Business Manager
Tile and Navigations

Table of Contents

Business Manager Tile and Navigations

Introduction to Business Manager Tile and Navigation

Fluid navigation provides a more modern look and feel to the PeopleSoft screens. The navigation methodology changes from a traditional breadcrumbs and menu list to fluid versions that most of you have seen as you browse the web. Beginning with the Financials tools upgrade of 2023, fluid navigation will be set as the default. This means that the general look and navigation will move away from the Classic pages with the left-side navigation and breadcrumbs across the top of the page. Homepages, Tiles, and the NavBar Navigator, will be the default mechanism. This document provides an introduction to the fluid navigation, new terminology, and the Business Manager tile and navigation.
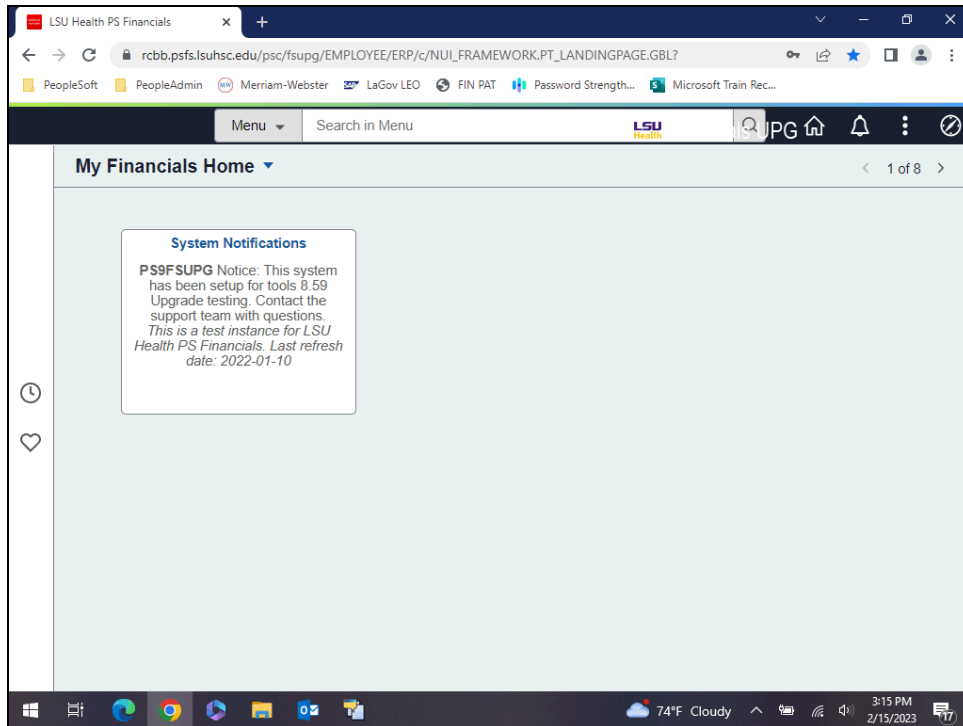
New Icons and Terminology used in Fluid Navigation

Topic Contents:

1. Intro to Business Manager tile
2. Fluid Navigation Icons and Terminology
    a. Home
    b. My Financials Home page
    c. System Notification tile
    d. Search field and Menu drop-down
    e. Notifications Bell
    f. Actions Ellipsis
    g. NavBar Icon
    h. Tile
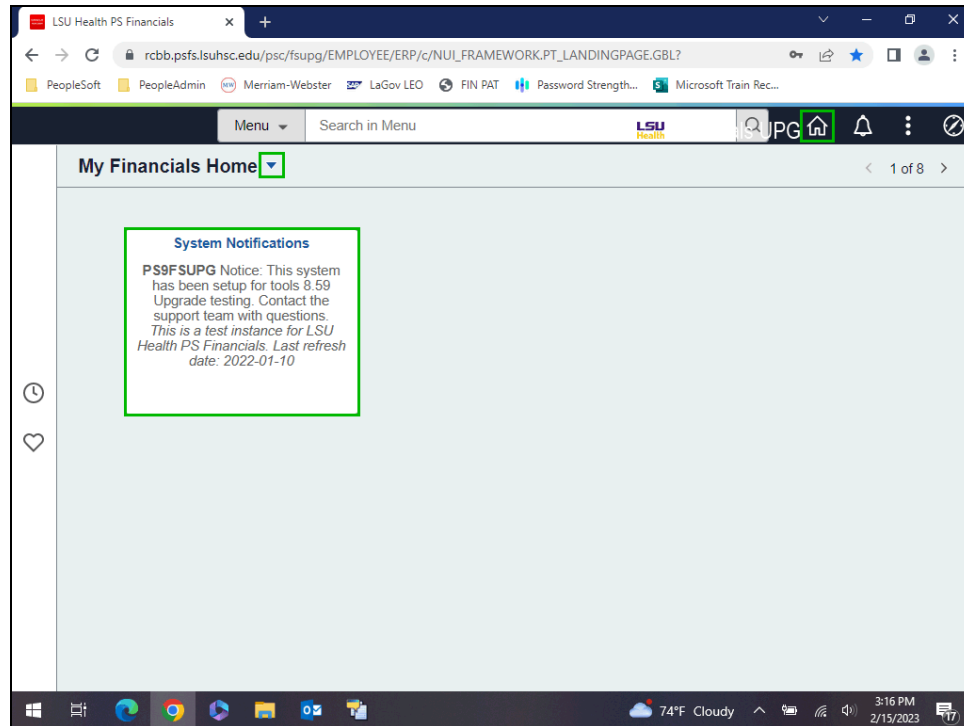   **i.** Navigation (Nav) Collections

