

## **PeopleSoft Training**

# FLUID HOMEPAGES PAYABLES OPERATIONS APRIL 2023



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#### Homepages

LSUHSC PeopleSoft Financials provides a custom homepage for Payables Operations to facilitate use by the Accounts Payable Department. Access to the homepage will be granted via security role to those users who maintain Payables Operations functions for the institution. This homepage is not intended for the end-user community. End-users would instead select the LSU Health Financials option.

Homepage navigation is meant to provide a more streamlined approach to navigate to commonly used features.

For purposes of this training, the assumption is that the user has already been trained to perform Payables Operations tasks. This guide instructs the user in the use of the Payables Operations homepage and other navigation methods.

## LSU Health

#### Navigation Methods

Upon launching PeopleSoft Financials, the default fluid homepage is "My Financials Home". This homepage is meant to be modified by each user to suit their needs.

This document recaps steps to add specific tiles to a home page. Addition documentation on adding tiles can be found in the Documentation library located at: http://www.lsuhsc.edu/ps/support/fin\_9\_manuals.aspx

Each user will see a different number of homepages based upon their security access.

There are two methods to navigate to a desired homepage. Each method will be demonstrated and you can determine which method is preferred for your use.





Each of the tiles on a homepage represent a Navigation Collection (Nav Collection). A Nav Collection is a grouping of menu items. The Nav Collections on a given homepage does not include every single page that the team uses. The NavBar menu (discussed later) may be used to supplement access to those pages.

Each homepage will display the System Notification tile as part of that pages' Nav Collection. It provides information regarding what system and database you are using as well as the last refresh date.

#### System Notifications

PS9FSPAT Notice: PeopleSoft Supply Chain testing: This system is running PeopleTools 8.59.05 for upgrade testing and review. This is a test instance for LSU Health PS Financials. Last refresh date: 2022-11-29

Messages on the tile are maintained by PS Development, so can change as needed over time.

Refer to the Delta Document for more details. http://www.lsuhsc.edu/ps/support/fin\_9\_manuals.aspx

#### Navigation Method 1

On the top left of the screen, note the drop-down selection arrow next to **My Financial Home.** Selecting the arrow allows you to see a list of each of the homepages for which you has been granted access. Select the desired homepage from the list.

Click the My Financials Home button

There are up to eight (8) homepage options available depending upon your security access. The first five (5) options (if applicable) will display in the drop-down window. Scroll down to view additional options.

My Financials Home 🔻	
My Financials Home	
LSU Health Financials	
Asset Management	
Projects & Receivables	1
General Ledger	



Navigation Method 2

At the top right of the screen, note that you see "< 1 of 8 >". (Depending upon your security access, this could be less.)

Selecting the left and right arrows moves you from one homepage to the next.

Click the *Next Homepage* arrow on the top right of the homepage.

The LSU Health Financials page displays. You can continue to click the right *Next Homepage* arrow until the desired homepage displays.

Return to the **My Financials Home** page.

መ Click the Home button.

## LSU Health

#### Personalizing Homepage

#### Accessing the Payables Operations Homepage

For the remainder of this exercise, you will be using the **Payables Operations** homepage.

Click the **Homepage Selector** dropdown arrow to activate the menu.

Using the mouse, click the scrollbar and drag the mouse down to the desired selection.

Click the button of the scrollbar next to **My Financials Home**.

#### Click the **Payables Operations** link.



The **Payables Operations** homepage displays.

	Menu 👻	Search in Menu		Q	Financials PAT	۵.	4	:	Ø
Payables Operations -							< 8	of 8	>
	Notifications Notice: PeopleSoft ssting: This system is lefools 8.50 06 for sting and review. I instance for LSU ancials. Last refresh 2022-11-29	Accounts Payable WorkCenter	Accounts Payable						



Personalize Payables Operations Homepage

In this activity, you will *Personalize* the **Payables Operations** homepage by adding the Nav Collection tile for the **Suppliers.** 

To add a Nav Collections tile.

Select the Action icon – the three stacked dots – at the top right of the page.



#### Select Personalize Homepage

Personalize Homepage

The following page will appear

Cancel	Personalize Homepage	Save
Add Homepage	Common Settings	
<ul> <li>My Financials Home</li> </ul>	Show Notifications Panel No 0	
= LSU Health Financials	Selected Homepage Settings	Add Tile
<ul> <li>Asset Management</li> </ul>	Homepage Payables Operations	
<ul> <li>Projects &amp; Receivables</li> </ul>		
= General Ledger	System Notifications	
= Procurement		
= Employee Self Service		
Payables Operations		
	Accounts Payable	

Once you are on the **Personalize Homepage** page, select the **Add Tile** link.



