Business Manager
Tile and Navigations

Version Date: November 5, 2025

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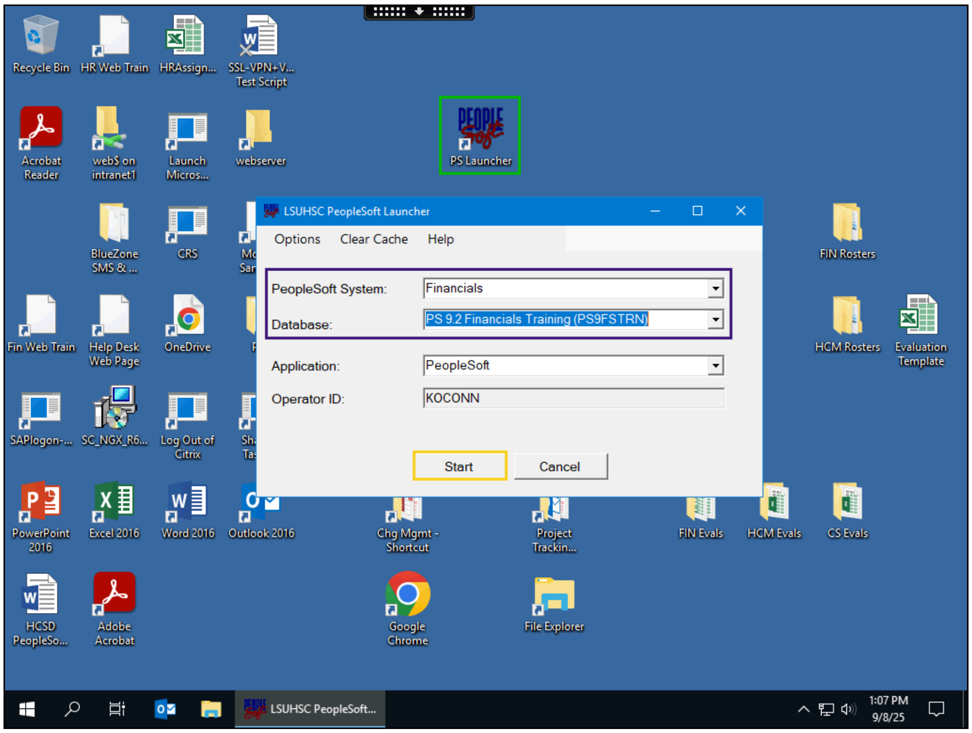
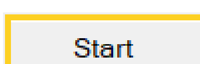
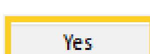
Business Manager Tile and Navigations

LSUHSC PeopleSoft Homepages

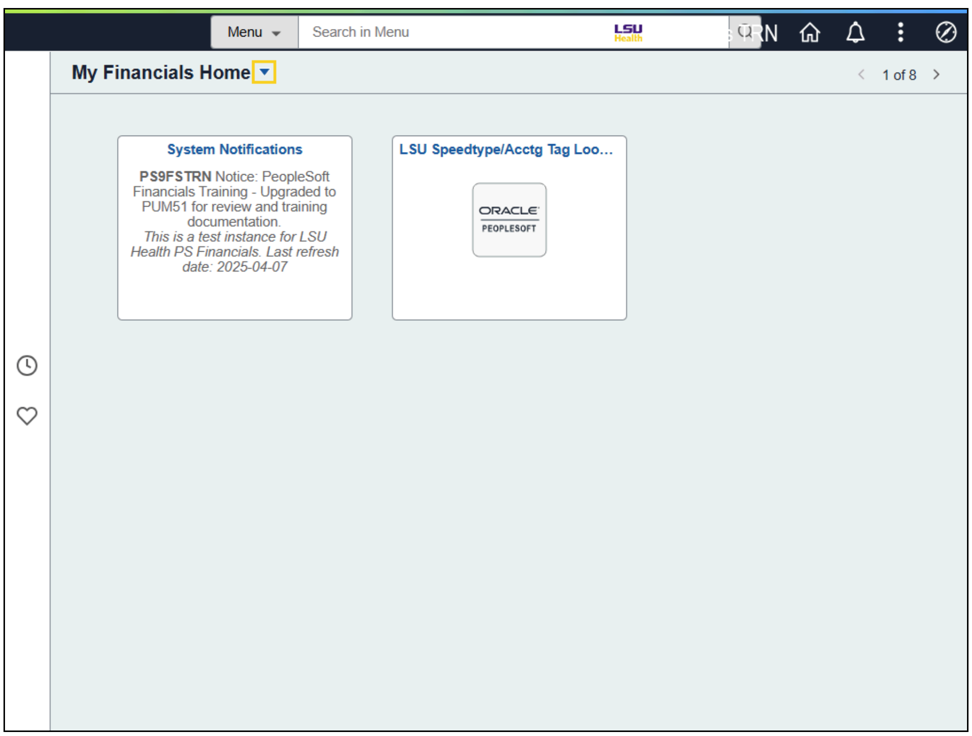
Procedure

In this topic you will learn about **LSUHSC PeopleSoft Homepages**.

