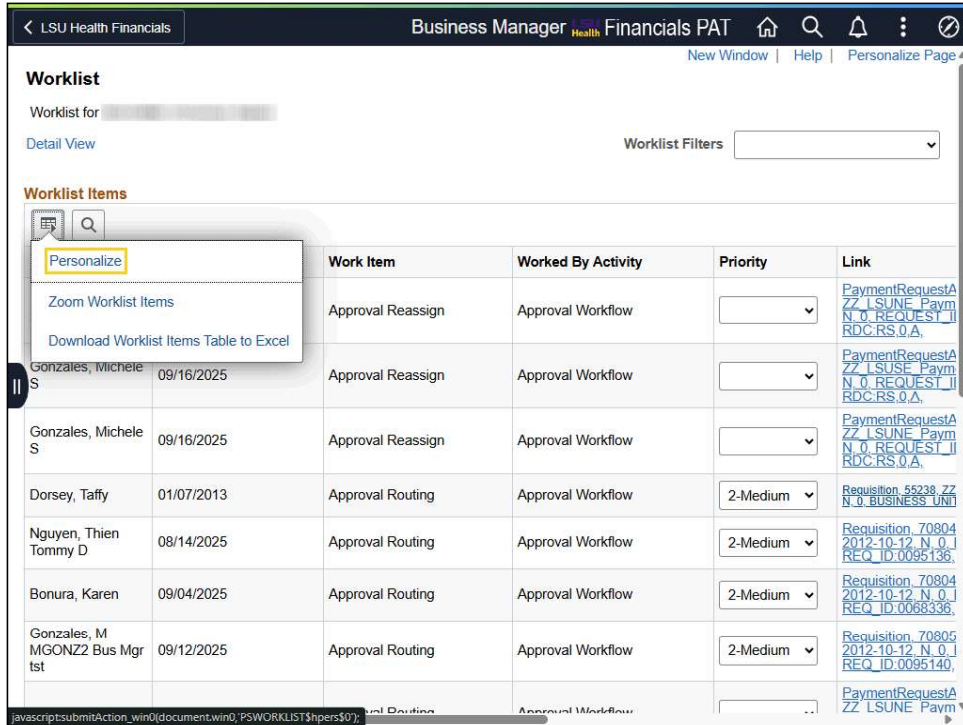


| From | Date From  | Work Item         | Worked By Activity | Priority | Link                                                                     |
|------|------------|-------------------|--------------------|----------|--------------------------------------------------------------------------|
|      | 09/16/2025 | Approval Reassign | Approval Workflow  |          | <a href="#">PaymentRequestA ZZ LSUNE Paym N 0 REQUEST II RDC.RS.0.A.</a> |
|      | 09/16/2025 | Approval Reassign | Approval Workflow  |          | <a href="#">PaymentRequestA ZZ LSUNE Paym N 0 REQUEST II RDC.RS.0.A.</a> |
|      | 09/16/2025 | Approval Reassign | Approval Workflow  |          | <a href="#">PaymentRequestA ZZ LSUNE Paym N 0 REQUEST II RDC.RS.0.A.</a> |
|      | 01/07/2013 | Approval Routing  | Approval Workflow  | 2-Medium | <a href="#">Requisition 55238 ZZ N 0 BUSINESS UNIT</a>                   |
|      | 08/14/2025 | Approval Routing  | Approval Workflow  | 2-Medium | <a href="#">Requisition 70804 2012-10-12 N 0 REQ_ID:0095136</a>          |
|      | 09/04/2025 | Approval Routing  | Approval Workflow  | 2-Medium | <a href="#">Requisition 70804 2012-10-12 N 0 REQ_ID:0068336</a>          |
|      | 09/12/2025 | Approval Routing  | Approval Workflow  | 2-Medium | <a href="#">Requisition 70805 2012-10-12 N 0 REQ_ID:0095140</a>          |
|      | 09/16/2025 | Approval Routing  | Approval Workflow  |          | <a href="#">PaymentRequestA ZZ LSUNE Paym</a>                            |

| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 7.   | <p><b>Download to Excel, Find, Personalize Buttons</b></p> <p><b><u>PAT - Upgraded</u></b></p> <p>The button that looks like a <i>little spreadsheet</i> is the <b>Grid Actions Menu</b>. This allows the user to <i>download to Excel</i>, <i>zoom in</i> on the <i>list of items</i>, or <i>personalize the grid</i> for certain pages.</p> <p>Click the <b>Grid Action Menu</b> button.</p>  |

