PUM Image 35 to 47 and PeopleSoft PeopleTools 8.60 Change Highlights *effective January 29, 2024*



Department of Financial Services

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Introduction

Overview

Florida PALM applied a PeopleSoft maintenance upgrade to bring the system to a more recent PeopleSoft Update Manager (PUM) Image and PeopleTools version. PUM Images are PeopleSoft environment instances that are released by Oracle on a published schedule to introduce a set of new features as well as fixes on known issues. Each PUM issued Image released by Oracle is identified by an image number. The current PUM Image Florida PALM is using is Image 35 and the upgrade will increase this to Image 47. PeopleTools is the background set of applications and tools that support PeopleSoft and is identified by a version number. For Florida PALM, the current PeopleTools version is 8.59 and the upgrade will increase this to 8.60.07. The upgrade will be available in production on January 29, 2024. This document will provide a summary of changes and compare what the system looked like before and after the upgrade.

Document Scope

This document will provide an overview of the changes in the system, including:

- Homepage and Banner Updates
- Navigation Updates
- Global Search Updates
- Search Page Updates
- Process Monitor Updates
- Cash Management Updates
- General Ledger Changes



Homepage and Banner Updates

1. New color scheme

The new Redwood color scheme is implemented throughout the system. The new color scheme can be seen in the sign-in screen, the banner, icons, backgrounds, and user interface elements, such as page tabs, grid tabs, check boxes, slider buttons, toggle buttons, etc.

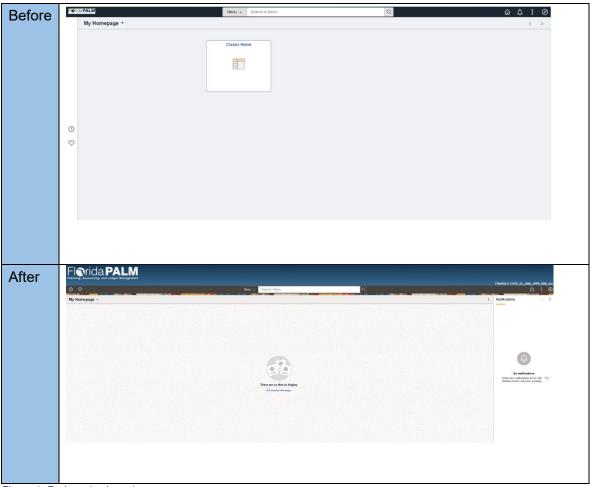


Figure 1: Redwood color scheme



2. Classic Homepage will no longer be available

The tile for Classic Home will no longer be available on the Homepage. This means users will have to now use functionalities such as the NavBar and Global Search to locate pages within PeopleSoft.

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Figure 2: Classic Home tile removal



3. Banner section includes only the branding, user, and environment information

The topmost section of the header (banner section) is now separated from the quick-access buttons, Global Search Bar, Action Menu, and NavBar. It also now includes a new feature, which is the display of the name of the current environment and the current user.

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Figure 3: The banner section of the header



4. Quick-access buttons are a part of the header

The quick-access buttons, which include the recently visited and favorites buttons, are now located on the left part of the header.

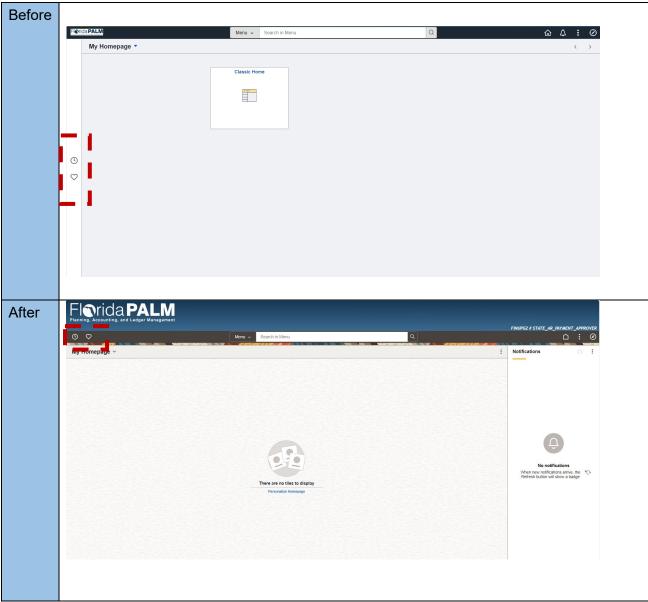


Figure 4: The quick-access buttons

5. The header has a global section that appears everywhere in PeopleSoft

The header now has a global section that has a consistent look and appears everywhere in PeopleSoft. This global section contains the quick-access buttons, Global Search Bar, Home button, Notification, Global Action Menu, and NavBar. It looks the same regardless of if the user is currently at Homepage, or inside an application page.



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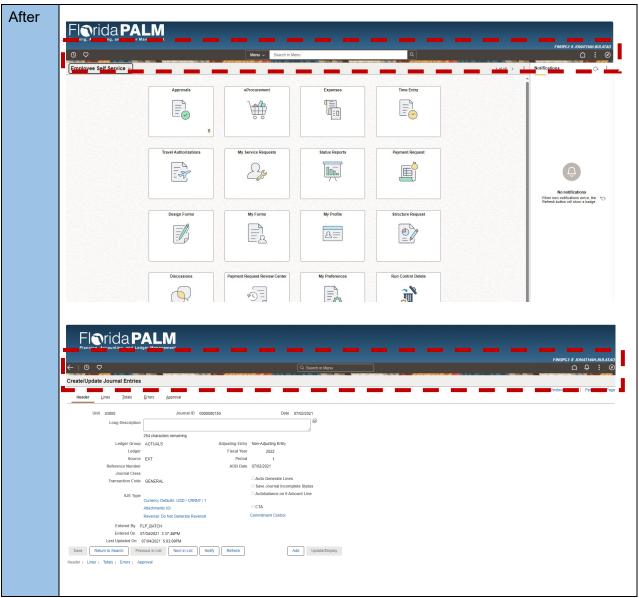


Figure 5: The Global header

6. The Action Menu is split into Global and Contextual Action Menus

The actions a user can perform are located on either the Global Action Menu or a new menu: the Contextual Action Menu. Each are displayed within one of the ellipses icons. The Global Action Menu is part of the header and contains actions that the user can perform everywhere, regardless of the screen currently loaded. Examples of global actions are New Window, Sign Out, and My Preferences. The Contextual Action Menu contains actions that are specific to the current screen being loaded. Example of contextual action are Personalize Homepage and Refresh.



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	Sign Out
	Contextual Action Menu
	Notifications
	Personalize Homepage
	Refresh

Figure 6: Action Menus



Navigation Updates

1. Breadcrumbs are not shown on the header

Breadcrumbs no longer display on the header.

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Figure 7: Breadcrumbs on header



The user can still view the navigation as part of the NavBar Menu.

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Figure 8: Breadcrumbs on NavBar menu

Alternatively, the user can easily look up a page using Global Search Bar located in the middle of the header.

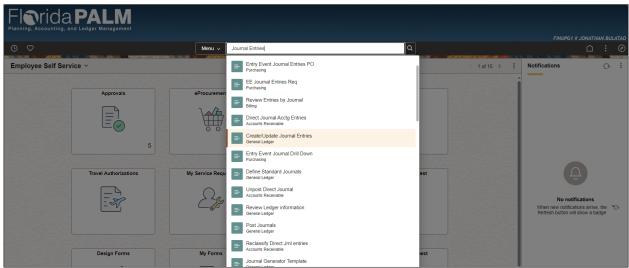


Figure 9: Global Search Bar



2. Back button has been added to the header

The Back button appears when the user opens an application page. This feature is another tool the user can leverage when navigating within PeopleSoft. This button allows the user to go to the previous screen.

