LSU Health

Fluid Homepages for Core Team Departmental Usage - Procurement

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Table of Contents

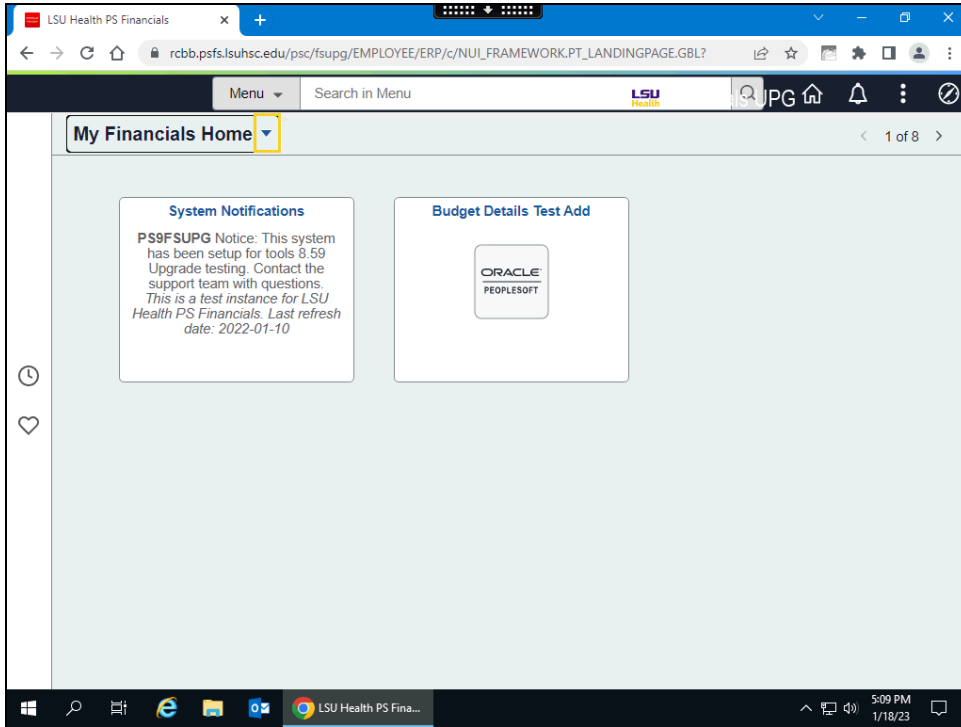# Fluid Homepages for Core Team Departmental Usage - Procurement

Navigate to Homepage

Topic Contents:

1. Introduction to Procurement 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 Procurement Homepage and Navigation Collections.
4. Supplier landing page options.
5. Return to homepage and select new tile.
6. Purchasing landing page:
    a. Worklist is default view;
    b. Expand/collapse menu options; and
    c. Available links
7. Navigate back to Procurement homepage.

