



PantherSoft Fundamentals

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Overview

Oracle's PeopleSoft applications are designed to address the most complex business requirements. They provide comprehensive business and industry solutions, enabling organizations to increase productivity, accelerate business performance, and provide a lower cost of ownership through a single system of record entry and reporting.

FIU owns a suite of PeopleSoft applications that include Human Capital Management (known at FIU as Human Resources), Financial Management (known at FIU as Financials), and Campus Solutions. PeopleSoft at FIU is also referred to as PantherSoft.

PantherSoft Human Resources supports the end-to-end human resources business processes of the University. This includes payroll, recruitment, employee self-serve and much more.

PantherSoft Financials supports and creates a flexible, robust financials management system that allows key business processes to be directed efficiently. It supports all financial and grant capabilities, integration to other key administrative and research applications.

Campus Solutions is a comprehensive suite of software specifically designed for the changing needs of higher education institutions including administrative and academic business processes. Through Campus Solutions, users can set up the student financials foundation, activate and enroll students and calculate their tuition. Participants also learn how to disburse financial aid, bill customers, and process refunds.

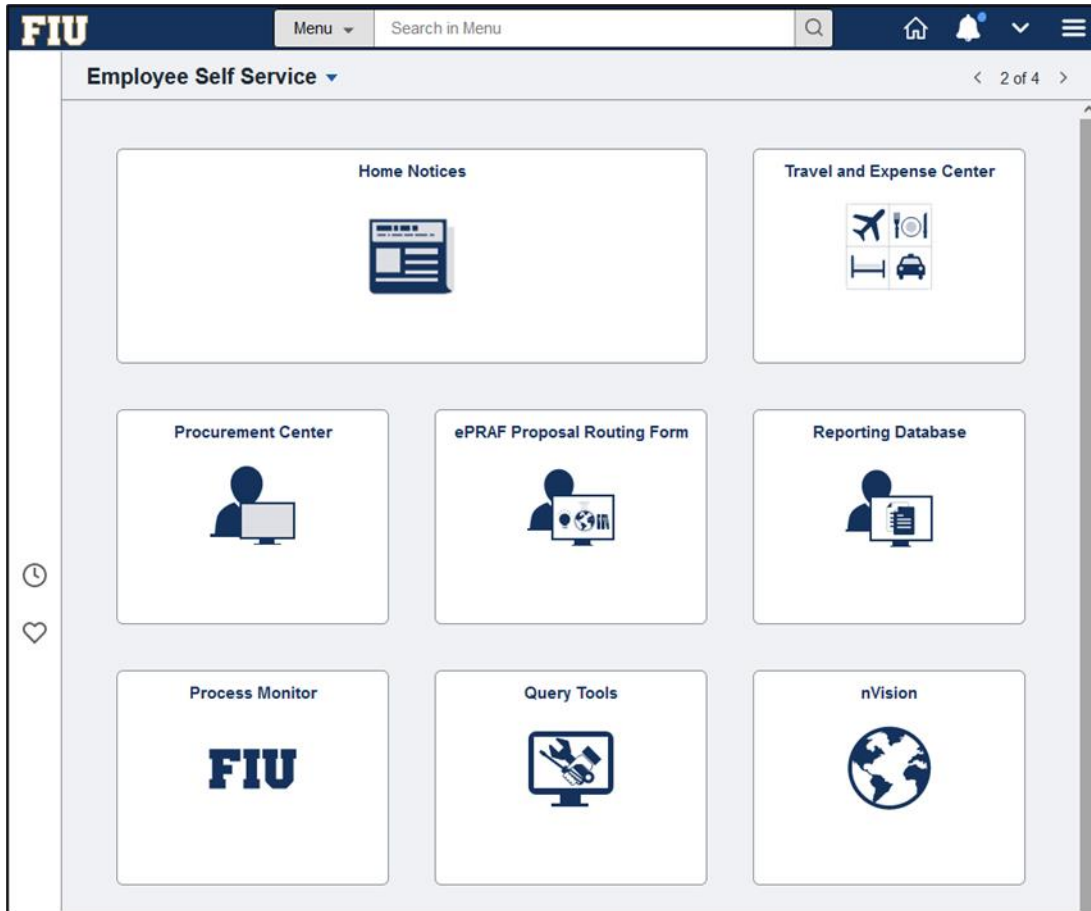
This manual should be used as a reference tool to use the FIU PantherSoft system efficiently. There is no prerequisite knowledge needed to follow this material and it is recommended for anyone using the PeopleSoft system.

The New PantherSoft Financials Fluid Interface

Fluid navigation includes **Homepages** and **Tiles** as the starting point for navigation.

The philosophy of Fluid navigation focuses on:

- Multiple paths for users to access functionality.
- Users may choose the path that is most effective for them.
- Use of related actions to make navigation work across all paths.



PantherSoft Glossary

A

Account: Identifies transactions based on the object of the event. This ChartField is used to classify transactions in the accounting systems as Assets, Liabilities, Revenues, Expenses, or Equity. Accounts are also revenue and expense items that appear on the statement of revenues and expenditures (profit & loss).

Accounting Date: The accounting date indicates when a transaction is recognized, as opposed to the date the transaction occurred. The accounting date and transaction date can be the same, but not always.

Accounting Period: The accounting period is equivalent to a calendar month beginning with the first month of the fiscal year. For example, the fiscal year runs from July 1 to June 30. July would be considered Period 1, August Period 2, and so on.

Accounts Payable: The record of money that the University owes to outside vendors.

Accounts Receivable: The record of money that is owed to the University.

Activity: These are specific tasks within a project.

Activity Number: Tracks revenues and expenses for a specific activity using a distinct fund, program code, site, and department (organization) string.

Actuals Ledger: (General Ledger) represents the place in PeopleSoft where all non-budget financial transactions are posted. i.e., displays the actual Revenues and/or Expenses posted for the periods. This is the data used for external financial reporting.

Adjustment Period: An additional accounting period in the PeopleSoft Financials system, used to store adjusting entries (typically made between fiscal years by the University's General Accounting Office).

AG_Related: An expense ledger that shows detail for the Restricted Agriculture funds.

Alternate Account: Classifies the nature of a transaction utilizing the State standard General Ledger code. Each "account" ChartField must be mapped to an alternate account.

Allocation: The movement of actual dollars, based on certain rules, performed with a journal (either automated or manual).

Approval Page: The tab on a journal that displays whether that journal has been approved, sent back (also known as "recycled"), or denied.

B

Blanket Purchase Orders: Used to make multiple purchases from a single vendor during a fiscal year (e.g., lab supplies, mice, space rental, consulting services, etc.). BPO's always have a due date of June 30.

Budget Check: A PeopleSoft process that checks to ensure that an available budget exists and the ChartString has funds available.

Budget Exception: Represents transaction items that have failed Budget Check.

Budget Journal: A commitment control journal used to establish a budget for a particular chart string.

Budget Period: The interval of time that is recognized as a unit for budgetary and reporting purposes. This is equivalent to the fiscal year for operating funds. Projects have one budget period for the life of the project.

Budget Reference: This is an optional field. It identifies the aid year for financial awards. Also used by the College of Medicine to identify the academic period.

Budget Transfer: The process used to move budget dollars between chart strings.

Business Meal: A Business Meal is a formal category of expense in which a group of individuals go out for a meal for a specific business purpose (for instance, as part of a job interview). The IRS requires the following information be provided related to Business Meals: the business purpose of the event, the location of the event, the people in attendance, and the date of the event. In contrast, a “travel meal” is simply a meal that is eaten while traveling, (e.g., as part of a conference or a trip.)

Business Unit: In the General Ledger, an entity with its own set of balanced books, which maintains its own set of transactions. (In other modules, the business unit provides a way of distinguishing entities that may have unique operating rules.)

Set ID (Business Unit): Code that is used to group and share configuration data across the application. PeopleSoft allows us to maintain more than one Business Unit for the general ledger. For example, at FIU, we create **most** of our control records (i.e., Accounts, Department ID, Activity #) under SetID ‘FIU01’ and it allows the entire university to use those values.

C

Cash Advance: An employee may request an advance to help defray out of pocket costs when traveling outside of the vicinity of the university. Note: there must be a travel authorization on file to receive a cash advance.

Chart of Accounts: Refers to the area of PeopleSoft concerned with the creation and maintenance of the University’s accounting structure. The chart of accounts serves as the basis for recording the day-to-day financial operations of the University and its structure uses “ChartFields” to record the financial effect of transactions. The use of ChartFields separates the unique aspects of each transaction into relational segments for summarization and reporting.

Chartfield: An individual field representing a portion of the accounting structure. Chartfield values represent account numbers, department codes, and so on. Each ChartField captures a different element of information regarding the transaction (e.g., who, what, why, how, where). At FIU, Activity Number, Cost PID, and Projects are examples of Chartfields.

ChartString: A set of ChartFields “strung” together to represent the proper categorization of a financial transaction. The use of multiple ChartFields allows for flexible reporting of the financial aspects of projects, activities, programs, events, etc., that occur across FIU organizations or funds.

Collected Revenue: Money that FIU has received from outside customers billed through the PeopleSoft Billing module.

Combination Editing: Certain rules that govern which ChartField combinations are valid and which combinations are not.

Commitment Control: The part of PeopleSoft Financials that deals with budgets. Reports drawn on Commitment Control show budget, revenue, and expenses.

Control: The act of placing restrictions on how certain monies are spent. Control is typically used in reference to sponsored projects.

Custom Report: Reports within PeopleSoft that were developed by UVM programmers. These reports can be changed and enhanced with additional programming effort.

Cost PID: A Chartfield that tracks revenues and expenses for a specific faculty member or faculty allocation.

D

Delivered Report: Standard reports that were received as part of the PeopleSoft package.

Deny: Not approving a request such as a Travel Authorization, Expense Report, or Smart Internal Bill. To deny, the manager must submit a comment.

Department: Identifies an organizational unit. To be considered a department, the unit must serve a distinct function or discipline, have a manager with subordinates, and have a budget. This is a common value across all PantherSoft systems (i.e., Campus Solutions, HR, and Financials).

DETAIL_KK Ledger: The ledger that stores information for all expense transactions at the detail account level for fiscal year 2008 and forward.

DETAIL_Rev Ledger: The ledger that stores information for all revenue transactions at the detail account level for fiscal year 2008 and forward.

Drill Down: The ability in PeopleSoft to click on hyperlinks to move from a transaction back to its source.

E

Employee Self-Service: In PeopleSoft Financials, the place where users can create (modify, delete, view and print) cash advance requests, travel authorizations and expense reports.

Encumbrance: Amount for which there is a legal obligation to spend in the future. A Purchase Order is a typical encumbrance transaction.

Expense: Financial activity when a payment has been processed for a voucher. An invoice is the catalyst for the payment process.

Expense Report: A record of business-related expenses submitted for reimbursement through the PeopleSoft Travel and Expense module.

Education & General (E & G) Funds: Includes funds for instruction, academic support, general and administrative activities, and plant operations and maintenance. Sources of funds are appropriated from general revenue, lottery funds, and tuition.

F - I

F&A: Refers to a percentage of the total grant award that is charged for Facilities and Administration expense. Also known as overhead or indirect cost.

Fund Affiliate: Used to correlate transactions between funds when using a single intra-unit account.

Fund Code: Identifies major funding sources that the University must report on separately. Each fund has its own rules for spending and receiving money.

FSCM: Financials Supply Chain Management, the PeopleSoft Financials system.

General Ledger: The final ledger in the financial system that holds all financial transactions used for external and summary financial reporting and financial management.

Grants: Money awarded to departments for providing products and/or services for a specific project.

In Process: Refers to the status of a report instance in the process monitor. It means that the report has been successfully started but is not yet complete. It may also refer to the status of an expense report requiring approval by multiple departments—where one or more departments have approved the report and one or more have not yet approved it.

Inquiry: A tool for pulling together information in PeopleSoft Financials. Inquiries are like reports except that the results can be viewed on screen or run to the screen (or to Excel) rather than to a .pdf file.

J

Journal Entry: Adjustment made directly in the General Ledger.

Journal ID: Transaction identification number used to identify Journal Entries. This number appears on budget detail reports and is used to research budget line-item details.

Journal: The official record of financial transactions that are recorded in PeopleSoft, journals are used to move dollars between ChartStrings.

Journal Post Date: The date that a financial transaction is accounted for in the general ledger.

K - L

KK: Abbreviation for Commitment Control, the part of PeopleSoft Financials that deals with budgets.

Ledger: Represents a repository for a set of data for each business unit or entity. Updated by budget checking (in the case of commitment control ledgers), or by journal entries.

Ledger Group: Stores ledger information in operations, project costing, and sponsored projects on the detail account level (child) or the budgetary (parent) level in the form of expenses or revenue.

Ledger Inquiry Sets: Represents a family of Ledger Groups, allowing users to see both expense and revenue simultaneously.

Lifespan: PeopleSoft functionality that allows users to see the lifecycle of a requisition (e.g., when a PO was created, when it was invoiced, when payments were made, etc.).

M - P

Manager Self-Service: It refers to the pages where managers would go to approve travel and expense reports and view requisitions (accessible through the “worklist” link).

PC Business Unit (project costing business unit): Used for Construction projects (FCN01), FIU Research Central (FSR00) and for Grants (FSR01).

Pending: In process, but not yet complete (i.e., in the Process Monitor, under Approval Status).

PeopleBooks: The reference materials furnished by PeopleSoft, accessible through the **Help** link in the upper right corner of many pages.

Pre-Encumbrance: Amount expected to spend, but for which there is no legal obligation to pay. A requisition is typically a pre-encumbrance transaction.

Process Monitor: A PeopleSoft tool used for viewing the status of a report. (It serves as the gateway for picking up reports that have been requested from the system.)

Profiles and Preferences: The area of PeopleSoft where changes are made to adjust how certain information appears on the user’s screen.

Program Code: This code identifies the primary mission or activity being reported such as instruction, research, public service, financial aid, student activities, etc. Also known as the PCS code and is a required code for state reporting and financial statements preparations.

Project: Tracks projects whereby the University is required to report fiscal activities on a “life-to-date” basis. Projects accumulate financial information related to a specific project or group of activities from all financial resources. Projects have a specific beginning and end date.

Project Costing: PeopleSoft module where projects are created and managed.

Proxy Access: One employee can assign another employee authority to access and report expense information on their behalf. The employee who has been assigned is the **Proxy**.

Purchase Orders: A legal contract prepared in advance of the purchase, created by Procurement Services from requisitions entered by departments. Purchase orders are used to order goods or services from vendors.

Q- R

Query: A tool used to retrieve data from PeopleSoft, based upon specified criteria.

Reconciliation: An accounting process that uses two sets of records to ensure figures are accurate and in agreement. Reconciliation is the key process used to determine whether the money leaving an account matches the amount spent, ensuring the two values are balanced at the end of the recording period.

Record Definitions: The record definitions are the design specifications that determine the structure of PeopleSoft application data tables and online processing. In the PeopleSoft database, tables are represented as record definitions. In PeopleSoft Query, tables are also called records.

Report: Reports are used to bring back data based on a set of specific criteria. Reports are “jobs” that need to be processed by the system. In PeopleSoft Financials, reports use a Run Control ID and present information in .pdf file format.

Requisition: Requisitions are orders to be placed with vendors for goods or services that are not placed on the PCard. Requisitions create pre-encumbrances of funds.

Role: Refers to PeopleSoft security. The role identifies the particular PeopleSoft functionality that an individual can access.

Run Control ID: A Run Control ID saves a set of criteria used to create a report. The criteria can be changed, but the Run Control ID itself cannot be renamed or deleted.

S

Send Back: In the Travel and Expense module, an approver can send an expense form back to the originator for additional information. The status of the expense form changes to “pending.”

Site: Identifies the campus or location to which the transaction is identified, such as On-Line, Study Abroad and Medical Locations.

SpeedChart: A SpeedType used when creating requisitions that populate other Chartfields automatically such as, Program, Fund, Site, Activity Number and/or Project, and Department. It is commonly found in Requisitions, Credit Cards, and Student Financials.

SpeedType: A shortcut key utilized to auto-populate a specific combination of ChartField values commonly used by a department/business unit. This increases journal entry efficiency and reduces errors.

SQL: Structured Query Language: a computer language that is used to enter, manipulate, and select data from a PeopleSoft database.

T

Task: Tracks expenses that have a similar purpose that are not identified in another existing ChartField. Used with projects.

Tables: The table is made up of columns (**Fields**) and rows (**Data**). Columns determine how the data will be stored. Rows represent the actual data stored in the database.

