FLORIDA INTERNATIONAL UNIVERSITY

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.

**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.

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.

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.

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.

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.).
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.

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.

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.

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.

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](http://my.fiu.edu) in the browser address.

2. Click **Login to MyFIU**.

3. Enter a Panther ID and Password, and click **Log In**.
4. 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](http://myhr.fiu.edu),
- Financials: [http://myfs.fiu.edu](http://myfs.fiu.edu) OR [http://financials.fiu.edu](http://financials.fiu.edu),
- Campus Solutions: [https://psprod.fiu.edu/psp/students/?cmd=login](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](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.
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:

<table>
<thead>
<tr>
<th>Access Role</th>
<th>Role Description</th>
<th>Access Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>001</td>
<td>Inquiry and Reporting</td>
<td>Inquiry access to supplier, voucher requisition, purchase order, general ledger, asset, grants and budget data. This role can also run queries, monitor reports and create budget transfers.</td>
</tr>
<tr>
<td>002</td>
<td>Requester / Super Receiver</td>
<td>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.</td>
</tr>
<tr>
<td>0024</td>
<td>Requester / Casual Receiver</td>
<td>This role gives the user the ability to create requisitions and create receipts for any requisitions/purchase orders.</td>
</tr>
<tr>
<td>005</td>
<td>Shoppable Role</td>
<td>This role only provides users access to mFLUmarket to shop and does not give access to create requisitions and receipt for any requisitions/purchase orders. If you want to shop mFLUmarket and create requisitions and receipts, select Access Role 004A instead.</td>
</tr>
<tr>
<td>007</td>
<td>Budget Transfer Approver</td>
<td>Approve or post budget transfers entered to the Budget Managers for the Departments selected.</td>
</tr>
<tr>
<td>007_DBM</td>
<td>Access to DBM Page</td>
<td>This role gives access to the Detail Budget Maintenance Page.</td>
</tr>
<tr>
<td>008</td>
<td>AP Journal Voucher Role Access</td>
<td>This role gives users access to create Journal Vouchers to replace AP transactions for FOU1 and Construction-FON01 business units via the custom Journal Voucher transaction for AP transactions in FOU Foundation and Health Care Network business units. Please reach out to respective AP department.</td>
</tr>
<tr>
<td>012</td>
<td>Student Assistance / Grants &amp; External Award Right</td>
<td>Process grants and external awards to students.</td>
</tr>
<tr>
<td>015</td>
<td>Payroll Detail Report / Payroll Transfer</td>
<td>Run payroll detail report and initiate payroll expense transfers.</td>
</tr>
<tr>
<td>017</td>
<td>Smart Billing Bill Creator</td>
<td>Create and update bills for Departments selected.</td>
</tr>
<tr>
<td>018</td>
<td>Smart Billing Item Creator</td>
<td>Create and update billing items for Departments selected.</td>
</tr>
<tr>
<td>019</td>
<td>Smart Billing Fund 350</td>
<td>Access for fund 350. Must have SIM_DOC_BILLING_ITEM role prior to requesting this access.</td>
</tr>
<tr>
<td>020</td>
<td>FOU OL Journal Entry</td>
<td>This role gives users access to create journal entries (including G3 transfers) in the General Ledger for FOU1 transactions. To request access to FOU Foundation and Health Care Network business units, employee's supervisor should send an email to <a href="mailto:controller@fiu.edu">controller@fiu.edu</a>.</td>
</tr>
</tbody>
</table>

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 Screen](image)

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

![Access Request Form]

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

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

![Submit Button]

5. 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.

![Approval Status Tab]
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 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.

![NavBar: Recently Visited](image)

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.

![NavBar: Favorites](image)

**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.

![Edit Favorites](image)

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

![Edit Favorites Table](image)

**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.

![Image of PantherSoft menu](image)

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.

**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.

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.”
Home

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

![General Settings](image_url)
3. The options for personalizing navigations are listed. Each option provides a choice to modify how PeopleSoft responds to the input from the user.

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

   **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.

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

<table>
<thead>
<tr>
<th>Choose a Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>PeopleSoft PeopleTools 8.55: Portal Technology, Managing Dashboard Pages</td>
</tr>
<tr>
<td>PeopleSoft PeopleTools 8.55: Portal Technology, Managing Homepages</td>
</tr>
</tbody>
</table>
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](image)

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.

![Projected Expenses](image)

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

### Required Fields

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

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

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

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.

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.
2. 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.

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

![Basic Lookup screenshot](image)

**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.

![Search By dropdown screenshot](image)
2. 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.

![Look Up Ship To](image)

**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.

1. After clicking the **Lookup Glass** icon, the **Lookup** page becomes available in a pop-up. Click the **Advanced Lookup** link.
2. 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.