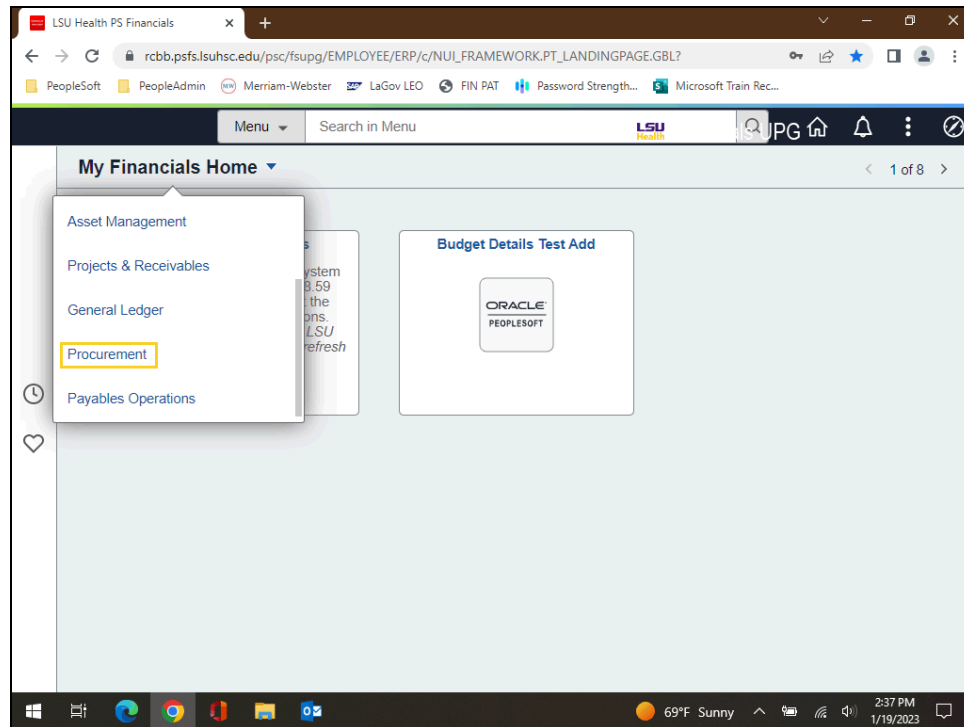| Step	Action
1.	LSUHSC PeopleSoft Financials provides a custom homepage for **Procurement** to facilitate use by the Purchasing Department. Access to the Homepage will be granted via security roles to those users who maintain the PO functions for the Institution at each campus. This homepage is not intended for the end-user community. End-Users would instead select the **LSU Health Financials** and select either the Purchasing tile or the ePro Requisitions tile.
2.	Homepage navigation is meant to provide 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. User may supplement their use of the Homepage with the NavBar as needed. *For purposes of this training, the assumption is that the user has already been trained to perform the Purchasing or ePro Buyer tasks. This training simply instructs the user in the use of the Procurement homepage.*
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 Documentation library. Each user will see a different number of homepages based upon the security access. 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.

Training Guide
for Core Team Departmental Usage - Procurement

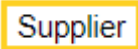| Step	Action
4.	**Method 1** On the top left of the screen shot, note the drop-down selection arrow next to My Financials Home. Selecting the arrow allows the user to see a list of each of the Homepages for which s/he has been granted access. Click the button to the right of the **My Financials Home** field. ▼
5.	The first five (**5**) options display in the drop-down window. There are eight (**8**) homepage options available. Scroll down to view additional options.
6.	**Method 2** At the top right of the screenshot, note that the user sees "**< 1 of 8 >**". Selecting the left and right arrows moves the user from one homepage to the next. Click the **Right Page** arrow. >
7.	The **LSU Health Financials** page displays. The user would continue to click the Right Page arrow until the desired homepage displays.

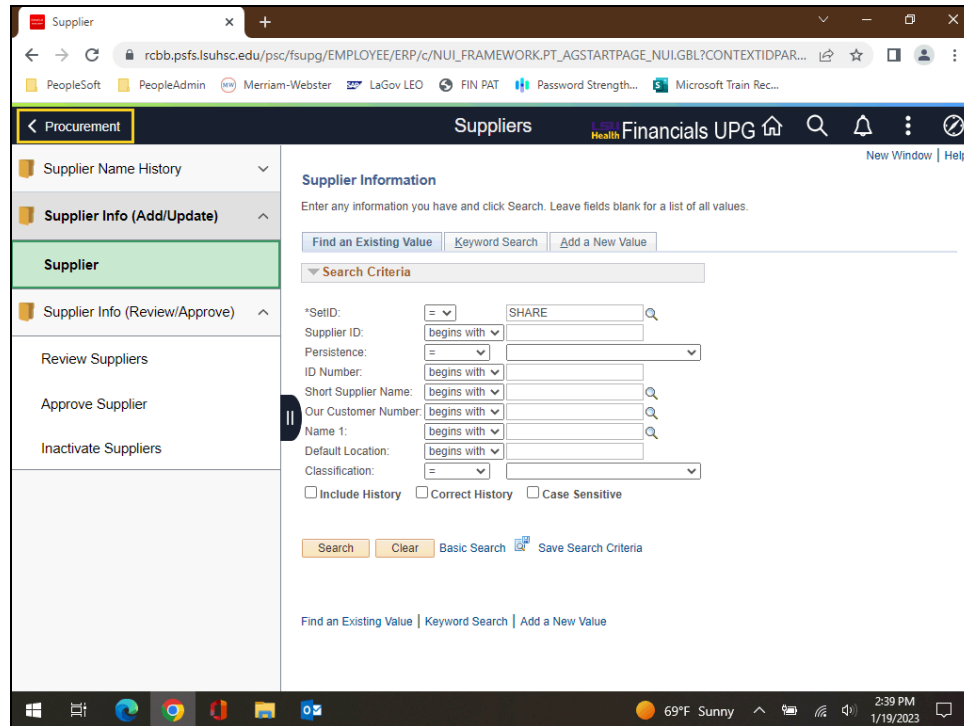| Step	Action
8.	Return to the **My Financials Home** page. Click the **Home** button. 🏠
9.	For the remainder of this exercise, the user will be using the **Procurement** homepage. Click the **Homepage Selector** dropdown button to activate the menu. 🔽
10.	Press the left mouse button over the scrollbar and drag the mouse to the desired location.