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Save Return to Search Pre	vious in List Next in List Notify Refresh	Add Update/Display		
Figure 10: Back bi	ıtton			



3. Sorting of the NavBar

The NavBar menu sorting is now changed to Alphabetical. This can be kept as-is or changed back to Standard sorting via the Personalize NavBar button.

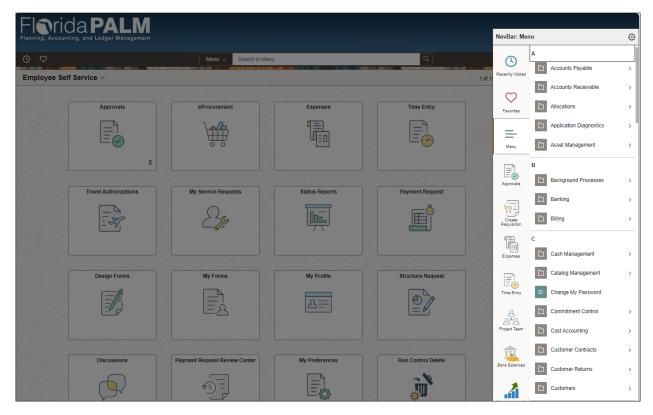
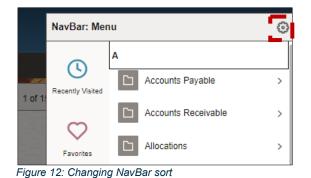
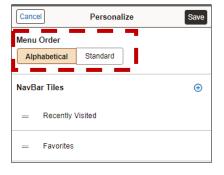


Figure 11: NavBar sorting

To change the sorting, users can select the Personalize NavBar menu and select Menu Order to Standard or Alphabetical.







Global Search Updates

1. Global Search Bar appears in standard form and muted form

The appearance of the Global Search Bar changes depending on which screen is loaded for the user. When the user is at the Homepage, the Global Search Bar displays in the standard form. When the user is in a WorkCenter or an application page, the Global Search Bar displays in the muted form.

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Figure 13: Global Search before



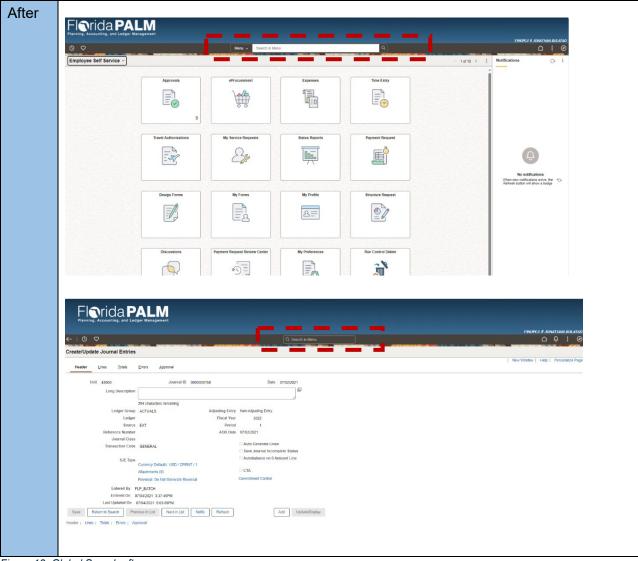


Figure 13: Global Search after



2. Global Search behavior within a WorkCenter or application page

By default, the Global Search Bar displays in muted form when the user is in a WorkCenter or application page. When the user selects within the Global Search Bar, it gets activated and changes into the standard form.

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Reversal: Do Not Generate Reversal	Commitment Control
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Figure 14: Global search bar in muted form

The muted form of the Global search bar changed to standard form when selected.

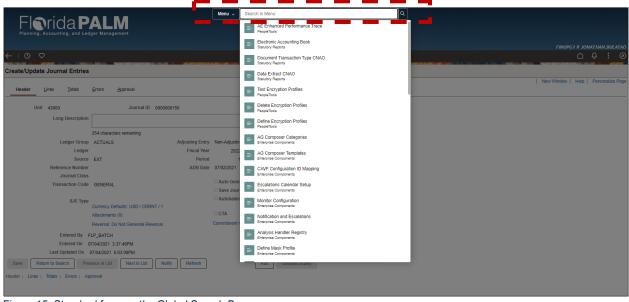


Figure 15: Standard form on the Global Search Bar



Search Page Updates

1. Search pages use buttons instead of tabs

Search pages use buttons instead of tabs when changing the search page screen between Add a New Value and Find an Existing Value.

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Figure 16: Search page using buttons instead of tabs



2. Keyword Search is not available on search pages

Keyword Search is not available on search pages; only Find an Existing Value and Add a New Value.

Before	
	Favorites* Main Menu* My Homepage Create/Update Journal Entries Sign Out Favorites* Main Menu* My Homepage Create/Update Journal Entries Sign Out Favorites* Main Menu* My Homepage Create/Update Journal Entries My Homepage Favorites* Main Menu* My Homepage Create/Update Journal Entries My Homepage Favorites* Main Menu* My Homepage Commanded Search Add To *
	Florida PALM Journals Search Add To - A Short Notification NavBar New Window Help
	Create/Update Journal Entries Enter any information you have and click Search. Leave fields blank for a list of all values.
	Eind an Existing V use Keyword Search Add New Value
	Note: Keyword Search Tips Search Criteria
	Keywords
	Search Basic Search Advanced Search
	Find an Existing Value Keyword Search Add a New Value
After	
	Florida PALM Plannag, Accounting, and Ledger Management
	Planning, Accounting, and Ledger Management FRUPCI # JONATHAN.BULATAO
	← ③ ♡
	New Window Help
	Add a New Value
	*Business Unit Q
	*Journal ID TEXT
	Add

Figure 17: Keyword search removed

3. Choose from recent searches functionality

In the Find an Existing Value screen on search pages, there is a new feature called Choose from Recent Searches that allows users to view recent searches made.



Before			
	Favorites Main Menu Mu > My Homepage Create/Update Journal	Entries	🏫 Home 🔰 Sign Out
	Florida PALM Journals - Search	>> Advanced Search	Add To 👻 🏠 🧭 Notification NavBar
		<u>—</u>	Notification NavBar New Window Help
	Create/Update Journal Entries		
	Enter any information you have and click Search. Leave fields blank for a list of all value	25.	
	Find an Existing Value Keyword Search Add a New Value		
	Search Criteria		
	Business Unit = Journal ID begins with		
	Journal Date = V		
	Line Business Unit = 🗸		
	Journal Header Status = Budget Checking Header Status =	J	
	Source = v Q Entered By begins with v JONATHAN.BULATAO Q		
	Attachment Exist = V]	
	Journal Class begins with V		
	Search Clear Basic Search 🖉 Save Search Criteria		
After			
	Florida PALM		
	Planning, Accounting, and Ledger Management		FINUPG1 # JONATHAN.BULATAN
	$\leftarrow \mid \odot \circ$	Q. Search in Menu	© : 4 ۵
	Create/Update Journal Entries		New Window Help
	Find an Existing Value V Search Criteria	⊕Add a New Value	
	Constrainty information your have affor cost Search. Leave mode black for a net of all values. Recent. Choose from recent searches Recent. Choose from saved searches	v //	
		• 2	
	Business Unit v Q		
	Journal Date = V		
	Document Sequence Number begins with v		
	Line Business Unit		
	Journal Header Status No Status - Needs to Budget Checking Header Status V		
	Entered By begins with V JONATHAN BULATAO Q		
	Attachment Exist		
	Journal Class begins with V Q		
	Case Sensitive		
	Search Clear		

Figure 18: Choose from recent searches



When the user selects the Choose from recent searches field, the user will be shown a drop-down list. The list contains the recent search parameters, and the user can select any from the list. The users can re-use any of the recent search parameters listed.

