



PeopleSoft Training

FLUID HOMEPAGES

PAYABLES OPERATIONS

APRIL 2023

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VERSION CONTROL

Date	Task	Owner	Description
04/01/2023	Created	Barbara Doss	Create
04/12/2023	Review	Barbara Doss Ulander Holloway	Walk-through
04/132023	Update	Barbara Doss	Update after initial training session.

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.

Navigation Methods

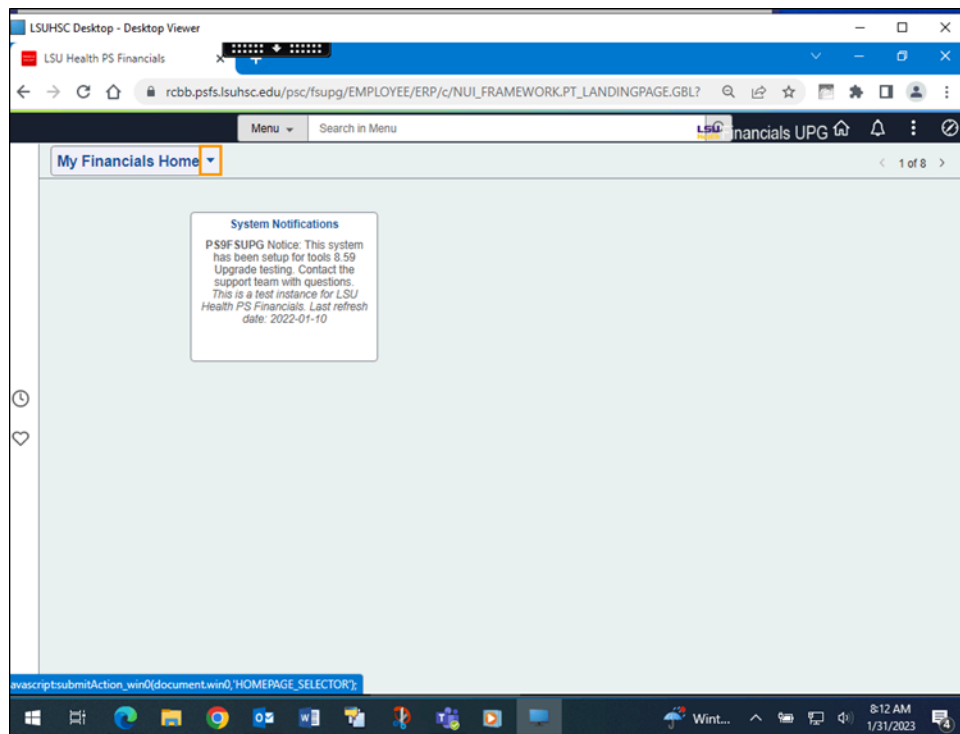
Upon launching PeopleSoft Financials, the default fluid homepage is "My Financials Home". This homepage is meant to be modified by each user to suit their needs.

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.lsuhscc.edu/ps/support/fin_9_manuals.aspx

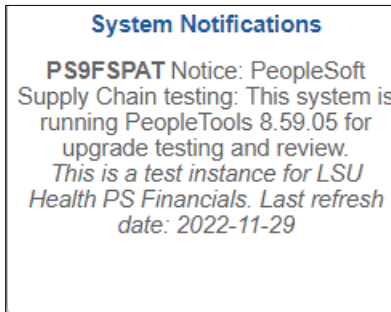
Each user will see a different number of homepages based upon their security access.

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.



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

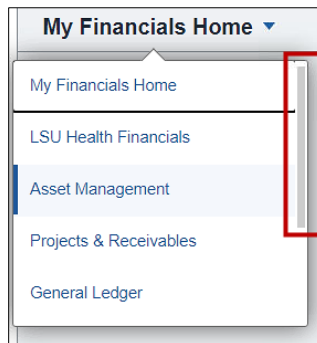
Refer to the Delta Document for more details.
http://www.lsuhs.edu/ps/support/fin_9_manuals.aspx

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.