Step	Action
11.	Click the **Procurement** link. Procurement

Step	Action
12.	The Procurement homepage contains tiles or navigation collections used by the buyer teams at all campuses. Although all users granted access to the Procurement homepage will see the tiles called *LSU ePro Buyer Center, LSU ePro Requisitions and ePro Receiving*, only **LSU Health Shreveport** uses **eProcurement**. Only those users will have access to the menu options included within those tile navigation collections.
13.	Each of the tiles on the Procurement page represent a Navigation Collection (Nav Collection). A Navigation Collection is simply a grouping of menu items. The Nav Collections are developed based upon the most commonly used pages. However, it does not include every single page that the team uses. The NavBar menu may be used to supplement access to those pages.
14.	All campuses use the Suppliers menu options so that tile will be used for the next example. Click the **Suppliers** button.
15.	The landing page for the Supplier tile is the **Supplier Name History** search page. Note that the navigation collection contains menu options on the left. Each menu option includes an arrow to expand or collapse a list of available page options. Click the **Supplier Info (Add/Update)** dropdown button to activate the menu. ⌄
16.	Click the **Supplier** button. Supplier
17.	From this page, you may update an existing supplier or add a new one as needed. Click the **Supplier Info (Review/Approve)** dropdown button to activate the menu. ⌄
18.	The Supplier Info (Review/Approve) menu includes three (3) pages for inquiry, approval, and inactivating suppliers. You may not see all of these options if you do not have the appropriate page access.

Step	Action
19.	Navigate back to the Procurement page. Click the **Procurement** button. **< Procurement**
20.	The Purchasing tile will be used for the next example. Click the **Purchasing** button.
21.	The default landing page for the Purchasing tile is the user's Worklist. The navigation collection includes menu options for Requisitions, RFQs, Purchase Orders, and Reports, as well as links to the PO Distribution Print Report and the link to the Process Monitor.
22.	Click the **Expand Purchase Orders menu** graphic. ⌄
23.	As you can see, the menu includes most of the menu options used with Purchase Orders. Continue to explore the nav collection by selecting the arrow next to each of the menu options to expand and collapse a list of associated menu pages. Click the **Collapse Purchase Orders menu** graphic. ⌃

Step	Action
24.	Click the **Expand Requisitions menu** graphic.
25.	Review **Requisitions** page list. Click the **Collapse Requisitions menu** graphic.
26.	Click the **Expand RFQs menu** graphic.
27.	Review **RFQs** page list. Click the **Collapse RFQs menu** graphic.
28.	Click the **Expand Reports menu** graphic.
29.	Review **Reports** page list. Click the **Collapse Reports menu** graphic.
30.	**Collapsing the Menu** 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. Click the **Navigation Area** button to collapse the area.
31.	Select the tab once more to expand the menu display. Click the **Navigation Area** button to expand the area.