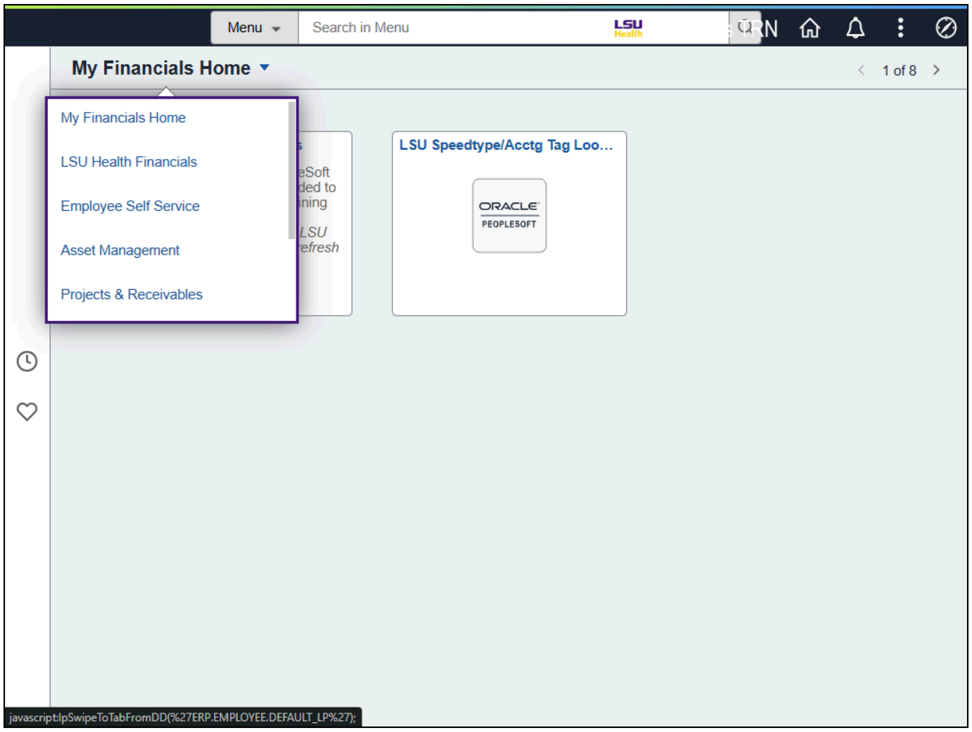


Step	Action
1.	Launch PeopleSoft Financials. ***NOTE: In this example, the Training (PS9FSTRN) database is used. This is for <u>training purposes</u> <u>only</u>. Normally, users will launch the <u>Production (PS9FSPRD)</u> database.*** Click the **Start** button. 
2.	A warning message displays stating this is a non-production database. Click the **Yes** button. 

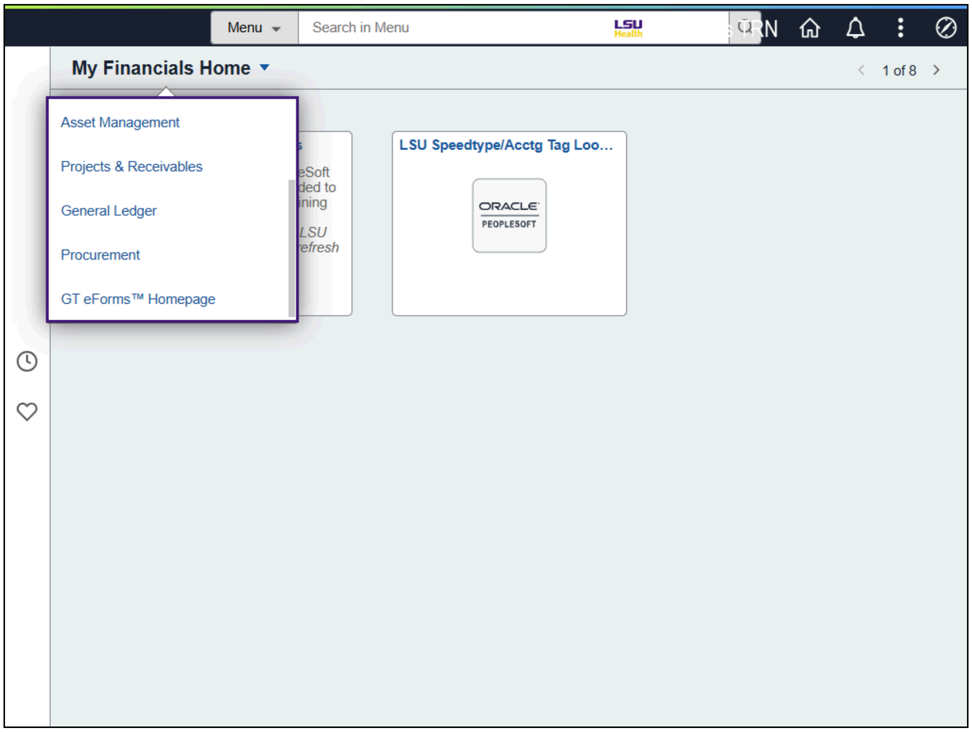
Step	Action
3.	Users must authenticate. Enter the desired information into the **User ID** field. Enter "**koconn**".
4.	Enter the desired information into the field. Enter "**************".
5.	Click the **Sign In** button. 
6.	**"My Financials Home"** is the *default landing page* when users log into 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 favorite or more generic*. Users have *access to modify* the **My Financials Home** as much as desired.



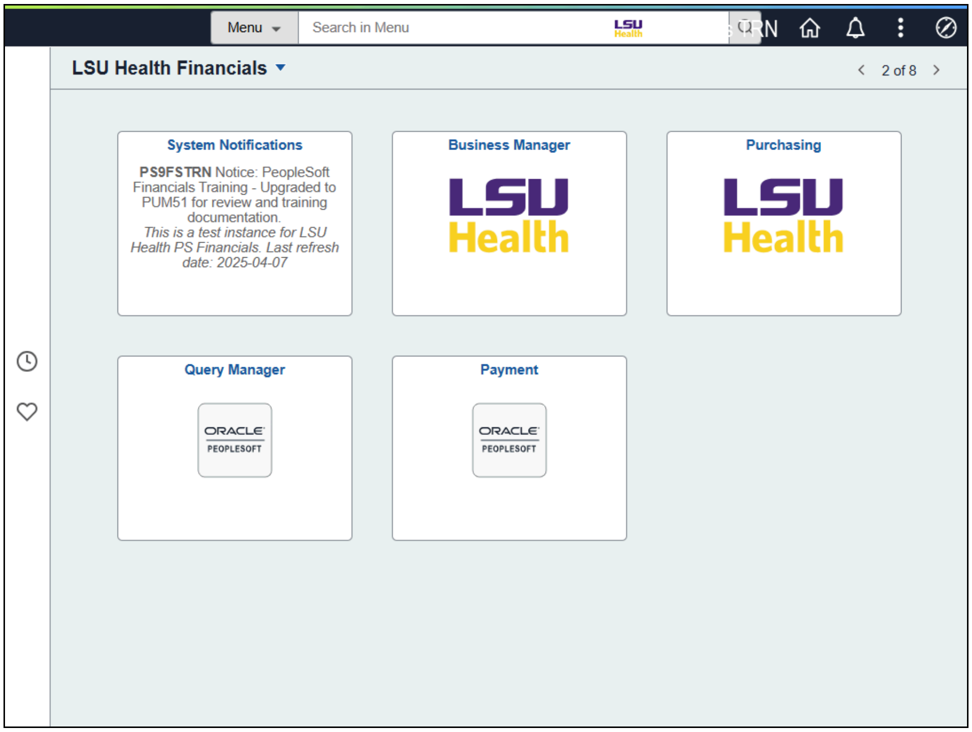
Step	Action
7.	There is a total of eight **(8)** homepage options available that you can scroll through. Depending on your user access, you may <u>not</u> see all available options. Users may select the drop-down arrow to view additional options. Click the button to the right of the **My Financials Home** field. 