Travel Authorization: The PeopleSoft transaction (and/or the accompanying document) that places an encumbrance against the budget in anticipation of a planned trip.

Tree: A tree is a graphic representation of the hierarchical relationships of data in the database. Trees provide a way to organize related data in a logical manner and give a visual summary of the tremendous amount of detailed data the system stores. Multiple trees may refer to the same data but organize it in different ways.

Tree Viewer: Functionality within PeopleSoft Financials that allows one to see the hierarchical relationship of ChartField values.

U-Z

Unit: Identifies the legal entity within the University, including FIU, FIU Foundation, Wolfsonian, etc.

Vendor: An individual or company that does business with or provides a service for the University.

Views: A view is a virtual table created from the result of queries running against one or more tables. The FIU_GL_TRANDATA_VIEW is used at FIU to capture data for some of our financial reports.

Voucher: The PeopleSoft accounting document that serves as the basis for cutting checks and recording financial transactions to pay a vendor. (Purchase Order invoices and Check Request forms are assigned voucher numbers during data entry.)

Worklist: The place in PeopleSoft Financials where a manager will find financial transactions needing approval.

Two-Factor Authentication (DUO app)

All PantherSoft (HR, Financials, Campus Solutions) login pages utilize a two-factor authentication process. As part of its ongoing cybersecurity strategy, the Division of IT has implemented Two-Factor Authentication.

Two-Factor Authentication will increase security measures on an account by requiring two steps to log in to FIU services: a password and something common that users have (a physical device, like a smartphone).

Because it requires two steps to log in, Two-Factor Authentication offers more account security than a password alone - it provides added protection for both individuals and the FIU community at large.

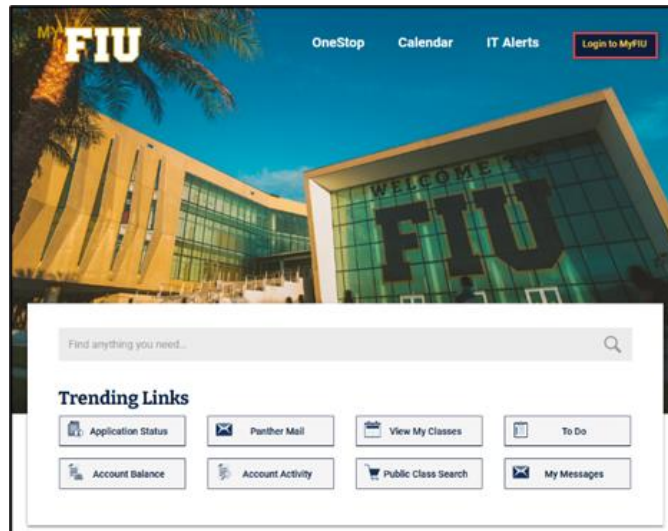
For information on how to setup two-factor authentication and use the DUO app, visit <http://twofactor.fiu.edu>.

Logging into PantherSoft Applications

There are three main ways to access PantherSoft applications. Login to PantherSoft applications via the myFIU Portal, a Direct URL or through the PantherSoft website.

Via myFIU Portal

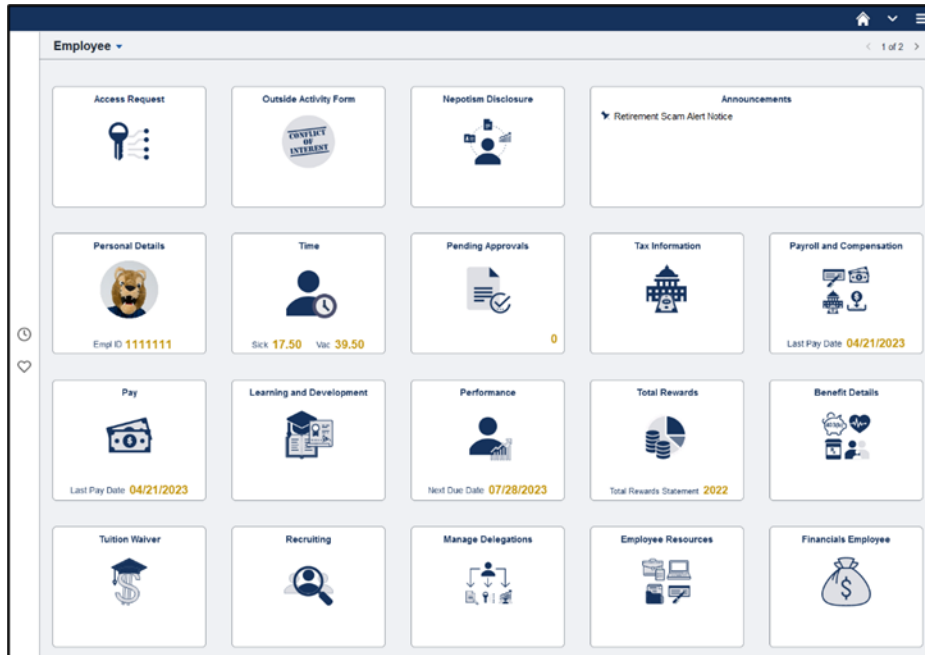
1. Open an internet browser (Mozilla Firefox, Internet Explorer etc.). Enter <http://my.fiu.edu> in the browser address.
2. Click **Login to MyFIU**.



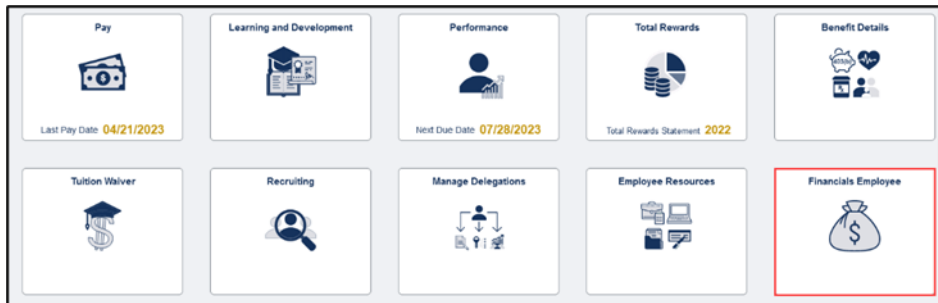
3. Enter a Panther ID and Password, and click **Log In**.

A screenshot of the MyFIU login form. The form is titled 'MyFIU' and has a dark background. It contains two input fields: 'Username' with the text 'rpanther' and 'Forgot username?' to its right; and 'Password' with a masked password '●●●●●●●●' and 'Forgot password?' to its right. Below the input fields is a 'Log In' button with a red border. At the bottom of the form, there is a small text line: 'This site is protected by reCAPTCHA and the Google Privacy Policy and Terms of Service apply.' and a small FIU logo.

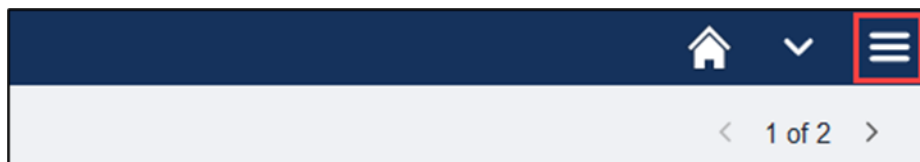
- From the MyFIU website, a customized screen appears and defaults to the **Employee** homepage. This includes Tiles specific to a users' access and combines Tiles from all PantherSoft systems, Human Resources, Campus Solutions and Financials.



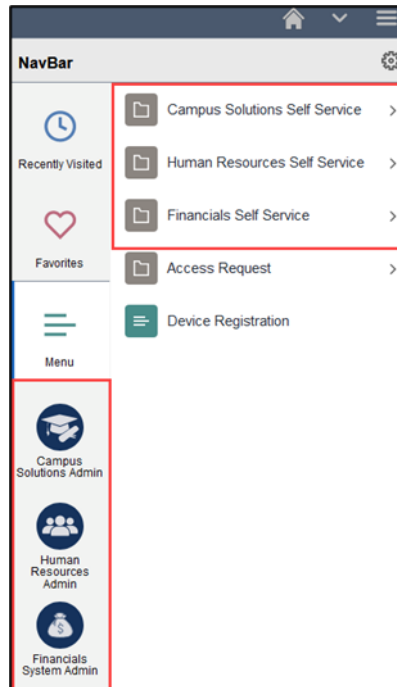
To navigate directly into PantherSoft Financials, click the **Financials Employee** Tile.



Alternatively, open the **NavBar** within MyFIU to navigate to specific PantherSoft applications (Campus Solutions, Human Resources, Financials).



Use the small Tiles in the NavBar to navigate directly to Campus Solutions Admin, Human Resources Admin, or Financials Admin. Users can also follow the breadcrumbs under Main Menu to a specific Self Service navigation.



Via direct URLs

The direct URLs to access the PantherSoft applications are as follows:

Human Resources: <http://myhr.fiu.edu>,

Financials: <http://myfs.fiu.edu> OR <http://financials.fiu.edu>,

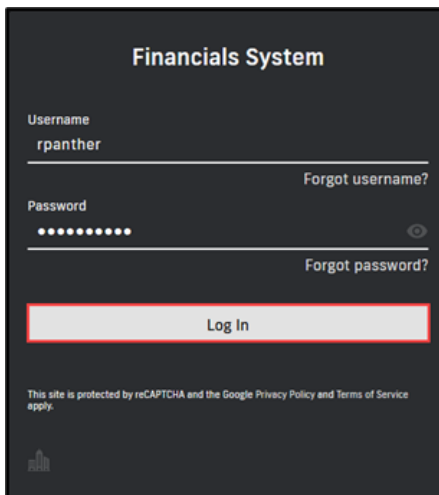
Campus Solutions: <https://psprod.fiu.edu/psp/students/?cmd=login>

The following is the process of logging into a PantherSoft application via a direct URL. In this example, it references the Financials System; however, each application login via direct URL is the same.

1. Enter <http://financials.fiu.edu> in a browser.
2. Enter a Panther ID & Password into the corresponding fields. Then, click the **Sign In** button.



3. Enter a Panther ID & Password into the corresponding fields. Then, click the Sign In button.

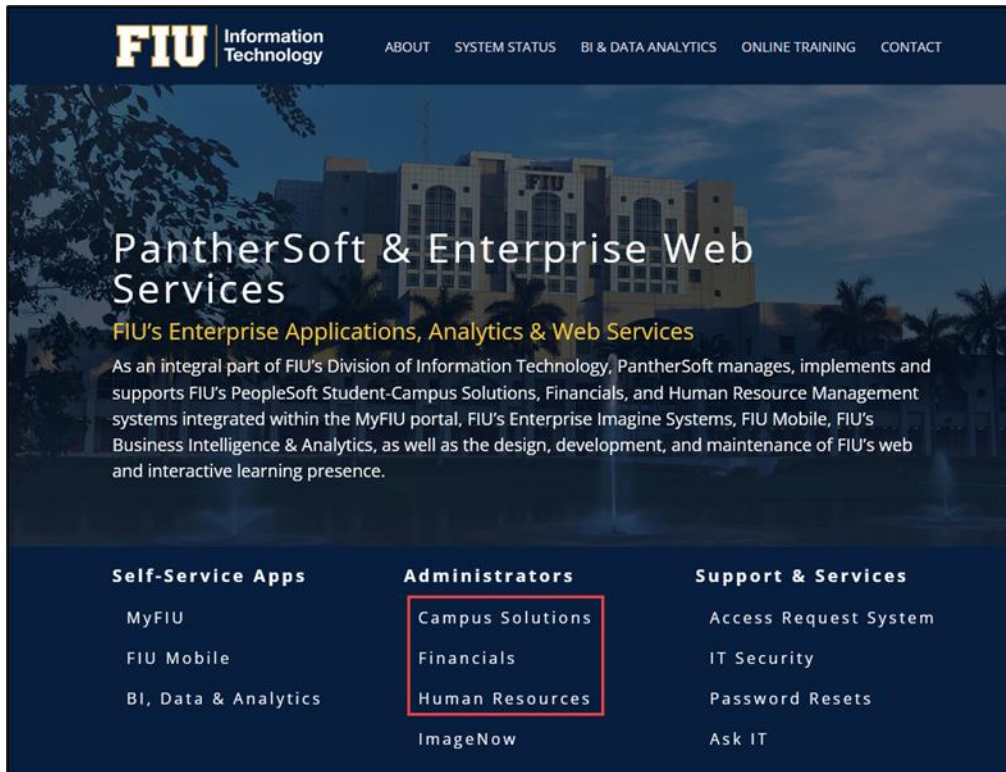


The specific PantherSoft application Home Page appears.

Via the PantherSoft Homepage: <http://panthersoft.fiu.edu>

Users who regularly toggle between multiple PantherSoft applications may want to bookmark this page under a browser's favorites.

1. Enter <http://panthersoft.fiu.edu> in a browser.
2. Scroll down the page.
3. Select the PantherSoft application (Financials, Human Resources, Campus Solutions)



4. Click **Login**
5. Enter a Panther ID & Password into the corresponding fields. Then, click the **Sign In** button.
6. The corresponding PantherSoft Home Page will appear.

Security Roles and Access Requests

All employees have *Basic User Access* to PantherSoft applications upon hire. This role includes the ability to access Self-Service pages and approve financial transactions (job role specific). Certain other accesses are job role specific and may be granted through Human Resources. Other roles can be requested within each application (HR, Financials, Campus Solutions) through the Access Request navigation.

Within PantherSoft Financials the following access can be requested:

Access Role	Role Description	Access Description
<input type="checkbox"/> 001	Inquiry and Reporting	Inquiry access to supplier, voucher, requisition, purchase order, general ledger, asset, grants and budget data. This role can also run queries, nVision reports and create budget transfers.
<input type="checkbox"/> 002	Requester / Super Receiver	This role gives the user the ability to create requisitions and create receipts for any requisitions /purchase orders. If you are an expense manager approving transactions in PeopleSoft, you must select this role.
<input type="checkbox"/> 002A	Requester / Casual Receiver	This role gives the user the ability to, create requisitions and create receipts only for their own requisitions/purchase orders.
<input type="checkbox"/> 005	Shopper Role	This role only provides users access to myFIUmarket to shop and does not give access to create requisitions and receipt for any requisitions/purchase orders. If you want to shop myFIUmarket and create requisitions and receipts, select Access Role 002A instead
<input type="checkbox"/> 007	Budget Transfer Approver	Approve or post budget transfers entered by the Budget Managers for the Departments selected.
<input type="checkbox"/> 007_DBM	Access to DBM Page	This role gives access to the Detail Budget Maintenance Page.
<input type="checkbox"/> 008	AP Journal Voucher Role Access	This role gives users access to create Journal Vouchers to reclass AP transactions for FIU01 and Construction FCNO1 business units via the custom Journal Voucher functionality. For AP transactions in FIU Foundation and Health Care Network business units, please reach out to respective AP department.
<input type="checkbox"/> 012	Student Assistance / Grants & External Award Mgmt	Process grants and external awards to students.
<input type="checkbox"/> 015	Payroll Detail Report / Payroll Transfer	Run payroll detail report and initiate payroll expense transfers.
<input type="checkbox"/> 017	Smart Billing Bill Creator	Create and update bills for Departments selected.
<input type="checkbox"/> 018	Smart Billing Item Creator	Create and update billing items for Departments selected.
<input type="checkbox"/> 019	Smart Billing Fund 350	Access for fund 350. Must have SM_DC_IBILLING_ITEM role prior to requesting this access.
<input type="checkbox"/> 020	FIU GL Journal Entry	This role gives users access to create journal entries (including ID transfer) in the General Ledger for FIU01 transactions. To request access to FIU Foundation and Health Care Network business units, employee's supervisor should send an email to controller@fiu.edu.
<input type="checkbox"/> J001	TCM Contract Manager	User responsible for review, submission and administration of procurement contract
<input type="checkbox"/> J002	TCM Contract Viewer	User with view-only access to TCM procurement contracts
<input type="checkbox"/> J010	Sourcing Requester	User with access to create and submit a Sourcing Event Request form in order to request a Sourcing Event
<input type="checkbox"/> J011	Sourcing Stakeholder	User with view-only access to Sourcing Events
<input type="checkbox"/> J020	Invoice Viewer	User with view-only access to myFIUmarket invoices

HR Supervisor Approval is required for all these Access Roles.

1. Within PantherSoft Financials use the **NavBar** to navigate to **Main Menu>Access Request System>Access Request**. Click **Add a New Value** tab.

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

[Find an Existing Value](#) [Add a New Value](#)

▼ Search Criteria

Search by: Request ID begins with

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

[Search](#) [Advanced Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

NOTE: The **Find an Existing Value** tab allows users to check on the status of submitted requests.