Add Tile	×
Search a Tile Tile name, tile category, or tile keyword	]→
Choose an Existing Tile	
FSCM Navigation Collections	>
PeopleSoft Applications	>
Update Manager	>
GT eForms™	>
Employee Self-Service	>
Project Management	>
Grants Management	>
Customer Contracts	>
General Ledger	>
Accounts Payable	>
Financial Operations AP	>
PeopleSoft Common Architecture	>

Enter "supplier" in the Search a Tile search box.

Add Tile	×
Search a Tile	
Supplier	$\times \rightarrow$
Choose an Existing Tile	
FSCM Navigation Collections	>
PeopleSoft Applications	>
Update Manager	>
GT eForms™	>
Employee Self-Service	>

Click the *Search*  $\supseteq$  arrow

Select the Supplier link.

	Add Tile	×
Search a Tile		
supplier	$x \mathrel{\Rightarrow}$	
<del>(</del>		
Suppliers		



Cancel	Personalize Homepage	Save
Add Homepage	Common Settings	
= My Financials Home	Show Notifications Panel No	
= LSU Health Financials	Selected Homepage Settings	Add Tile
= Asset Management	Homepage Payables Operations	
= Projects & Receivables		
= General Ledger	System Notifications	
= Procurement		
= Employee Self Service		
Payables Operations		
	Accounts Payable 🔒 Suppliers 🗃	

Click Save Save

#### The *Supplier* tile now appears on your Payables Operations homepage.

Payables Operations 🔻			< 8 of 8 >
System Notifications PS9750AT Notice: People Supply Chan leading. This system unring PeopleTicols 8.30.05 for upgrade leading and review. This is a test instance for LSU Health PS Financials. Last refresh date: 2022-11-29	Accounts Payable	suppliers LSU Health	

#### Viewing Nav Collections tiles

From the **Payables Operations** homepage click thee **Accounts Payable WorkCenter** tile.

Accounts Payable WorkCenter

The Accounts Payable WorkCenter Collection displays the menus and pages used for vouchers and payments on one page.

Payables Operations							A	ccounts Paya	ble Work	Center					H	🔚 Financials PAT	ଳ Q
C	0	Unpaid \	Voucher	Status													
My Work	_	T															
Vouchers	~	Voucher L	ist														
Voucher Exceptions	~	Business Unit O	Voucher	Payment Number	Express Payment	Supplier 0	Short Supplier Name O	Invoice No 🌣	Approval Status ்	Scheduled Pay Date	Payment Amount	Currency O	Match Status	Entry Status	Post Status	Payment Selection Status O	Documer Tolerance Status O
Links																	
Payments	~	HCSDA	00039514	1	7	000003089	LSUSHSC-001	SAP 2025	Approved	03/12/2014	324.14	USD	Not Applicable	Postable	Posted	Not Selected for Payment	Valid
Payment Requests	~	HCSDA	00040544	1	7	000000683	AT&T-004	337 M60-5518 001 0519(MAY2,14)	Approved	06/19/2014	-1.34	USD	Not Applicable	Postable	Posted	Not Selected for Payment	Valid
Vouchers	~	HCSDA	00046135	3	7	000003089	LSUSHSC-001	00046135	Approved	04/13/2016	-15.80	USD	Not Applicable	Postable	Posted	Not Selected for Payment	Valid
Payables Inquiries	~	HCSDA	00052079	1	5	000000019	LA STATE EMPLO	MCLNO CREDIT AUGUST 2020	Approved	08/31/2020	-53.81	USD	Not Applicable	Postable	Posted	Not Selected for Payment	Valid
• Queries	-1	HCSDA	00053077	1	- 17	0000000019	LA STATE EMPLO	WSTMC-2021-	Approved	09/08/2021	-15.30	USD	Not Applicable	Postable	Posted	Not Selected for Payment	Valid
Query Manager	- 11	LOURE						08-31									
Daily Queries	~	LSUNE	00312949	4	19 I.	700591650	GRENIER-002	TB092115	Approved	09/24/2015	100.00	USD	Not Applicable	Postable	Posted	Not Selected for Payment	valid
Chase Corporate Q-Pay - LSUSH	~	LSUNE	00348267	1	7	760021270	NIH-001	DP1656000S577	Approved	11/29/2017	-3.84	USD	Not Applicable	Postable	Posted	Not Selected for Payment	Valid
Chase Corporate Q-Pay - LSUNO	·																
Chase SUA (LSUSH only)	~																
Withholding queries	~																
Public	~																
Voucher Workflow Approvers	~																
Payment Request Workflow Appr	ro. <sub>0</sub>																

*NOTE:* Each menu option includes a down arrow to the right of the menu option name.



Click that arrow it to expand or collapse each menu options to view the various features in the NAV Collection for *Vouchers*.

Navigate to the different menu options as desired.