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.

Click the **Home**  button.

Personalizing Homepage

Accessing the Payables Operations Homepage

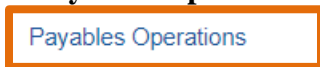
For the remainder of this exercise, you will be using the **Payables Operations** homepage.

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

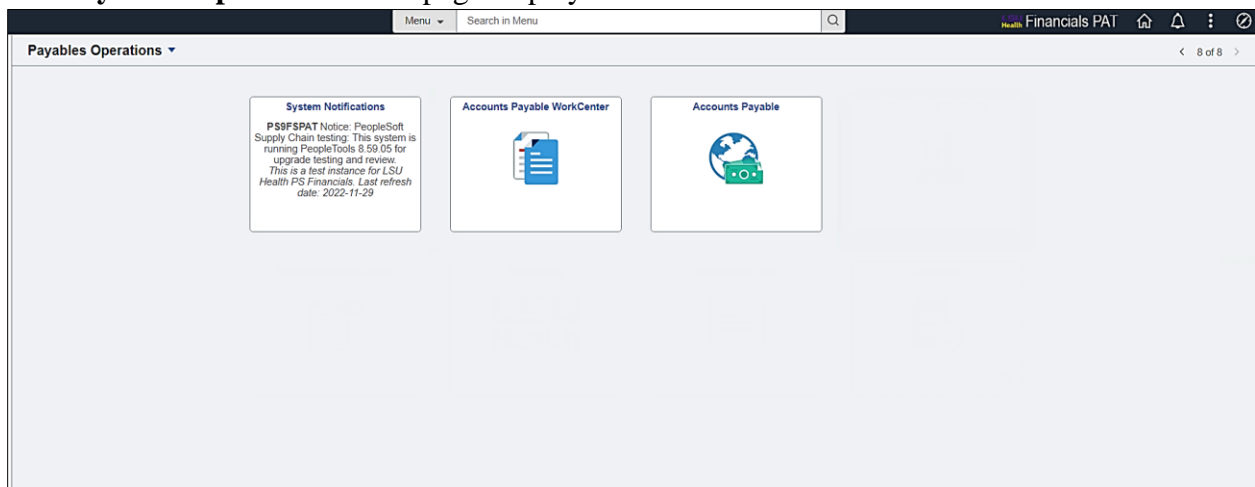
Using the mouse, click the scrollbar and drag the mouse down to the desired selection.

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

Click the **Payables Operations** link.



The **Payables Operations** homepage displays.

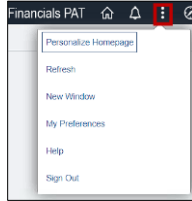


Personalize Payables Operations Homepage

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.

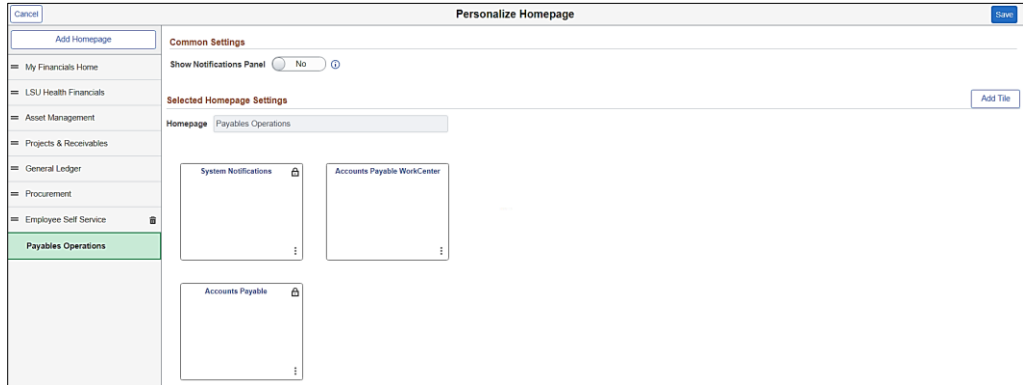
Select the **Action** icon – the three stacked dots – at the top right of the page.