2. The **Empl ID** box will be pre-filled with the Panther ID of the logged in user. To request access on behalf of someone else, delete the pre-filled number and use the PID number of the user needing access. Click **Add**.

Access Request

[Find an Existing Value](#) [Add a New Value](#)

*Request ID NEXT

*Empl ID

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

- The **Description** field is mandatory, fill in a reason or information about the request and select the desired Access Role(s).

The screenshot shows the 'Access Request' form. At the top, there are tabs for 'Access Request' and 'Approval Status'. Below the tabs, the form displays 'Request ID: NEXT' and 'Request Status: Not Submitted'. A red box highlights the 'Description' field, which is currently empty. Below this, the 'Empl ID' is listed as '1111111 Panther, Roary'. The 'Access Group' is set to 'CM' and 'Community Roles'. A 'Select' section shows a list of access roles. Role 002, 'Requester / Super Receiver', is selected with a blue checkmark. Below the role list, there is a section for 'Enter Additional Information for this Access Role' with a 'Location' field highlighted by a red box. At the bottom, role 002A is also visible but not selected.

NOTE: Roles 002, 002A, 017, and 018 require additional information.

- Leave additional information relevant to the request in the **Comments** field, then click the **Submit** button.

The screenshot shows the 'Comments' field at the top, which is empty. Below the field are three buttons: 'Submit', 'Approve', and 'Deny'. The 'Submit' button is highlighted with a red box.

- Once submitted, the Access Request Form header will change to include a Request ID as well as the Request Status. To view approval flow and status details, click the **Approval Status** tab above the header.

The screenshot shows the 'Access Request' form after submission. The 'Request ID' is now '000006286' and the 'Request Status' is 'Pending Approval'. The 'Description' is 'New Financial Employee Access'. A red arrow points from the 'Approval Status' tab to the 'Approval Status' section below. This section shows the approval flow: 'Pending' (Panther, Patty, AccReq_HRSupervisor) -> 'Not Routed' (Multiple Approvers, AccReq_FSSSecurityAdmin). Below this is an 'Action History' table:

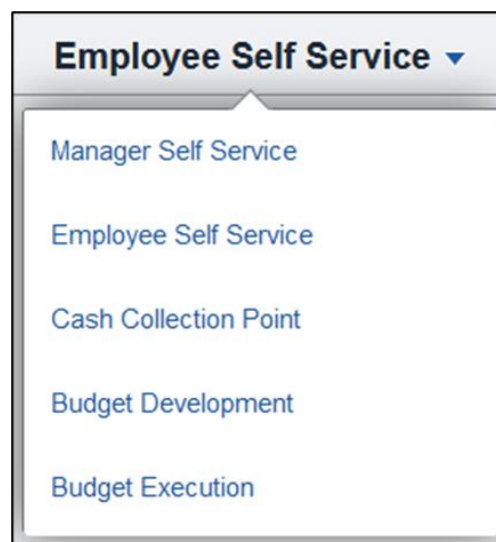
Action	Action By	Action Date	Comments
Submitted	Panther, Roary	04/28/23 9:03:51AM	

Homepages and Tiles

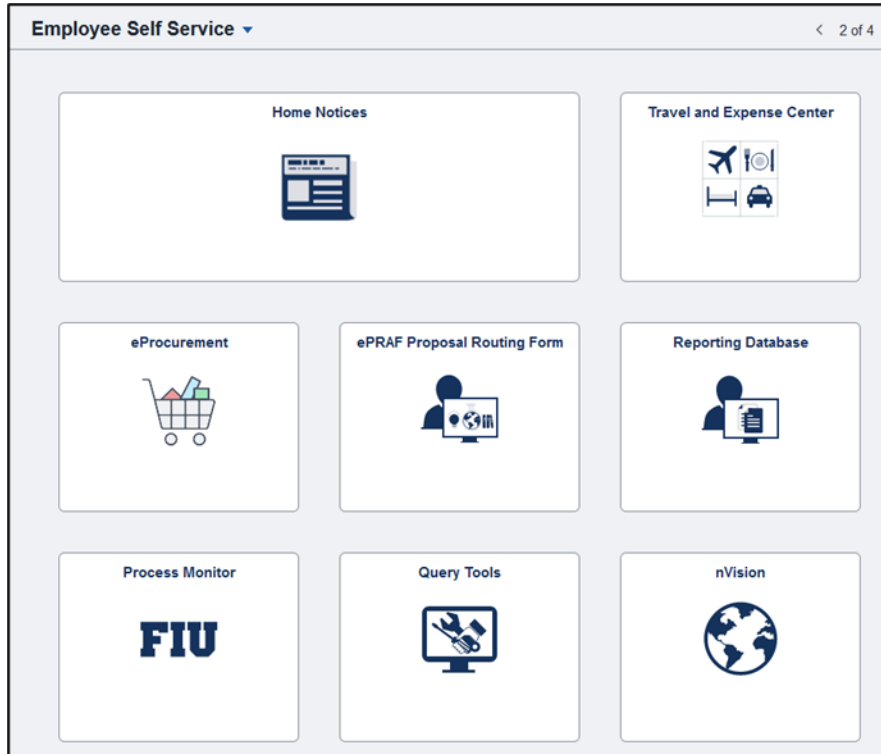
Homepages are the starting point for navigation in the PantherSoft Financials Fluid interface. They are pre-defined and provide quick access to tiles for specific functions or roles. These **Tiles** are more direct, alternate paths to both Fluid and Classic components. Tiles may include a grouping of related components on an Application Start page, where a user can easily navigate among them.

When users need access to functions related to a specific role, use a role-based homepage. Once there, users can choose a tile (if available) for the function they are trying to accomplish. If a tile is not available, use the **Menu** located within the **NavBar**.

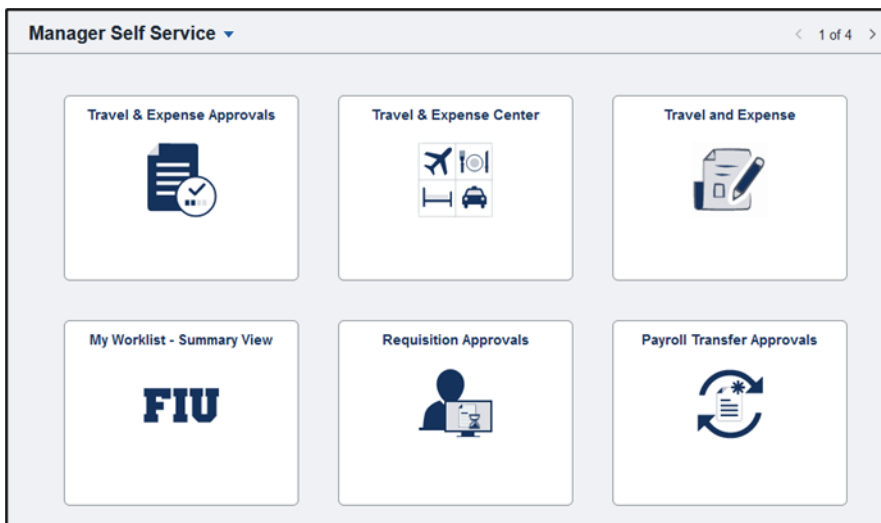
A user can have several homepages, which are accessible at the top of the PantherSoft Financials screen via the gold dropdown.



The **Employee Self Service** homepage is what users will see when they first log in. It includes travel, procurement, and reporting tiles. Functions within these are controlled by roles and access. It also includes a Notices section that will provide important and up to date alerts.



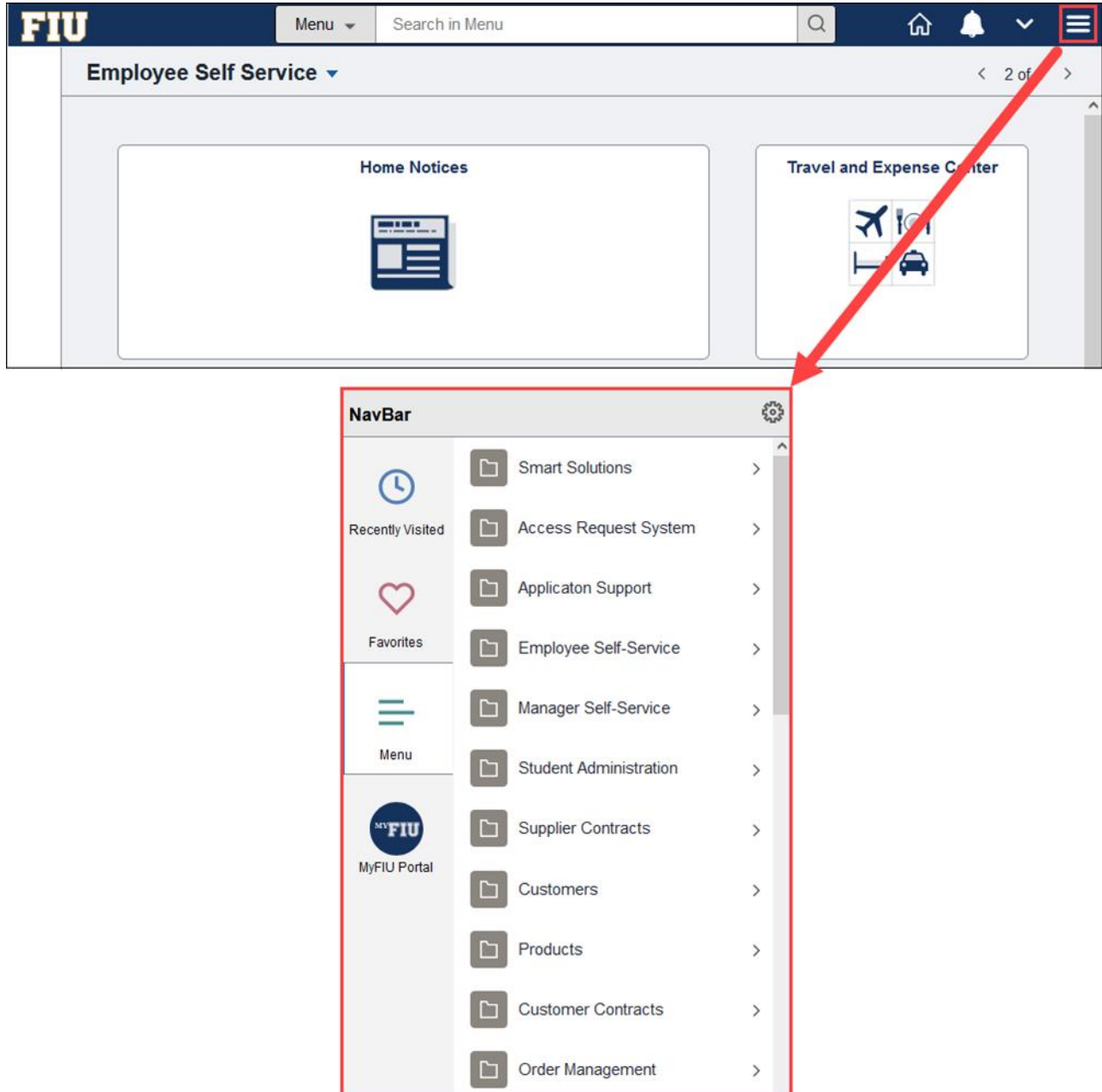
The **Manager Self Service** homepage consolidates tiles related to various approval functions performed by budget and expense approvers. Access to the functions contained within are controlled by an individual user's role and access. Other **Homepages** may be accessible to certain units or individuals with specific roles.



The NavBar

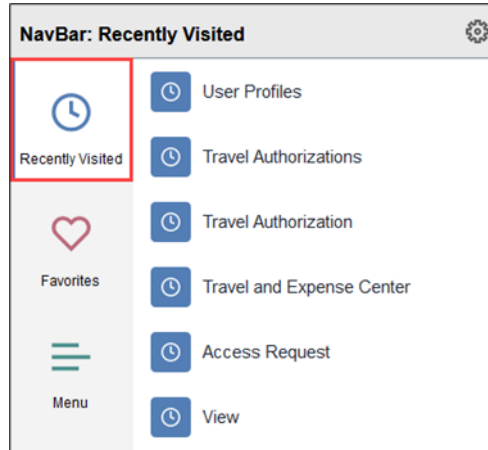
The primary method of navigation in the PantherSoft Financials Fluid interface is via homepages and tiles. However, if a component is not available via the tiles on a homepage, use the **NavBar**. This includes **Recently Visited**, **Favorites**, and **Menu**.

The **NavBar** is in the upper-right hand corner of the PantherSoft Financials screen.



Recently Visited

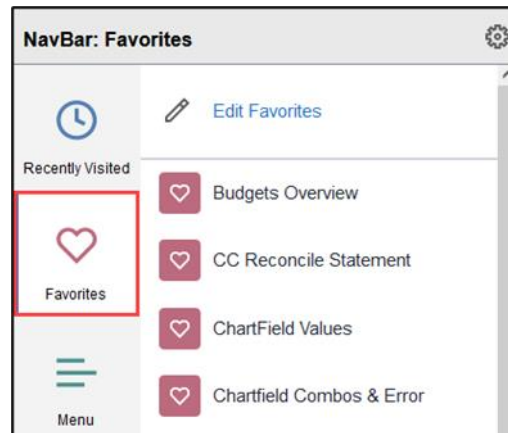
The **Recently Visited** tile in the NavBar stores a list of the recently visited places. Users can easily navigate back to components from this list.



Favorites

The **Favorites** tile stores a list of components the user has marked as Favorites. This tile enables users to choose frequently visited components and add them to a list for easier access.

Here, users can also access the **Edit Favorites** feature.

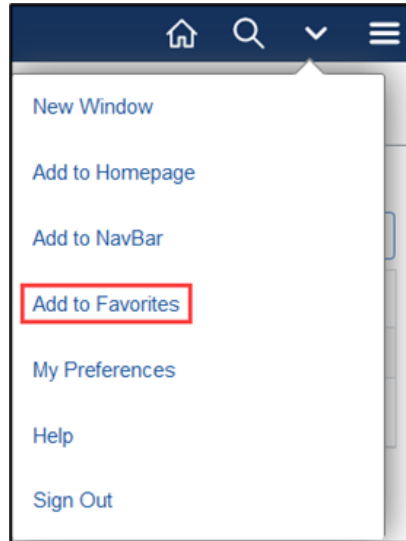


NOTE: The saved Favorite should appear on the list under the name it was assigned by the user.

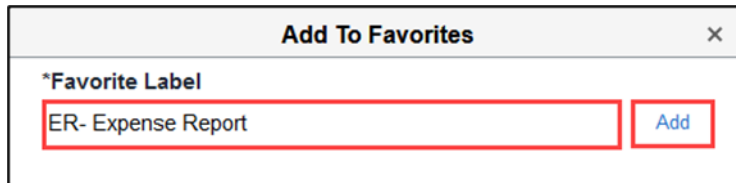
Adding to Favorites

When a user finds that they are frequently utilizing a certain page, it is suggested to add that page to the **Favorites** menu for easy retrieval.

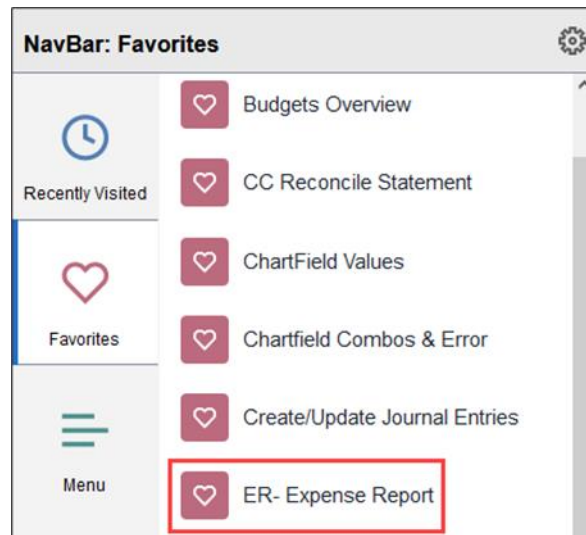
1. On a specific page or within a navigation, click the **Actions List** icon, click **Add to Favorites**.



2. Enter a unique **Favorite Label** in the pop-up as some screens have the same name, then click **Add**.



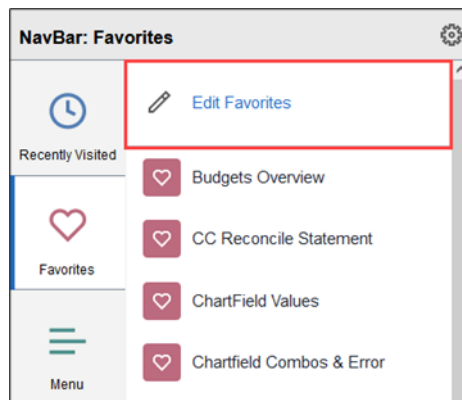
A link to the favorited page, with the unique label given, will then appear under the **Favorites** menu for future ease of access.