# Training Guide

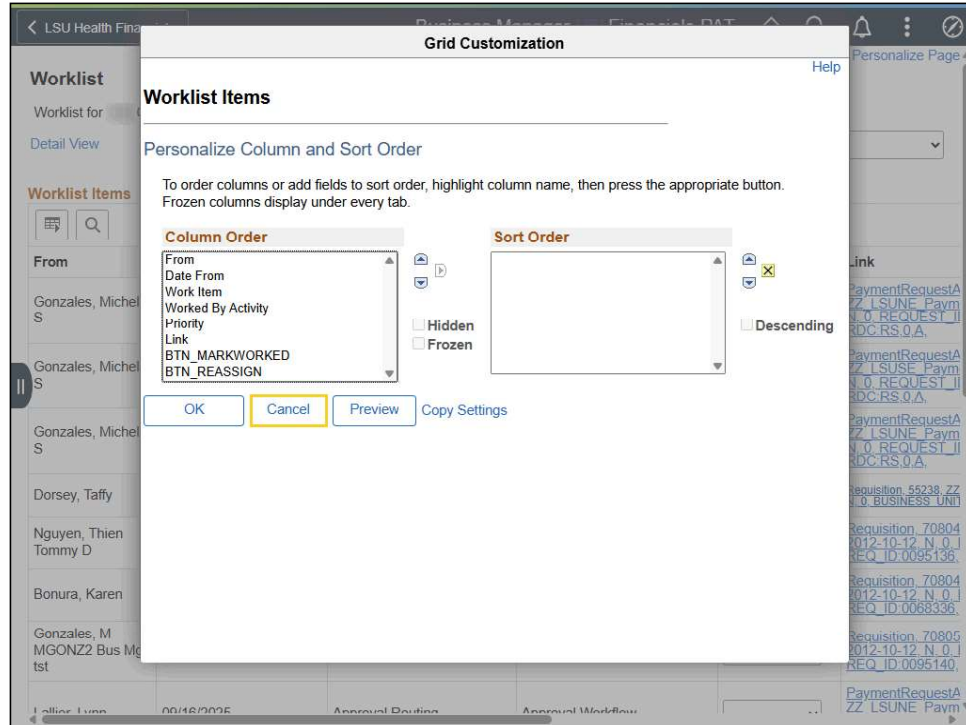
## PeopleSoft\_Financials\_Upgrade\_to\_PUM51\_Delta



| Step | Action                                                                                                                                                                                                                                                                                                                   |
|------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 8.   | <p><b>Download to Excel, Find, Personalize Buttons</b></p> <p><b><u>PAT - Upgraded</u></b></p> <p>By selecting the <b>Grid Actions</b> button on the <b>Worklist grid</b>, the user <i>sees</i> the <i>menu options</i> shown in the screenshot.</p> <p>Click the <b>Personalize</b> link.</p> <p><b>Personalize</b></p> |

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## PeopleSoft\_Financials\_Upgrade\_to\_PUM51\_Delta



| Step | Action                                                                                                                                                                                                                                                                                                                                                     |
|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 9.   | <p><b>Download to Excel, Find, Personalize Buttons</b></p> <p><b><u>PAT - Upgraded</u></b></p> <p>The Personalize page allows the user to order column or add field to the sort order. The user accomplishes this by clicking on the column name and then pressing the appropriate button.</p> <p>Click the <b>Cancel</b> button.</p> <p><b>Cancel</b></p> |

# Training Guide

## PeopleSoft\_Financials\_Upgrade\_to\_PUM51\_Delta

Asset Management

AM Search for an Asset Financials PRP

Search for an Asset

Asset Search Criteria

Unit: LSUNO Book: Parent ID: Category: Location: Area ID: Asset ID: Asset Status: In Service Group ID: Tag Number: Profile ID: Serial ID: Approval Pending: Additional Search Criteria Chartfield Search Criteria

Acquisition Details

PO Unit: Receipt Unit: AP Unit: PC Bus Unit: PO No: Receipt No: Voucher: Project ID:

Retrieve ?

☐ Cost Information ☐ Acquisition Information ☐ Location ☐ Non Capital Asset ☐ Custodian ☐ Lease

Search Clear

Notify

| Step | Action                                                                                                                                                                                                                                                               |
|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 10.  | <p><b>Search/Find Button Moved to within the Field Box</b></p> <p><u><i>PRP - Not Upgraded</i></u></p> <p>Users will see that the <b>Find</b> button, the <i>magnifying glass</i> is now <i>inside</i> the <i>field box</i> instead of immediately to the right.</p> |

# Training Guide

## PeopleSoft\_Financials\_Upgrade\_to\_PUM51\_Delta

**Search for an Asset**

**Asset Search Criteria**

Unit:

Book:

Category:

Location:

Asset ID:

Tag Number:

Serial ID:

Asset Status:

Profile ID:

☐ Approval Pending

[Additional Search Criteria](#) [Chartfield Search Criteria](#)

**Acquisition Details**

PO Unit:

Receipt Unit:

AP Unit:

PO No:

Receipt No:

Voucher:

**Retrieve** ⓘ

☐ Cost Information ☐ Acquisition Information ☐ Location ☐ Non Capital Asset ☐ Custom

| Step | Action                                                                                                                                                                                                         |
|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 11.  | <p><b>Search/Find Button Moved to within the Field Box</b></p> <p><b><u>PAT - Upgraded</u></b></p> <p>The screenshot shows the <i>Search/Find - magnifying glass</i> - button <i>within the field box</i>.</p> |

# Training Guide

## PeopleSoft\_Financials\_Upgrade\_to\_PUM51\_Delta

LSU Health Financials Business Manager LSU Health Financials PAT

### Search for an Asset

**Asset Search Criteria**

Unit:

Category:

Asset ID:

Tag Number:

Serial ID:

☐ Approval Pending

[Additional Search Criteria](#)

[Chartfield Search Criteria](#)

**Acquisition Details**

PO Unit:

PO No:

Receipt Unit:

Receipt No:

AP Unit:

Voucher:

**Retrieve** ⓘ

☐ Cost Information ☐ Acquisition Information ☐ Location ☐ Non Capital Asset ☐ Cust

| Step | Action                                                                                               |
|------|------------------------------------------------------------------------------------------------------|
| 12.  | This completes <i>Download to Excel, Find, and Personalize Buttons</i> .<br><b>End of Procedure.</b> |