Florida PALM Planing: Accounting, and Ledger Management	
	Q Search in Menu
Create/Update Journal Entries	
Find an Existing Value ~ Search Criteria Enter any informations in have made of: Semiclassics for additional values.	(3) Add a New Value
Searches Choose from saved searches Business Unit 4000, Journal Neader Status Business Unit 41000, Journal Date 2023 45 Business Unit 41000, Journal Da	

Figure 19: Choose search parameters

The user can also select the pencil icon next to Choose recent searches field to open up the Manage Recent Searches screen. This will allow the user to remove certain recent searches or delete all recent searches. The user can delete recent searches via the Manage Recent Searches screen.

- 0 🗢	Q. Search in Menu	$\leftarrow \mid \odot \circ$	Q. Search in Menu	
reate/Update Journal Entries		Create/Update Journal Entries		
ind an Existing Value		Find an Existing Value	Manage Recent Searches	
Search Criteria	Add a New Value	✓ Search Criteria	Recent Searches	
Search Criteria Iter any information you have and click Search. Leave fields blank in the second values.		Enter any information you have and click Search. Leave fields blank for a list of all values. Recent Choose from recent searches		
Recent Choose from recent searches Ved Choose from saved searches	arches 🗸 🗸		Business Unit/EQ143000	
Business Unit = V Q		Business Unit = v	Business Unit(EQ) 36000, Journal Header Status(EQ) Unposted	
		Journal ID begins with v	Business Unt(EQ):41000,Journal Date(GE):2023-05-01	
Journal ID begins with 🗸		Journal Date 💷 👻	Business Unit(EQ):41000, Journal Date(GT) 2023-05-01	
Journal Date = 🗸		Document Sequence Number begins with 🖌	Business Unit(EQ):43000, Journal Date(OT) 2023-05-01	
Document Sequence Number begins with 🗸		Line Business Unit	L	
Line Business Unit = v Q		Journal Header Status 📃 🗸 No Status - Needs to 🔻	Save Cancel	
Journal Header Status = V No Status - Needs to V		Budget Checking Header Status = 👻		
		Source = • ONL	Q	
Budget Checking Header Status = 🗸		Entered By begins with V JONATHAN BULATAO	Q	
Source = V ONL Q		Attachment Eaist		
Entered By begins with V JONATHAN BULATAO Q		Journal Class begins with v		
Attachment Exist =		Show fewer options	<u></u>	

Figure 20: Recent searches



4. Choose from saved searches functionality

The user can also save any search parameters for future re-use. The Choose from saved searches button will bring up a list of search parameters that the user had specifically saved for re-use.

Before			
	Favorites Main Menu My Homepage Create/Update Journal Entries		ign Out
	Florida PALM	Advanced Search	Add To 🖛 🏠 🧭 Notification NavBar
	Create/Update Journal Entries		New Window Help
	Enter any information you have and click Search. Leave fields blank for a list of all values.		
	Find an Existing Value Keyword Search Add a New Value		
	Search Criteria		
	Business Unit		
	Journal ID[begins with		
	Document Sequence Number begins with Line Business Unit		
	Journal Header Status = Budget Checking Header Status =		
	Source v Q Entered By begins with V JONATHAN.BULATAO Q		
	Attachment Exist = V V Journal Class begins with V		
	Case Sensitive		
	Search Clear Basic Search 🕼 Save Search Criteria		
After			
	Florida PALM		
	Planning, Accounting, and Ledger Management		FINUPG1 # JONATHAN.BULATAO
	← ① ♡ Create/Update Journal Entries	n Menu	0 : 4 0
	Find an Existing Value	⊙Add a New Value	New Window Help 🔒
	Search Criteria Enter any information you have and click Search. Leave fields blank for a tot		
	Recent way sincertained from new and clock dealerst. Cearly food to call the assisted sectors Sectors Choose from saved searches	• <i>I</i>	
	Business Unit 💷 🔍 🔍 Q		
	Journal ID Regins with v		
	Journal Date = Document Sequence Number (begins with V)		
	Line Business Unit		
	Journal Header Status 🔹 🔍 No Status - Needs to 🗸		
	Budget Checking Header Status 📼 💙 🔍 💙 Source 🔳 V ONL Q		
	Entered By begins with V JONATHAN BULATAO Q		1
	Attachment Exist v v		
	Ashow fewer options Case Sensitive		
	Clear Search Clear		

Figure 21: Saved search parameters



When the user selects the Choose from saved searches field, a drop-down list will display. The list contains search parameters that were previously saved by the user.

Florida PALM Planning, Accounting, and Ledger Management		
← ◎ ♡	Q Search in Menu	
Create/Update Journal Entries		
Find an Existing Value Search Criteria Enter any information you have and click Search. Leave fields blands and click Search.	Add a New Value]
Recent Searches Choose from recent searches Business Unit = Journal ID begins with	Search Lottery Business Unit:36000, Journal Header Status: Un Dept of Legal Affairs JrnIs Business Unit:41000, Journal Da +1more	
Journal Date =		
Document Sequence Number begins with	▼	
Line Business Unit 🗧 🗸	Q	
Journal Header Status 🛛 = 👻	No Status - Needs to 🗸	

Figure 22: Drop-down list containing the saved search parameters

To save a search, the user needs to enter the search parameters first, and select the Search button. After the button is selected, a new button called Save Search will appear. The user can select the Save Search button to save the current search parameters.

Florida PALM Planning, Accounting, and Ledger Management		
		FINUPG1 # JONATHAN, BULAT
	Q. Search in Menu	: A A
Create/Update Journal Entries		
Find an Existing Value	⊕Add a New Value	
✓ Search Criteria		
Enter any information you have and click Search. Leave fields blank		
Recent Searches Choose from recent searches	▼ P ☐ Saved Choose from saved searches ▼ P	
Business Unit 🔳 🗸	45000 Q	
Journal ID begins with ~		
Journal Date 🛛 =		
Document Sequence Number begins with 🗸		
Line Business Unit 🛛 = 👻	Q	
Journal Header Status 🛛 = 👻	~	
Budget Checking Header Status = 👻	~	
Source = 🗸	ONL Q	
Entered By begins with ~	Q	
Attachment Exist 🛛 =	~	
Journal Class begins with 🗸	٩	
Case Sensitive		
Search Clean	Save Search	

Figure 23: Save Search button



When the user selects the Save Search button, the Save Search screen displays. The user can provide a name for the search parameters for easy identification. The search will be saved after selecting the Save button.

Florida PAI							
							FINUPG1 # JONATHAN.BULAT.
$\leftarrow \mid \odot \ \heartsuit$				Q Search in Men			<u>∩</u> ÷ ∩
Create/Update Journal Entries							
Find an Existing Value					⊕ Add a New Val	16	
✓ Search Criteria						_	
Enter any information you have and click Search. Le	eave fields blank f	or a list of all values.					
Recent Searches Choose from recent searches		V C Saved Searches	Choose from saved searches		. 1		
Searches		Searches	1	Save Search		×	
Business Unit	= •	45000				Help	
Journal ID	begins with 🗸		Name	Dept of State ONU			
Journal Date	= •		Business Unit	45000			
Document Sequence Number	begins with 🗸		Source				
Line Business Unit			Source	UNL			
Line Business Unit	= •		Cancel		Save		
Journal Header Status	= •	~					
Budget Checking Header Status	= ~	~					
Source	= 🕶	ONL	۹				
Entered By	begins with 🗸		۹				
Attachment Exist	= *	~					
Journal Class	begins with 🗸		۹				
Show fewer option	15						
Case Sensitive							
Search	Clear	Save Search					

Figure 24: Naming a Saved Search

The new search parameter would then display on the Choose from saved searches field.

