# Fluid Homepages for Core Team Department Usage - Asset Management

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# Fluid Homepages for Core Team Department Usage Asset Management

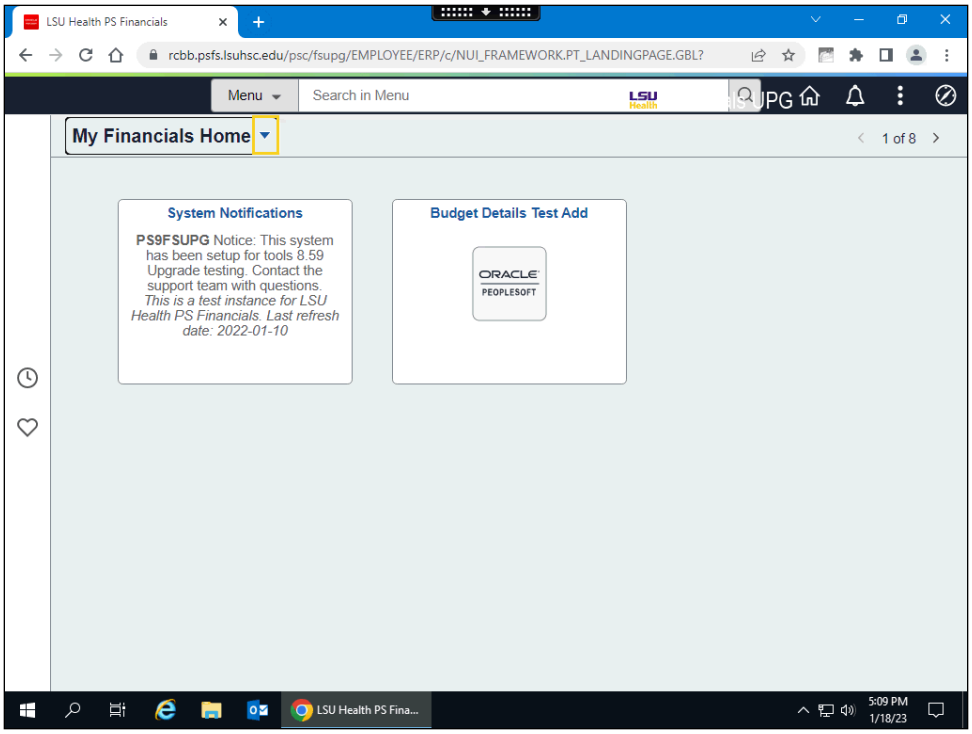
## Navigate to Homepage

**Topic Contents:**

**1.** Introduction to Asset Management Homepage.
**2.** Two (2) methods of navigating to Homepage:
  **a.** Use the drop-down arrow to the right of My Financials Home, and/or
  **b.** In the top right corner of the screen, use the left and right arrows to move between pages.
**3.** Introduction to Asset Management Homepage and Navigation Collections.
**4.** AM Asset Transaction nav collection.
  **a.** Folder icons
  b. Review menu options.
**5.** Return to Asset Management homepage.
**6.** Select AM Asset Depreciation tile.
  **a.** Default landing page.
  **b.** Asset Depreciation option.
**7.** Collapse/Expand the menu
**8.** Navigate back to Asset Management homepage.