Training Guide
Tile and Navigations

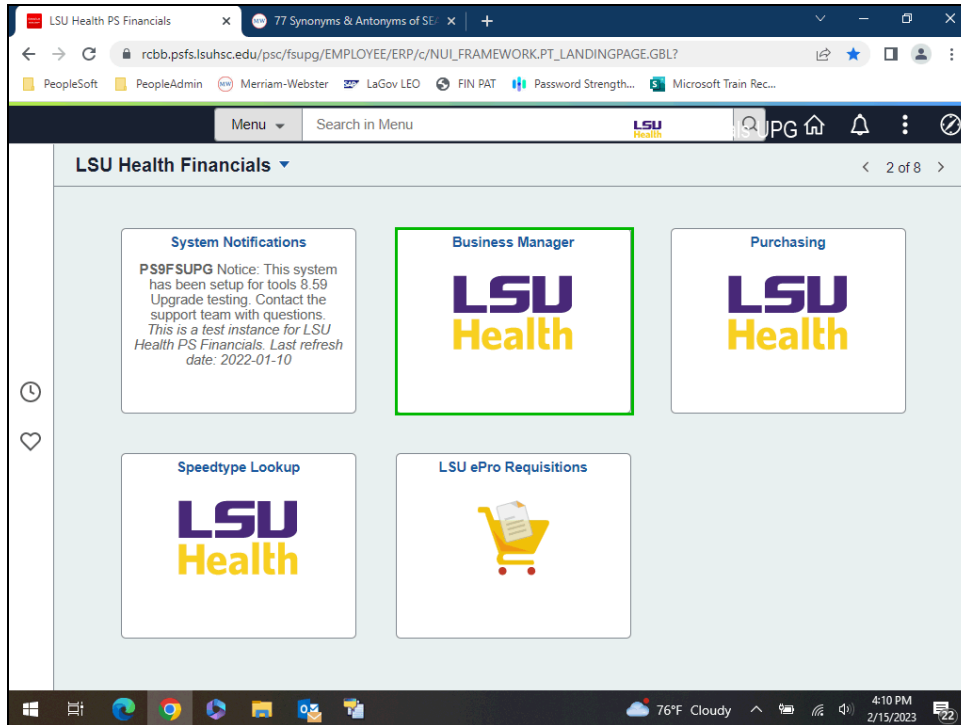| Step	Action
1.	The **Business Manager** tile and navigations provide access to frequently used menu options in PeopleSoft Financials. The navigation collection will save time by grouping frequently used navigations together and by reducing the number of clicks a user must perform.

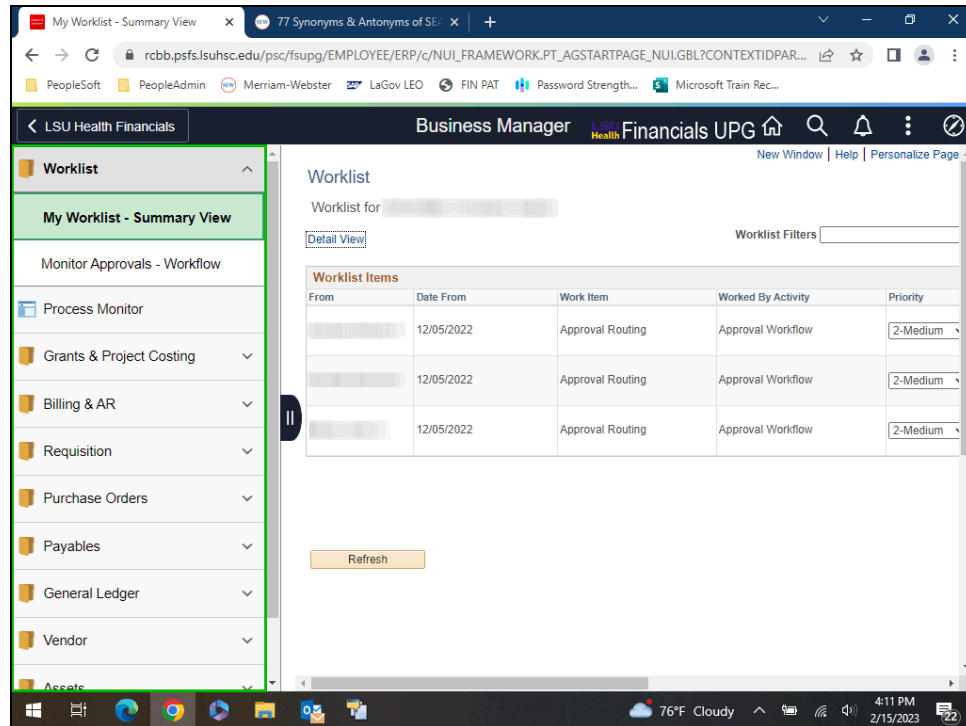| Step	Action
2.	**New Icons and Terminology used in Fluid Navigation** **Home Icon** - returns users to the homepage The **My Financials Home** is the default homepage for all users. Additional homepages can be viewed by clicking the drop-down arrow to the right of **My Financials Home**. The **System Notification** tile is used to alert users to events such as scheduled downtimes or maintenance, as well as other new feature information.
3.	**New Icons and Terminology used in Fluid Navigation (continued)** Use the **Search** field to locate pages when you are not sure of the navigation. Select the drop-down button to the right of **Menu** to search by a specified topic (e.g., Requisitions, Grants, Vouchers, etc.)
4.	**New Icons and Terminology used in Fluid Navigation (continued)** **Notifications Bell** - used to alert users that there are items on the Worklist requiring attention. This is used with Fluid navigations when enabled.