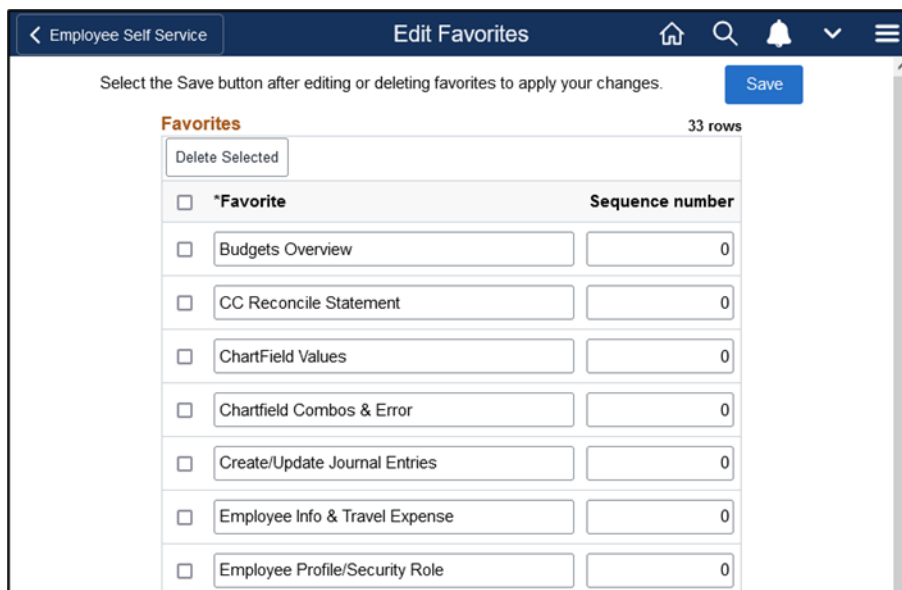
Editing Favorites

Favorites can be changed or re-organized by choosing Edit Favorites under the **NavBar** icon.

1. Click My Favorites, then choose **Edit Favorites**.

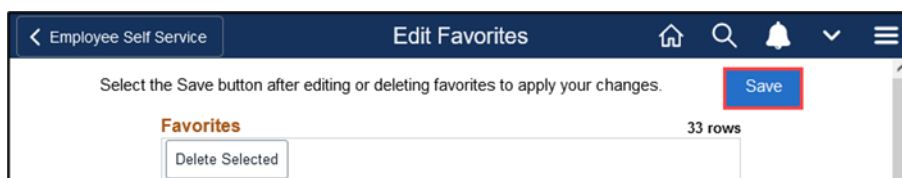


2. From the **Edit Favorites** screen, users can rename favorite links, change sequence, delete favorites, and edit the name of the favorite.



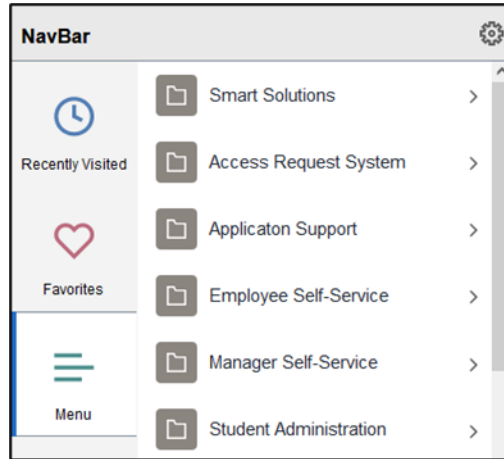
NOTE: Favorites are in alphabetical order by default. To change the sequence of the favorites, the user must place a numerical value for each favorite under the **Sequence number** column.

3. Click the **Save** button on the lower-left corner of the screen.

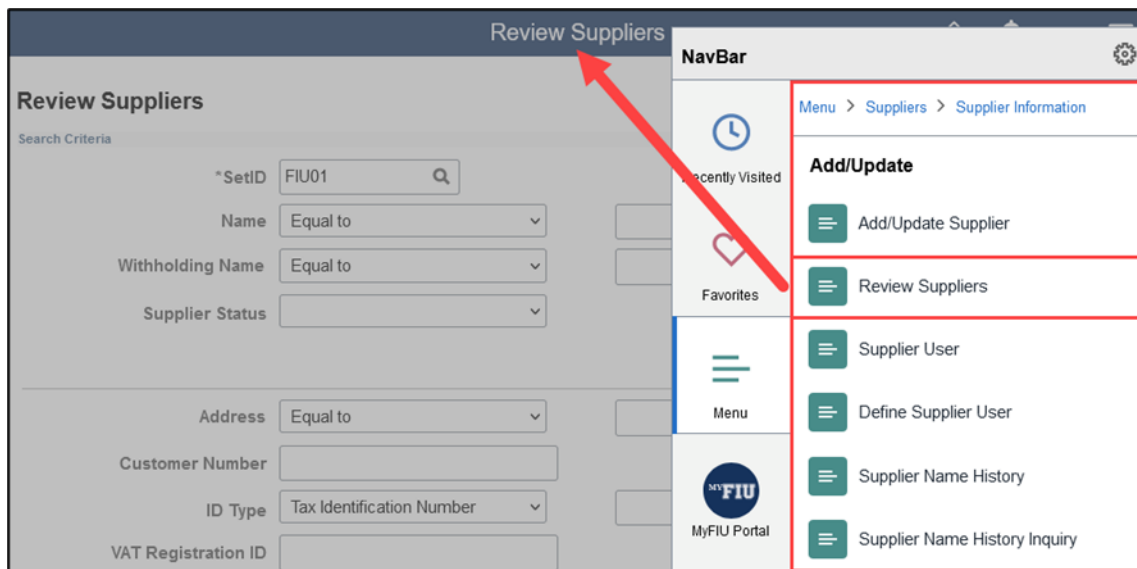


Menu

Users will utilize the NavBar and **Menu** to navigate through the various modules and corresponding pages within PantherSoft, when a tile is not available on a homepage.



Once a screen is accessed via **Menu**, *breadcrumbs* visually display the user's navigation path and give access to related components.



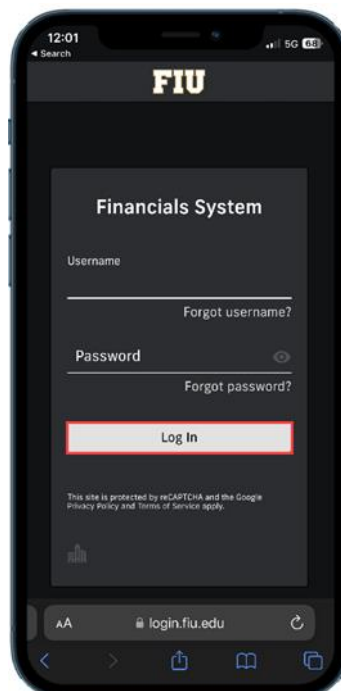
Navigating via Mobile Devices

PantherSoft Financials delivers a responsive and easy-to-use mobile interface that works seamlessly with the same core functionalities available via users' desktops.

1. Log on using browser on a mobile device to <https://myfs.fiu.edu>. Click on the **Login** button.



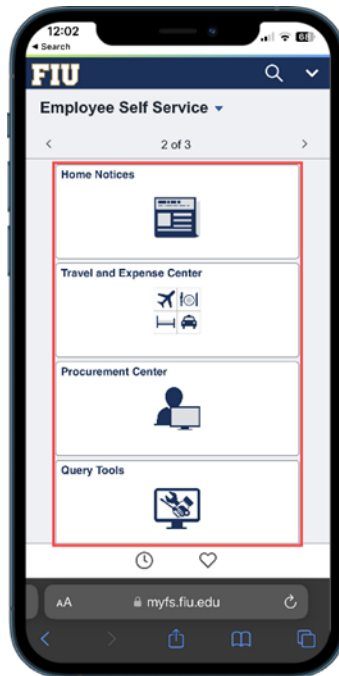
2. Enter your FIU credentials, then click the **Log In** button.



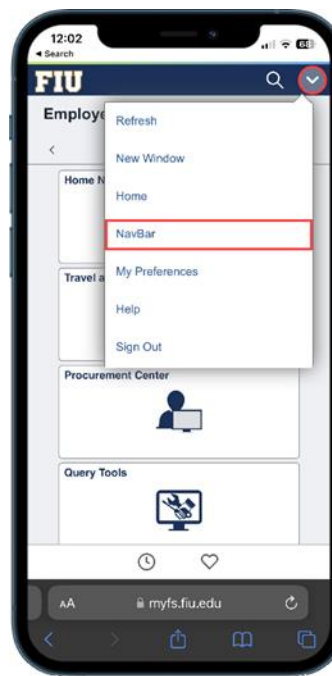
Navigate to any available **Homepage** at the top of the PantherSoft Financials screen via the gold dropdown.



Utilize any of the available tiles. Otherwise, the NavBar is accessible via the top-right corner of the screen.



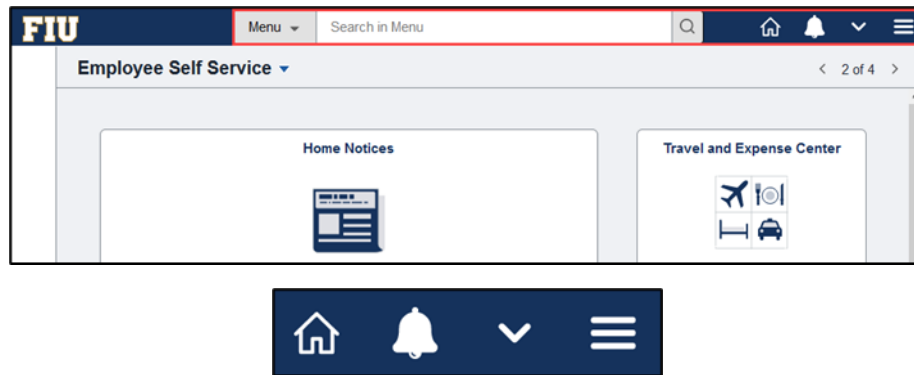
OR



NOTE: All other functionalities within the system remain the same.

Navigations

Navigations are available within the upper right area of the header and are available throughout a user's navigation within PantherSoft.



Home – Returns the user back to the Home screen (Employee Self-Service) from anywhere within PantherSoft.

Notifications – Displays a list of pending actions or alerts for the user.

Actions List- Changes based on functionalities within a page– includes Add to NavBar, Add to Favorites, My Preferences, Help, and Sign Out.

Nav Bar (Navigation Bar)- Includes Menu, Recently Visited, and Favorites.

Search

The search bar is available only within PantherSoft Financials and Panther Soft HR. It allows the user to search any topic within Financials. There is also an Advanced Search option that allows additional parameters to be entered to narrow results.

1. Enter Search value in the Search Box. Click the arrows to search.



Search Results will display the results in a two-panel layout. Each link in blue is a clickable link. In addition, there are filters that can be applied by clicking the drop-down arrow under Folders.

Advanced Search

In this example, a user entered a value before clicking **More Options**, the entry populated in the Keywords field on the More Options screen. **If it had been left blank, the keyword field would have appeared blank.** Multiple fields can be used at once.

1. Click on **More Options**.

The screenshot shows a 'New Search' form with the following elements: a 'Category' dropdown menu set to 'Menu', a 'Keywords' text input field containing the word 'Purchasing', a 'More Options' button highlighted with a red rectangular border, and two buttons at the bottom: 'Search' (blue) and 'Clear' (white with blue border).

2. Choose applicable fields and enter search Values. Common search value fields include the following:

Category– *Menu* options can be changed by clicking the drop-down arrow.

Keywords – Search for multiple words at once, separate them by comma. (E.g., Purchasing, Requisitions)

With this Exact Phrase – enter in an exact phrase, for example “Define Report Request.”

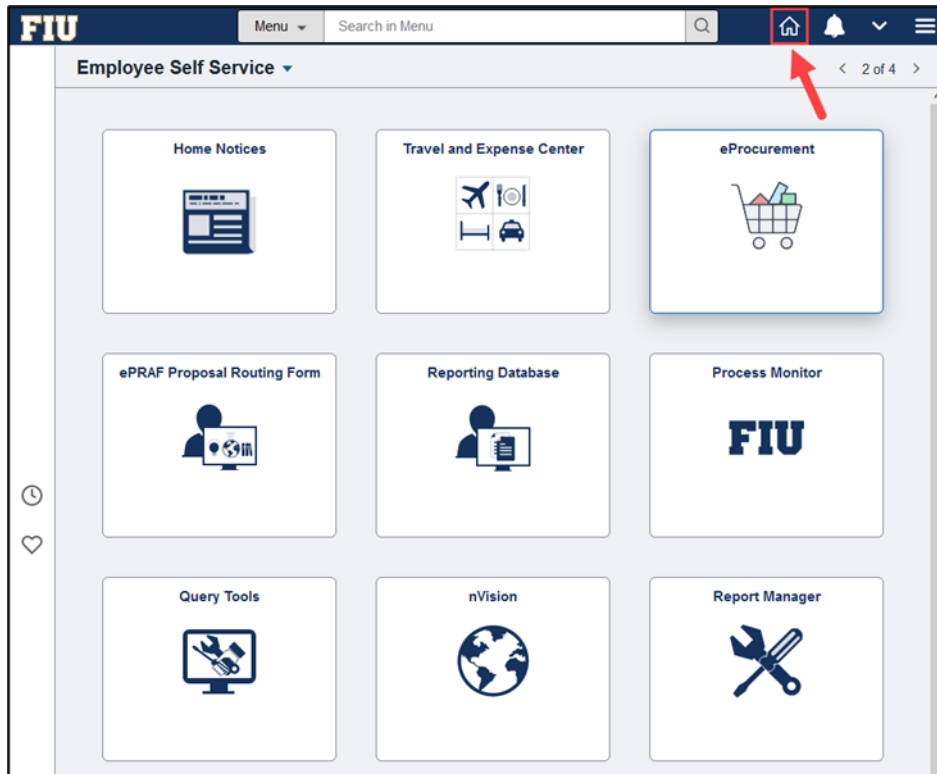
With any of these words – enter any words separated by comma.

Exclude – system will not bring back any links that contain that word. (E.G. Keywords: Purchasing Exclude: Orders). None of the results will include anything with the word “Order.” The exclusion is very specific to the exact word. Links with the word “Orders” will come up but not “Order.”

This screenshot shows the 'New Search' form with additional search criteria fields. It includes the 'Category' dropdown (set to 'Menu') and 'Keywords' field (containing 'Purchasing'). Below these are four more text input fields: 'With this Exact Phrase', 'With any of these Words', and 'Exclude', each currently empty.

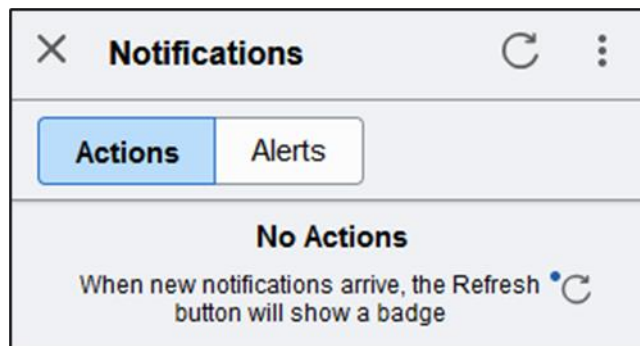
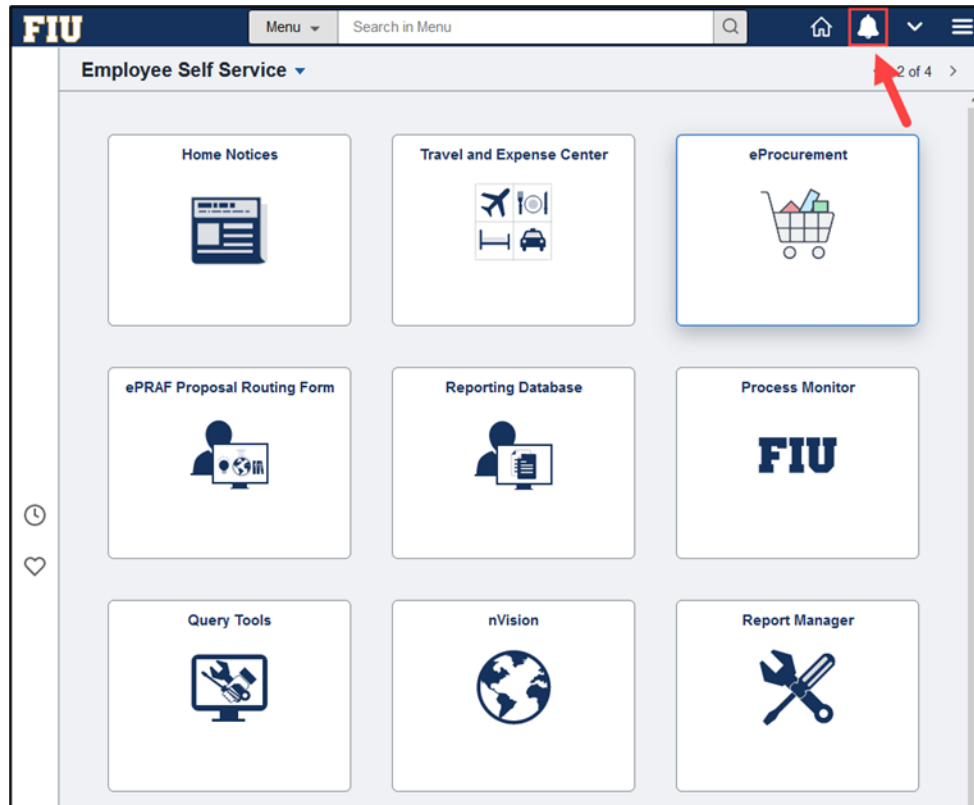
Home

The home icon brings users back to the **Employee Self Service** homepage regardless of the homepage.