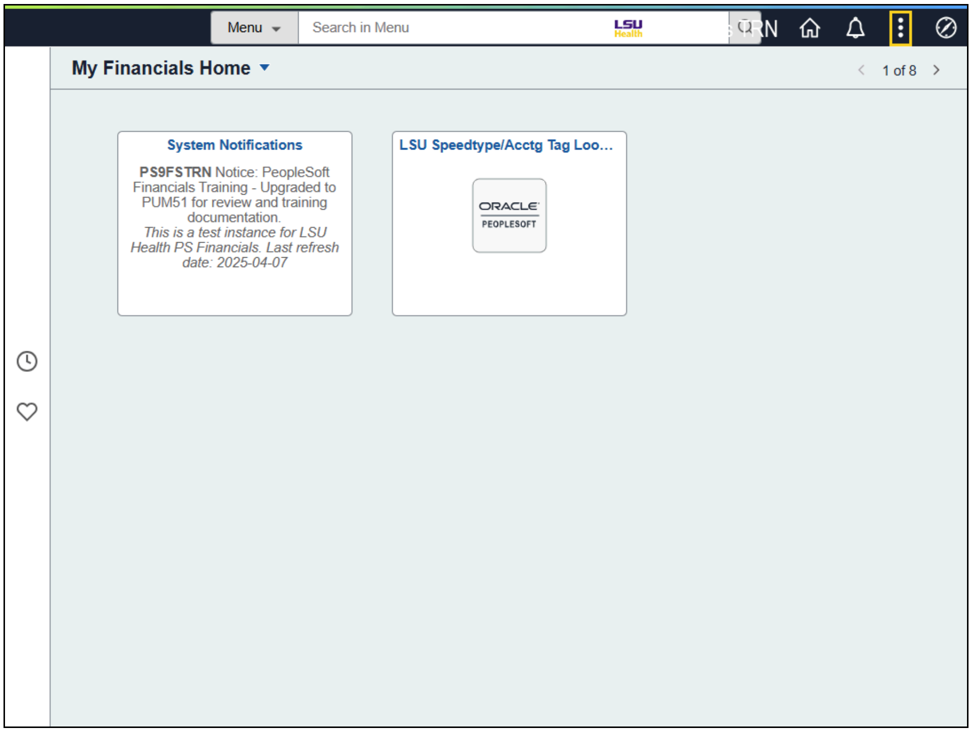
Step	Action
8.	View available homepages.



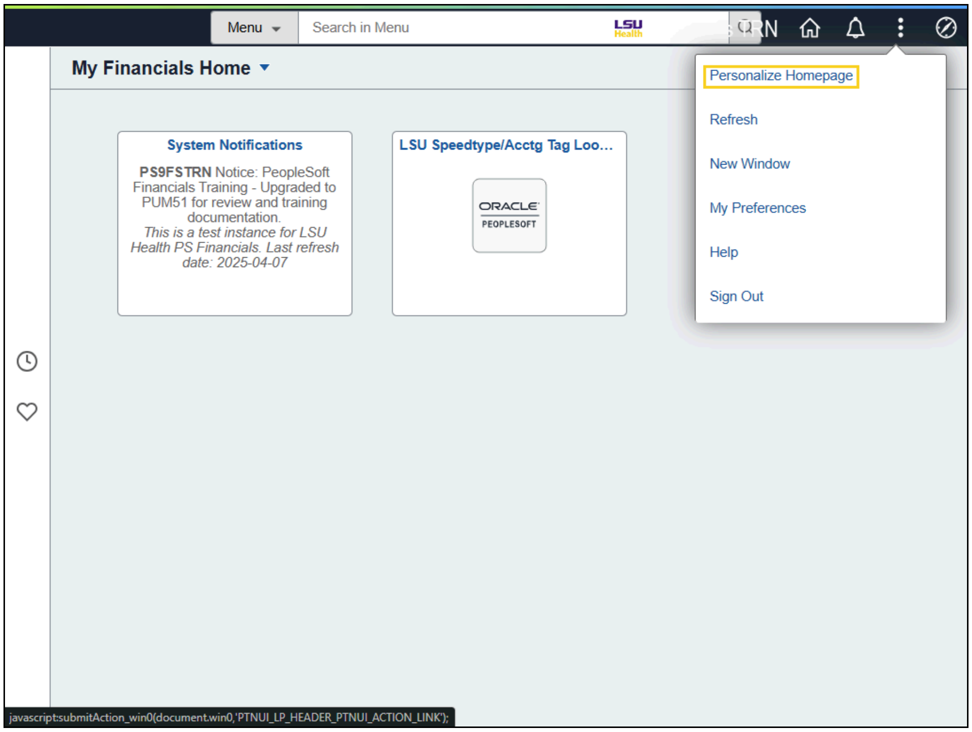
Step	Action
9.	View additional homepages.
10.	To navigate between **My Financials Home** and **LSU Health Financials**, select the *drop-down selection arrow* next to **My Financials Home** and choose **LSU Health Financials**. Click the **LSU Health Financials** button. LSU Health Financials



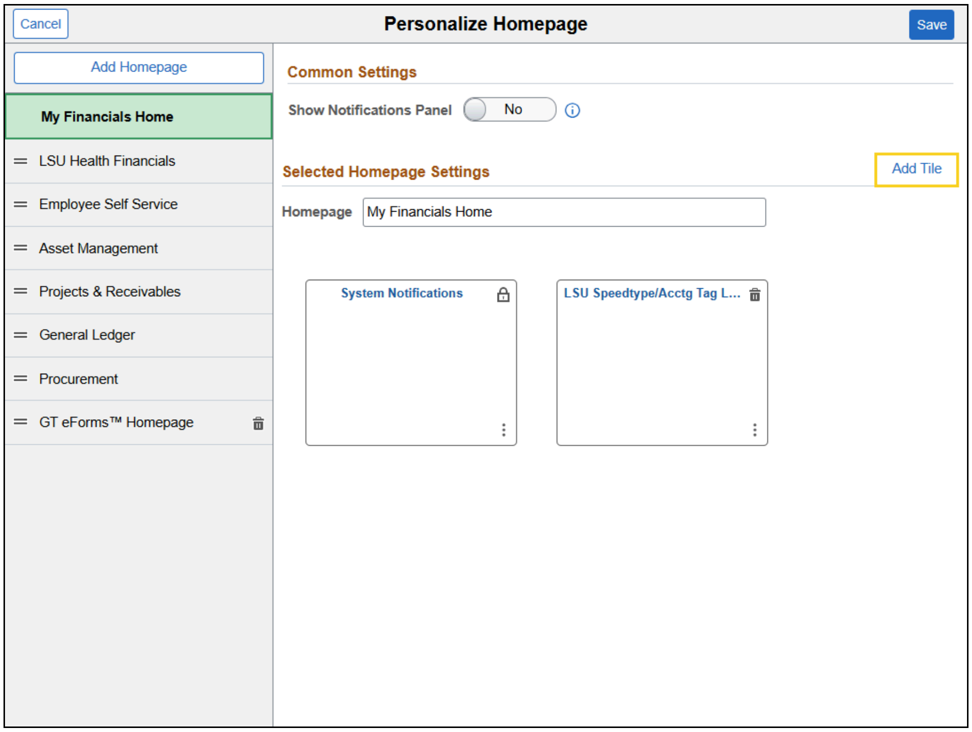
Step	Action
11.	**"LSU Health Financials"** is the Financials homepage where you will access the *tiles and navigation collections* to which *you have access*. LSUHSC IT has defaulted several commonly used Tiles onto the page. ***Defaulted tiles cannot be removed from the page.*** However, users may *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*, and *ePro Requisitions (LSUSH only)*. New tiles to be added to the LSU Health Financials Home are the *Approvals Tile*, *Payment Request Tile*, and the *LSU Speedtype/Accounting Tag Lookup, Process Monitor and Report Manager*. You may also choose to add any of these tiles to **My Financials Home**.
12.	A **System Notification** tile is displayed 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.***
13.	Add the **Approvals Tile** to **My Financials Home** so that it will be visible to you on the landing page. Click the **Home** button. 