Training Guide
Tile and Navigations

Step	Action
5.	**New Icons and Terminology used in Fluid Navigation (continued)** **Actions Ellipsis** - used to perform various actions including signing out • **Add to Homepage** • **Add to NavBar** • **Add to Favorites** • **My Preferences** • **Help** • **Sign Out**
6.	**New Icons and Terminology used in Fluid Navigation (continued)** **NavBar Icon** - used to select the right side navigation and menu options

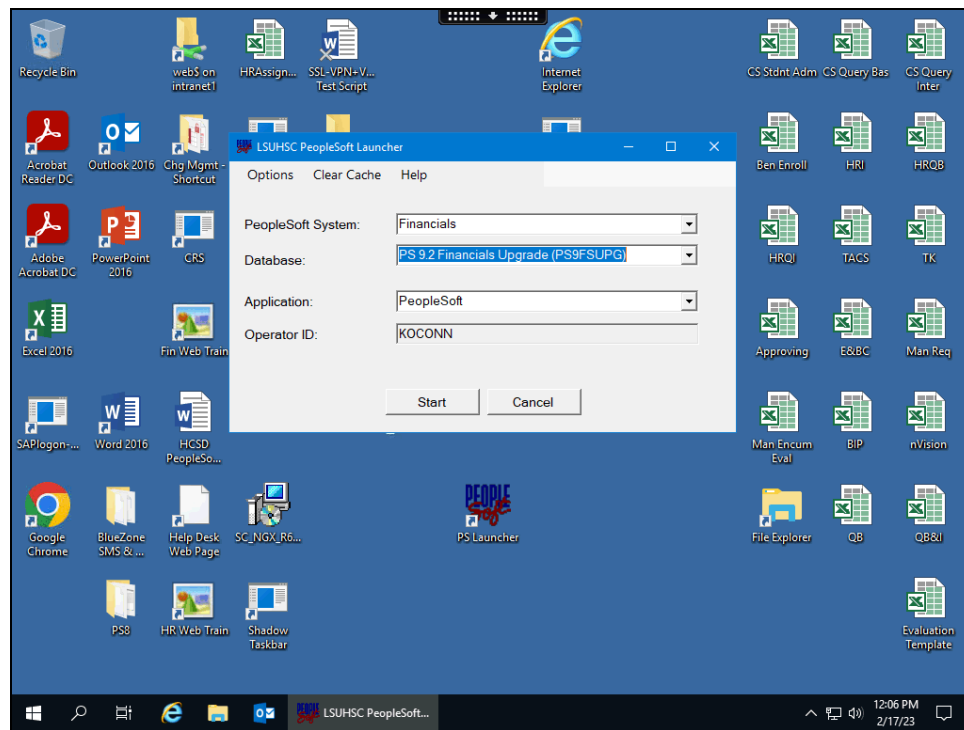| Step	Action
7.	**New Icons and Terminology used in Fluid Navigation (continued)** **Tile** - Tiles are used as a graphic representation of collections of pages and navigations

Step	Action
8.	**New Icons and Terminology used in Fluid Navigation (continued)** **Navigation Collection** - This is also known as a **Nav Collection**. These are groups of frequently used menu navigation links grouped together on a tile to facilitate ease of access in the system. The tiles and navigation collections can save users time by reducing the number of times they need to click menu options as well as alleviate issues when menu navigations are not easily remembered.
9.	This completes *New Icons and Terminology used in Fluid Navigation*. **End of Procedure.**

LSU Health PeopleSoft Financials Home Pages
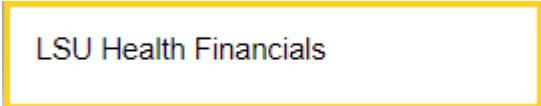
Topic Contents