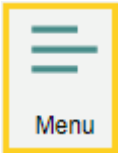| Step	Action
32.	Return to the Procurement page. Click the **Procurement** button. ‹ Procurement
33.	This completes *Navigate to Homepage*. **End of Procedure.**

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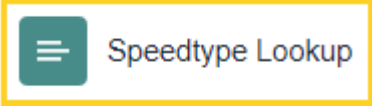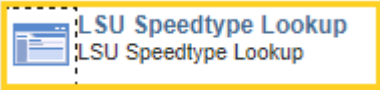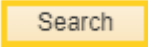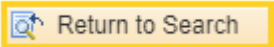
Step	Action
1.	Users may need to access a menu option not included in their Procurement homepage or one of the tile navigation collections. Users can select the NavBar icon at the top right of the page to display the options to get to a more traditional menu. Once you select the icon, the NavBar pop-out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

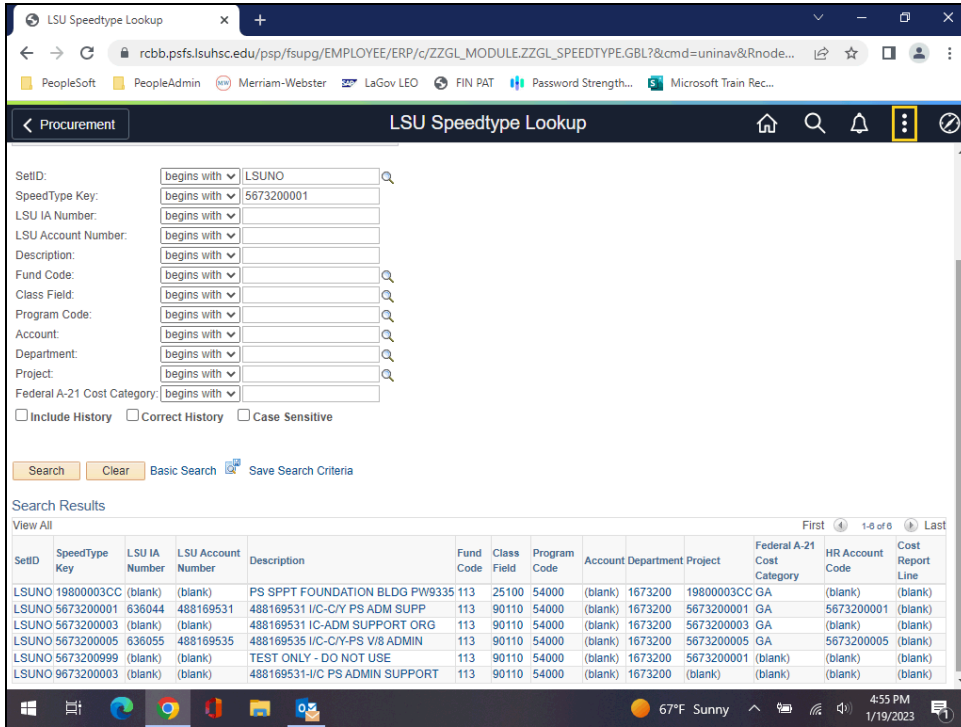| Step	Action
3.	The menu displays in alphabetical order. Scroll to the "S" section to select Speedtype Lookup. Press the left mouse button over the scrollbar and drag the mouse to the desired location.
4.	Click the **Speedtype Lookup** button. ☰ Speedtype Lookup
5.	Click the **LSU Speedtype Lookup** link. LSU Speedtype Lookup LSU Speedtype Lookup
6.	On the landing page, the user may enter information to focus the search for a speedtype, thus reducing the number of results returned. In this example the following parameters will be entered: **SetID** - LSUNO **Department** - 1673200 **Fund** - 113 Enter the desired information into the **SetID:** field. Enter "**LSUNO**".
7.	Enter the desired information into the **Department:** field. Enter "**1673200**".
8.	Enter the desired information into the **Fund Code:** field. Enter "**113**".
9.	Click the **Search** button. Search
10.	Click the **SpeedType Key 5673200001** link. 5673200001
11.	SpeedType and chartstring information display for the selected project. Click the **Return to Search** button. ↩ Return to Search
12.	This completes *The NavBar Menu*. **End of Procedure.**