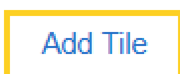


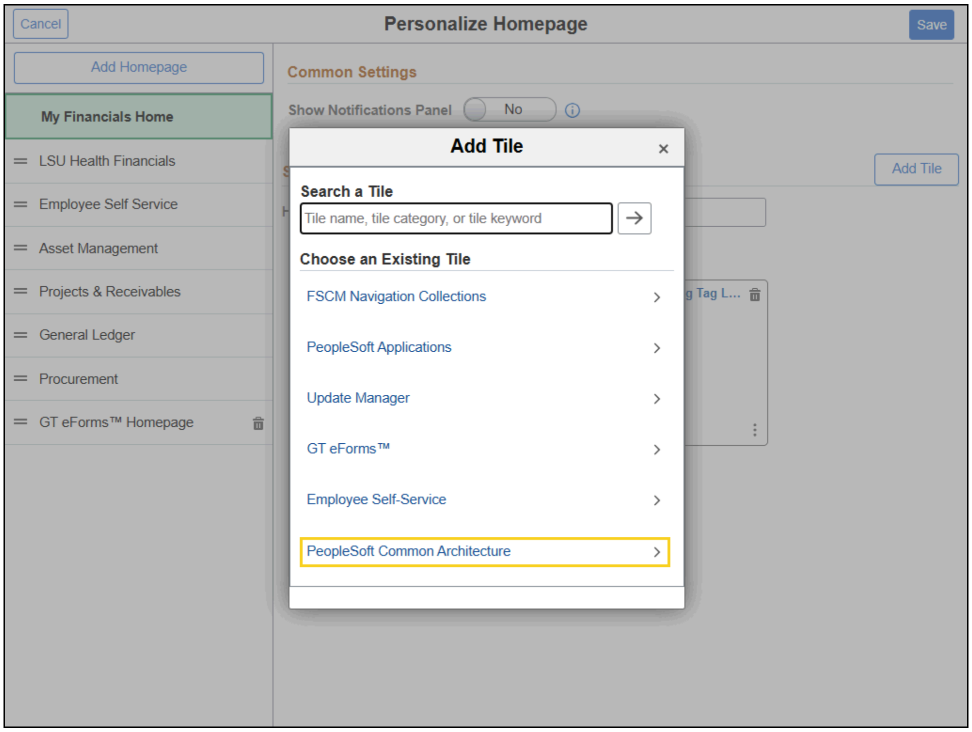
Step	Action
14.	Select the **Actions (3 stacked dots)** icon. Click the **Actions** menu. 



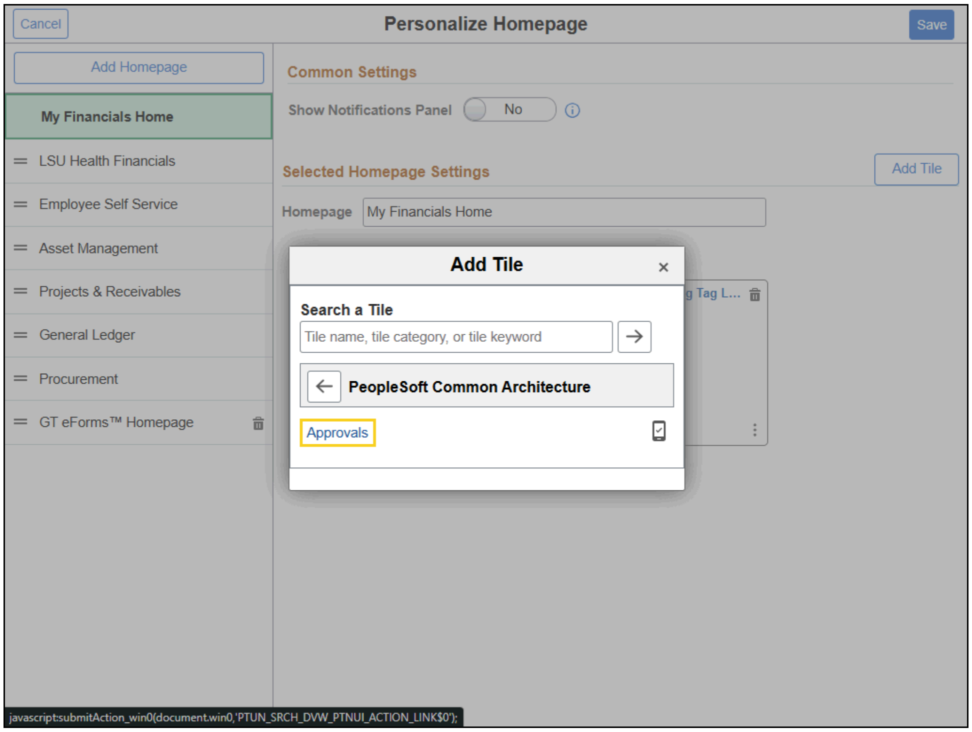
Step	Action
15.	Click the **Personalize Homepage** link. Personalize Homepage