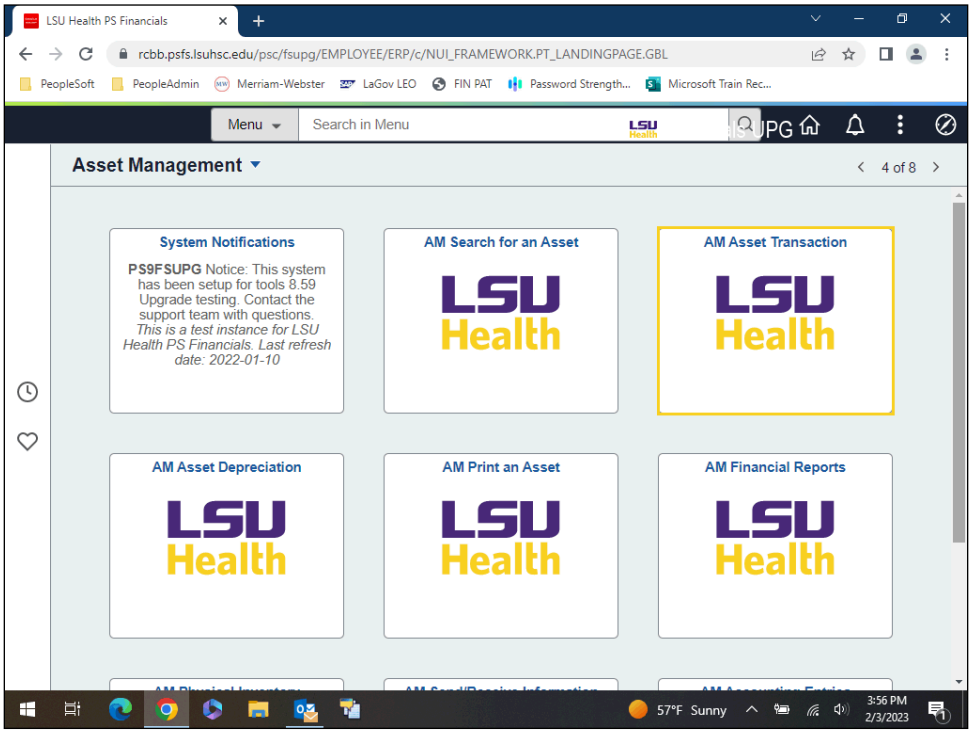
| Step | Action |
|---|---|
| 1. | LSUHSC PeopleSoft Financials provides a custom homepage for **Asset Management** to facilitate use by the Asset Management Department. Access to the Homepage will be granted via security roles to those users who maintain the assets for the Institution. This homepage is not intended for the end-user community. |
| 2. | Homepage navigation provides a more streamlined approach to navigation to commonly used features. It can be used in place of the NavBar menu navigation. However, not all menu options on the NavBar are included in the Homepage navigations. Users may supplement their use of the Homepage with the NavBar as needed.<br><br>***For purposes of this training, the assumption is that the user has already been trained to perform the Asset Management tasks. This training simply instructs the user in the use of the AM Home.*** |

| Step | Action |
|---|---|
| 3. | Upon launching PeopleSoft Financials, the default fluid Homepage is **"My Financials Home"**. This Homepage is meant to be modified by each user to suit his/her needs. Documentation on adding tiles to My Financials Home may be found in the Navigational Tools topic in this manual. Each user will see a different number of homepages based upon their security access.<br><br>There are **two methods** to navigate to the desired Homepage. Each method will be demonstrated and the user may determine which method is preferred for his/her use. |