Select **Personalize Homepage**



The following page will appear

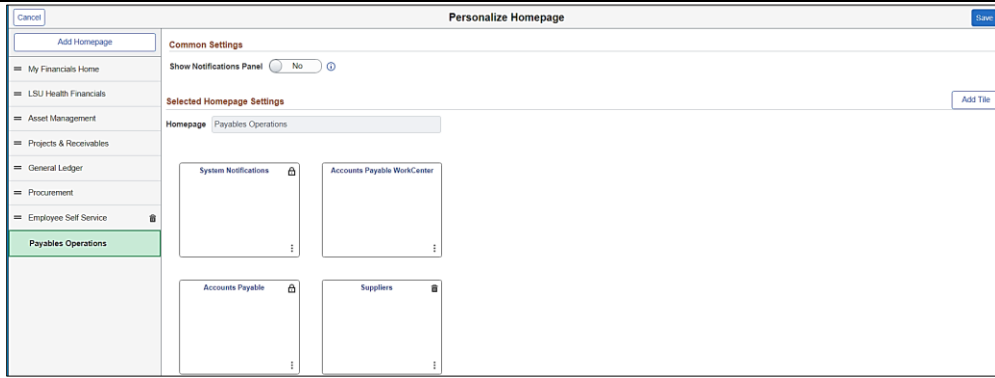


Once you are on the **Personalize Homepage** page, select the **Add Tile** [Add Tile](#) link.

Enter “supplier” in the **Search a Tile** search box.

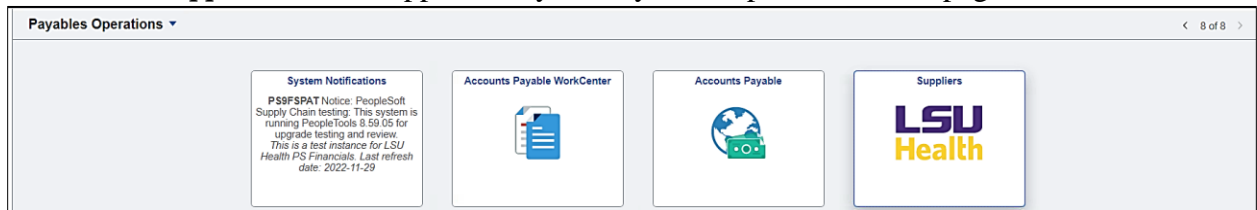
Click the **Search**  arrow

Select the *Supplier* link.



Click **Save**

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



Viewing Nav Collections tiles


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



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

Unpaid Voucher Status															
Business Unit	Voucher	Payment Number	Express Payment	Supplier	Short Supplier Name	Invoice No	Approval Status	Scheduled Pay Date	Payment Amount	Currency	Match Status	Entry Status	Post Status	Payment Selection Status	Document Tolerance Status
HCSDA	00039514	1		0000003089	LSUSHSC-001	SAP 2025	Approved	03/12/2014	324.14	USD	Not Applicable	Postable	Posted	Not Selected for Payment	Valid
HCSDA	00040544	1		0000000983	AT&T-004	337 M90-5518 001 05/19/MAY2,14)	Approved	06/19/2014	-1.34	USD	Not Applicable	Postable	Posted	Not Selected for Payment	Valid
HCSDA	00046135	3		0000003089	LSUSHSC-001	00046135	Approved	04/13/2016	-15.90	USD	Not Applicable	Postable	Posted	Not Selected for Payment	Valid
HCSDA	00052079	1		0000000019	LA STATE EMPLO	MCLNO CREDIT AUGUST 2020	Approved	08/31/2020	-53.81	USD	Not Applicable	Postable	Posted	Not Selected for Payment	Valid
HCSDA	00053077	1		0000000019	LA STATE EMPLO	WSTMC-2021-08-31	Approved	09/08/2021	-15.30	USD	Not Applicable	Postable	Posted	Not Selected for Payment	Valid
LSUNE	00312849	4		700591650	GRENER-002	TB092115	Approved	09/24/2015	100.00	USD	Not Applicable	Postable	Posted	Not Selected for Payment	Valid
LSUNE	00348267	1		780021270	NH-001	DP16580005577	Approved	11/29/2017	-3.84	USD	Not Applicable	Postable	Posted	Not Selected for Payment	Valid

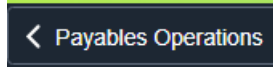
NOTE: Each menu option includes a down arrow to the right of the menu option name.