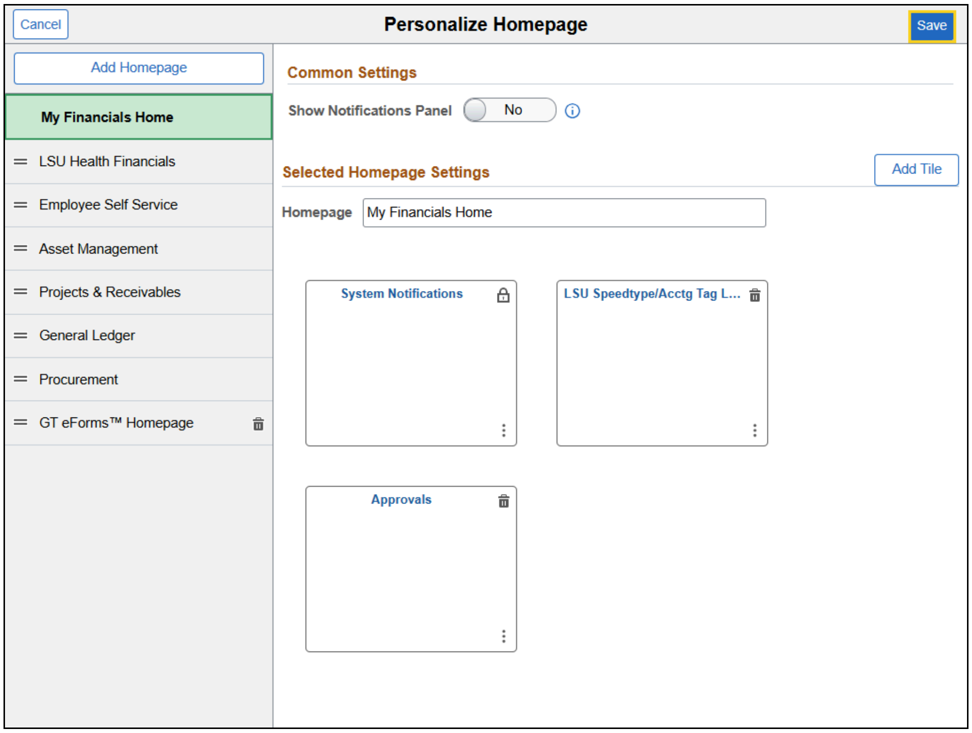
Step	Action
16.	Click the **Add Tile** button. 



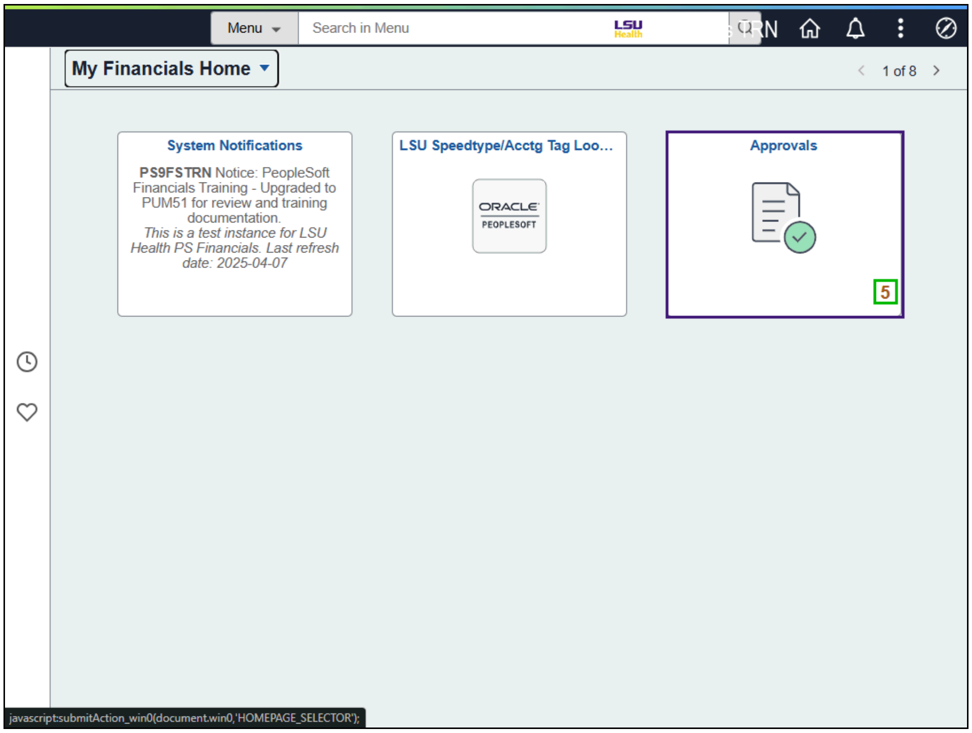
Step	Action
17.	Click the **PeopleSoft Common Architecture** link. PeopleSoft Common Architecture >



Step	Action
18.	Click the **Approvals** link. 



Step	Action
19.	The **Approvals Tile** is added to **My Financials Home** settings page. You must **Save** your changes to complete the process. Click the **Save** button. 



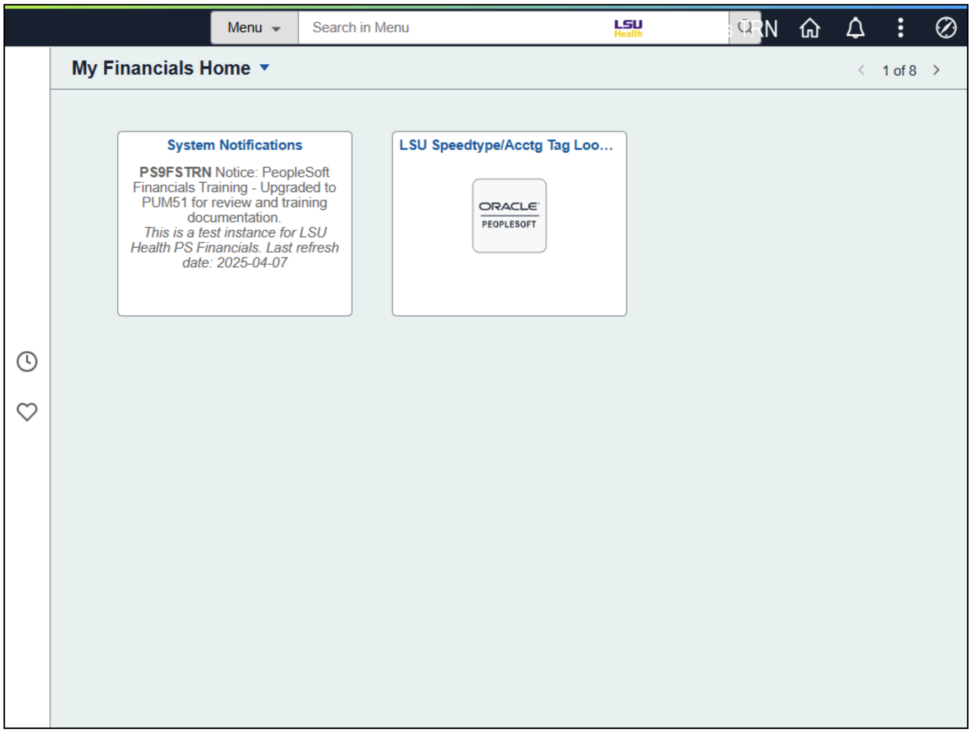
Step	Action
20.	The **Approvals** tile is displayed on **My Financials Home**. A *counter* appears in the *lower right corner* of the tile identifying the *number of pending actions* the user has.
21.	This completes ***LSUHSC PeopleSoft Homepages***. **End of Procedure.**