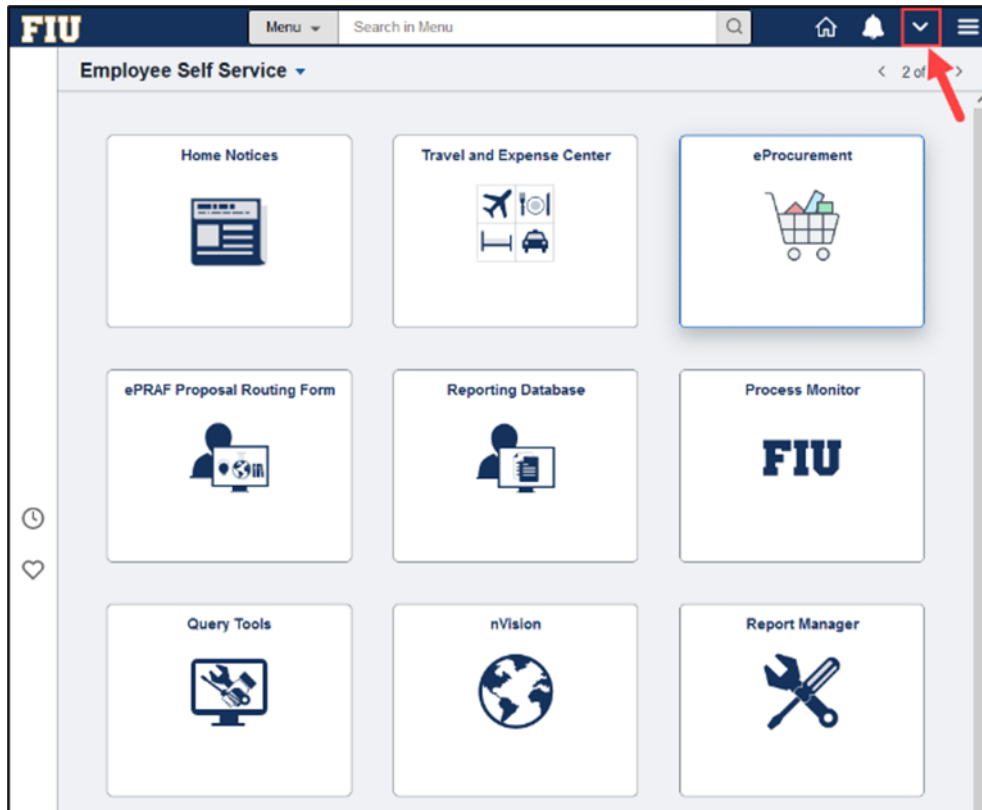
Notifications

The **Notifications** icon displays a list of pending actions and alerts for the user.



Actions List

The Actions List gives a list of options for what users can do for the page that they are currently on.



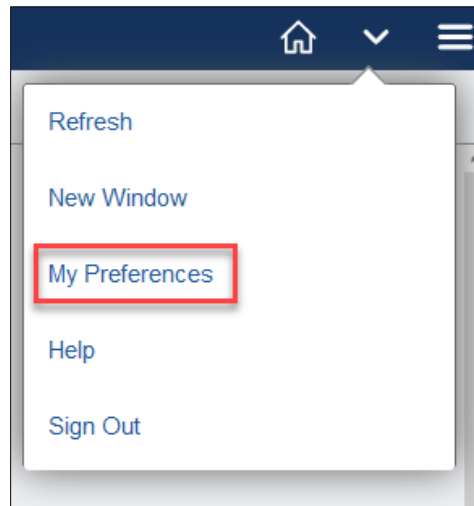
NOTE: The options **vary** based on functionalities within a specific page. However, it **includes** Add to NavBar, Add to Favorites, My Preferences, Sign Out

- Add to NavBar
- Add to Favorites
- My Preferences
- Help
- Sign Out

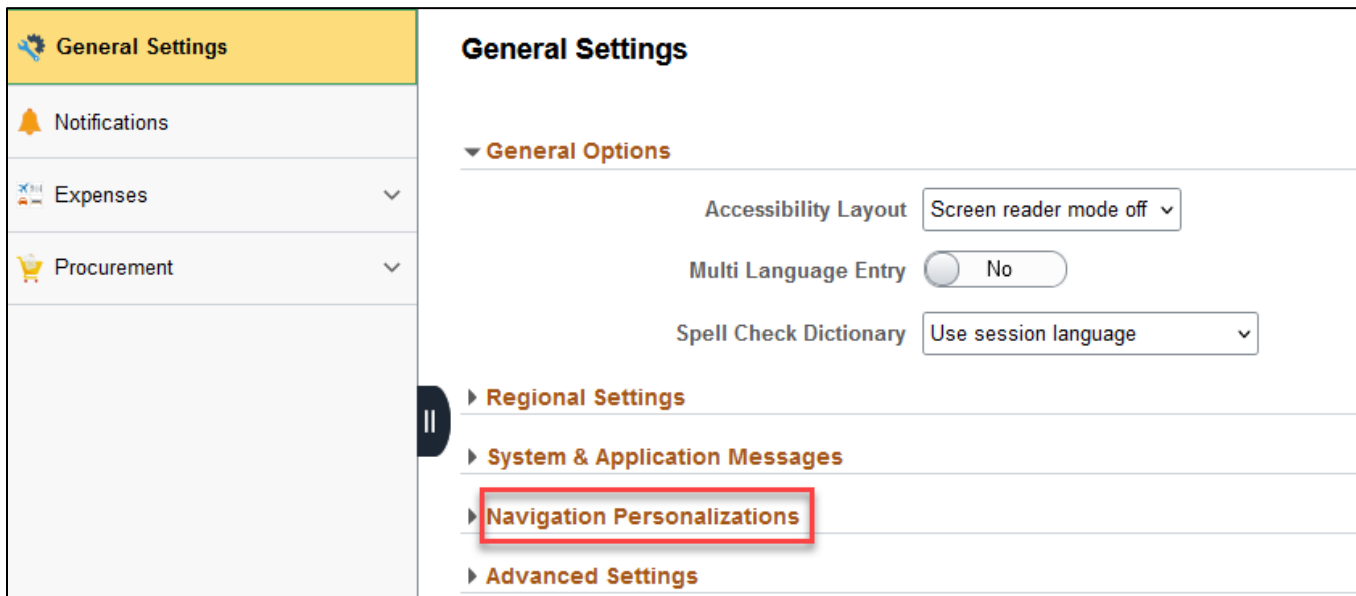
My Preferences

Users can modify some of the navigation features within PantherSoft, such as whether the cursor returns to the home position during a prompt lookup as the user types to suggest appropriate values.

1. Click the **My Preferences** link found under the **Actions List**.



2. Click the **Navigation Personalization's** link.



- The options for personalizing navigations are listed. Each option provides a choice to modify how PeopleSoft responds to the input from the user.

Navigation Personalizations

- Automatic Menu Collapse No
- Tab over Calendar Button No
- Tab over Grid Tabs No
- Tab over Header Icons No
- Tab over Lookup Button No
- Tab over Navigation Bar No
- Tab over Browser Elements No
- Tab over Page Links No
- Tab over Related Page Links No
- Tab over Toolbar No
- Autocomplete Yes

- The most common personalization option that defaults as overridden is **Autocomplete**.

Navigation Personalizations

- Automatic Menu Collapse No
- Tab over Calendar Button No
- Tab over Grid Tabs No
- Tab over Header Icons No
- Tab over Lookup Button No
- Tab over Navigation Bar No
- Tab over Browser Elements No
- Tab over Page Links No
- Tab over Related Page Links No
- Tab over Toolbar No
- Autocomplete Yes

Autocomplete – this personalization is enabled for any field with a prompt edit defined for it. The system will do a prompt lookup as the user types to suggest appropriate values and return. This is particularly useful when doing data entry, to avoid the cursor returning to the home position within a field before the user can complete entry of values (i.e., SpeedCharts)

The remaining options specify which page elements should be skipped when the Tab key is pressed.

- Click the **Save** button on the upper right-hand corner of the page once changes are complete.

General Settings

Restore Defaults Save

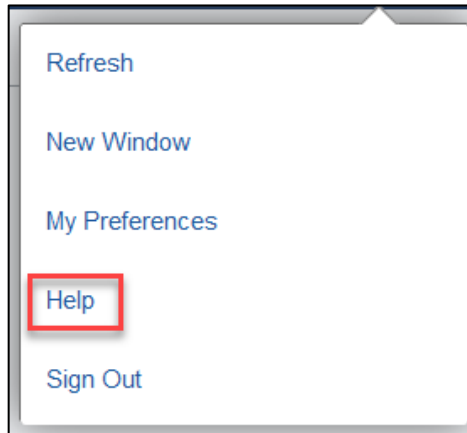
General Options

- Accessibility Layout
- Multi Language Entry No
- Spell Check Dictionary

Help

Clicking Help on any PantherSoft Page opens a pop-up window with links to Peoplebooks, which are the Operational Manuals provided by Oracle Support.

1. On a particular page or navigation, select the [Help](#) Link or Help from the Action drop-down. The help material differs depending on the page.



Here is an example of the User Guides for the Employee Self Service Homepage:

Choose a Topic

- [PeopleSoft PeopleTools 8.55: Portal Technology, Managing Dashboard Pages](#)
- [PeopleSoft PeopleTools 8.55: Fluid User Interface Developer's Guide, Managing Fluid Homepages](#)
- [PeopleSoft PeopleTools 8.55: Portal Technology, Managing Homepages](#)
- [PeopleSoft PeopleTools 8.55: Applications User's Guide, Working With Fluid Homepages](#)

Screen Navigation & Functionalities

The goal of this section is to review the basic screen details and functionalities found within all PantherSoft modules (e.g., eProcurement, Travel & Expense, Benefits). The availability of these functions depends on the specific module.

Header Information

Screen Headers, found along the top portion of various document entry and status screens, provide identifying and detailed information to the document that impacts all transactional Lines therein.

Document Status Requisition

Business Unit	FIU01	Req ID	0000282367
Document Date	03/01/2023	Status	Approved
Currency	USD	Document Type	Requisition
Requester	Dickerson,Darryl Athos	Merchandise Amt	80.70
		Budget Status	Valid

Line Information

On most transactions there is a section of the screen that details specific information about the transaction, this is referred to as the line area or line information. In this example, there are Requisition **Lines**, or the expense lines of the requisition displayed.

Expand lines to review shipping and accounting details + Add More Items

Requisition Lines ⓘ

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Scotch(R) 665 Permanent Double		OFFICE DEPOT INC	1.0000	Package	6.3600	6.36		Edit	
2	Mannequin		12TH AVENUE GRAPHICS	1.0000	Each	10.0000	10.00		Add	

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

In this example, there is a projected Expense **Line**, or the expense lines of the travel authorization displayed.

Projected Expenses ⓘ

Expand All | Collapse All

						Totals (1 Line)	4.45	USD
*Date	*Expense Type	Description	*Payment Type	*Amount	Currency			
09/25/2018	Domestic Mileage	<input type="text" value="254 characters remaining"/>	Out of Pocket	4.45	USD			

Accounting Distribution (Chartfields)

The third most common section of most PantherSoft pages includes the Accounting/Chartfield area. It may display with different names (Accounting Lines or Accounting Details); it contains the specific ChartField values that in combination make up the specific accounting string or accounting distribution being used for a transaction.

Accounting Lines

*Distribute By: Qty SpeedChart

Accounting Lines

1-1 of 1 View All

Chartfields1 Chartfields2 Chartfields3 Details Details 2 Asset Information Asset Information 2 Budget Information

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event
1	Open		0101003457	1.0000	100.0000	22.33	FIU01	

Accounting Details

1 row

GL ChartFields Project ChartFields Show All

Amount	*GL Unit	*Account	Alt Acct	Fund	Dept	Program	Site	Bud Ref	Task	Affiliate	Fund Affil	Activity Nbr	Cost PID
100.00	FIU01	311098	31100	441	110401000	61	01					1104140015	

Required Fields

Any PantherSoft field with an asterisk (*) beside it requires that a value be entered.

Access Request

Access Request

Request ID: NEXT Request Status: Not Submitted

*Description:

Attempting to save or submit a screen lacking required values (*) will result in the field appearing in red.

Access Request


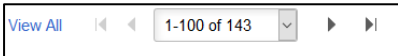












Access Request

Request ID: 0000006280 Request Status: Pending Approval

*Description:

Common Buttons

The following table provides a brief overview of the common functionalities found throughout PantherSoft applications. The descriptions and screenshots that follow will further review the usage of these functions.

Common Buttons Used within PantherSoft			
	Search Glass/Lookup Glass icon accesses the <i>Lookup page</i> ; it allows search and selects data to populate within a field.		These Grid Navigators allow users to move through sets of results, returned from searches.
	Calendar icon displays a pop-up with the calendar to select a date to populate a field		Collapse and Expand Section allows the opening or closing of more information or transaction line(s)
	Line Details icon displays a pop-up with additional information related to a line		Add and Delete icons allow to create a new row or delete a row within a transaction
	Approvals icon displays workflow approval(s) including name and panther ID of individuals needing to approve a specific transaction		Show all Columns icons expand or contract additional nested columns that previously were displayed under tabs.
New Window	New Window link opens a new PantherSoft window while allowing the current navigation to remain open (This is not available in all screens.)		Line Comments icon displays a pop-up to add and edit comments and attachments
	Grid Action Menu icon has three options, Personalize, Zoom Accounting Lines, Download Accounting Lines Table to Excel		Delete icon allows the deletion of a particular line.
	Schedule details icon and Distribution details icon display accounting distribution and ChartField information		Document Status icon shows the current status of the document selected
	Display item description in modal window icon opens a pop-up window or expands the field to display more space		

Lookup Glass

The **Lookup Glass** icon provides access to the *Lookup* page, where a user can search for values when either completing data entry or searches. This data can then be pulled through to the corresponding field on the screen from which the *Lookup* page was accessed.


*Ship To 

Address
MODESTO A. MAIDIQUE CAMPUS
11200 S.W. 8TH ST.
CSCS 01136
MIAMI, FL 33199

The following steps detail the basic functionalities and differences between Partial, Basic, and Advanced Lookup options accessed after clicking on the **Lookup Glass** icon.

Partial Typing and Basic Lookup

Partial Typing Lookup allows the user to search for values by typing partial values, which can narrow the search. Type a partial value into the search field.

*Ship To 

Address
MODESTO A. MAIDIQUE CAMPUS
11200 S.W. 8TH ST.
CSCS 01136
MIAMI, FL 33199

In PantherSoft, a commonly used wildcard is the percent sign, “%.”

This wildcard is a space holder and is used to represent any number of values that are unknown to the user at the time of the search or inquiry. Users may place a wildcard anywhere, but it is most commonly used at the end.

1. Click on the **Lookup Glass** icon.

*Ship To 

Address
MODESTO A. MAIDIQUE CAMPUS
11200 S.W. 8TH ST.
CSCS 01136
MIAMI, FL 33199

- Users can type partial values in the prompt field using the search parameter, *begins with*. Click **Search**. Then the user can select any link for the value to pull over.