Click that arrow  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.

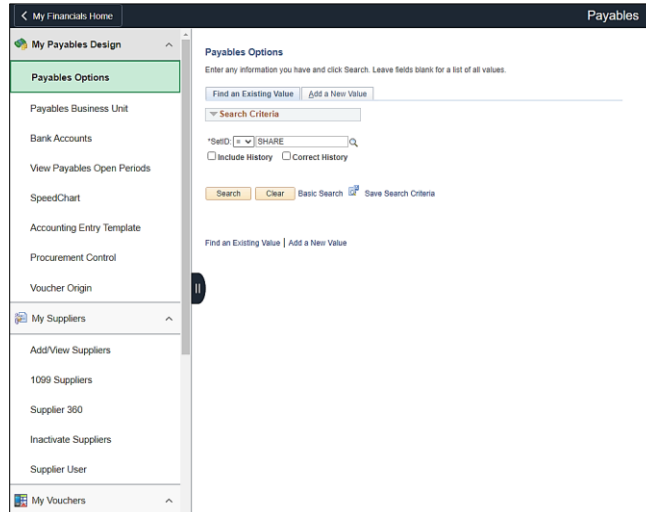
Click the **Payables Operations** link.



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.

Click the **Navigation Area**  button.

Expanding the Menu

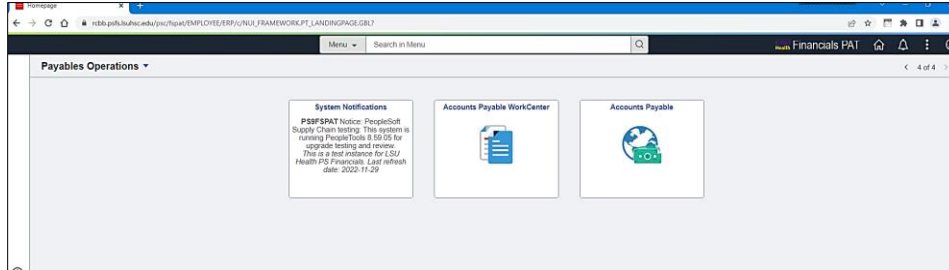
Select the tab again to expand the Nav Collection menu.

Click the **Navigation Area**  button.

Click 

NavBar Menu

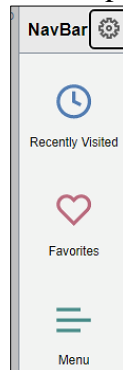
Accessing NavBar



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 **NavBar** icon in the top right corner of the page to display other options for a more traditional menu.

Click the **NavBar**  button.

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

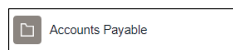


Click the **Menu**  button.

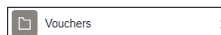
The NavBar menu displays “**Recently Visited**”, “**Favorites**” and the “**Application Menu**”. In this example, select the **Menu** link to display the entire menu items in alphabetical order.

Click the **Menu**  button.

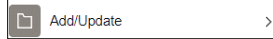
Click the **Accounts Payable** link.



Click the **Vouchers** link.



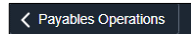
Click the **Add/Update** link.



Click the **Regular Entry** link.



Note: The top black horizontal bar indicates which tile you are viewing and the page **Voucher**.