Icons and Terminology used in Fluid Navigation

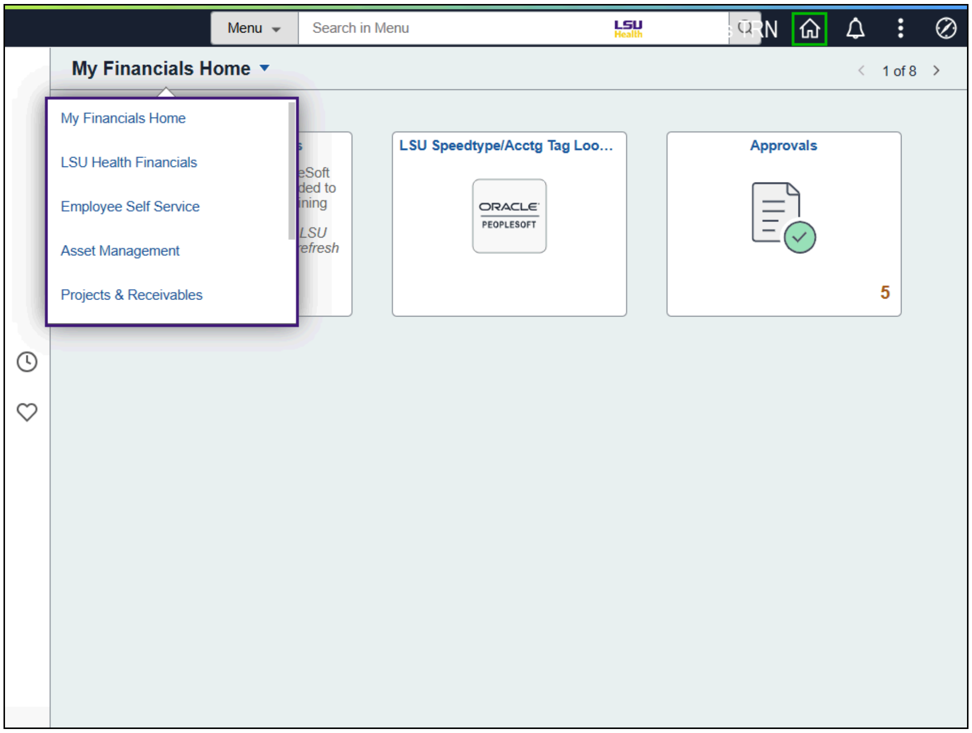
Procedure

In this topic you will learn about **Icons and Terminology used in Fluid Navigation**.

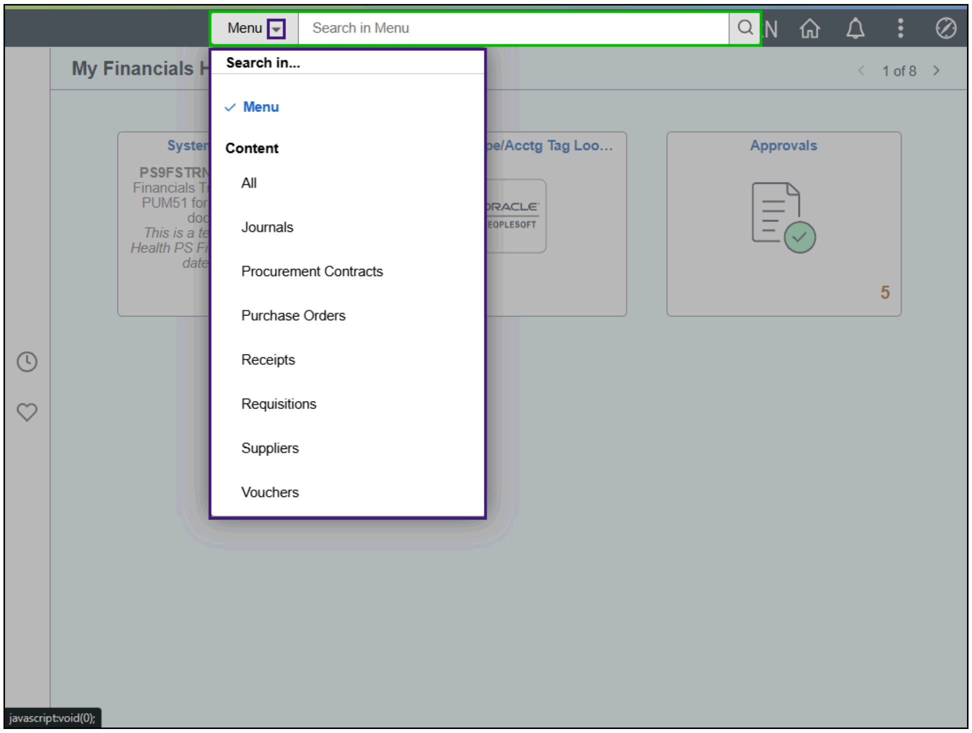
Step	Action
1.	**Introduction to Business Manager Tile and Navigations** Fluid navigation provides a more modern look and feel to the PeopleSoft screens. The navigation methodology changes from a traditional breadcrumbs and menu list to fluid versions containing Tiles and Navigation Collections. This document introduces the fluid navigation, terminology, and the custom Business Manager tile and navigation.