	Florida PA								
CectedUpdate Journal Entries Find Existing Value Search Criteria Tetra ny information you have and cick Search. Lever fields bank for all of all values: Performation Business total Document Delay and the Search Document Delay and the Search Document Sequence Number Document Sequence Number Document Sequence Number Document Exists Source Outrain theoder Status Source Outrain Class Degree upon Source Text Descrites Divertimes Descrites Divertimes Divertimes Divertimes Divertimes Divertimes Divertimes									FINUPG1 # JO
Find an Existing Value • Sarch Criteria Enter withormation you have and click Starch. Leave fields takink for a tast at auxe. • Secretizes • Businees tint = • • Businees tint = • • Decir of Legal Affairs Jrins Businees tint = • • Decir of Legal Affairs Jrins Businees tint = • • Decir of Legal Affairs Jrins Businees tint = • • Decir of Legal Affairs Jrins Businees tint = • • Decir of Legal Affairs Jrins Businees tint = • • Decir of Legal Affairs Jrins Businees tint = • • Decir of Legal Affairs Jrins Businees tint = • • Decir of Legal Affairs Jrins Businees tint = • • Decir of Legal Affairs Jrins Businees tint = • • Decir of Legal Affairs Jrins Businees tint = • • Decir of Legal Affairs Jrins Businees tint = • • Decir of Legal Affairs Jrins Businees tint = • • Decir of Legal Affairs Jrins Businees tint = • • Decir of Recting Heeder Status = • • ONL • ONL • Decir of Recting Heeder Status = • • ONL • ONL • ONL • ONL • ONL <	← © ♡			Q. Search in Me	าน				
Sanch Crient Terrer any information you have and club. Bearing suited at	Create/Update Journal Entries					19 (9) "BBA BBA			W. DAT DA
Eleta any information you have and club. Bearch Leave fields blank for a lat of all values.	Find an Existing Value				Add a New Value				
Business Unit = + 6000 Journal IDa = + 6000 Journal IDa = - 0 Journal IDa = - 0 Document Sequence Number Estimets Unit 40000 Journal Da., + troore Document Sequence Number = Journal Header Status = Journal Header Status		.eave fields blank	for a list of all values.			,			
Business Unit a v 4000 Business Unit 3000 Journal Header Shallwarm. Journal Ibe begins with v Business Unit 3000 Source ONL Business Unit 4000 Journal Da. • Imore Document Sequence Number Edgess unit 41000 Journal Da. • Imore Document Sequence Status a v C V All And All All All All All All All All All Al	Recent Searches Choose from recent searches		✓ I □ Saved Searches	Search	P				
Journal Ibagins with v Buiness Unit 40000, Source ONL Journal Ibagins with v Buiness Unit 41000, Journal Iba+Imore Document Sequence Number begins with v Line Business Unit I v C Journal Header Status I v Journal Header Status I v Budget Checking Heeder Status I v Source I v ONL Q Attachment Eixis I v Journal Class Begins with v Journal Class Begins with v	Business Unit	= •	45000	Business Unit:36000, Journal Header Statue-Un					
Journal Data a Document Sequence Number begins with • Line Business Uit a Journal Header Status a a • Budget Checking Header Status a a • Source a ONL O Entered By begins with • Journal Class begins with • Journal Class begins with • Cass Sensitive -	Journal ID	begins with 🗸		Business Unit:45000,Source:ONL					
Line Business Unit a v a a a a a a a a a a a a a a a a a	Journal Date	= •		Dept of Legal Affairs Jrnls Business Unit:41000,Journal Da +1more					
Journal Header Status a v v Budget Checking Header Status a v v Source a v ONL Q Entered By begins with v Q Attachment Exist a v v Journal Class begins with v Q Case Sensitive	Document Sequence Number	begins with 🗸							
Budget Checking Header Status a v v v Source a v ONL Q Entered By begins with v Q Attachment Exist a v v v Journal Class begins with v Q Case Sensitive	Line Business Unit	= •		Q					
Source a v ONL Q Entered By begins with v Q Attachment Exist a v v Journal Class begins with v Q - Show two rotions Case Sensitive	Journal Header Status	= •		~					
Entered By begins with \checkmark Q Attachment Exist $= \checkmark$ \checkmark Journal Class begins with \checkmark Q \land Show here options Case Sensitive	Budget Checking Header Status	= •		•					
Attachment Edist a v v Journal Class begins with v Q Show fewer options Case Sensitive	Source	= •	ONL	Q					
Journal Class [begins with v] Q > Show lever options Case Sensitive	Entered By	begins with 🗸		Q					
Show fewer options Case Sensitive	Attachment Exist	= •		•					
Case Sensitive	Journal Class	begins with 🗸		Q					
		ns							
		Clear	Rawa Search						

Figure 25: New search parameter



There is also a Manage Saved Searches screen that can display by selecting the pencil icon next to the Choose saved searches field. In this screen, the user can delete or rename saved searches.

	⊕ Add a New Value				
⊕Add a New Value		Manage Saved Sea	rches		×
r a list of all values.	es. ived arches	Display By Newest or	1 top	~	Help
Choose from saved searches		Saved Searches			⊗ <u>Delete All</u>
(45000 Q.)		Dept of State ONL: Business Unit(EQ):45000,Source(EQ):ONL	⊐} <u>Rename</u>	×	
		Lottery: Business Unit(EQ):36000, Journal Header Status(EQ):Unposted	⊫ <u>≹Rename</u>	×	
		Dept of Legal Affairs Jrnls: Business Unit(EQ):41000,Journal Date(GE):2023-05-01, +1more	⊏ <u>¥Rename</u>	×	
Q		Save Cancel			
		<u> </u>			.::

Figure 26: Manage Saved Searches



5. Image when no search has been submitted

During the initial load of the Find an Existing value screen, there is an icon of a person with a magnifying glass and a message saying "*Nothing yet. Your search results will appear here*." This icon is a reminder that the user has not performed a search yet since the screen has loaded.

Before	Favorites Main Menu General Ledger Journals Journal Entry	Create/Update Journal Entries	A Home Sign Out			
Delete	Florida PALM	Advanced Search 🛛 Last Search Results	Add To 👻 🛕 🧭 Notification NavBar			
	Create/Update Journal Entries Enter any information you have and click Search. Leave fields blank for a list of all values.					
	Einer any information you have and click search. Leave lielus brank for a list of all values. Find an Existing Value Keyword Search Add a New Value					
	Search Criteria					
	Business Unit Image: Status Journal ID begins with V Image: Status Journal Header Status Image: Status Journal Header Status Image: Status Journal Header Status Image: Status Source Image: Status Journal Header Status Image: Status Journal Header Status Image: Status Journal Lease (Lass begins with V) Image: Status Journal Class Image: Status Journal Class Image: Status Image: Status Image: Status Image: Status Image: Status Journal Class Image: Status Image: Status Image: Status Journal Class Image: Status Image: Status Image: Status Journal Class Image: Status Image: Status Image: Status Image: Status Image: Status Image: Status Image: Status Image: Status					
After	CenterUpdate Journal Entrice Journal Date Journal Mesder Statu Journal Class Jour	Q Bendin Meru				

Figure 27: Reminder message and icon



Process Monitor Updates

1. "All" option is a part of the Last / Date Range field

The Last / Date Range field in the Process Monitor Page now includes the "All" option, which returns all available process instances regardless of the date. Previously, the "All" option was part of the Units field (where the user specifies Days, Hours, Minutes, Years).