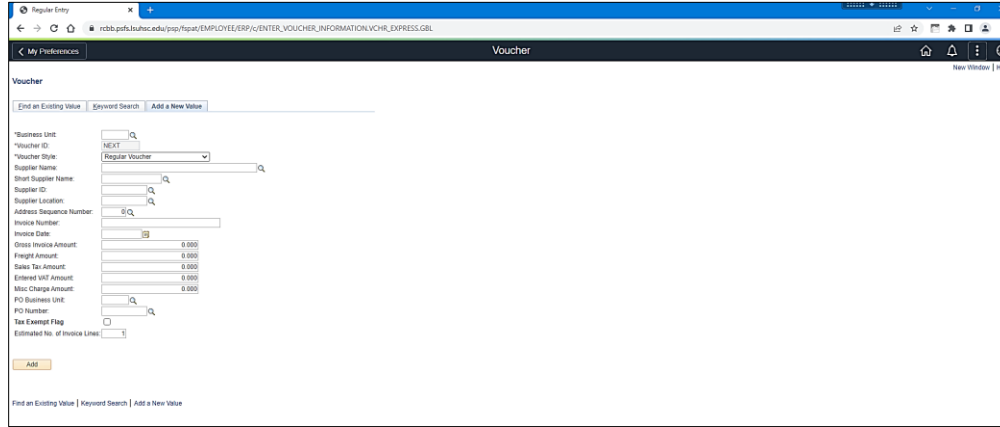


The **Voucher Entry** page is not available on the **Payables Operations** homepage, but this is a page often navigated to. You can add the page to the **Payables Operations** homepage or another homepage, the **Add to Favorites** or to the **NavBar** Menu by selecting one of the “**Add to...**” options.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

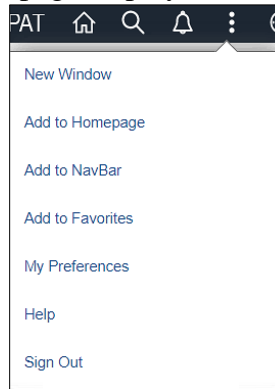
Search for the Voucher Entry page by using the NavBar.



My Favorites

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

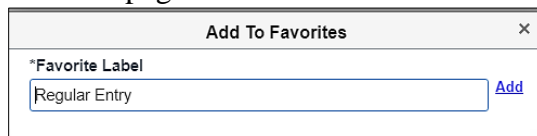
Begin by selecting the **Actions**  button in the toolbar. A list of options for adding the page displays.



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

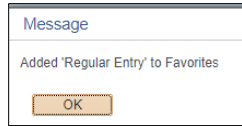


The name of the page defaults into the ***Favorite Label** field.



Click the **Add**  link.

A confirmation message displays.



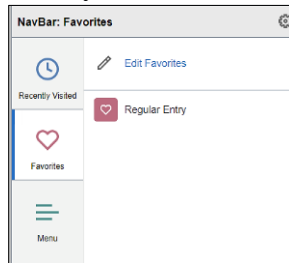
Click the **OK**  button.

Verify the entry has been added to NavBar **Favorites**.

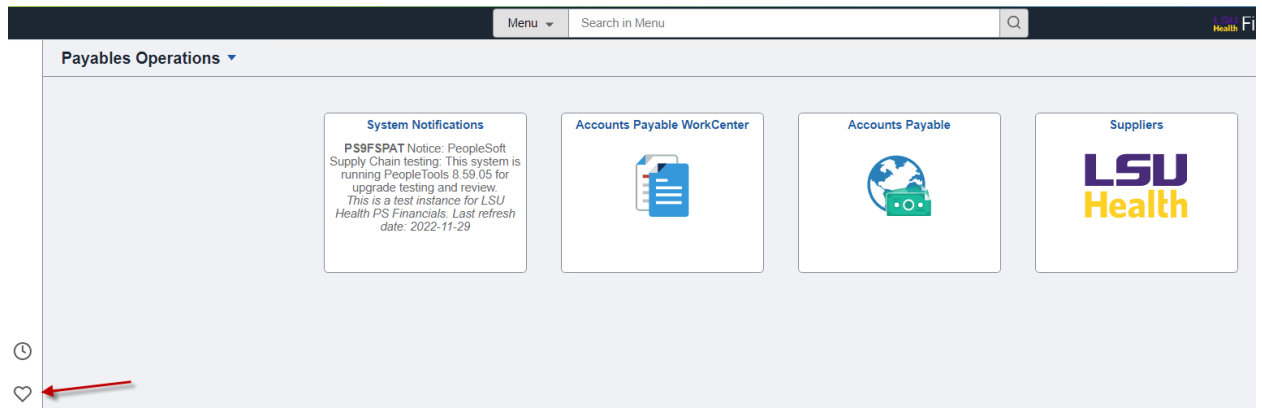
Click the **NavBar**  button.