Look Up Ship To [x] Help

*SetID FIU01

Ship To Location **begins with** []

Description **begins with** []

Search Clear Cancel Basic Lookup

Search Results

Only the first 300 results of a possible 24712 can be displayed.

View 100 1-300 of 300

Ship To Location	Description
0001000010	PC 00010
0001000020	PC 00020
0001000030	PC 00030
0001000040	PC 00040

- The value, including all related corresponding data, then pulls over to the prompt field within the original screen.

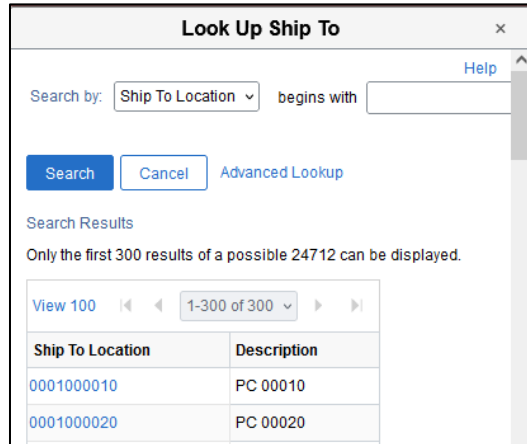
*Ship To [Q]

Address
MODESTO A. MAIDIQUE CAMPUS
11200 S.W. 8TH ST.
PC 00010
MIAMI, FL 33199

Basic Lookup

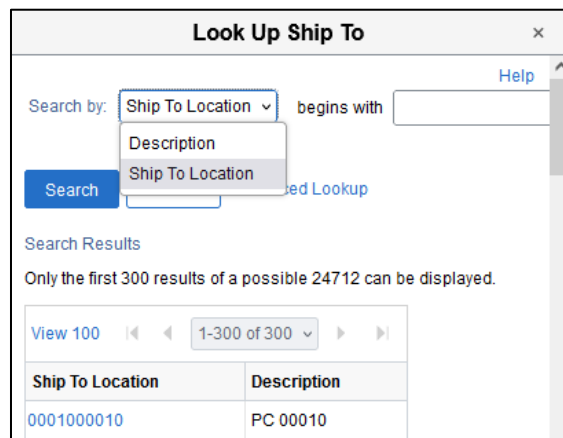
Basic Lookup gives simplified and basic search fields based on the available fields.

After clicking the **Lookup Glass** icon, the **Basic Lookup** page becomes available in a pop-up window.



NOTE: All available options will show initially under the Search Results. If immediately visible, the user may select a link of the desired entry without further searching.

1. Open the **Search By** dropdown to select which column of available data to search within. In this example, *Description* or *Ship to Location*.



- The user can search through available data by entering a value and clicking the **Search** button.

In this example the drop down was chosen to search by description, and “PC” was typed into the begins with box. Then click **Search**. The desired result is chosen by clicking on the blue link under the Description column of the search results.

The screenshot shows a pop-up window titled "Look Up Ship To". At the top right is a "Help" link. Below it, the search criteria are set to "Search by: Description" (selected in a dropdown) and "begins with PC". There are three buttons: "Search" (highlighted with a red box), "Cancel", and "Advanced Lookup". Below the buttons, it says "Search Results" and "Only the first 300 results of a possible 1157 can be displayed." There is a pagination control showing "View 100" and "1-300 of 300". A table with two columns, "Description" and "Ship To Location", is shown. The first row, "PC 00010" with location "0001000010", is highlighted with a red box. Other rows include "PC 00020" and "PC 00030".

NOTE: The Basic Search functionality defaults all searches to “begins with.”

Advanced Lookup

Advanced Lookup allows the user to specify additional search criteria within more of the available columns of data for the prompt field.

- After clicking the **Lookup Glass** icon, the *Lookup* page becomes available in a pop-up. Click the Advanced Lookup link.

The screenshot shows the same "Look Up Ship To" pop-up window. The search criteria are now "Search by: Ship To Location" and the "begins with" field is empty. The "Advanced Lookup" button is highlighted with a red box. Below the buttons, it says "Search Results" and "Only the first 300 results of a possible 24712 can be displayed." The pagination control shows "View 100" and "1-300 of 300". A table with two columns, "Ship To Location" and "Description", is shown. The first row, "0001000010" with description "PC 00010", is highlighted with a red box. Other rows include "0001000020" with description "PC 00020".

- The Advanced Lookup page allows the user to specify additional search criteria within one or more of the available columns of data for the prompt field.

- Search options allow the user to narrow the criteria to search by a variety of different search operators.

Ship To Location	Description
0001000010	
0001000020	PC 00020

Search Operators			
<u>Begins With</u>	Returns all values that start with.	<u>Contains</u>	Returns all values that have what is entered within it.
<u>= (equal)</u>	Returns exact matches.	<u>Not = (not equal)</u>	Returns all values that do not match.
<u>< (less than)</u>	Returns all values that are less than what is entered.	<u><= (less than or equal to)</u>	Returns all values equal to and below what is entered.
<u>> (greater than)</u>	Returns all values greater than what is entered.	<u>>= (greater than or equal to)</u>	Returns all values equal to and above what is entered.
<u>Between</u>	Shows two prompts and allow the user to assign a range of values.	<u>In (in list)</u>	Shows a list of values to choose from and allow the user to pick from a list.

4. In this example, the criteria specified has returned all Location **Descriptions** that “contains 1136”. Click the **Look Up** button. Navigate through the Search Results and select the clickable link value for the result.

5. The value, including all related corresponding data, then pulls over to the prompt field within the original screen.

Navigating Search Results

For multiple rows of search results, the navigation to view them will be available for selection above the visible rows of data. If desired, the user can elect to have visible all rows of search results by selecting the View All link.

Search Results
300 of 206293 results are displayed.

[View All](#) 1-100 of 300

Business Unit	Requisition ID	Requisition Status	Requisition Date	Origin	Requester	Description
FIU01	NEX66313	Complete	05/23/2008	PO	2606660	Pineda, Marianne
FIU01	NEW	Complete	08/02/2004	PO	1096321	Yff, Donna P

NOTE: If there are more rows of results than can be displayed, refine search parameters to reduce results.

To navigate forward and backward through results, use the corresponding arrows. The user can check the range of results they have navigated to between these arrows.

Search Results
300 of 206293 results are displayed.

[View All](#) 1-100 of 300

Business Unit	Requisition ID	Requisition Status	Requisition Date	Origin	Requester	Description
FIU01	NEX66313	Complete	05/23/2008	PO	2606660	Pineda, Marianne
FIU01	NEW	Complete	08/02/2004	PO	1096321	Yff, Donna P

Calendar

Every date field includes a built-in calendar.

1. Click on the **Calendar** icon.

Requisition Date = [dropdown] [input field] [calendar icon]

2. A calendar will display for the user to use. Select desired date by navigating the calendar.

Calendar [close icon]

April [dropdown] 2023 [dropdown]

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

< Current Date >

3. The selected date will populate in the prompt field from the previous screen.

Requisition Date = [dropdown] [input field: 09/27/2018] [calendar icon]

Vertical Line Expansion & Retraction

This symbol expands and retracts, the selected line to show additional nested lines of data found below.

1. Clicking on the grey triangle that faces right will expand the line to show what is nested below.

Requisition Lines ?

Line	Description	Item ID	Supplier
1	Porelon BR80C-6 Replacement Ny		OFFICE DEPOT INC
Shipping Line 1			
*Ship To			0022001136
Address			MODESTO A. MAIDIQUE CAMPUS 11200 S.W. 8TH ST. CSCS 01136 MIAMI, FL 33199
Attention To			Cobo, Bethany
Due Date			

2. Clicking on the grey triangle that faces down will retract the line back to its original state.

Requisition Lines ?

Line	Description	Item ID	Supplier
1	Porelon BR80C-6 Replacement Ny		OFFICE DEPOT INC

Transaction Item Description Detail

When the Transaction Item Description icon is clicked, it opens a pop-up with additional details.

The screenshot shows a table with columns: Price, Total, Details, Comments, and Delete. The 'Details' column contains a document icon, which is highlighted with a red box. A red arrow points from this icon to a 'Line Details' pop-up window. The pop-up window contains the following information:

- Line Details:** Line 1, M510 Wireless Mouse Black LOM5, Line Status: Open
- Item Details:**
 - Merchandise Amount: 22.33 USD
 - Item ID: [blank]
 - Category: 20488
 - Original Substituted Item: [blank]
 - Description: [blank]
 - Physical Nature: Goods (dropdown)
 - Buyer: 1148671
 - Buttons: Buyer Information, Configuration Info
 - Checkboxes: RFQ Required, Device Tracking, Zero Price Indicator, Stockless Item, Amount Only, Inspection Required
- Supplier Information:**
 - Supplier ID: 0000000502, B AND H FOTO AND ELECTRONICS CORP
 - Supplier Location: NEW YORK, NEW YORK
 - Supplier Item ID: LOM510
 - Supplier's Catalog: [blank]
 - Buttons: Suggest New Supplier

NOTE: Line Details available will vary, depending on the module purpose & functionalities.

Add & Delete Rows

When working in data entry screens, the add (plus) and delete (minus) buttons may be present to adjust the number of rows present.

1. To add a row, click the **Plus** button. A new row will then appear below the original.

The screenshot shows a table with columns: 'ise Amt', 'GL Unit', and 'Entry Event'. The first row contains the values: 102.99, FIU01, and a search field. To the right of the search field are two buttons: a plus sign (+) and a minus sign (-). The plus sign button is highlighted with a red box. A red arrow points from the plus sign button down towards the text below.

Debit Amt	GL Unit	Entry Event		
102.99	FIU01 <input type="text"/>	<input type="text"/>	<input data-bbox="1068 317 1130 380" type="button" value="+"/>	<input data-bbox="1182 317 1243 380" type="button" value="-"/>
0.00	FIU01 <input type="text"/>	<input type="text"/>	<input data-bbox="1068 411 1130 474" type="button" value="+"/>	<input data-bbox="1182 411 1243 474" type="button" value="-"/>

NOTE: PantherSoft Financials' data entry screens will require all new rows to have date entered before allowing the user to save & proceed. Missing information will be highlighted in red.

- To delete a row, click on the **Minus** button. The corresponding row will be deleted.

Debit Amt	GL Unit	Entry Event		
102.99	FIU01 <input type="text"/>	<input type="text"/>	<input data-bbox="1052 821 1114 884" type="button" value="+"/>	<input data-bbox="1166 821 1227 884" type="button" value="-"/>
0.00	FIU01 <input type="text"/>	<input type="text"/>	<input data-bbox="1052 915 1114 978" type="button" value="+"/>	<input data-bbox="1166 915 1227 978" style="border: 2px solid red;" type="button" value="-"/>



Debit Amt	GL Unit	Entry Event		
102.99	FIU01 <input type="text"/>	<input type="text"/>	<input data-bbox="1084 1220 1146 1283" type="button" value="+"/>	<input data-bbox="1198 1220 1260 1283" type="button" value="-"/>

Line Horizontal Expansion & Retraction

These icons expand & retract respectively additional accounting and ChartField data that may be nested in additional accounting lines.

- Clicking on the **Expansion** icon to expand all tabs to show on the same line.

Accounting Lines									
Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event	
1	Open		0101003457 <input type="text"/>	1.0000	100.0000	22.33	FIU01 <input type="text"/>	<input type="text"/>	<input data-bbox="1344 1787 1373 1829" type="button" value="+"/> <input data-bbox="1393 1787 1422 1829" type="button" value="-"/>



Accounting Lines

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event	Account	Alt Acct	Fund
1	Open		0022001140	1.0000	100.0000	19.39	FIU01		773301	77300	

NOTE: All tabs from the first screenshot are expanded across the same line, resulting in the need to use a browser's horizontal scrollbar to view all column data.

- Clicking on the **Retraction** icon to retract all line columns back into their corresponding tabs.

Accounting Lines

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event	Account	Alt Acct	Fund	Dept
1	Open		0022001136	1.0000	100.0000	102.99	FIU01		711916	71100		



Accounting Lines

1-1 of 1 | View All

Chartfields1 | Chartfields2 | Chartfields3 | Details | Details 2 | Asset Information | Asset Information 2 | Budget Information

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event		
1	Open		0022001140	1.0000	100.0000	19.39	FIU01			

Freeform Text Field Pop-Out

When entering freeform text into a textbox, it is possible to expand the box for all data to be visible while typing.

Enter requisition comments



ePro Requisitions

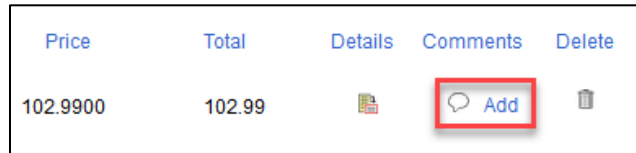
I

Return

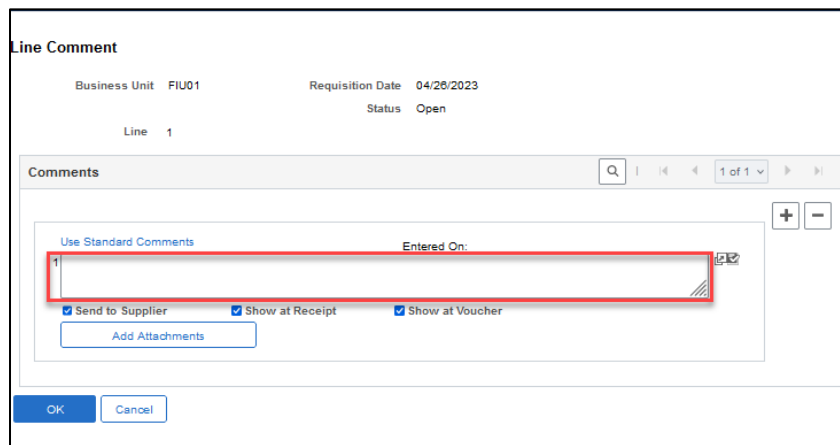
Add & Edit Comments and Attachments

Line comments and attachments can be added via the Comments icon.

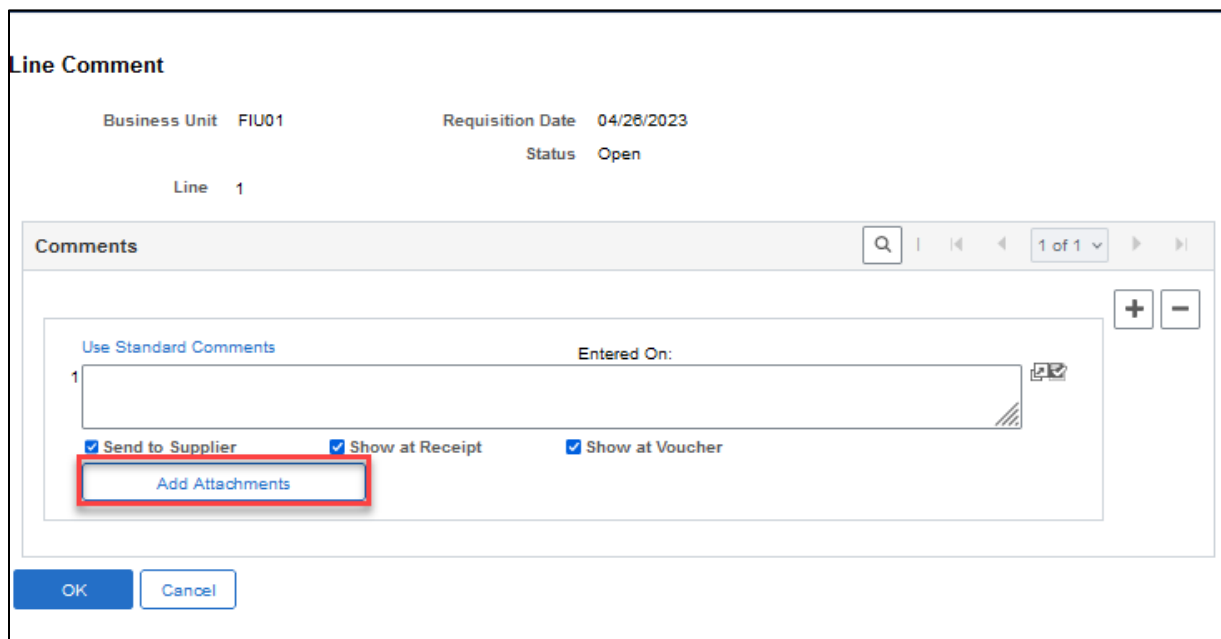
1. Click on the Comments “Add” icon.