Before	Favorites * Main Menu * > PeopleTools * > Process Scheduler * > Process Monitor	🟫 Home Sign Out
	Florida PALM All Search Search Search Results	Add To 👻 💭 🧭 Notification NavBar
	Process List Server List	New Window Help Personalize Page
	View Process Request For	
	User ID Q Type V Last V 1 Days V	Refresh
	Server Name Q Date Range Instance To	Clear
	Run Status 💙 Distribution Status 💙 🛛 Save On Refresh Report Manager	Reset
	▶ No process / job matching the criteria	
	Save Notify	
	Process List Server List	
	Save Notify	



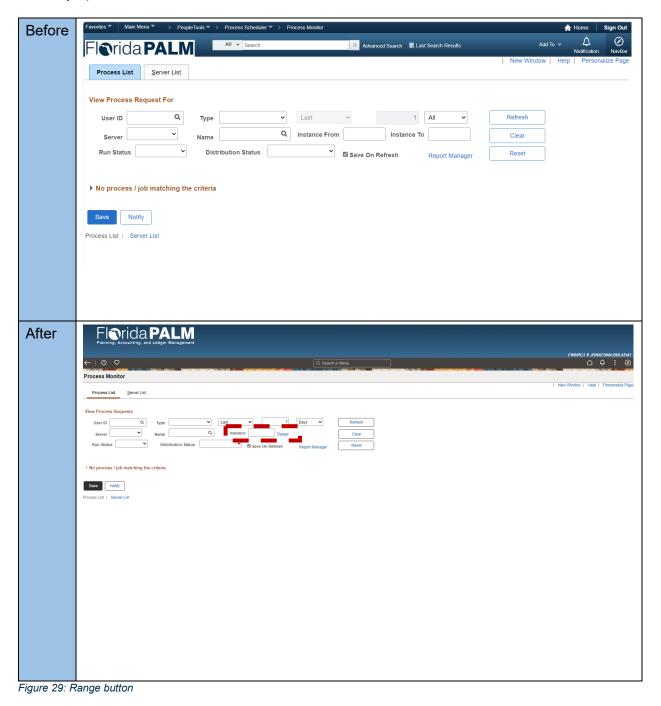
After	Florida PALM Planning, Accounting, and Ledger Management	
		i jonathan.bulati
	Process Monitor	allantenin en no.
		Help Personalize P
	View Process Requests User ID JONATHAN.BU Q Type Image: Clear Server Image: Name Image: Clear	
	Run Status 🗸 Distribution Status Last Report Manager Reset	
	> No process / job matching the criteria	
	Save Notify Process List Server List	
	Florida PALM Planling, Accounting, and Ledger Management	FINUPG1 # JONATHAN.BULA
	← ⊙ ♥ Q Bearch in Menu Process Monitor	
		ew Window Help Personalize
	View Process Requests User ID Q Type Last I Days Refresh Server Name Q Itstance Range Hours Clear Run Status Distribution Status V Bissee On Refresh Years Jer	
	> No process / job matching the criteria Exw Notify Process List Sever List	

Figure 28: The "All" option in the Last / Date Range field



2. New button added to be able to pick Process Instance Range

The Process Monitor by default only contains one Instance field where the user can enter a process instance to search. If the user wants to search for a range, the user can select the Range button, which would change the Instance field into Instance From and Instance To fields. Compared with the previous functionality, the Instance From and Instance To fields are the default and only option.





When the user selects the Range button, the Instance field changes into Instance From and Instance To buttons.

Florida PALM Planning, Accounting, and Ledger Management		
		FINUPG1 # JONATHAN.BULATAO
\leftarrow \odot \heartsuit	Q. Search in Menu	
Process Monitor		
Process List Server List		New Window Help Personalize Pape
View Process Requests		
User ID JONATHAN EU Q. Type		
> No process / job matching the criteria		
Save Notify		
Process List Server List		

Figure 30: The Instance From and Instance To Field



3. Run Control ID

Run Control ID is now included on the Process List grid.

FI	s 🔻 Main Me	nu▼ > PeopleTools		Process Monitor						A Home Sig
	Nrida	PALM	All 👻 S	earch	Advance	d Search 🛛 🔯 Last Search Re	sults			Add To 👻 🗘 Notification M
Pr	ocess List	Server List						1	New Window	w Help Personalize F
View	Process Re							- -		
L. L.	Jser ID		/pe~		<u> </u>	All 🗸	Refresh	J		
	Server	Na	me Q		n Instance T	°	Clear	ļ		
R	un Status	~	Distribution Status	~	Save On Refresh	Report Manager	Reset	J		
▼ Pr	ocess List						4 1-5	D of 519 🗸		View 100
	ct Instance	Seq. Process	Type Process Nam	le User	R	un Date/Time	Run Status	Distribution	Details	Actions
	757323	BI Publis	her FLP_TCB_RF	T PURUSHO	TTAM.KARAMBELKAR 1	1/03/2023 4:31:55AM ED	T Success	Posted	Details	▼ Actions
	757321	Applicatio	on Engine FLP_GLCSH_	AE TEST.USE	R.SS9 1	1/03/2023 3:08:56AM ED	T Warning	Posted	Details	▼ Actions
	757319	Applicatio	on Engine FLP_GLCSH_	AE TEST.USE	R.SS9 1	1/03/2023 3:05:22AM ED	T Warning	Posted	Details	▼ Actions
0	757258	Applicatio	on Engine PTSF_GENFE	EED ACM_DEP	LOY_USER 1	1/03/2023 3:01:27AM ED	T Success	Posted	Details	▼ Actions
	757246	Application	on Engine PTSF_GENFE	ED ACM_DEP	LOY_USER 1	1/03/2023 3:01:27AM ED	T Success	Posted	Details	▼ Actions
Pro View P Use	rocess Reques	Q Туре	Q Instance Fr		1 Days V	Refresh				1
	Status	Name Distributi				Clear				
				a save on Kene	Report Manager					
1100	ess List						(
		Run Control ID	Process Type	Process Name	liser		Run Distributi		_	
	669466	4659865			STATE_BATCH_SCHEDULER	11/03/2023 3:34:58AM	Status Status Warning Posted		Actions	
	669464	ONLJEAGENCY_GL_J	OURN000000003 Application Eng		AGENCY_GL_JOURNAL_PROC	44/02/2022 2/22/27414	Success Posted		Actions	
0	669463	152486409	plication Eng	ine FLP_INTAP_AE	STATE_GL_JOURNAL_PROCESS		Success Posted	Details ~	Actions	
		635825467	Application Eng	ine GL_ADB_CALCX	STATE_GL_JOURNAL_PROCESS	OR EDT	Success Posted	Details 💊	Actions	
	669461	035825467								
	669461 669460	FLP_INT_INC_JGEN		ine FS_JGEN	STATE_GL_JOURNAL_PROCESS	OR EDT 11/03/2023 3:15:29AM	Success Posted	Details 💊	Actions	
			oplication Eng	ine FS_JGEN ine FLP_INTAP_AE	STATE_GL_JOURNAL_PROCESS	EDT	Success Posted Success Posted		Actions	
Select	Q Instance Seq. 669466 669464	ONLJEAGENCY_GL_J 152486409	OURN000000003 Application Eng	ine FLP_INTAP_AE	AGENCY_GL_JOURNAL_PROC STATE_GL_JOURNAL_PROCESS STATE_GL_JOURNAL_PROCESS	Kui Jate/IIIIe kui Jate/IIIie kDT k	Status Status Warning Posted Success Posted Success Posted Success Posted	On Details Act Details \scale \scale Details \scale \scale Details \scale \scale Details \scale \scale	Actions Actions Actions Actions Actions	

Figure 31: Run Control ID is now included on the Process List grid



Cash Management Updates

1. Allow to submit Bank Reconciliation process for all bank accounts

Bank Statement processing has been enhanced to allow a user to submit the Bank Reconciliation process for all bank accounts to which the user has access. Previously, this functionality was not available, however, this was customized to populate the Run Control ID with all bank accounts available for reconciliation.