Click the **Favorites**  button.

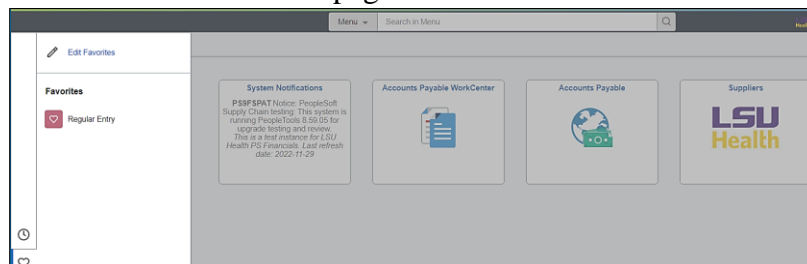
Voucher Entry has been added to the **Favorites** page.



Favorites can also be viewed from any homepage.



Click the heart  on the left side of the page.



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.


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.

Click the **Yes**  button.

The changes must be saved before proceeding.

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

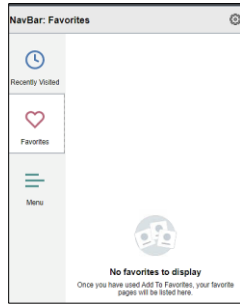
Note that the **SAVE**  option is no longer available.

The **Voucher Entry** page has been removed from **NavBar Favorites**.

To confirm, **NavBar**.

Click Menu  to refresh

Click Favorites



Click the **My Financials Home**  button.

NavBar

Click the **My Financials Home**  search button.

Scroll down and select **Payables Operations** .

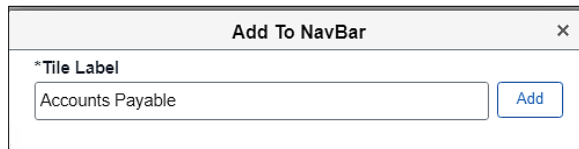
Select the Accounts Payable tile



Click the **Actions**  button.

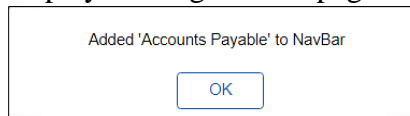
Click the **Add To NavBar**  list item.

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



Click the **Add**  link.

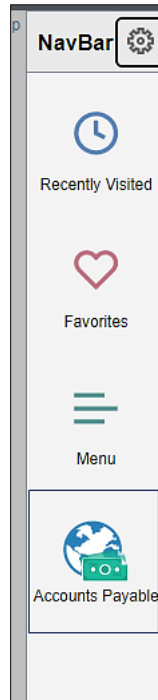
A confirmation message displays stating that the page has been added.



Click the **OK**  button.

Verify that the page has been added to the NavBar.

Click the **NavBar**  button.



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**  button.