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

<table>
<thead>
<tr>
<th>Operator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Begins With</strong></td>
<td>Returns all values that start with.</td>
</tr>
<tr>
<td><strong>Contains</strong></td>
<td>Returns all values that have what is entered within it.</td>
</tr>
<tr>
<td><strong>= (equal)</strong></td>
<td>Returns exact matches.</td>
</tr>
<tr>
<td><strong>Not = (not equal)</strong></td>
<td>Returns all values that do not match.</td>
</tr>
<tr>
<td><strong>&lt; (less than)</strong></td>
<td>Returns all values that are less than what is entered.</td>
</tr>
<tr>
<td><strong>&lt;= (less than or equal to)</strong></td>
<td>Returns all values equal to and below what is entered.</td>
</tr>
<tr>
<td><strong>&gt; (greater than)</strong></td>
<td>Returns all values greater than what is entered.</td>
</tr>
<tr>
<td><strong>&gt;= (greater than or equal to)</strong></td>
<td>Returns all values equal to and above what is entered.</td>
</tr>
<tr>
<td><strong>Between</strong></td>
<td>Shows two prompts and allow the user to assign a range of values.</td>
</tr>
<tr>
<td><strong>In (in list)</strong></td>
<td>Shows a list of values to choose from and allow the user to pick from a list.</td>
</tr>
</tbody>
</table>

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.

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.
Calendar

Every date field includes a built-in calendar.

1. Click on the Calendar icon.

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

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

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

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

![Transaction Item Description Detail](image)

**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.

![Add & Delete Rows](image)
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.

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

Line Horizontal Expansion & Retraction

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

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

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

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.
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.
4. 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.

![File Attachment window](image1)

5. 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.

![Line Comment screen](image2)

6. 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.

![Price and Total table](image3)
Drag and Drop Feature

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

1. 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.
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.

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.

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.)

3. To view contact information for the approver(s), click on the approver’s name.
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.
3. 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/](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.
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:

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unit</td>
<td>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</td>
<td>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</td>
</tr>
<tr>
<td>SpeedType</td>
<td>A SpeedType is a code that represents a combination of ChartField values. Using SpeedTypes simplify the entry of ChartFields that are commonly used together.</td>
<td>A SpeedType is a code that represents a combination of ChartField values. Using SpeedTypes simplify the entry of ChartFields that are commonly used together.</td>
</tr>
<tr>
<td>Account</td>
<td>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.</td>
<td>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.</td>
</tr>
<tr>
<td>Alternate Account</td>
<td>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.</td>
<td>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.</td>
</tr>
<tr>
<td>Department</td>
<td>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).</td>
<td>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).</td>
</tr>
<tr>
<td>Site</td>
<td>Identifies the campus or location to which the transaction is identified, such as on-line, study abroad, medical locations.</td>
<td>Identifies the campus or location to which the transaction is identified, such as on-line, study abroad, medical locations.</td>
</tr>
<tr>
<td>Fund Code</td>
<td>Identifies major funding sources that the University must report on separately. Each fund has its own rules for spending and receiving money.</td>
<td>Identifies major funding sources that the University must report on separately. Each fund has its own rules for spending and receiving money.</td>
</tr>
<tr>
<td>Program Code</td>
<td>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.</td>
<td>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.</td>
</tr>
<tr>
<td>Activity Number</td>
<td>A code used to track revenues and expenses for a specific activity using a distinct fund, program code, site, and department (organization) string.</td>
<td>A code used to track revenues and expenses for a specific activity using a distinct fund, program code, site, and department (organization) string.</td>
</tr>
<tr>
<td>Cost PID</td>
<td>Tracks revenues and expenses for a specific Faculty member.</td>
<td>Tracks revenues and expenses for a specific Faculty member.</td>
</tr>
<tr>
<td>Budget Reference</td>
<td>Identifies the aid year for financial awards. Also used by College of Medicine to identify the academic period.</td>
<td>Identifies the aid year for financial awards. Also used by College of Medicine to identify the academic period.</td>
</tr>
<tr>
<td>PC Business Unit (project costing business unit)</td>
<td>Used for Construction projects (FCN01), FIU Research Central (FSR00) and for Grants (FSR01).</td>
<td>Used for Construction projects (FCN01), FIU Research Central (FSR00) and for Grants (FSR01).</td>
</tr>
<tr>
<td>Project</td>
<td>Tracks projects whereby the University is required to report fiscal activities on a “life-to-date” basis.</td>
<td>Tracks projects whereby the University is required to report fiscal activities on a “life-to-date” basis.</td>
</tr>
<tr>
<td>Activity ID</td>
<td>Activities are the specific tasks within a project.</td>
<td>Activities are the specific tasks within a project.</td>
</tr>
</tbody>
</table>
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.
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.

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

Employee ID: 111111
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_EF/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.
4. Use the **Search Pending Transactions** section to find pending transactions within each tab. Click the expander to see these options.

5. To approve the transaction, click on the **Description** or **Transaction ID** blue link.
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.
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.”
2. 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](image)

3. 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](image)

**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.