1. Launch PeopleSoft
2. Intro to My Financials Home page
3. Navigate to LSU Health Financials page
4. Intro to LSU Health Financials homepage
    a. System Notification tile

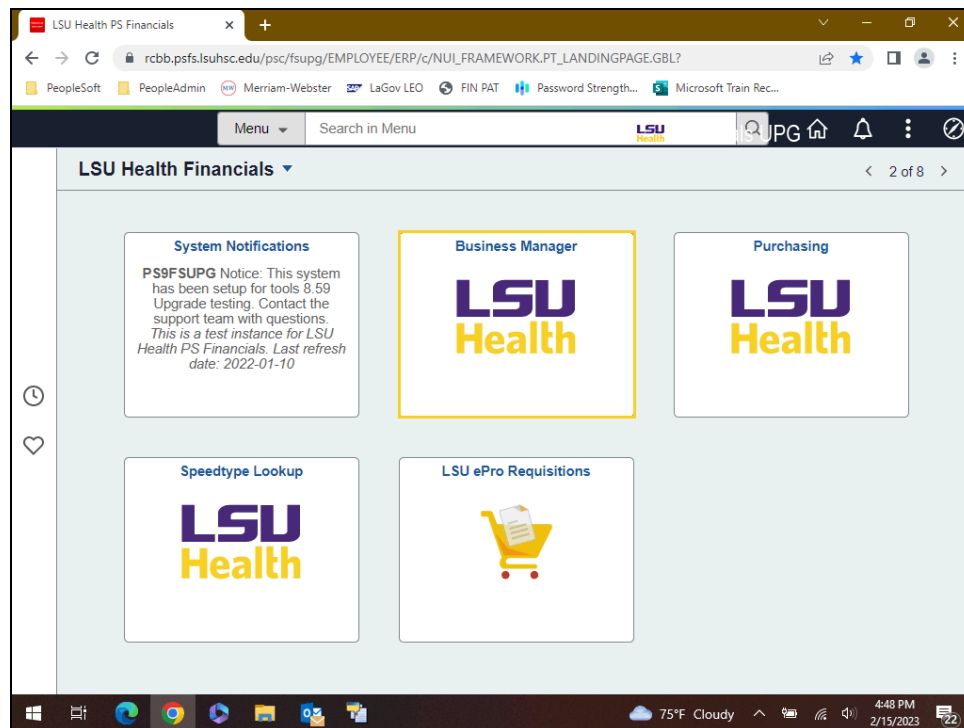| Step	Action
1.	Launch PeopleSoft Financials. ***NOTE: In this example the Upgrade (UPG) database is used. This is for training purposes only. Normally, users will launch the Production (PRD) database.*** Click the **Start** button. Start
2.	**"My Financials Home"** is the default landing page when users log into a PeopleSoft Financials database. The name of the Homepage is seen at the top left of the screen. **My Financials Home** is where users can personalize and add quick navigations that direct you to frequently used pages. **My Financials Home** can be the user's favorites or more generic. Users have access to modify the **My Financials Home** as much as desired.

Step	Action
3.	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 may select the drop-down arrow to view additional options. Click the button to the left of the **My Financials Home** field. ▼
4.	To navigate between **My Financials Home** and **LSU Health Financials**, select the drop-down selection arrow next to *My Financials Home* and choose *LSU Health Financials*. Click the **LSU Health Financials** menu. LSU Health Financials
5.	**"LSU Health Financials"** is the Financials homepage where you will access the tiles and navigation collections to which you have access. Defaulted tiles cannot be removed from the page. However, users may personalize the page by adding tiles or pages to the page that are often used. Tiles that you may see on the **LSU Health Financials** are: *Business Manager*, *Purchasing*, e*Pro Requisitions (LSUSH only)*, and *SpeedType Lookup*. A **System Notification** tile has also been added to share system refresh information. In the future, this tile may be used for downtime notices. This is a fixed tile and cannot be removed by the user.
6.	This completes *LSU Health PeopleSoft Financials Home Pages*. **End of Procedure.**

Access and Navigate the Business Manager Tile

Topic Contents

1. Landing page - Worklist
2. Parts of page
3. Intro to Navigation Collection
4. Topics included in each Navigation Collection
5. Exploring the Requisition navigation collection
6. Using the Navigation Area button
7. Returning the LSU Health Financials homepage
8. Exploring Grants & Project Costing
9. Exploring the Billing & A/R folder
10. Sign Out of PeopleSoft

Step	Action
1.	Select the **Business Manager** tile to view the related *Navigation Collection*. Click the **Business Manager** button.
2.	The landing page for the **Business Manager** tile is the *Worklist* where you can approve requisitions and/or vouchers and payment requests.
3.	Notice that the screen is divided into two **(2)** parts. The *left side* of the screen is similar to a *menu selection* with grey folder tiles containing an arrow that expands the folder when selected. Each folder section contains links to commonly used menu options. The *right side* of the screen is the *work area*.