Florida PALM Planning, Accounting, and Ledger Management	
\leftarrow O \heartsuit	
Process Reconciliation	
Run Control ID BANKRECON_all	Report Manager Process Monitor Run
Process All Accounts *Date Type Relative Dates	Days Back
Save Notify	Add Update/Display

Figure 32: Process all Accounts



2. Allow to submit Bank Addenda Parsing for all bank accounts

Parse Statement Addenda processing has been enhanced to allow a user to submit the Parse Statement Addenda process for all bank accounts to which the user has access. Previously, this functionality was not available, however, this was customized to populate the Run Control ID with all bank accounts available for reconciliation.

Florida Planning, Accounting, and					
←∣⊙ ♡	NETWORK THE TAXABLE PROPERTY AND A DESCRIPTION				
Parse Statement Addenda					
					Ne
Run Control ID PARCE		Report Manager	Process Monitor	Run	
Process All Accounts	*Bank Statement Type	y ❤ ∗Date Type	Relative Dates V	Days Back	
Save Notify Refresh]				Add Update/Display

Figure 33: Process all Accounts for Parce Statement Addenda



3. Semi-Manual Reconciliation page

Semi-Manual Reconciliation page has been changed to allow the user to load more than 5,000 rows.

-	ס כ				Q Search in Menu					FINUP	G2 # MAYDA	BARSUM Q
omi M	anual Reconci	liation	NAMES AND ADDRESS			18 36 7 Not 7			aver in		AT AT VIED	110-10
		nation									lew Window He	olo L Domons
				*Search By From Date / Thr	Date × *Rat	Rate Table	~				iew willdow [116	eip [Persona
Search C	riteria			search by Trom Date / Th		e Rate Table	•					
Ba	nk ID 044000037	Q Acc	ount # 3136_CONTROL_E	DISB Q				s	tatement ID %	Q		
From	Date 08/23/2023	The	u Date 08/28/2023						(11 mar			
			u Date 00/20/2023					*Reconcili	ation Status Unre	conciled 🗸		
From An	ount		mount				с	*Reconcili urrency Code U		earch		
From An	nount		mount			- 1	с		SD SD		-	
	nsactions 👔		mount	ersonalize Find View 100	🖉 🔜 🛛 First 🚯 1-50 of	11216 🕑 Last	System	Additional Searc	SD SD	earch	irst 🕢 1-50 of	5331
			mount	ersonalize Find View 100 Comments	[2]] ■ First ④ 1-50 of Expanded comments	11216 🕑 Last	System Transactio	Additional Searc Pers	SD S	earch nced search aw 00 🕢 🔣 F	-	5331 Last
Bank Tra	nsactions ②	To A	P				System Transaction Select	Additional Searc Pers ns Reference	SD S	earch nced Search 20 [2] []] F Tran Amt Type	Source	- 5331 ast
Bank Tra	Reference	To A Bank Date▼	Province Pro	Comments	Expanded comments	_	System Transaction Select	Additional Searc Pers	SD S	earch nced search aw 00 🕢 🔣 F	-	5331 Last
Bank Tra Select	Reference FTJ2308280062266	To A Bank Date • 08/28/2023	Tran Amt Type 745,000,000.00 WIR	Comments	Expanded comments Expanded comments	Ph.	System Transaction Select	Additional Searc Pers ns Reference	SD S	earch nced Search 20 [2] []] F Tran Amt Type	Source	5331 ast
Bank Tra Select	Reference FTJ2308280062266 FTJ2308280090065	To A Bank Date• 08/28/2023 08/28/2023	Tran Amt Type 745,000,000.00 WIR 138,953,000.00 WIR	Comments	Expanded comments Expanded comments Expanded comments		System Transaction Select	Additional Search Pers ns Reference 4401452830	SD S	earch nced Search D0 [2] [2] F Tran Amt Type -2,150.00 MAN	Source Payables	5331
Bank Tra Select	Reference FTJ2308280062266 FTJ2308280090066 4489	To A Bank Date 08/28/2023 08/28/2023 08/28/2023 08/28/2023	Tran Amt Type 745,000,000 00 WIR 138,953,000.00 WIR 129,578,000.00 WIR	Comments	Expanded comments Expanded comments Expanded comments Expanded comments		System Transaction Select	Reference 4401452840	SD S	earch nced search aw 00 (2) (2) (2) (2) (2) (2) (2) (2) (2) (2)	Source Payables Payables	5331 1391
Bank Tra Select	Reference FTJ2308280062266 FTJ2308280090066 4489 ATS OF 23:08-28	To A Bank Date* 08/28/2023 08/28/2023 08/28/2023 08/28/2023 08/28/2023	Tran Amt Type 745,000,000 00 WIR 138,953,000.00 WIR 129,578,000.00 WIR 2,000,000 WIR		Expanded comments Expanded comments Expanded comments Expanded comments Expanded comments		System Transaction Select	Reference 4401452830 4401452840 4401452850	SD SD<	earch nced search w bo [2] [2] F Tran Amt Type -2,150.00 MAN -810.25 MAN -65.85 MAN	Source Payables Payables Payables	5331 aşt

Figure 34: Semi-Manual Reconciliation



The Semi-Manual Reconciliation page has been changed to allow a user to select all items when unreconciling transactions.

Plan		a P	ALM er Management										
← (⁴)) (7)				Q Search in Menu					FIN	UPG2 # MAYDA.	DARSU L	IMYAN-DES
					APLOTS MEDTAL SLADIA VAN) • • • •		V 46 4				• •
Semi Ma	inual Reconci	liation											
Search Crit	teria			*Search By From Ref ID / 1	o Ref ID 🗸 "R	ate Rate Table	~				New Window	Help F	ersonalize Pa
	(ID 044000037	Accou	Int # 3136_CONTROL_D	ISB Q				St	atement ID %	٩			
From Ref	f ID 4400567810	To Re	ef ID 4400567810						tion Status Recor				
From Amo	unt	To Ame	ount				Cu	rrency Code US		arch			
								Additional Searc	h Criteria Advan	ced Search			
Bank Trans	sactions 🕐			Personalize Find	View All 🔄 🔜 🛛 First 🧃	🕖 1 of 1 🛞 Last	System Transactio	ins	Personalize Find	View All [🗾 🛛 🔜	First 🚯 1 of 1 🧕 La		
Select	Reference	Bank Date	Tran Amt Type	Comments	Expanded comments		Select	Reference	Tran Date▼	Tran Amt Type	Source	51	
	4400567810	08/23/2023	-586,076.12 CHK	1.7.00	Expanded comments								
								4400567810	07/25/2023	-586,076.12 MAN	Payables		
		Amount	0.00		Amount	0.00							
					Difference	0.00							
Select All Bank	Transactions				Select All System Tran	nsactions							
Clear All													
Reverse En	tries For External T	ransactions											
*Reve	rsal Date Current D Option	ate	~										
Unreco	ncile Re	fresh	Select Matches	Save Comments									

Figure 35: Select all Transactions



General Ledger Updates

1. Navigation

On the Journal Line page, the Personalization is now located on the left grid along with the Excel Download and Zoom Lines functionality.

	prid	a PAI I, and Ledger Mar	Magement							
\leftarrow \odot	\heartsuit					Q	Search in Menu			
Create/Upd	ate Journal	Entries				LE CARDAN ARC - 27				
Header	Lines	<u>T</u> otals <u>E</u> rrors	Approv	al						
Uni	t 40000 Template List			Journal ID	NEXT			Date	10/31/2 Change	
	Inter	r/IntraUnit		*Process	Edit Journal		~			Process
✓ Lines		=,1								
Personalize		<u>*Li</u> nit		*Ledger	SpeedType		Account	Fund		Organization
Zoom Lines Download I	ines Table to Ex	40000	Q	ACTUALS		٩	Q		Q	

Figure 36: Personalize Option

Once Personalize link is selected, the Grid is displayed and allows to hide, rearrange order, and sort fields per user preference. Note the image on the next page.