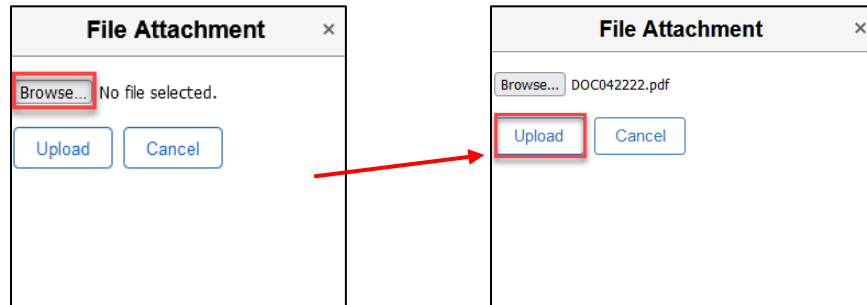
2. The Line Comment screen will appear as a pop-up, displaying a field where the user can add comments.



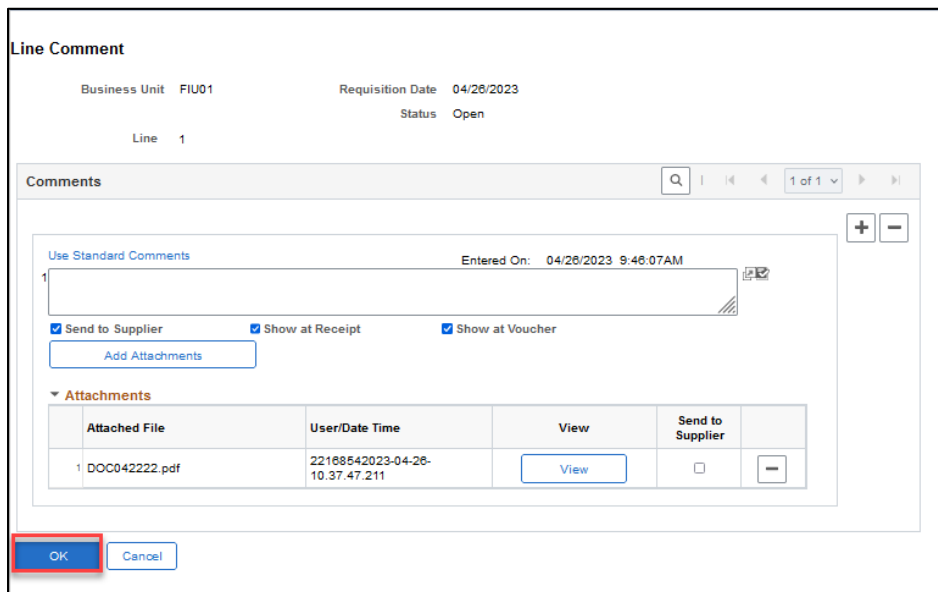
3. If an attachment needs to be added, click the **Add Attachments** button.



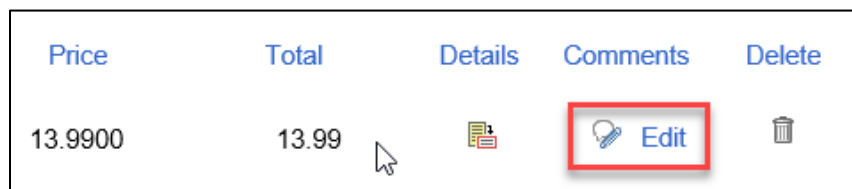
- The File Attachment window will appear in a pop-up, where attachments can be added by clicking the **Browse** button and locating the file to be added. Once located, click the **Upload** button.



- Prior to fully submitting the additions to the Line Comments screen, Comments & Attachments can be reviewed and edited from the Line Comment screen. To submit, click the **OK** button.



- Once Comments and Attachments have been saved, the Comments “Add” icon changes to the Comments “Edit” icon. If edits need to be made, clicking this icon will re-open the Line Comments pop-up.



Drag and Drop Feature

Some grids allow the order of the column to be changed by dragging and dropping the column headers.

- From the header of any column, click and hold the title and drag to the desired location. In the below example, the **Trans Date** column is being moved to be shown before the **Expense Type** column. Release the mouse to relocate the column to its new location.

Bank Statement

Transaction | Billing |

	Merchant	*Status	Transaction Amount	Trans Date	Currency				Budget Status	Chartfield Status	Redistrib
1	<input checked="" type="checkbox"/> GOL LINHAS A	Staged	1,034.95	02/20/2023	USD				Error	Valid	No
2	<input type="checkbox"/> PUBLIX #375	Staged	28.67	02/21/2023	USD				Error	Valid	No
3	<input type="checkbox"/> DOC-USFCS-3019753880	Staged	2,800.00	02/27/2023	USD				Error	Valid	No
4	<input type="checkbox"/> AIRBNB HM4MHMASJY	Staged	1,262.28	02/20/2023	USD				Error	Valid	No
5	<input type="checkbox"/> PAYPAL	Staged	300.00	02/22/2023	USD				Error	Valid	No
6	<input type="checkbox"/> COURTYARD WASHINGTON D	Staged	362.09	02/10/2023	USD				Error	Valid	No
7	<input type="checkbox"/> COURTYARD WASHINGTON D	Staged	362.09	02/10/2023	USD				Error	Valid	No
8	<input type="checkbox"/> AMAZON.COM*HE9ZE5HU2	Staged	592.35	02/17/2023	USD				Error	Valid	No

Bank Statement

Transaction | Billing |

	Trans Date	Merchant	*Status	Transaction Amount	Currency				Budget Status	Chartfield Status	Redistrib
1	<input checked="" type="checkbox"/> 02/20/2023	GOL LINHAS A	Staged	1,034.95	USD				Error	Valid	No
2	<input type="checkbox"/> 02/21/2023	PUBLIX #375	Staged	28.67	USD				Error	Valid	No
3	<input type="checkbox"/> 02/27/2023	DOC-USFCS-3019753880	Staged	2,800.00	USD				Error	Valid	No
4	<input type="checkbox"/> 02/20/2023	AIRBNB HM4MHMASJY	Staged	1,262.28	USD				Error	Valid	No
5	<input type="checkbox"/> 02/22/2023	PAYPAL	Staged	300.00	USD				Error	Valid	No
6	<input type="checkbox"/> 02/10/2023	COURTYARD WASHINGTON D	Staged	362.09	USD				Error	Valid	No
7	<input type="checkbox"/> 02/10/2023	COURTYARD WASHINGTON D	Staged	362.09	USD				Error	Valid	No
8	<input type="checkbox"/> 02/17/2023	AMAZON.COM*HE9ZE5HU2	Staged	592.35	USD				Error	Valid	No

Customizing Grids

For most grids, users can customize the order of the columns, the sort order, which columns are frozen, and which columns are hidden. Users can also choose to share grid customizations with other users or copy another user's settings. Personalize Column and Sort Order by clicking the **Customize** link in the header or footer bar of the grid. The customizations that are made for that grid will remain until changed.

1. To personalize a grid like the **Grid Action Menu** icon. Then click **Personalize**.

Bank Statement

1-8 of 8 | View All

					*Status	Transaction Amount	Currency				Budget Status	Chartfield Status	Redistrib
					Staged	1,034.95	USD				Error	Valid	No
2	<input type="checkbox"/>	02/21/2023	PUBLIX #375		Staged	28.67	USD				Error	Valid	No
3	<input type="checkbox"/>	02/27/2023	DOC-USFCS-3019753880		Staged	2,800.00	USD				Error	Valid	No
4	<input type="checkbox"/>	02/20/2023	AIRBNB HM4MHMASJY		Staged	1,262.28	USD				Error	Valid	No
5	<input type="checkbox"/>	02/22/2023	PAYPAL		Staged	300.00	USD				Error	Valid	No
6	<input type="checkbox"/>	02/10/2023	COURTYARD WASHINGTON D		Staged	362.09	USD				Error	Valid	No
7	<input type="checkbox"/>	02/10/2023	COURTYARD WASHINGTON D		Staged	362.09	USD				Error	Valid	No
8	<input type="checkbox"/>	02/17/2023	AMAZON.COM*HE9ZE5HU2		Staged	592.35	USD				Error	Valid	No

Select All Clear All Stage Validate Budget

Search Purchase Details Split Line Distribution Template

By approving these charges, the approver is certifying that the individual charges have been reviewed with the cardholder and that these charges comply with the university policies and procedures.

Save Notify

To change the column order:

1. In the **Column Order** grid of the **Grid Customization** page, select the column that should be moved.

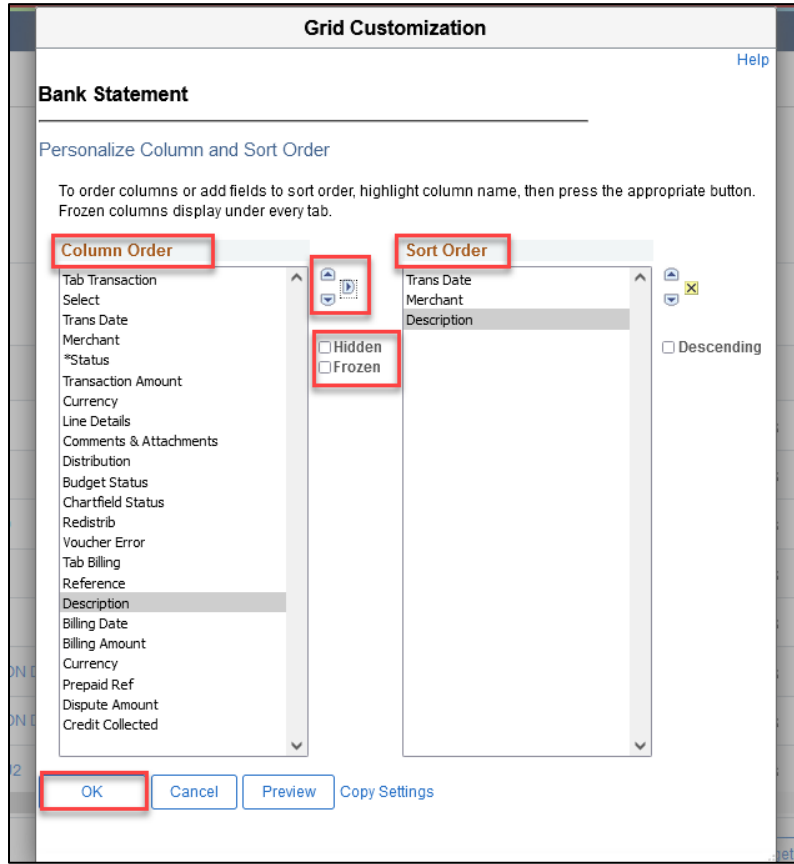
To select multiple columns in succession, press the **shift** key while selecting additional column names. To select multiple columns that are separated from each other, press the **ctrl** key.

If the grid contains tabs, the system displays the tab separators in the **Column Order** table. Users can move the tab separator the same way a regular column is moved, thus altering the number of columns that the system displays at once.

2. Click the up or down arrow buttons to move the column up or down in the list.

If a frozen column is moved after an unfrozen column, the system disables the frozen setting.

3. Repeat steps one and two to move any additional columns.
4. Click the **OK** button to save changes and return to the transaction page.



To Hide a column:

1. In the **Column Order** grid of the **Grid Customization** page, select the column that should be hidden.

To select multiple columns in succession, press the shift key and select additional column names. To select multiple columns that are separated from each other, press the ctrl key.

2. Select the **Hidden** check box.

Note that when the find feature is used in the grid, the system will not search any columns that are set as hidden.

3. Click the **OK** button to save changes and return to the transaction page.

To Freeze a column:

1. In the **Column Order** grid of the **Grid Customization** page, select the column that needs to be frozen.

A frozen column remains immobile when using the grid's horizontal scroll bar.

Note: Any columns that the developer already defined as frozen appear with the frozen check box selected. Users can override this setting by clearing the check box.

2. Select the Frozen check box.

The system automatically freezes all columns above it in the Column Order grid. If a frozen column is moved after an unfrozen column, the system disables the frozen setting.

3. Click the OK button to save changes and return to the transaction page.

Document Approval Status

When reviewing inquiry or status screens for documents that require approval, the Document Approval Status icon will be available to review approver(s) and their contact information.

1. Click on the Document Approval Status icon.

Requisitions

Req Inquiry

Details Status

Unit	Requisition	Requisition Name	Change Order	On RFQ	On PO	Direct Ship from Supplier	Received	On MSR	On Voucher	Use Procurement Card		
FIU01	0000284192	0000284192	J									

Search

Notify

2. An approval status screen will appear as a pop-up window, displaying the approver(s) for the document and the status (i.e., Pending, Approved, Denied, etc.)

Requisitions Requisition Approval

Approval Status

Business Unit FIU01
 Requisition ID 0000284192
 Requisition Name 0000284192
 Requester Roary Panther
 Entered on 04/21/2023
 Status Pending
 Priority Medium
 Budget Status Valid
 Total Amount 559.32 USD

Requester's Justification
 No justification entered by requester.

View printable version

Line Information

Review/Edit Approvers

Requisition Approvals

Line 1: Pending
 RADNOR Cobalt Classic Series Safety Glasses With Charcoal Frame, Clear Indoor/Outdoor Anti-Fog Lens And Adjustable Temple
 Approvers
 Pending
 Multiple Approvers
 Req Budgetary Approver

Line 2: Pending
 Bullard Yellow Classic C33 HDPE Full Brim Hard Hat With 6 Point Ratchet Suspension Absorbent Cotton Brow Pad And Chin Strap Attachment
 Approvers
 Pending
 Multiple Approvers
 Req Budgetary Approver

3. To view contact information for the approver(s), click on the approver's name.

Approver #1

Name: Panther, Tim
 User ID: 1111111
 Email ID: fststuser@fiu.edu

Approver #2

Name: Panther, Ali
 User ID: 1111111
 Email ID: fststuser@fiu.edu

Panther, Ali

Establishing a Run Control ID

When generating reports or initiating a process, users may first need to establish a **Run Control ID**. A Run Control ID saves a set of criteria. The criteria can be changed, but the Run Control ID itself cannot be renamed or deleted. This set of criteria becomes the parameters the system uses to run the reports or generate results in a process.

A process or report can be found again using the **Find an Existing Value** tab to retrieve saved Run Control IDs. Establishing a run control alleviates the user of having to define the report or process parameters each time the report/process is run.

Run Control IDs

The first step is to establish the **Run Control ID**. This step is only necessary once per report/process type.

In the below example, we are running the *General Ledger Activity Report* for an Activity Number. On subsequent reports, the user can use the search feature under “Find an Existing Value” to locate an existing Run Control ID.

1. To create a new **Run Control ID**, begin on the **Add a New Value** tab. Enter the Name of the **Run Control ID** (maximum thirty characters), then click **Add**.

NOTE: The Run Control ID should make sense to the process. Avoid vague Run Control IDs like “summary” or “weekly.” Spaces are not allowed, use underscores.

2. To re-run a process/report that was already created, click on **Find an Existing Value**

- Enter the specific parameters for the unique report/process. Each Run Control ID is unique to its parameters. For more information about parameters for a specific module or report/process see additional Training Resources on the Office of the Controller website or contact Financial Systems and Support Help Desk. <https://controller.fiu.edu/departments/financials-support/training-help-desk/>

The below screenshot is an example of a Run Control ID and parameters related to General Ledger.

Ledger Activity Report

Run Control ID: GL_AC_XX587 Report Manager Process Monitor

Language: English

Report Request Parameters

Unit: FIU01 Ledger: ACTUALS

Fiscal Year: 2023 Currency: USD

From Period: 1 To Period: 2 Date Code: All

Show Discrepancies Only Show Journal Detail Display Full Numeric Field Display Closing Entry

Include Adjustment Periods

Adjustment Period			
1		+	-

ChartField Selection

Sequence	ChartField Name	Include CF	Summarize	Detail	All Values	Value	To Value
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Chartfields and SpeedTypes

In PeopleSoft financial applications, the individual fields in an accounting structure are called Chartfields. Chartfields are used to classify accounting transactions created in subsystems or entered directly into the general ledger.