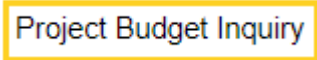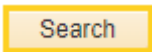| Step	Action
4.	Each folder is a navigation collection containing links to pages you may use during the course of your work. There are action pages such as entering a requisition, creating a payment request, or the worklist where you may approve a requisition or a voucher. There are also a large number of inquiry pages where you can review status information on your projects, awards, purchase orders, departmental asset, etc. Each nav collection will be expanded and collapsed in this topic for your review. By exploring the navigations, you will see how you gain efficiencies by using the navigation collection.
5.	**What is included in the navigation collection?** **1. Worklist** **a.** My Worklist - Summary View **b.** Monitor Approvals - Workflow **2. Grants & Project Costing** **a.** Award – project inquiry for a project associated with an award **b.** Project Costing – General info – project inquiry on a project from the project costing module **c.** Project Activity – inquiry page for activities associated with a project **d.** Award Profile – award inquiry where users can navigate to associated contract or project info **e.** Project Budget Inquiry – inquiry on a project budget **f.** Review Award Modification – inquiry on award modifications by project
6.	**What is included in the navigation collection?** (continued) **3. Billing & A/R** **a.** Billing Invoice Details – inquiry into the billing invoices for a project **b.** Item Activity Summary – inquiry into AR item activity by billing item **4. Requisition** **a.** Worklist – link to the worklist **b.** Add/Update Requisitions – create or update a purchase requisition **c.** Print Requisition – run the process to print a requisition **d.** Requisitions – requisition inquiry **e.** Budget Check – run the budget check process on a requisition **f.** Document Status Inquiry – inquiry into requisition document status and associated documents **g.** Req and PO Budgetary Activity Report – run the report to review requisition pre-encumbrance

Step	Action

7.	**What is included in the navigation collection?** (continued)
	
	5. Purchase Orders
	   a. Purchase Order – inquiry on purchase orders
	   b. Activity Summary – inquiry on po activity
	   c. Document Status – inquiry into po document status and all associated documents
	   d. Print POs – run the print po process
	   e. Req and PO Budgetary Activity Summary – run the report generation process to review and manage encumbrances

8.	**What is included in the navigation collection?** (continued)
	
	6. Payables
	   a. Payment Request Center – add/update a payment request
	   b. Document Status – inquiry into voucher and payment document status and all associated documents
	   c. Worklist – link to the worklist
	   d. Payment – inquiry into payments
	   e. Voucher – voucher inquiry

9.	**What is included in the navigation collection?** (continued)
	
	7. General Ledger
	   a. Chartfield Values – inquiry to the chartfields pages
	   b. LSU Speedtype Lookup – LSU Health's custom chartstring (speedtype) lookup
	   c. Run Control Maintenance – provides the user the ability to delete run controls that are not needed
	
	8. Vendor (Supplier)
	   a. Supplier – inquiry into supplier information such as id, address, location, phone info by navigating through the identifying information tabs
	   b. Review Suppliers – inquiry into supplier information – basic vendor information inquiry
	   c. Supplier Name History – inquiry to show all vendor's names for those who have had updated in the system

10.	**What is included in the navigation collection?** (continued)
	
	9. Assets
	   a. Basic Add – inquiry for users into the asset acquisition information and basic asset details
	   b. Review Purchase Order – inquiry into the po assigned to an asset
	   c. Review Cost - inquiry on the asset cost screen
	   d. Print an Asset – created a printable view of asset information for a single asset id
	   e. Search for an Asset – inquiry by asset id or asset tag