Grid Cus	stomization
Lines	
Personalize Column and Sort Order To order columns or add fields to sort order, highli Frozen columns display under every tab.	ght column name, then press the appropriate button.
Column Order Select (frozen) Line (frozen) *Unit *Ledger SpeedType Prompt Account Fund Organization OA1 Budget Entity Category PC Bus Unit Project Activity An Type PC Source Type PC Category PC Subcategory Contract State Program	
Other Accumulator 2 Affiliate N/R Base Amount *Calculate Budget Date Reference Journal Line Description PC Status OK Cancel Preview Copy S	Settings

Figure 37: Personalization



2. Enhanced General Ledger to retain approval history for Denied Journals

The Create/Update Journal Entries page has been enhanced to allow Florida PALM users to view the history of denied journals.

Create/Update Journal Entries								
Unit 72000	Journal ID	0000920538	Date 05/05/2023					
Approval Status								
	72000							
Approval Check Active	Y							
Approval Status	Denied							
Approval Action	Approve	~						
Deny Comments			[3] //					
	254 characters rema	aining						
GL Journal Approval Stage								
 Unit 72000, ID 0000920538, Date 	2023-05-05, Line l	Jnit 72000:Denied	♥View/Hide Comments					
Back/Future Dated Transaction								
Kadam, Ketaki TEST.G	Approved Kadam, Ketaki Agency GL Approver 1 07/31/23 - 4.04 AM Denied TEST.GL2 State GL Journal Approver 07/31/23 - 4.21 AM							
Comments								

Figure 38: Denied Journals History.

The Approval History Page has been enhanced to allow Florida PALM users to see detailed information on all denied activities.

 Approva 	I History							
Thread ID	Definition ID	Effective Date	Requester	Stage	Path	Step Number	Step Status	Approver
8931	STATE	01/10/1901	CHITRA.KODUMUR	10	3	1.00	Approved	KETAKI.KADAM
8931	STATE	01/10/1901	CHITRA.KODUMUR	10	3	2.00	Denied	ADITYA.SHRIVASTAVA
8931	STATE	01/10/1901	CHITRA.KODUMUR	10	3	2.00	Denied	APOORVA.PANCHANADIKAR
8931	STATE	01/10/1901	CHITRA.KODUMUR	10	3	2.00	Denied	CHRISTOPHER.OGBEIDE
8931	STATE	01/10/1901	CHITRA.KODUMUR	10	3	2.00	Denied	DEAL_TEST
8931	STATE	01/10/1901	CHITRA.KODUMUR	10	3	2.00	Denied	DFS_GL_Journal_Approver
8931	STATE	01/10/1901	CHITRA.KODUMUR	10	3	2.00	Denied	DFS_Investment_Journal_Appr

Figure 39: Denied Journals History Entries



3. Enhanced the GL Fluid WorkCenter

The GL Fluid WorkCenter has been updated and now lists all journals that are pending approval and not just journals pending your approval

Welcome to Work	Center
	0 O
My Work	
Journal Processing	~
** Journals Approach	ing P
** Mark/Submit Journals	s for
** Journals Pending Ap	proval
gure 40: Journals Pending Appl	roval in GL Fluid Wo



4. Period Close Visualization

The Open Period Management feature was added to assist the Division of Accounting and Auditing with closing and opening financial books for Business Units and legal entities. This new feature utilizes the tree manager and displays all entities and Business Units in a hierarchical manner. The user can drill down and back up, as well as take action on entities, Business Units, and subsystems that allow the user to manage the closing of a specific period.

←	0	\heartsuit		Q Search in Me	nu				ΟĢ	. : .
Perio	d Clos	se Visua	lization							
lavigatio	n: ALL GE!	NERAL LEDGE	R BU VALUES						View	Compact
ĺ										
			ALL GENERAL LEDGER BU	VALUES	\odot	ALL GENERAL LEDGER BU	VALUES	\odot		
			Total Entities 2	GL Business Units 37		Total Entities 2	GL Business Units 37			
			AGENCY BUSINESS UNITS		\odot	TREASURY BUSINESS UNIT	\$	\odot		
			Total Entities 0	GL Business Units 35		Click to Drill Down	GL Business Units 2			
			L			L				

Figure 41: Period Close Visualization

$ \odot \heartsuit$		Q. Search in Menu		Â	Ĉ ; ⊙	
iod Close Visualization					:	
tion: ALL GENERAL LEDGER BU VALUES > AGENC	Y BUSINE	SS UNITS		Vie	ew Compact 🗸	
ALL GENERAL L	EDGER E		ENERAL LEDGER BU	VALUES		
Total E	ntities 2	Actions × Express Period Roll 2		GL Business Units 37		
		Mass Update Open Period				
	1	Update Open Period	⊙ ness Units			
	1	GL WorkCenter	35			
		Update Run Control Date				
Legislature	Q	Email Notification	\odot	State Courts System	\odot	
Default Ledger Group: ACTUALS Open Period: 10-2023 To 11-2023		Default Ceuger Group: ACTUALS Open Period: 10-2023 Tr		Default Ledger Group: ACTUALS Open Period: 10-2023 To 11-2023		
Exec Office Of The Governor	0	Dept Of The Lottery	\odot	Dept Of Environ Protection	O	
Default Ledger Group: ACTUALS Open Period: 10-2023 To 1-2024		Default Ledger Group: ACTUALS Open Period: 10-2023 T		Default Ledger Group: ACTUALS Open Period: 10-2023 To 1-20	24	
	0	Dept Of Legal Affairs	©	FL GAMING CONTROL COMMISSION	0	
Dept Of Economic Opportunity				Default Ledger Group: ACTUALS Open Period: 10-2023 To 11-2023		

Figure 42: Period Close Visualization Actions



5. Period Close Visualization "My Preferences" update

With this new feature, a user can setup many different definitions with various Trees and nodes as applicable for their job duties. This allows the user to visualize the Period Close data in various ways. It is particularly helpful for users handling multiple agencies.

\leftarrow 0 \heartsuit		Q. Search in Menu				Ô	:	0+
My Preferences								
💸 General Settings	Î	Period Close Visualization						
Q Notifications		Search Definition					Save	
💝 General Ledger	^		Add New Search	Delete Search	7			
My Recon by Status		"Search Name	SAMPLE	۹				
My Recon by Due Date		"SetID	STATE	Q				
Period Close Visualization		"Tree Name	GL BU REPORTING	Q				
By Billing	~	"Tree Node	ALL GL BU VALUES	Q				
Customer Contracts	~	II Default	Yes					
Expenses	~							

Figure 43: Period Close Visualization Preferences



6. Journal Source Security

Journal Source Security has been changed so that Florida PALM Users can only view the journal sources assigned to their permission list. Before, Florida PALM users could view all journal sources. For example, *Agency Journal Entry Processors* will only have access to enter online journal entries and redistribution / adjustment journals. Journal Source Security Role - FLP_AGENCY_GL_JOURNAL_PROC, has only two journal sources checked to "Allow Access". No other values can be used.