Navigate back to the **Payables Operations** homepage by selecting the **Payables Operations** option that is displayed in the black bar at the top left of the screen.

Click the **Payables Operations** link.



Click the Accounts Payable tile on the Payables Operations homepage.

|--|

The following page appears



#### Collapsing a Menu

If you need more space on the screen, the left menu can be collapsed and expanded as desired. Note the little black tab containing "||" to the left of the Search button. Selecting this will collapse the menu.



#### Expanding the Menu

Select the tab again to expand the Nav Collection menu.







#### NavBar Menu

#### Accessing NavBar

	Menu - Search in Menu	4	Q	Financials PAT	ଜ	Δ	1
Payables Operations •						-	4 of 4
	System Notifications PS#SPAT Notice: PeopleSoft	Accounts Payable WorkCenter	Accounts Payable				
	Supply Chain testing: This system is numming People Tools 8.59 05 for upgrade testing and review. This is a test instance for LSU Health PS Financials. Last refresh date: 2022-11-29						

You might need to access a menu option not included on the **Payables Operations** homepage or one of the other tile Nav Collections. You can select the **NavB**ar icon in the top right corner of the page to display other options for a more traditional menu.

Click the **NavBar** lotton.

Once the NavBar icon is selected, the NavBar pop-out displays on the right.

ĺ	NavBar 🍪	
	C Recently Visited	
	$\heartsuit$	
	Favorites	
	Menu	

Click the **Menu** button.

The NavBar menu displays "*Recently Visited*", "*Favorites*" and the "*Application Menu*". In this example, select the **Menu** link to display the entire menu items in alphabetical order.

Click the **Menu** button.

Click the Accounts Payable link.

Click the **Vouchers** link.

Vouchers	

>

Accounts Payable

Click the **Add/Update** link.



Click the <b>Regular Entry</b> link.	
Plasters Operation       Voucher         Ind an Existing Value       Add a New Value         ***unders Diff:       ***         ****unders Diff:       ****         ************************************	

<u>Note:</u> The top black horizontal bar indicates which tile you are viewing and the page Voucher.

The **Voucher Entry** page is not available on the **Payables Operations** homepage, but this is a page often navigated to. You can add the page to the **Payables Operations** homepage or another homepage, the **Add to Favorites** or to the **NavBar** Menu by selecting one of the "**Add to...**" options. (Discussed in the next section)



#### Navigation Tools

In this topic, we will discuss some navigational tools you may find handy if a page is often used by adding/deleting often used pages.

Search for the Voucher Entry page by using the NavBar.

Regular Entry	× +						
< → C ☆ ■	bb.psfs.lsuhsc.edu/psp/fspat/EMPLOYEE/ERP/c/ENTER_VOUCHER_INFORMATION.VCHR_EXPRESS.GBL		Ŕ	\$ E	*	0.0	9 1
My Preferences		Voucher		ŵ	۵	:	0
Voucher					Nev	v Windo	w   Help
Eind an Existing Value Ke	word Search Add a New Value						
"Voucher Style: StopEen Name: StopEen Name: StopEen ID: StopEen ID: StopEen ID: Novice Date: Invoice Date: Invoice Date: Orass Invoice Annout: Freight Annout: Stalle Tax Annout: Entered VAT Annout: Miss Charge Annout: PO Nambe: FO Nambe:							
Add							
Find an Existing Value   Keywo	Search   Add a New Yalive						

#### My Favorites

In this example, the Voucher Entry page is displayed. We will add this page to the NavBar Favorites.

Begin by selecting the **Actions** button in the toolbar. A list of options for adding the page displays.



Click the Add To Favorites list item.

Add To Favorites

The name of the page defaults into the \*Favorite Label field.

Add To F	avorites	×
*Favorite Label		
Regular Entry		Add

Click the **Add** ink.



A confirmation message displays.

Message
Added 'Regular Entry' to Favorites
ОК

Click the **OK** button.

Verify the entry has been added to NavBar Favorites.

Click the **NavBar** button.

Click the **Favorites** button.

Voucher Entry has been added to the Favorites page.



Favorites can also be viewed form any homepage.



**Favorites** now appear on the left hand side of the page.



If the page was added in error, or is no longer needed as a **Favorite**, the entry can be removed from the list.

From the NavBar Favorites page, click the **Edit Favorites** link.

Edit Favorites				
Select the Save button after editing or deleting favorites to apply your change	es. Save			
Favorites	1 row			
Delete Selected				
Favorite Sequer	nce number			
Regular Entry	0			

Click the **Select** this row for Voucher Entry

Click the **Delete Selected** button.

A confirmation message will display asking you if you wish to delete the selected line.