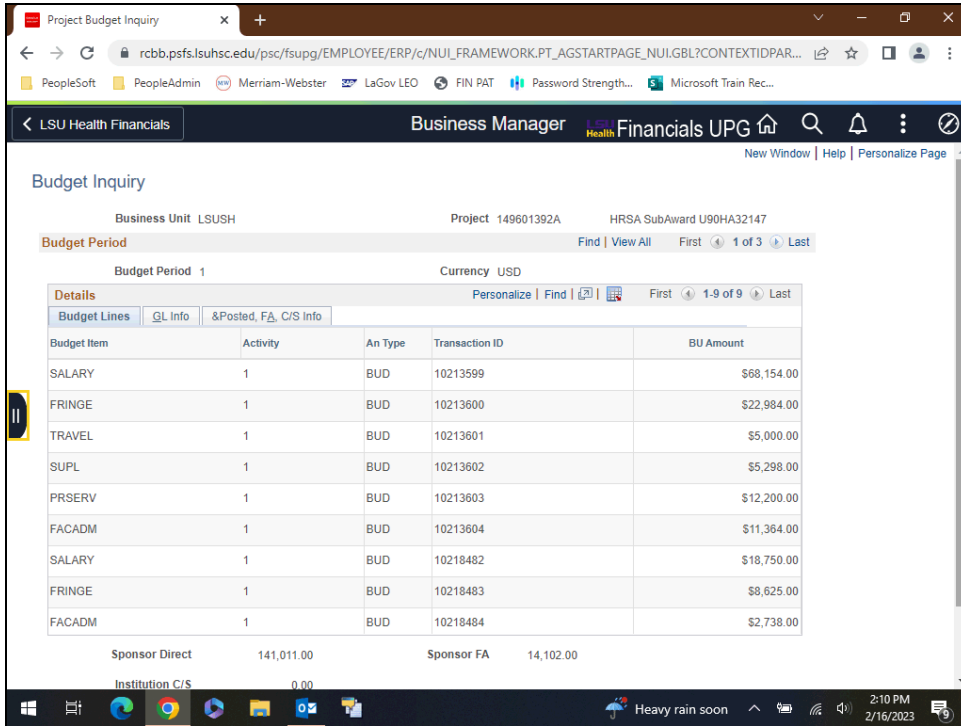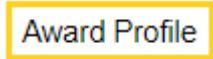| Step	Action
11.	**What is included in the navigation collection?** (continued) 10. Reporting - You may see different links based on your security as some items are more readily assigned in RPT. **a.** Query Report Viewer – granted in PRD for a limited number of BI Publisher reports written from the Journal or Ledger table and available in RPT for all BI reports **b.** Query Report Scheduler – granted in PRD for a limited number of BI Publisher reports written from the Journal or Ledger table and available in RPT for all BI reports **c.** Define Report Book – nVision for PS9FSRPT **d.** Define Report Request – nVision for PS9FSRPT and for specified users in PRD **e.** Query Manager – allowed for users in PS9FSRPT and only for users granted access in PRD **f.** Query Viewer – allowed only for users who are explicitly granted access to run query in PRD **g.** Schedule Query – allowed only for users who are explicitly granted access to run query in PRD **h.** Report Manager
12.	Click the button to the right of the **Requisition (select to expand or collapse child steps)** field.
13.	The Requisitions nav collection contains links to *add or update requisitions*, *print a req*, *inquire on requisitions*, *budget check, inquire on the document status* and *run the req and po budgetary activity report*. An additional navigation link to *access the worklist* has also been included. *NOTE: Business Managers at the Shreveport campus will have a separate eProcurement Tile for requisitions.*
14.	Click the **Document Status - REQ** button.
15.	The **Requisition Document Status** page allows you to search for/select a requisition in order to view all associated purchase orders, receipts, vouchers and payments.
16.	On the screenshot, please note the icon that displays immediately to the left of the search button that looks like **"ll"**. This icon collapses the menu section on the left to allow a larger viewing area on the page. Click the **Navigation Area** button.

Step	Action
17.	To expand the menu, select the **"ll"** button again. Click the **Navigation Area** button. ![II button]
18.	At the top left of the page in the dark blue bar, notice the **"< LSU Health Financials"** button. Select it to return to the **LSU Health Financials** homepage.
19.	**Project Budget, Award, Billing Invoice Review** If, for example, you want to review the information for a project budget to see what types of expenses are allowed on your chartstring, expand the **Grants & Project Costing** folder, then select *Project Budget Inquiry*. Click the **Grants & Project Costing (select to expand or collapse child steps)** button. ![down arrow button]
20.	Click the **Project Budget Inquiry** link. ![Project Budget Inquiry]
21.	In this example, LSUSH project 149601392A will be entered. Enter the desired information into the **Business Unit:** field. Enter "**LSUSH**".
22.	Enter the desired information into the **Project:** field. Enter "**149601392A**".
23.	Click the **Search** button. ![Search button]
24.	Hide the navigation collection to view the Budget Inquiry page. Click the **Navigation Area** button. ![II button]
25.	For this particular project *Salary*, *Fringe*, *Supplies*, *Travel, Other*, *Professional Services*, *F&A*, and *Operating Services* are allowable expenses. For other project ids, you many only see one or a handful as allowable expenses depending upon the agreement. Notice also that the displayed budget is for budget period 1 where this particular project has 3 budget periods.
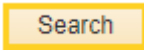
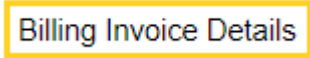| Step	Action
26.	Click the **Navigation Area** button.
27.	If you then want to view billing invoice information for that project id, you will need to know the sponsor/customer id for the contract or just the contract id. The contract id is generally the project id excluding the alpha characters. If you wanted to identify the sponsor/customer, select the **Award Profile** link from the **Grants & Project Costing** folder. Click the **Award Profile** link.
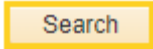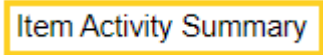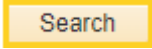
Step	Action
28.	Enter the desired information into the **Project:** field. Enter "**149601392**".
29.	Click the **Search** button.
30.	Click the **Navigation Area** button.
31.	On the Award Profile screen, the **Sponsor** name is displayed below the *Description* and *Award PI*. However, to view the Sponsor ID you must select the **View Contract** link. Click the **View Contract** link.
32.	The Sponsor ID is displayed in the **"Sold To Customer"** field. In this example, it is LSUSH customer **04662**. If you needed to review other *Award Profile* information, at the bottom left of the page, you might select the *Return to Award Profile* link. Or, you might choose to navigate back to the **Business Manager** tile. Click the **Business Manager** button.