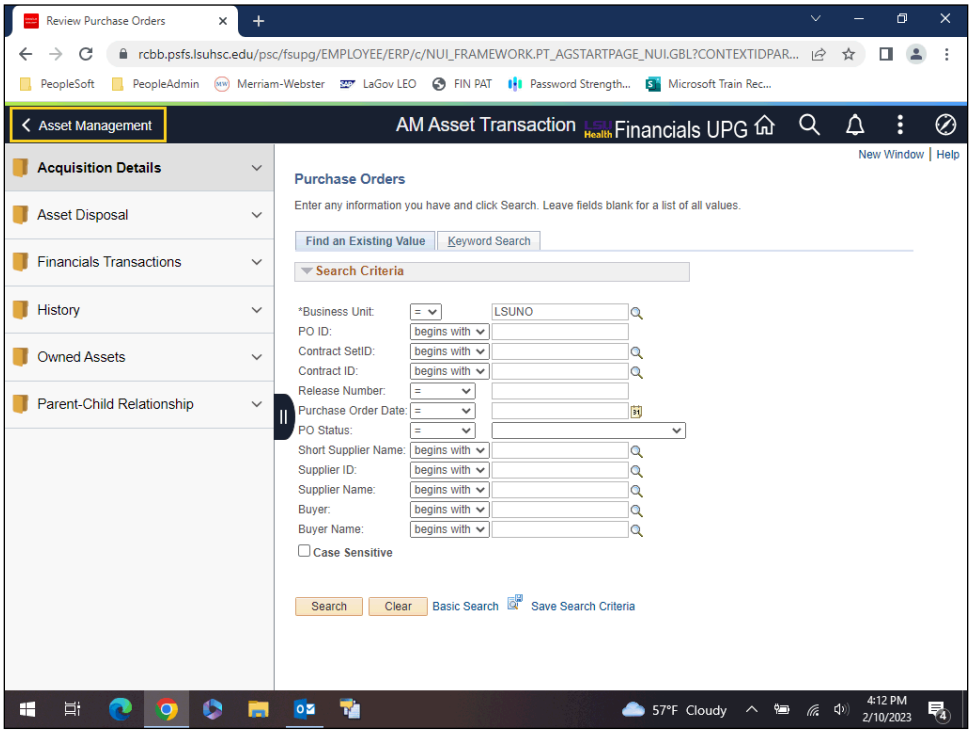

| Step | Action |
|---|---|
| 4. | **Method 1**<br><br>On the top left of the screen shot, note the drop-down selection arrow next to **My Financials Home**. Selecting the arrow allows the user to see a list of each of the Homepages for which s/he has been granted access.<br><br>Click the button to the right of the **My Financials Home** field.<br> |

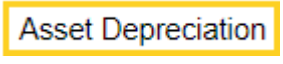
| Step | Action |
|---|---|
| 5. | **Asset Management** displays in the first five **(5)** options in the drop-down window. There are a total of eight **(8)** homepage options available that you can scroll through. Depending on your user access, you may not see all available options. Users would scroll down to view additional options. |
| 6. | **Method 2**<br><br>At the top right of the screenshot, note that the user sees "**< 1 of 8 >**". Depending on your user access, you may see 1 of **x** where **x** is any number between 1 and 8. Selecting the left and right arrows moves the user from one homepage to the next.<br><br>Click the **Right Page** arrow.<br> |
| 7. | The **Asset Management** page displays. If needed, the user can continue to click the Right Page arrow until the desired homepage displays. |
| 8. | Return to the **My Financials Home** page.<br><br>Click the **Home** button.<br> |
| 9. | For the remainder of this exercise, the user will be using the **Asset Management** homepage.<br><br>Click the **Homepage Selector** dropdown button to activate the menu.<br> |
| 10. | Click the **Asset Management** link.<br> |
| 11. | The **Asset Management** homepage displays. Each of the tiles on the Asset Management page represent a ***Navigation Collection (Nav Collection)***. A Navigation Collection is simply a grouping of menu items. The Nav Collections on the Asset Management homepage are the most commonly used features by the Asset Management staff. |




| Step | Action |
|---|---|
| 12. | The **AM Asset Transaction** tile is the starting place for the majority of work by the Asset Management staff. To explore the menu options included in the Nav Collection, select the tile.<br><br>Click the **AM Asset Transaction** button. |
| 13. | The tile loads the **AM Asset Transaction** nav collection menu options. Each menu option displays a folder icon at the left of the name and an arrow to the right. In this example, the **Acquisition Details** menu option is the landing page and defaults to expanded. Users see two (2) options for selection. You may close this option and navigate to a different menu option as needed.<br><br>Click the **Owned Assets** dropdown button to activate the menu.<br> |
| 14. | The **Owned Asset** menu includes three (3) pages for copying an asset, express add of an asset, and basic add of an asset. |
| 15. | Users may navigate to the different menu options as desired. These should all be familiar to the experienced **Asset Management** user.<br><br>Click the **Owned Asset** button to collapse the menu.<br> |

| Step | Action |
|---|---|
| 16. | Click the **Acquisition Details** button to collapse the section.<br> |
| 17. | Click the **Asset Disposal** dropdown button to activate the menu.<br> |
| 18. | The **Asset Disposal** menu displays.<br><br>Click the **Asset Disposal** button to collapse the menu.<br> |
| 19. | Click the **Financials Transactions** dropdown button to activate the menu.<br> |
| 20. | The **Financials Transaction** menu displays.<br><br>Click the **Financials Transaction** button to collapse the menu.<br> |
| 21. | Click the **History** dropdown button to activate the menu.<br> |
| 22. | The **History** menu displays.<br><br>Click the **History** button to collapse the menu.<br> |
| 23. | Click the **Parent-Child Relationship** dropdown button to activate the menu.<br> |
| 24. | The **Parent-Child Relationship** menu displays.<br><br>Click the **Parent-Child Relationship** button to collapse the menu.<br> |