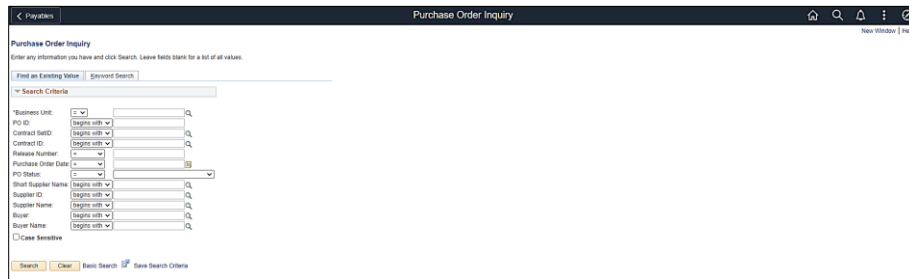
Adding Frequently Used Pages to a Homepage

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.

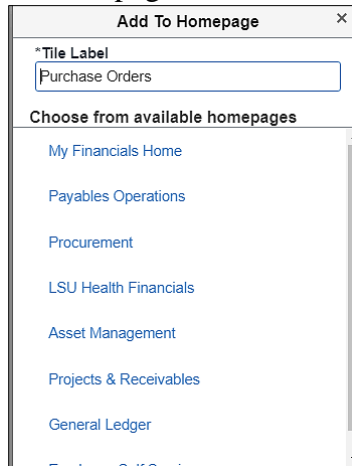
Navigate to NavBar > Menu > Purchasing > Purchase Orders > Review PO Information > Purchase Orders.



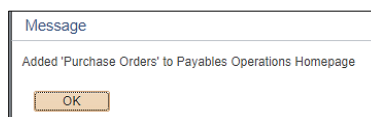
Click the **Actions** button.

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.




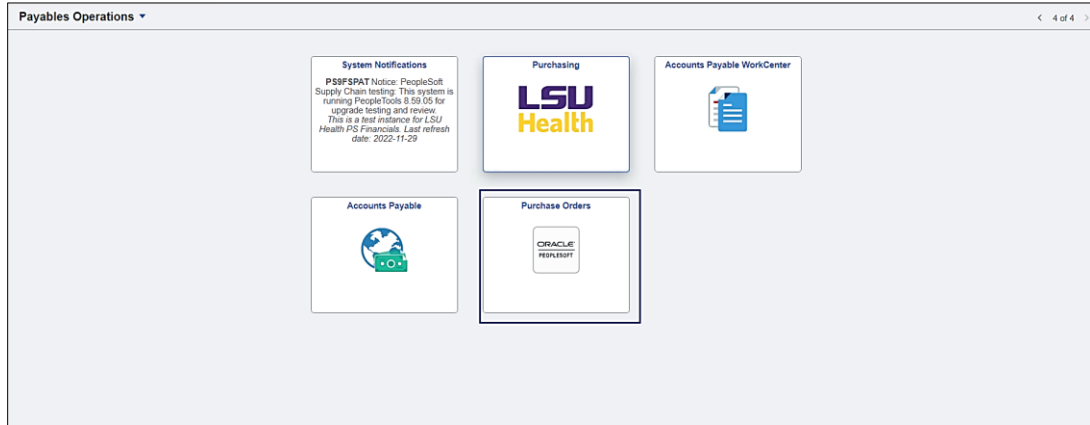
Click the **Payables Operations** Payables Operations link.



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



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.

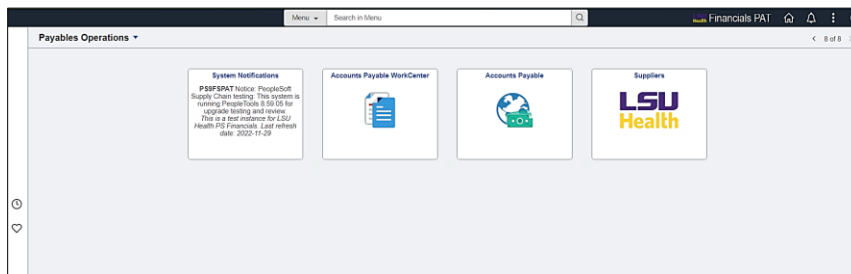
From the **Payables Operations** page, click the **Actions**  button.

Click the **Personalize Homepage**  list item.

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

The changes must be saved before proceeding.

Click the **Save**  button.



The page has been removed.

END OF PROCESS