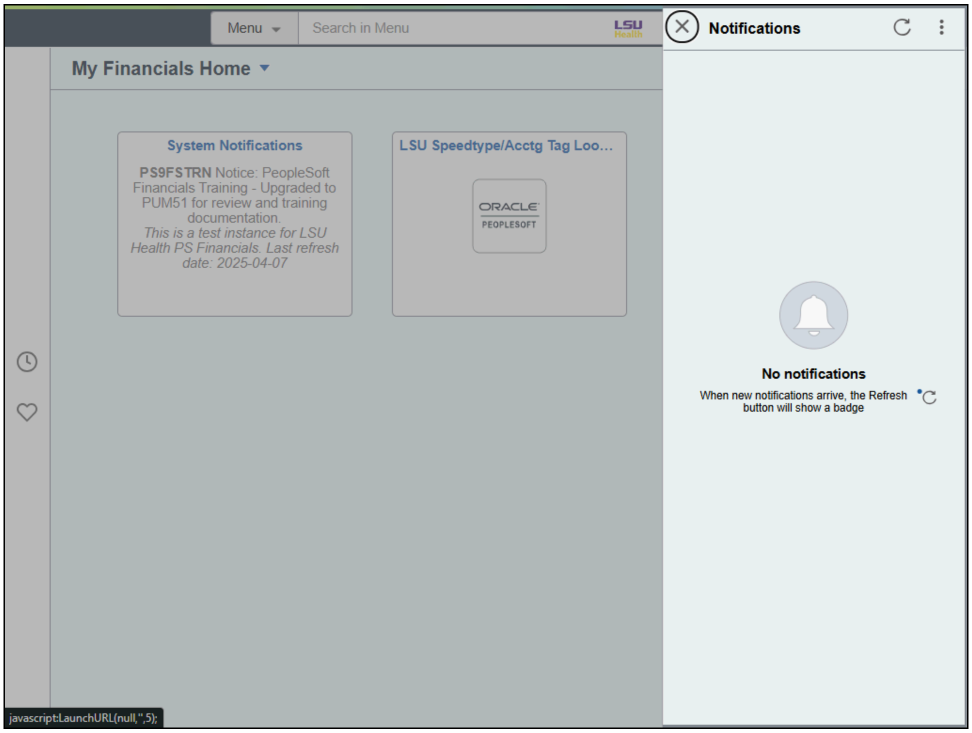
Step	Action
2.	**Icons and Terminology used in Fluid Navigation** The *landing page* when logging into PeopleSoft Financials is called **My Financials Home**. Each user may *personalize* **My Financials Home** with navigations they frequently utilize. LSUHSC IT has created the *Business Manager tile* and *navigations* to 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. This *tile may* be *added* to **My Financials Home**.



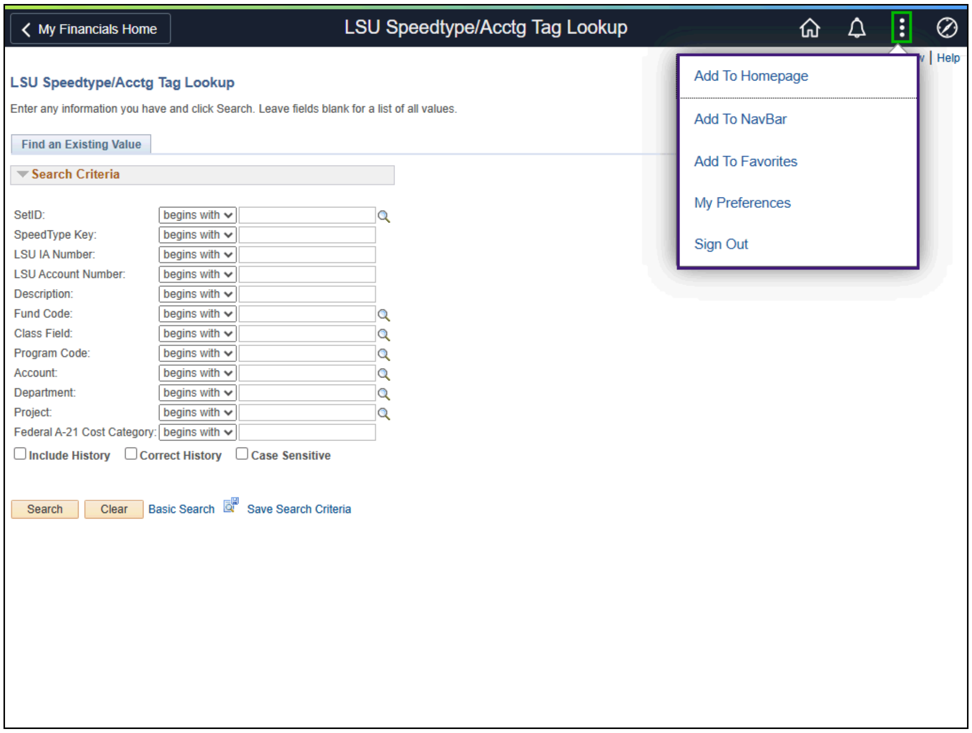
Step	Action
3.	**Icons and Terminology used in Fluid Navigation** (continued) **Home Icon** - returns users to the homepage The **My Financials Home** is the default landing homepage for all users. *Additional homepages* can be viewed by *clicking the drop-down arrow* to the right of **My Financials Home**. ***GTeForms*** and ***LSU Health Financials*** are *commonly used* homepages.
4.	**Icons and Terminology used in Fluid Navigation** (continued) The **System Notification** tile is used to alert users to events such as scheduled downtimes or maintenance, as well as other feature information. It also provides a reminder of the database the user has entered.



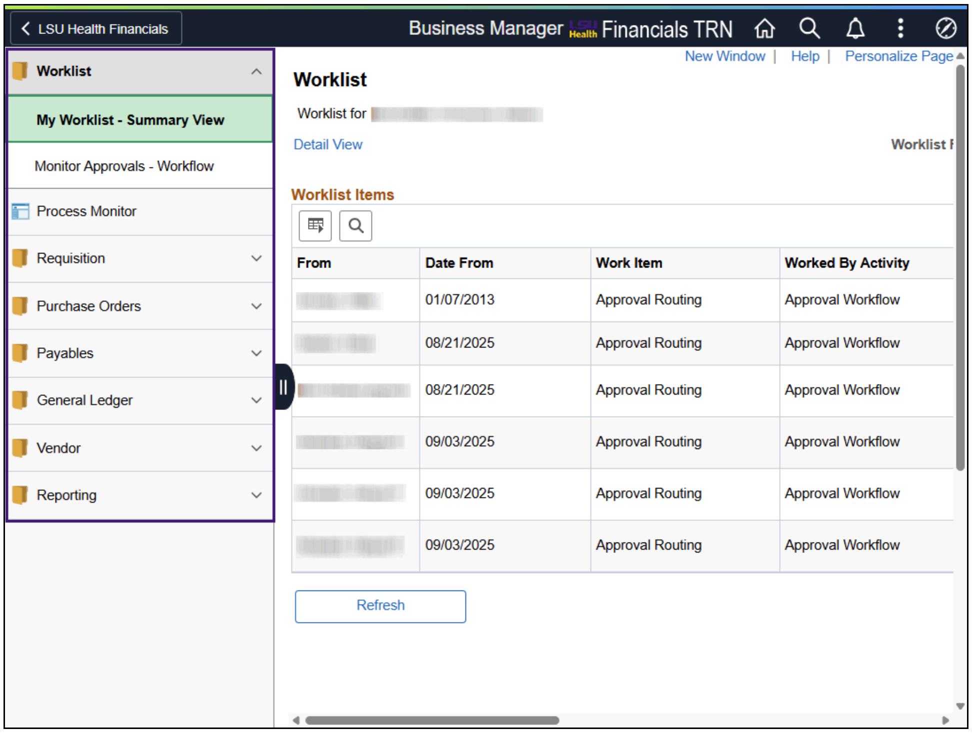
Step	Action
5.	**Icons and Terminology used in Fluid Navigation** (continued) Use the **Search** field to locate pages when you are *not sure of the navigation*. Select the *drop-down button* to the right of **Menu** to *search* by a *specific topic* (e.g., Requisitions, Grants, Vouchers, etc.)