Step	Action
33.	You will land back on the **Award Profile** search page Click the **Grants & Project Costing (select to expand or collapse child steps)** button to collapse menu. ﹀
34.	Now that you have noted the sponsor/customer id, expand the **Billing & A/R folder**, then select **Billing Invoice Details**. Click the **Billing & A/R (select to expand or collapse child steps)** button to expand menu. ﹀
35.	Click the **Billing Invoice Details** button. Billing Invoice Details
36.	The **Business Unit (BU)** defaults into the *Business Unit* field. It the **BU** does <u>not</u> default, *enter it or select it* by clicking the **Look up Business Unit** button to the right of the field. Enter the desired information into the **Customer** field. Enter "**04662**".
37.	Click the **Search** button. Search
38.	A list of invoices for the customer displays. To identify if the invoice is for the project id, select the invoice id. For this example, select **SG22-0032**. Click the **SG22-0032** link. SG22-0032
39.	Click the **Notes** link. Notes
40.	Note the **Invoice**: *SG22-0032*. Click the **Item Activity Summary** link. Item Activity Summary
41.	The **Business Unit (BU)** defaults into the *Business Unit* field. It the **BU** does <u>not</u> default, *enter it or select it* by clicking the **Look up Business Unit** button to the right of the field. Enter the desired information into the **Item ID:** field. Enter "**SG22-0032**".

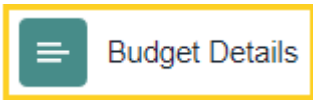| Step	Action
42.	Click the **Search** button. Search
43.	This particular invoice was entered in *October 2021* and the payment was received in *November 2021*. As you can see, this can be a helpful way to keep track of the billing and payments for your projects.
44.	Users should continue to explore all of the options included with the **Business Manager** tile. The *Sandbox* database can be utilized to further explore expanding folders and selecting links to try.
45.	To *sign out* of PeopleSoft Financials, select the **Actions** icon at the top right and then select **Sign Out**. Click the **Actions** dropdown button to activate the menu.
46.	Click the **Sign Out** menu. Sign Out
47.	This completes *Access and Navigate the Business Manager Tile*. **End of Procedure.**

Actions Icon Options
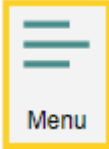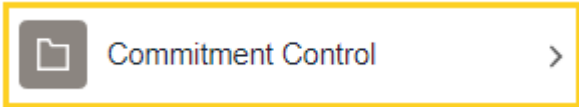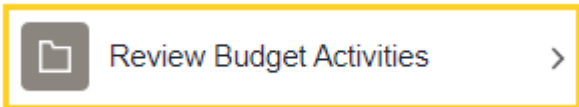
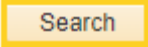| Step	Action
1.	Users can consider the **My Financials Home** page as their own personal *Favorites* page. A variety of individual pages can be added to the page to help users more efficiently navigate to often used pages. This topic provides the steps needed to add pages to the **My Financials Home** page, as well as adding a page to the *NavBar* and *My Favorites*, and using *My Preferences*.
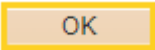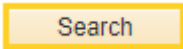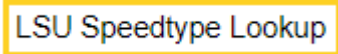
Step	Action
2.	**Action Item Options** Making changes to the *My Financials Home* page may be accomplished using the **Actions** ellipsis. The **Actions** menu list is different than when the user is on a specific page such as *Add/Update Requisitions*. Click the **Actions** button.
3.	The menu options for the **Actions** ellipsis' are the same for <u>all</u> <u>Homepages</u>. The available menu options are: • **Personalize Homepage** • **Refresh** • **New Window** • **My Preferences** • **Help** • **Sign Out**

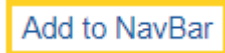| Step	Action
4.	The **NavBar** is available on any page in the system. When you click the **NavBar** button at the top right of the page, its menu will pop out from the right side. Other options personalizations and preference settings are available through the **NavBar**. For instance, users may set preferences for the **NavBar** menu order, add a navigation button to the **NavBar** menu, and/or add pages or reports to the **Favorites** menu. Click the **NavBar** button.
5.	Click the **Menu** button.
6.	Click the **Commitment Control** menu.
7.	Click the **Review Budget Activities** menu.
8.	Click the **Budget Details** list item.
9.	Once the user lands on a page, the *Actions* ellipsis options change to an **Add To** drop-down list. The new list can be used to perform various actions such as: • **Add to Homepage** • **Add to NavBar** • **Add to Favorites** • **My Preferences** • **Sign Out**
10.	In this example, the user is <u>outside</u> a navigation collection, such as the *Business Manager* tile, so s/he will only have these options from which to choose on the **Add To** list.