Navigational Tools

Topic Contents:

1. Add/Delete LSU Speedtype Lookup page to:
    a. Favorites
    b. NavBar
    c. My Financials Homepage
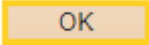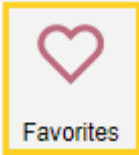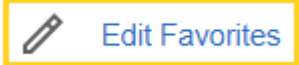**2.** Search for LSU Speedtype Lookup page using NavBar

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: **1.** NavBar Favorites; **2.** NavBar; and/or **3.** My Financials Homepage (or other homepage of choice) Examples will be demonstrated in the order listed.
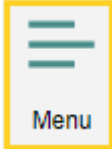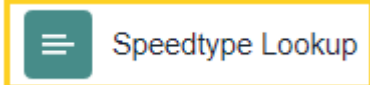
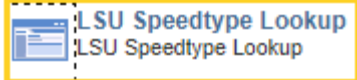| Step	Action
2.	**NavBar My Favorites**
	In this example, you are on the SpeedType Lookup page, so all that is needed is to add this page to NavBar Favorites. Begin by selecting the **Actions** button in the toolbar. A list of options for adding the SpeedType Lookup page displays.
	Click the **Actions** button.
3.	In this example, users are adding the SpeedType Lookup to the NavBar Favorites list.
	Click the **Add To Favorites** list item.
4.	The name of the page defaults into the *Favorite Label field.
	Click the **Add** link.

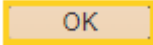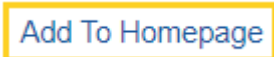| Step	Action
5.	A confirmation message displays. Click the **OK** button. OK
6.	Verify the entry has been added to NavBar **Favorites**. Click the **NavBar** button. ⊘
7.	Click the **Favorites** button. ♡ Favorites
8.	The LSU SpeedType Lookup has been added to the **Favorites** page. If you have added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

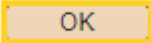| Step	Action
13.	Click the **Procurement** button. **< Procurement**
14.	**NavBar** You have been returned to the Procurement homepage. You must navigate back to the LSU SpeedType Lookup page to add it to the **NavBar**. The Actions button does not provide an option for adding a page from a Homepage. Click the **NavBar** button. ⊘
15.	Click the **Menu** button. Menu
16.	Scroll down to the **"S"** section and select SpeedType Lookup. Press the left mouse button over the scrollbar and drag the mouse to the desired location.
17.	Click the **Speedtype Lookup** link. ≡ Speedtype Lookup
18.	Click the **LSU Speedtype Lookup** link. LSU Speedtype Lookup LSU Speedtype Lookup
19.	Click the **Actions** button. ⋮
20.	Click the **Add To NavBar** list item. Add To NavBar
21.	The name of the page defaults into the *Tile Label field. Click the **Add** link. Add

Step	Action
22.	A confirmation message displays stating that the page has been added.
	Click the **OK** button.
	OK
23.	Verify that the page has been added to the NavBar.
	Click the **NavBar** button.
24.	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.
25.	Click the **Delete LSU Speedtype Lookup** button.
26.	You must save the changes before navigating away from the page.
	Click the **Save** button.
	Save
27.	**My Financials Homepage**
	Frequently used pages can also be added to the Homepage of the user's choice.
	Click the **Actions** button.
28.	Click the **Add To Homepage** list item.
	Add To Homepage
29.	A list of available Homepages displays. In this example, you will add the SpeedType Lookup page to the My Financials Home page.
	Click the **My Financials Home** link.
	My Financials Home

Step	Action
30.	A confirmation message displays stating the page has been added. Click the **OK** button. OK
31.	Verify that the page has been added to the My Financials Home page. Click the **Home** button.
32.	The page tile has been added.
33.	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 Click the **Actions** button.
34.	Click the **Personalize Homepage** list item. Personalize Homepage
35.	Click the **Delete LSU Speedtype Lookup** button.
36.	You must save the changes before navigating away from the page. Click the **Save** button. Save
37.	This completes *Navigational Tools*. **End of Procedure.**