	Edit Favor	itos		
	Select the Save button after editing or deleting favorite	es to apply your changes Save		
	Delete Selected			
	Pavorite	Sequence number		
	Regular Entry	0		
Click the	Vou here selected to define ALL of your far ves e Yes Ves butt	No		
		E	Edit Favorites	
	Select the Save butto	on after editing or de	eleting favorites to apply your changes.	Save
	Favorites			
	There are no favo	orites.		

#### The changes must be saved before proceeding.

Click the **Save** button. You will receive a message that the save for successful.

Note that the SAVE see option is no longer available.

	Edit Favorites
Favorites	
There are no favorites.	

The Voucher Entry page has been removed from NavBar Favorites.

To confirm, NavBar.

Click Menu to refresh



#### **Click Favorites**

NavBar: Favo	orites (
0	
$\smile$	
Recently Visited	
0	
~	
Favorites	
=	
Menu	
1994TU	
	272
	No favorites to display
	Once you have used Add To Favorites, your favorite pages will be listed here.

Click the **My Financials Home b**utton.

#### NavBar

Click the My Financials Home	•	search button.
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Scroll down and select **Payables Operations** 

Select the Accounts Payable tile

## Accounts Payable

Click the **Actions** <sup>**I**</sup> button.

Click the **Add To NavBar** list item.

The name of the page defaults into the **\*Tile Label** field.

Add To NavBa	r ×
*Tile Label	
Accounts Payable	Add
L	

Click the **Add** link.

A confirmation message displays stating that the page has been added.



Click the **OK** button.

Verify that the page has been added to the NavBar.



Click the NavBar 🙆 button.		
	p	NavBar 😳
		C
		Recently Visited
		$\heartsuit$
		Favorites
		=
		Menu
		Accounts Payable

The page has been added as a tile at the *bottom* of the NavBar list.

If you have added this page in error, or no longer wish the tile to be on the NavBar, you can remove the tile from the NavBar.

Click the **Personalize NavBar** button.

Click the **Delete accounts Payable** button.

The changes must be saved before proceeding.

Click the **Save Save** button.

### **LSU** Health

Adding Frequently Used Pages to a Homepage

Frequently used pages can also be added to the Homepage of your choice.

The Actions button does not provide an option for adding a *page* from a Homepage.

This can be accomplished by using the NavBar navigation.

Navigate to NavBar > Menu > Purchasing > Purchase Orders > Review PO Information > Purchase Orders.

✓ Payataes	Purchase Order Inquiry	ົດ	94:	Ø
Purchase Order Inspuly Data any Internation you have and cicl. Search. Leave fields blank for a bit of all values. [Find an Lixing Wark ] Synvord Search			New Wind	aw   Help
Search Crear Search 52 Save Search Criteria				

Click the Actions button.

Click the Add To Homepage	Add To Homepage	list item.
---------------------------	-----------------	------------

A list of available Homepages that can be added to is displayed. In this example, the Purchase Order page will be added to the **Payables Operations** homepage.

Add To Homepage	×
*Tile Label	
Purchase Orders	
Choose from available homepages	
My Financials Home	
Payables Operations	
Procurement	
LSU Health Financials	
Asset Management	
Projects & Receivables	
General Ledger	
England Call Cardina	

Click the **Payables Operations** Payables Operations link.

Message	
Added 'Purchase Orders' to Payables Operations Homepage	
ОК	

A confirmation message displays stating the page has been added. Click the **OK** button.



Verify that the page has been added to the **Payables Operations** page.

You can use the black bar "back" arrows or you can click the **Home** button and use the down arrow near My Financials Home and select Payables Operations.

Payables Operations -				< 4 of 4 >
	System Notifications PS9FSPAT Notice: PeopleSoft Supply Chain testing. This system is running PeopleTools 8.50 of for upgrade testing and review. This is a test indiance for LSU Health P. Pattern States of LSU Health P. Pattern States of LSU	Purchasing LSU Health	Accounts Payable WorkCenter	
	Accounts Payable	Purchase Orders		

The Purchase Orders page has been added.

If you have added this page in error, or no longer wish it to be on a homepage, you can remove it.

From the **Payables Operations** page, click the **Actions** button.

Click the **Personalize Homepage** Personalize Homepage

Click the **Delete Delete Purchase Order** button.

The changes must be saved before proceeding.

Click the **Save** button.

		Menu	Search in M	iun		Q		Financials PAT	ŵ	۵	: 0
Payables Oper	rations 🔻									<	8 of 8 🔿
		System Notifications PSGSDAT Notice: PeopleSoft Supply Chain testing: This system is uniting PeopleSoft 85 000 for This is a test instance for LSU Health Pannocals. Last referen date: 2022-17-29		yable WorkCenter	Accounts Payable		Suppliers LSU Health				
2											

The page has been removed.



END OF PROCESS