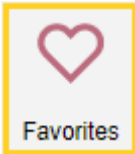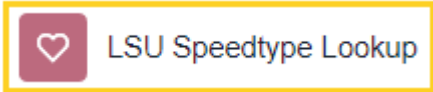| Step	Action
11.	The **Business Unit (BU)** defaults into the *Business Unit* field. It the **BU** does <u>not</u> default, *enter it or select it* by clicking the **Look up Business Unit** button to the right of the field. Enter the desired information into the **Ledger Group:** field. Enter "**PRMST_EXP**".
12.	Click the **Search** button. Search
13.	Click the **Add To** link.
14.	**Add to My Financials Home**
15.	**Add to Homepage** The **Add to Homepage** option allows users to add the selected page to the **My Financials Home** screen. Imagine that you frequently review the budget available on a project through the *Commitment Control > Review Budget Activities* navigation. You could add the inquiry to **My Financials Home** to make it easier to navigate to it and perform your inquiry. *NOTE: Not all users have access to the page. This is simply used as an example of adding a page to My Financials Home.*
16.	Click the **Add to Homepage** link. Add To Homepage
17.	A pop-up selection box displays. The page name, *Budget Details,* defaults into the ***Tile Label** field. The page name does <u>not</u> have to remain as defaulted. Users can change the name for the tile if desired (e.g., Budget Details Test Add). Enter the desired information into the **Title Label** field. Enter "**Budget Details Test Add**".
18.	You must select to which homepage you will add the tile. In this example, you will add the *Budget Details Test Add* tile to the **My Financials Home** page. Click the **My Financials Home** link. My Financials Home
19.	At the pop-up message displays indicating the tile has been added. Click the **OK** button. OK

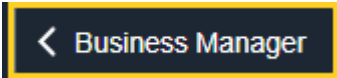| Step	Action
20.	Click the **Home** button.
21.	The tile displays on **My Financials Home**. If you wish to search for a specific project, select the tile to return to the **Budget Details Overview** page. Click the **Budget Details Test Add** button.
22.	You may search by either *Project* or **Budget Period**. In this example, you will search using **Project** 149601392A. Enter the desired information into the **Project** field. Enter "**149601392A**".
23.	Click the **Search** button.
24.	Click the **View Details** link.
25.	The **Commitment Control Budget Details** page displays. Click the **Home** button.
26.	**Add to NavBar**
27.	Click the **My Financials Home** dropdown button to activate the menu.
28.	Click the **LSU Health Financials** link.
29.	Click the **Business Manager** button.
30.	Click the button to the right of the **General Ledger (select to expand or collapse child steps)** field.
31.	Click the **LSU Speedtype Lookup** list item.

Step	Action
32.	The search page is super handy to lookup the **speedtype** for a *project* or *department*. This is a frequently used page for the user and s/he wants to *add* it to the **NavBar** to make it easy to get to. Click the **Actions** button.
33.	In this example, the user selects the **Actions** icon. A <u>different</u> list of **Actions** items displays because the user is performing the action <u>inside</u> a navigation collection (i.e., the *Business Manager* tile). The new list can be used to perform various actions such as: • **New Window** • **Add to Homepage** • **Add to NavBar** • **Add to Favorites** • **My Preferences** • **Help** • **Sign Out**
34.	Click the **Add to NavBar** link. Add to NavBar
35.	On the pop-up box, type the label for the item and click Add. Enter the desired information into the ***Tile Label** field. Enter "**LSU Speedtype Lookup**".
36.	Click the **Add** button. Add
37.	Click the **OK** button. OK
38.	Click the **NavBar** button.
39.	The NavBar displays on the right side of the page and now includes the LSU Speedtype Lookup menu option. Click the **NavBar** button to close the NavBar.
40.	**Add to Favorites**

Step	Action
41.	In this example, the **LSU Speedtype Lookup** becomes one of the user's go-to navigations and they want to add it to **Favorites**. Click the **Actions** button.
42.	Click the **Add to Favorites** link.
43.	On the pop-up, type the label, and then click Add. Enter the desired information into the ***Favorite Label** field. Enter "**LSU Speedtype Lookup**".
44.	Click the **Add** button.
45.	Click in the **OK** field.
46.	To verify that this is now a Favorite, select the NavBar. Click the **NavBar** button.
47.	Click the **My Favorites** button.
48.	The **My Favorites** list appears. *NOTE: The Edit Favorites option displays. This allows users to remove an item, change the order of items, etc.* Click the **LSU Speedtype Lookup** button.
49.	**My Preferences**

Step	Action
50.	Click the **Actions** button. ⋮
51.	Click the **My Preferences** link. My Preferences
52.	The **My Preferences** page allows users to set preferences for *tabbing over the lookup button* and *auto complete*. Both of these options can be found under the **Navigation Personalizations** option. Notice the left menu section displays the **General Settings** for these choices. If you make any changes, you must click *Save*.
53.	Any additional sections are for the *core department staff* from **GL**, **AP**, **PO**, etc., and allows users to enter some default values for their choices, as well as to set defaults for pivot grids and charts for which the user has security clearance.
54.	To navigate back to the **LSU Speedtype Lookup** page**,** click the "**< Business Manager**" button at the top left in the dark blue bar. Click the **Business Manager** button. ‹ Business Manager
55.	You are returned to the **LSU Speedtype Lookup** page.
56.	This completes *Actions Icon Options*. **End of Procedure.**