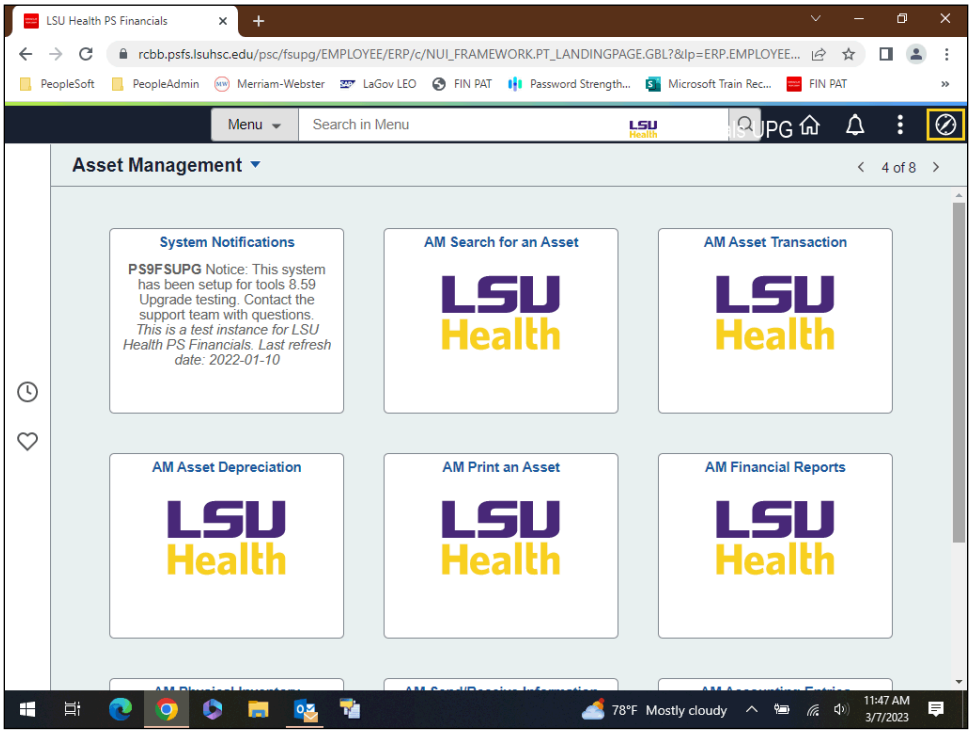

| Step | Action |
|---|---|
| 25. | Navigate back to the **Asset Management** page.<br><br>Click the **Asset Management** button.<br> |
| 26. | You are returned to the **Asset Management** homepage where you may select another Tile/Nav Collection.<br><br>Click the **AM Asset Depreciation** button. |
| 27. | The default landing page for this nav collection is the **Depreciation Process Log**.<br><br>The navigation collection includes menu options for ***Open Transaction, Processing,*** and ***Review Depreciation Info***. |
| 28. | Click the **Review Depreciation Info** dropdown button to activate the menu.<br> |
| 29. | Click the **Asset Depreciation** button.<br>  |
| 30. | From here, you can enter the *AM unit* and the *asset id* or *tag number* to search for the desired asset. |

| Step | Action |
|---|---|
| 31. | **Collapsing the Menu**<br><br>If the user needs more space on their screen, the left menu may be collapsed and expanded as desired. Note the little black tab containing **"ll"** to the right of the menu box. Selecting this will collapse the menu.<br><br>Click the **Navigation Area** button to collapse the area.<br> |
| 32. | Select the tab once more to expand the menu display.<br><br>Click the **Navigation Area** button to expand the area.<br> |
| 33. | Return to the **Asset Management** page.<br><br>Click the **Asset Management** button.<br> |
| 34. | This completes ***Navigate to Homepage***.<br>**End of Procedure.** |

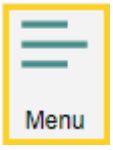
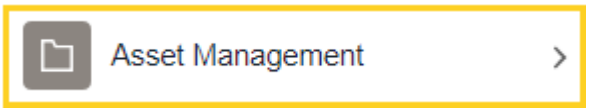
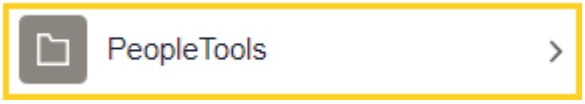
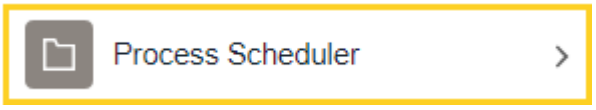
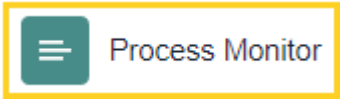
# The NavBar Menu