The following are the fields that make up FIU's chart of accounts:

ChartFields

Name	Description
Unit	A unit or business unit is an organization or organizational subset that is independent with regard to one or more accounting or operational functions. Examples: FIU01, FIU02, FIU06
SpeedType	A SpeedType is a code that represents a combination of ChartField values. Using SpeedTypes simplify the entry of ChartFields that are commonly used together.
Account	Identifies transactions based on the object or nature of the event to which they relate. This ChartField is used to classify transactions in the accounting systems as Assets, Liabilities, Revenues, Expenses, or Equity. It further breaks down this classification by types such as rent revenue, fees, travel expenses, etc.
Alternate Account	Classifies the nature of a transaction utilizing the State standard General Ledger code. Each "account" ChartField must be mapped to an alternate account. Used for standard reporting only.
Department	Identifies an organizational unit. To be considered a department, the unit must serve a distinct function or discipline, have a manager with subordinates, and have a budget. This is a common value across all PantherSoft systems (Campus Solutions, HR, and Financials).
Site	Identifies the campus or location to which the transaction is identified, such as on-line, study abroad, medical locations.
Fund Code	Identifies major funding sources that the University must report on separately. Each fund has its own rules for spending and receiving money.
Program Code	This code identifies the primary mission or activity being reported such as instruction, research, public service, administrative support, plant operation and maintenance, financial aid, student activities, etc. The numbering scheme has been set up by the State. Also known as the PCS code, it is a required code for State reporting and financial statements preparation.
Activity Number	A code used to track revenues and expenses for a specific activity using a distinct fund, program code, site, and department (organization) string.
Cost PID	Tracks revenues and expenses for a specific Faculty member.
Budget Reference	Identifies the aid year for financial awards. Also used by College of Medicine to identify the academic period.
PC Business Unit (project costing business unit)	Used for Construction projects (FCN01), FIU Research Central (FSR00) and for Grants (FSR01).
Project	Tracks projects whereby the University is required to report fiscal activities on a "life-to-date" basis.
Activity ID	Activities are the specific tasks within a project.

Using SpeedTypes

SpeedTypes are frequently used when entering financial transactions within modules. SpeedTypes allow users to enter a commonly used combination of accounting Chartfield values, rather than entering these individually and repeatedly. The SpeedType will auto-populate these specific fields, increase accounting entry efficiency, and reduce errors.

The SpeedType or SpeedChart is always the same number as an Activity Number or Project Number.

1. Enter the SpeedType into the SpeedChart searchable field. Click the search glass to confirm speedchart number. Once entered, the Speedtype populates all corresponding Chartfield values.

Accounting Lines

*Distribute By: Qty SpeedChart: 1026020001

Accounting Lines

Chartfields1 | Chartfields2 | Chartfields3 | Details | Details 2 | Asset Information | Asset Information 2 | Budget Information

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event
1	Open		0022001140	1.0000	100.0000	22.33	FIU01	

Accounting Lines

*Distribute By: Qty SpeedChart: 1026020001

Accounting Lines

Chartfields1 | Chartfields2 | Chartfields3 | Details | Details 2 | Asset Information | Asset Information 2

Task	PC Bus Unit	Project	Activity	Activity Nbr	Cost PID
				1026020001	

Accounting Lines

*Distribute By: Qty SpeedChart: 1026020001

Accounting Lines

Chartfields1 | Chartfields2 | Chartfields3 | Details | Details 2 | Asset Information | Asset Information 2 | Budget Information

Account	Alt Acct	Fund	Dept	Program	Site	Budget Reference
711916	71100	210	102600000	61	01	

Approving Transactions

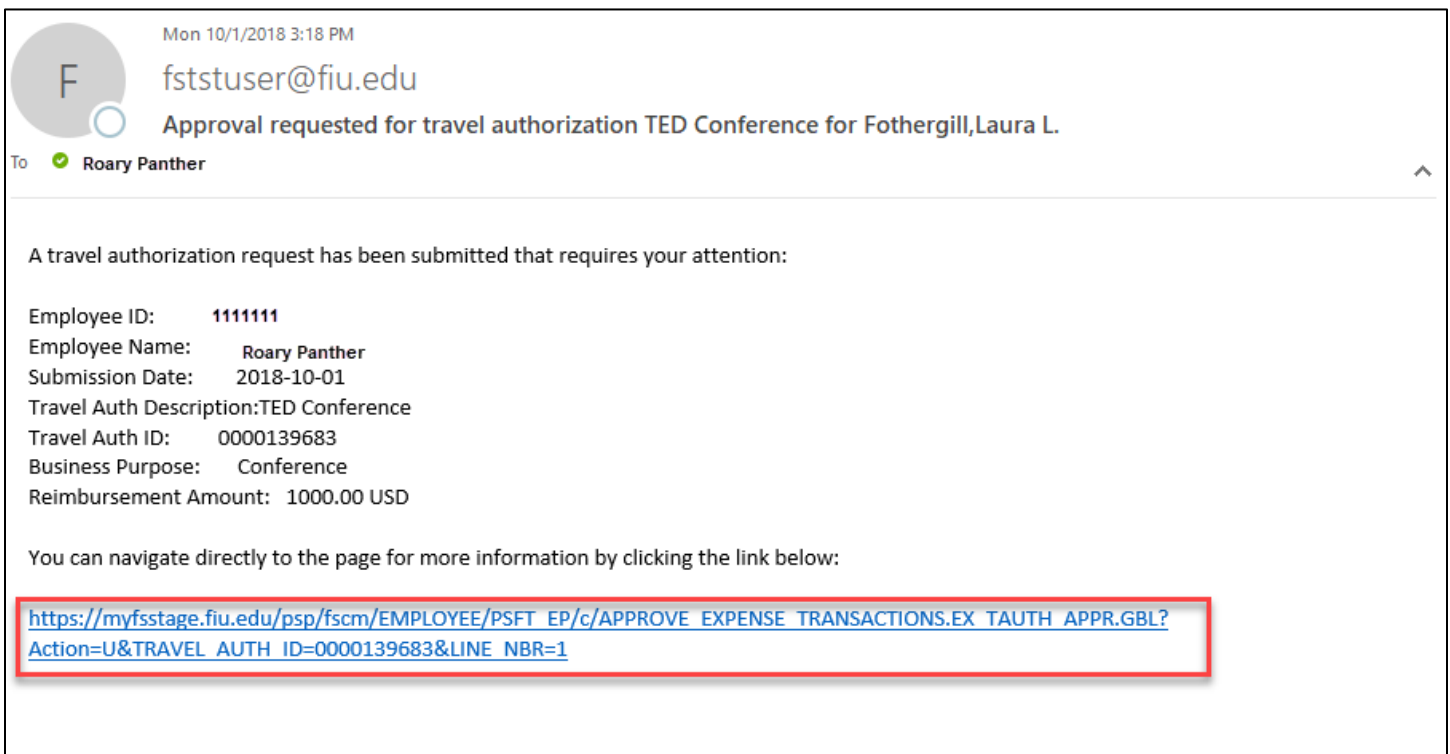
After submitting transactions within Financials, a transaction then routes through the workflow approval process. Depending on the transaction type and Chartfield information entered, a user's HR Supervisor, Expense Manager, Project Manager, University Prepaid Auditor, and/or supplemental approvers may be involved in the approval process.

Approvers have a variety of ways to approve a transaction such as: email with approval link, FIU Mobile App, and within PantherSoft Financials via Tiles, Worklist, or specific navigation.

Approving via Email Link

When there is a financial transaction in need of approval, the approver receives an email. Different transaction approver emails may be formatted differently, but each will have a link to click on.


1. Login to PantherSoft Financials. Then click the Approve link to route directly to the transaction in need of approval.



Mon 10/1/2018 3:18 PM

F fststuser@fiu.edu

Approval requested for travel authorization TED Conference for Fothergill, Laura L.

To  Roary Panther

A travel authorization request has been submitted that requires your attention:

Employee ID: 1111111
Employee Name: Roary Panther
Submission Date: 2018-10-01
Travel Auth Description: TED Conference
Travel Auth ID: 0000139683
Business Purpose: Conference
Reimbursement Amount: 1000.00 USD

You can navigate directly to the page for more information by clicking the link below:

https://myfsstage.fiu.edu/psp/fscm/EMPLOYEE/PSFT_EP/c/APPROVE_EXPENSE_TRANSACTIONS.EX_TAUTH_APPR.GBL?Action=U&TRAVEL_AUTH_ID=0000139683&LINE_NBR=1

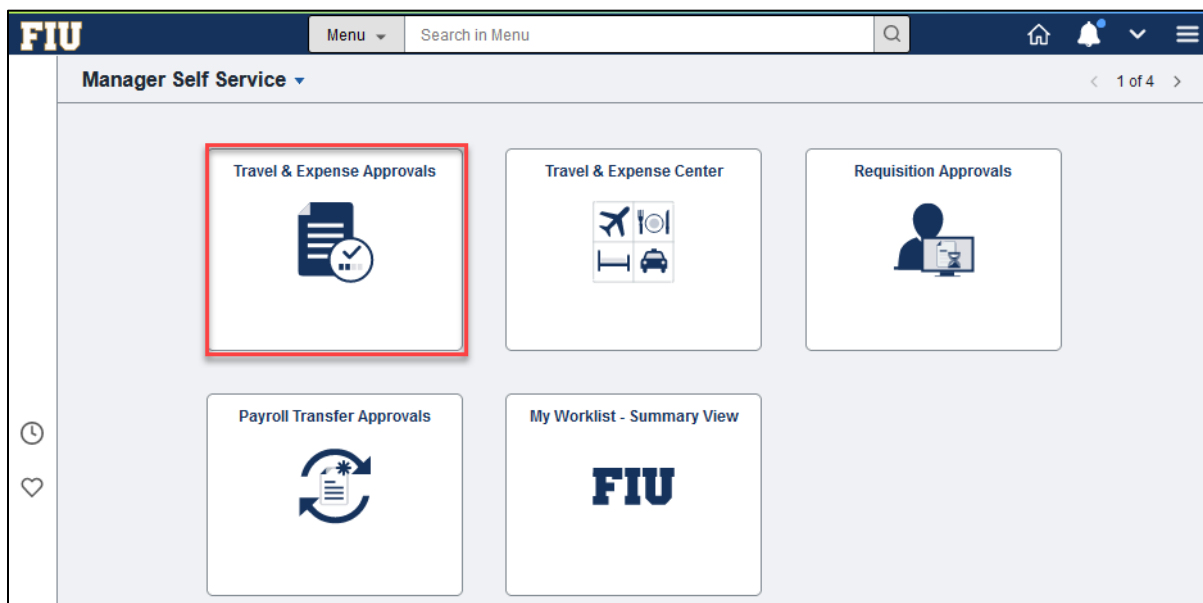
Approving via Manager Self Service Homepage

Within PantherSoft Financials are various homepages including Manager Self Service. This homepage provides various Tiles to approve different transactions.

1. To access the Manager Self Service homepage, click the gold bar at the top of the PantherSoft Financials screen and choose **“Manager Self Service.”**



2. Depending on the user role there are different Tiles to access the approvals including **Travel & Expense Approvals, Worklist, Requisition Approvals, Payroll Transfer Approvals,** and more.



3. The tabs at the top of the screen group approvals by type.

Search Pending Transactions ?

Change Sort Order ?

Refresh List

Transactions to Approve ?

Urgency	Transaction Type	Total	Unit	Name	Employee ID	Description	Transaction ID	Date Submitted	Status	Role
	Travel Authorization	10.00	USD	Meertins, Kevon Jordan	6364757	Testing Approvals	0000182591	04/04/2023	Submitted for Approval	HR Supervisor
	Travel Authorization	16.68	USD	Lam, Emma Mae-Fung	5719331	Test Default Accounting 2	0000182618	04/14/2023	Submitted for Approval	HR Supervisor
	Travel Authorization	100.00	USD	Yero, Odette	2218854	Workshop TA	0000182641	04/14/2023	Submitted for Approval	HR Supervisor

Refresh List

Return to Approval List
Employee Expense History

- Use the **Search Pending Transactions** section to find pending transactions within each tab. Click the expander to see these options.

Search Pending Transactions ?

Column Name Expression Criteria

Search Clear

Change Sort Order ?

Refresh List

Transactions to Approve ?

Urgency	Total	Curr	Budget Status	Name	Employee ID	Description
	10.00	USD	Not Budget Checked	Meertins, Kevon Jordan	6364757	Testing Approvals

- To approve the transaction, click on the **Description** or **Transaction ID** blue link.

Employee ID	Description	Transaction ID	Trip Date	Date Submitted	Status
6364757	Testing Approvals	0000182591	04/12/2023	04/04/2023	Submitted for Approval
5719331	Test Default Accounting 2	0000182618	04/26/2023	04/14/2023	Submitted for Approval
2218854	Workshop TA	0000182641	04/19/2023	04/14/2023	Submitted for Approval

Refresh List

6. Document Header, Line, Accounting Distribution, Attachments, and Workflow details are available on this page for the approver to review. Often, approvers have the option to write comments along with the actions to Approve, Deny, Send Back, or Hold depending on document type. Some transactions require Budget checking.

< Overview
Travel Auth Fluid Approval

Approve Travel Authorization

Travel Authorization Summary

Roary Panther User Defaults

General Information

Description	Workshop TA	Authorization ID	0000182841
Business Purpose	Workshop	Reference	
Status	Submitted for Approval	Description	Florida, Jacksonville Multiple Destinations
Date From	04/19/2023 To 04/21/2023	Updated on	04/14/2023 11:18:01AM By 2216854
		Foreign Travel Guidance and Screening Survey	Notes

Accounting Defaults More Options ...Choose an Action GO

You can deny individual expenses and still approve or send back the overall report.

Details

Expense Type	Date	PC Business Unit	Project	Activity	Amount	Currency	Approve
Domestic Airfare	04/19/2023				100.00	USD	<input checked="" type="checkbox"/>

Totals

Total	100.00 USD
Less Non-Approved	0.00 USD
Total Authorized	100.00 USD

Pending Actions

Role	Name	Action	Date/Time
HR Supervisor	Panther, Ali		
Expense Manager	(Pooled)		

Action History

Role	Name	Action	Date/Time
Employee	Panther, Roary	Submitted	04/14/2023 11:18:01AM

Comments

Budget Checking is required before the Travel Authorization can be Approved. Please click on the Budget Options hyperlink.

Budget Status Not Budget Checked

[Budget Options](#)

Approve
Send Back
Hold

[Return to Approval List](#)
[Previous in List](#)

Delegating an Alternate Workflow Approver

An approver can grant another employee who has the same approval authority as they do access to approve transactions in their absence. Please note the same approval authority refers to someone else who also has either Expense Manager and/or Project Manager system access. This kind of delegation applies to ALL transaction approvals. The transaction will start rerouting to the selected alternate approver from the set date range. Any transaction that was in the approval process prior to delegating will not route to the delegated approver.

To enable a user to complete the approval process on behalf of someone else, follow the navigation below:

1. Use the **NavBar** to navigate to **Main Menu>My System Profile**. The General Profile Information page opens. In the “**Alternate User ID**” box enter the Panther ID for the user that should be set as an Approver. To search for the Panther ID of a user **click the Look Up button** to the right of “Alternate User ID.”

Employee Self Service

General Profile Information

Panther, Roary

Password
[Change password](#)
 Change or set up forgotten password help

Personalizations

My preferred language for PIA web pages is: English
 My preferred language for reports and email is: English
 Currency Code: [Search]
 Default Mobile Page: [Search]

Alternate User

If you will be temporarily unavailable, you can select an alternate user to receive your routings.

Alternate User ID [Search] (highlighted with a red box)

From Date: [Calendar] (example: 12/31/2000)
 To Date: [Calendar] (example: 12/31/2000)

Workflow Attributes

Email User Worklist User

Miscellaneous User Links

Email

Primary Email Account	Email Type	Email Address
<input checked="" type="checkbox"/>	Business	fststuser@fiu.edu

IM Information

Protocol	XMPP Domain	UserID	Password
XMPP	[Search]	[Search]	[Search]

Save

- Using the **Search by** and *Description* begins with parameters, enter the last name of the alternate user. Click the **Search** button and select the user.

Look Up Alternate User ID [x]

Search by: Description ▾ begins with [] [Help](#)

Search Cancel Advanced Lookup

- In the **“From Date”** and **“To Date”** select the desired time frame for this user to Approve transactions on behalf of the other user. **Click Save.**

Alternate User

If you will be temporarily unavailable, you can select an alternate user to receive your routings.

Alternate User ID [] 🔍

From Date [] 📅 (example:12/31/2000)

To Date [] 📅 (example:12/31/2000)

NOTE: There are circumstances where a travel document may need to be re-routed to an alternate approver because the previous process was either not followed or there is an exception. In this case an email can be sent to controller@fiu.edu with a request to re-route the travel document. Include in the request, the document number (TA, CA, ER) and names and Panther ID numbers of both the original approver and alternate approver. The original approver and alternate approver **MUST BE** copied to the email request. Financial System and Support Services team members will review each request.