Create/Update Journal Entries		<u> </u>		
Create/Opdate Journal Entries	·			Look Up Source ×
Header Lines Totals	Errors Approval			SetID STATE
Unit 77000	Journal ID NEXT			Source begins with v
Long Description	Test journal for Journal Source Security			Search Clear Cancel Basic Lookup
	214 characters remaining			
*Ledger Group	ACTUALS Q	Adjusting Entry	Non-Adjustir	Search Results
Ledger	Q		Non-Aujustii	View 100 < < 1-2 of 2 > >
		Fiscal Year	2024	Source Description
*Source	Q	Period	2	ONL Online Journal Entry
Reference Number		ADB Date	08/30/2023	
Journal Class				RED Redistributions & Adjustments
			□ Auto Gen	
Transaction Code	GENERAL Q		Save Jour	
SJE Type	~		Autobalar	
	Currency Defaults: USD / CRRNT / 1			
	Attachments (0)		CTA	
	Reversal: Do Not Generate Reversal		Commitment	Control
Entered By	AGENCY_GL_JOURNAL_PROCESSOR		Generic Test	ing User ID
Entered On				
Last Updated On				
Save Notify Refresh				Add Update/Display
Header Lines Totals Errors A	pproval			

Figure 44: Journal Source Security



If the user tries to enter a value that is not allowed via the security protocols, they will receive an error message. The error must be fixed before proceeding.

Create/Update Journal Entries		
Lines	Errors Approval	
Unit 77000 Long Description	Journal ID NEXT	Date 01/18/2024
*Ledger Group		tch one on the allowable values. You can see the allowable values by pressing the
Ledger		ОК
*Source	EXT Q Perio	bd 7
Reference Number	ADB Da	te 01/18/2024
Journal Class	Q	
Transaction Code	GENERAL Q	□ Auto Generate Lines
SJE Type		Save Journal Incomplete Status Autobalance on 0 Amount Line
	Currency Defaults: USD / CRRNT / 1	
	Attachments (0)	CTA
	Reversal: Do Not Generate Reversal	Commitment Control

Figure 45: Journal Source Invalid Value

If the Business Unit <u>is not attached to the Role</u> under Journal Source Security Role configuration, the following Error message is displayed. User cannot proceed, as no source values are available, with journal entry creation.

Create/Update Journal Entries	5			
				New Window Help
Header Lines Totals	Errors Approval			
Unit 77000	Journal ID	NEXT	Date 01/18/2024	
Long Description			ccess to any source for Business Unit 77000.	
		User/Role does not have a	ccess to any source for Business Onit 77000.	
	254 characters remaining	- House and Courdes to Jou	mar Source cecurit, ceer/Role pages ter me Business Unit.	
*Ledger Group	ACTUALS Q			
Ledger	Q		ОК	
*Source	Q	Period	7	
Reference Number		ADB Date	01/18/2024	
Journal Class	Q			
Transaction Code	GENERAL Q		Auto Generate Lines	
			□ Save Journal Incomplete Status	
SJE Type		~	□ Autobalance on 0 Amount Line	
	Currency Defaults: USD / CRRN	 [/1		
	Attachments (0)		СТА	
	Reversal: Do Not Generate Reve	rsal	Commitment Control	

Figure 46: Journal Source User Role Permission



Some agencies, such as DFS, may be assigned multiple journal sources. In this example Business Unit 43000 is associated with the State Journal Processor role can also enter Allocations, Adjustments and Clear Water journals. All sources marked as "Allowed" under the role are available to be used.

						Look U	p Source	×
Create/Update Journal Entries					SetID Source	begins with 🗸	STATE	Help
Header Lines Totals	Errors Approva						<u> </u>	
Unit 43000	J	ournal ID NEXT			Search	Clear	Cancel	Basic Lookup
Long Description	Long Description Test journal entry for STATE role Source Security				Search Results			
205 characters remaining				View 100 < < 1-5 of 5 > >				
*Ledger Group	ACTUALS Q		Adjusting Entry	Non-Adjustir	Source	Description		
Ledger	٩		Fiscal Year	2024	ADJ	Accounting A	djustments	
*Source	٩		Period		ALO	Allocation Pro	ocess	
Reference Number			ADB Date	08/30/2023	CLW	Clear Water		
Journal Class	Q				ONL	Online Journa	al Entry	
Transaction Code	GENERAL Q			🗆 Auto Gen	RED	Redistribution	ns & Adjustme	nts
SJE Type		~		□ Save Jour □ Autobalar				
	Currency Defaults: US	D/CRRNT/1						
	Attachments (0)			СТА				
	Reversal: Do Not Gen	erate Reversal		Commitment				
Entered By	STATE_GL_JOURNAL	PROCESSOR		Generic Test				
Entered On								
Last Updated On								
Save Notify Refresh					A	dd Upda	te/Display	
Header Lines Totals Errors A	pproval							

Figure 47: Journal Source Security - 43000



Business Unit 43001 is associated with the State Journal Processor role. All sources marked as "Allowed" under the role are available to be used. In this example, DFS has security to 6 journal sources, and they can enter General Revenue Adjustments.

←∣© ♡					Look Up Source	×
Create/Update Journal Entries				SetID	STATE	Help
Header Lines Totals	Errors Approval			Source	begins with 🗸	
Unit 43001	Journal ID NE	хт		Search	Clear Cancel	Basic Lookup
Long Description	Test journal entry for STATE role Sour	rce Security		Search Re	esults	
	205 characters remaining		_	View 100	I< < 1-6 of 6 ✓ >	>
*Ledger Group	ACTUALS Q	Adjusting Entry	Non-Adjustir	Source	Description	
Ledger	Q	Fiscal Year	2024	ADJ	Accounting Adjustments	
*Source	Q	Period	2024	ALO	Allocation Process	
Reference Number		ADB Date	08/30/2023	CLW	Clear Water	_
Journal Class	Q		handadadadada	GRD	General Revenue Daily Adju	ust
			Auto Gen	ONL	Online Journal Entry	
Transaction Code	GENERAL Q		Save Jour	RED	Redistributions & Adjustmer	nts
SJE Type		~	Autobalar			
	Currency Defaults: USD / CRRNT / 1		СТА			
	Attachments (0) Reversal: Do Not Generate Reversal		Commitment			
Entered By	TATE_GL_JOURNAL_PROCESSOR	-	Generic Test			
Entered On			Generic Test			
Last Updated On						
Save Notify Refresh				A	dd Update/Display	
Header Lines Totals Errors A	pproval					

Figure 48: Journal Source Security – 43001



Business Unit 43002 is associated with the State Journal Processor role. All sources marked as "Allowed" under the role are available to be used. In this example users that have access to Business Unit 43002 are only assigned two journal sources.

ate/Update Journal Entries				Look Up Source
Header Lines Totals	Errors Approval			SetID STATE
Unit <u>4</u> 30 <u>02</u>	Journal ID	NEXT		Source begins with ~
Long Description	Test journal for STATE journal sec	urity		Search Clear Cancel Basic Looku
	215 characters remaining			Search Results
*Ledger Group	ACTUALS Q	Adjusting Entry	Non-Adjustir	
Ledger	Q	Fiscal Year	2024	
*Source	Q	Period	-	Source Description
Reference Number		ADB Date	08/30/2023	ONL Online Journal Entry
Journal Class	Q			RED Redistributions & Adjustments
Transaction Code	GENERAL Q		🗆 Auto Gen	
SJE Type		~	Save Jour	
	Currency Defaults: USD / CRRNT	/1	ОСТА	
	Attachments (0)		Commitment (Control
	Reversal: Do Not Generate Revers			
	TATE_GL_JOURNAL_PROCESSO	R	Generic Testi	ting User ID
Entered On Last Updated On				

Figure 49: Journal Source Security - 43002