**Topic Contents:**

**1.** Access NavBar
**2.** NavBar Menu and navigation
**3.** Using the Menu link
**4.** Navigate to Process Monitor page




| Step | Action |
|---|---|
| 1. | **NavBar**<br><br>Users may need to access a menu option not included in their **Asset Management** homepage or one of the tile navigation collections. Users can select the **NavBar** icon at the top right of the page to display the options to get to a more traditional menu. Once you select the icon, the **NavBar** pop-out displays on the right.<br><br>Click the **NavBar** button.<br> |

| Step | Action |
|---|---|
| 2. | Click the **Menu** button.<br>  |
| 3. | All of the menu options for which the user has security access are displayed in alphabetical order.<br><br>Click the **Asset Management** button.<br>  |
| 4. | The menu defaults to display the **Asset Management** menu options. If the user needed to change to a different menu, such as Purchasing or Reporting Tools, the s/he should select the **Menu** link at the top of the menu list.<br><br>Click the **Menu** link.<br> |
| 5. | In this example, select the following options:<br>**PeopleTools** > **Process Scheduler** > **Process Monitor**<br><br>Press the left mouse button over the scrollbar and drag the mouse to the **PeopleTools** option. |
| 6. | Click the **PeopleTools** button.<br>  |
| 7. | Press the left mouse button over the scrollbar and drag the mouse to the **Process Scheduler** option. |
| 8. | Click the **Process Scheduler** button.<br>  |
| 9. | Click the **Process Monitor** button.<br>  |

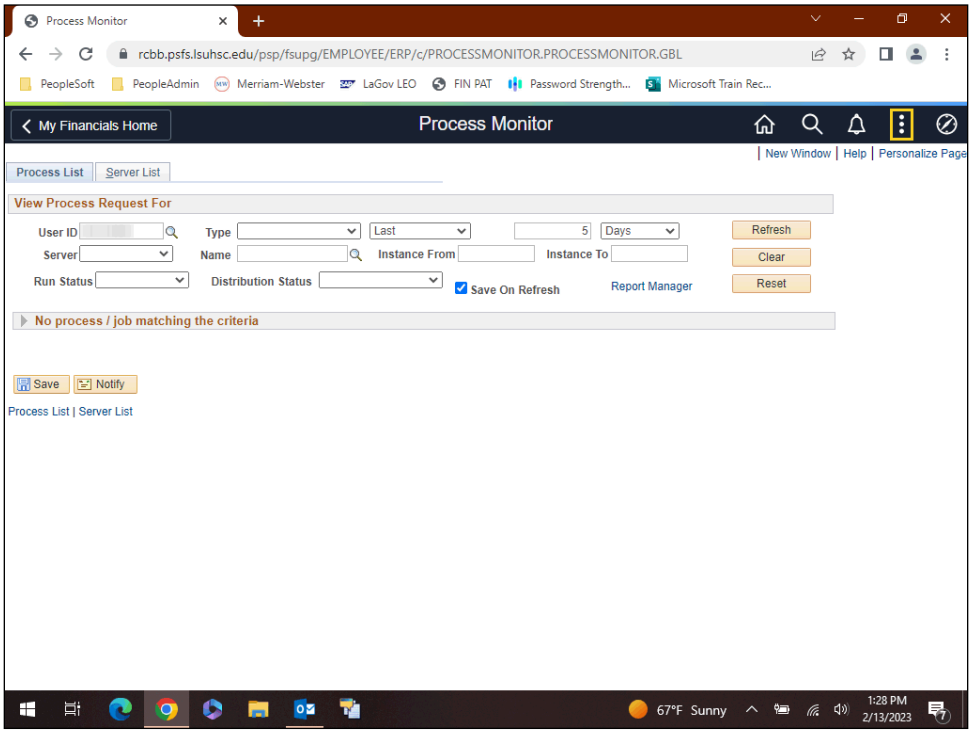
| Step | Action |
|---|---|
| 10. | Once you are on the **Process Monitor** page, you realize you did not see the AM Homepage tile list, but this is a page that you want to navigate to. You can do a few things. First, you can add it to your **Favorites**. Second, you can add it to **My Financials Home**. |
| 11. | This completes ***The NavBar Menu***.<br>**End of Procedure.** |

# Navigational Tools

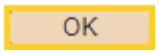
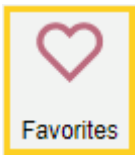
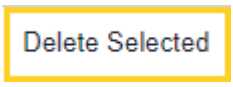
**Topic Contents:**

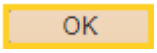
**1.** Add/Delete Process Monitor page to:
  **a.** Favorites
  **b.** NavBar
  **c.** My Financials Homepage

| Step | Action |
|---|---|
| 1. | In this topic, we will discuss some navigational tools the user may find handy if a page if often used. Users may now add/delete often used pages to the following:<br><br>**1.** NavBar Favorites;<br>**2.** NavBar; and/or<br>**3.** My Financials Homepage (or other homepage of choice)<br><br>Examples will be demonstrated in the order listed. |




| Step | Action |
|---|---|
| 2. | **NavBar My Favorites**<br><br>In this example, you are on the **Process Monitor** page, so all that is needed is to add this page to **NavBar Favorites**. Begin by selecting the **Actions** button in the toolbar. A list of options for adding the **Process Monitor** page displays.<br><br>Click the **Actions** button.<br> |
| 3. | In this example, users are adding the **Process Monitor** to the **NavBar Favorites** list.<br><br>Click the **Add To Favorites** list item.<br> |
| 4. | The name of the page defaults into the ***Favorite Label** field.<br><br>Click the **Add** link.<br> |

| Step | Action |
|---|---|
| 5. | A confirmation message displays.<br><br>Click the **OK** button.<br>  |
| 6. | Verify the entry has been added to NavBar **Favorites**.<br><br>Click the **NavBar** button.<br> |
| 7. | Click the **Favorites** button.<br>  |
| 8. | The **Process Monitor** page has been added to the **Favorites** page.<br><br>If you have added this page in error, or no longer wish it to be a **Favorite**, you can remove the entry from your list.<br><br>Click the **Edit Favorites** link.<br> |
| 9. | Click the **Select this row** box for the **Process Monitor** option.<br> |
| 10. | Click the **Delete Selected** button.<br>  |
| 11. | A confirmation message will display asking you if you wish to delete the entry.<br><br>Click the **Yes** button.<br> |
| 12. | The **Process Monitor** page has been removed from **NavBar Favorites**. You must save the change before navigating away from the page.<br><br>Click the **Save** button.<br> |

| Step | Action |
|---|---|
| 13. | Click the **Process List** button.<br> |
| 14. | **NavBar**<br><br>You have been returned to the **Process Monitor** page. Just as you added the page to your Favorites, you can also add to the **NavBar**.<br><br>***NOTE: You must add the page to the NavBar from the page itself. The Actions button does not allow a page to be added from a Homepage.***<br><br>Click the **Actions** button.<br> |
| 15. | Click the **Add To NavBar** list item.<br> |
| 16. | The name of the page defaults into the ***Tile Label** field.<br><br>Click the **Add** link.<br> |
| 17. | A confirmation message displays stating that the page has been added.<br><br>Click the **OK** button.<br>  |
| 18. | Verify that the page has been added to the **NavBar**.<br><br>Click the **NavBar** button.<br> |
| 19. | The page has been added as a tile at the *bottom* of the **NavBar** list.<br><br>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**.<br><br>Click the **Personalize NavBar** button.<br> |

| Step | Action |
|---|---|
| 20. | Click the **Delete Process Monitor** button.<br> |
| 21. | You must save the changes before navigating away from the page.<br><br>Click the **Save** button.<br> |
| 22. | **My Financials Homepage**<br><br>Frequently used pages can also be added to the Homepage of the user's choice.<br><br>Click the **Actions** button.<br> |
| 23. | Click the **Add To Homepage** list item.<br> |
| 24. | A list of available Homepages displays. In this example, you will add the **Process Monitor** page to the **My Financials Home** page.<br><br>Click the **My Financials Home** link.<br> |
| 25. | A confirmation message displays stating the page has been added.<br><br>Click the **OK** button.<br> |
| 26. | Verify that the page has been added to the **My Financials Home** page.<br><br>Click the **Home** button.<br> |
| 27. | The **Process Monitor** tile has been added to **My Financials Home**.<br><br>If you have added this page in error, or no longer wish it to be a tile on the **My Financials Home** page, you can remove the tile from the page<br><br>Click the **Actions** button.<br> |

| Step | Action |
|---|---|
| 28. | Click the **Personalize Homepage** link.<br> |
| 29. | Click the **Delete Process Monitor** button.<br> |
| 30. | You must save the changes before navigating away from the page.<br><br>Click the **Save** button.<br> |
| 31. | This completes ***Navigational Tools***.<br>**End of Procedure.** |