Step	Action
6.	**Icons and Terminology used in Fluid Navigation** (continued) **Notification Panel and Notification Bell -** used to alert users that there are items requiring attention. ***This is used with Fluid navigations enabled. Push notifications will <u>not</u> be available now but will be enabled after the next tools upgrade. The description that follows is information currently in place.*** Users will utilize their *Worklist* and the *Approvals Tile* for managing their approval items. The **My Financials Home** screenshot provides an example of the Notifications Panel. The *Notification Bell does <u>not</u> display when the Notification Panel is shown.* When a user navigates into a page, the *Notification Bell* displays at the *top right*, next to the icon for Home, NavBar and the ellipses.



Step	Action
7.	**Icons and Terminology used in Fluid Navigation** (continued) **Action Ellipses** - used to perform various actions including signing out Items on the **Actions** menu will *change depending on the page* you are on. This example shows the Action items on the LSU Speedtype/Acctg Tag Lookup page. • **Add to Homepage** • **Add to NavBar** • **Add to Favorites** • **My Preferences** • **Sign Out**
8.	**Icons and Terminology used in Fluid Navigation** (continued) **NavBar** - used to select the right-side navigation and menu options
9.	**Icons and Terminology used in Fluid Navigation** (continued) **Tiles** - Tiles are used as a graphic representation of collection of pages and navigations



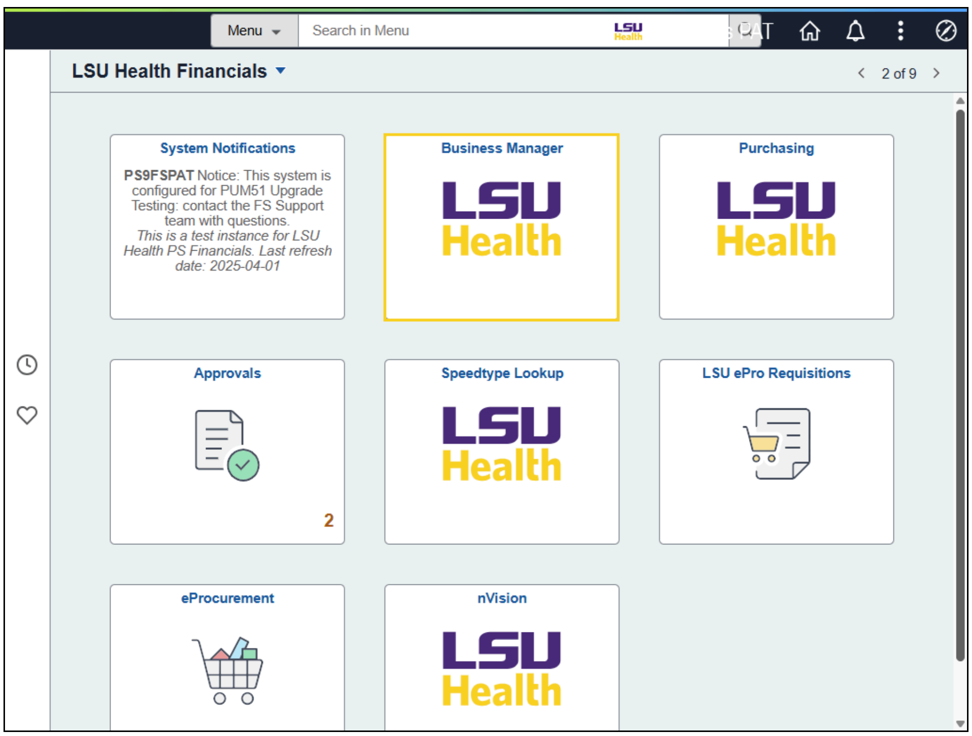
Step	Action
10.	**Icons and Terminology used in Fluid Navigation** (continued) **Navigation Collection -** This is also known as a *Nav Collection*. These are groups frequently used menu navigation links grouped together on a tile to facilitate ease of access in the system. The tiles and navigation collections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

Access and Navigate the Business Manager Tile

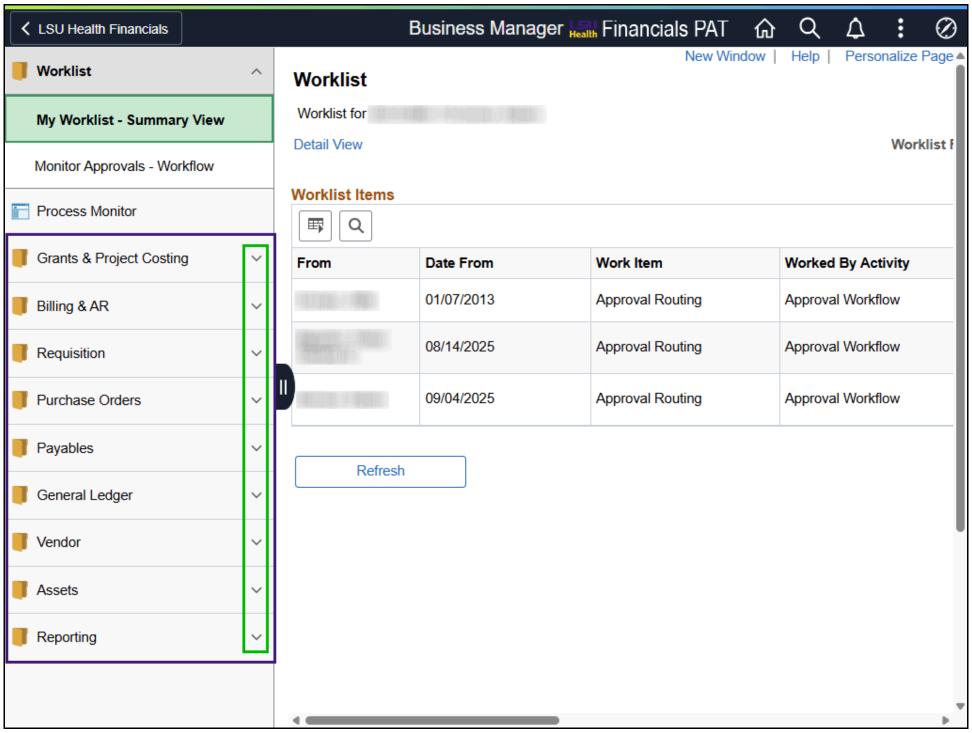
Procedure

In this topic you will learn how to **Access and Navigate the Business Manager Tile**.

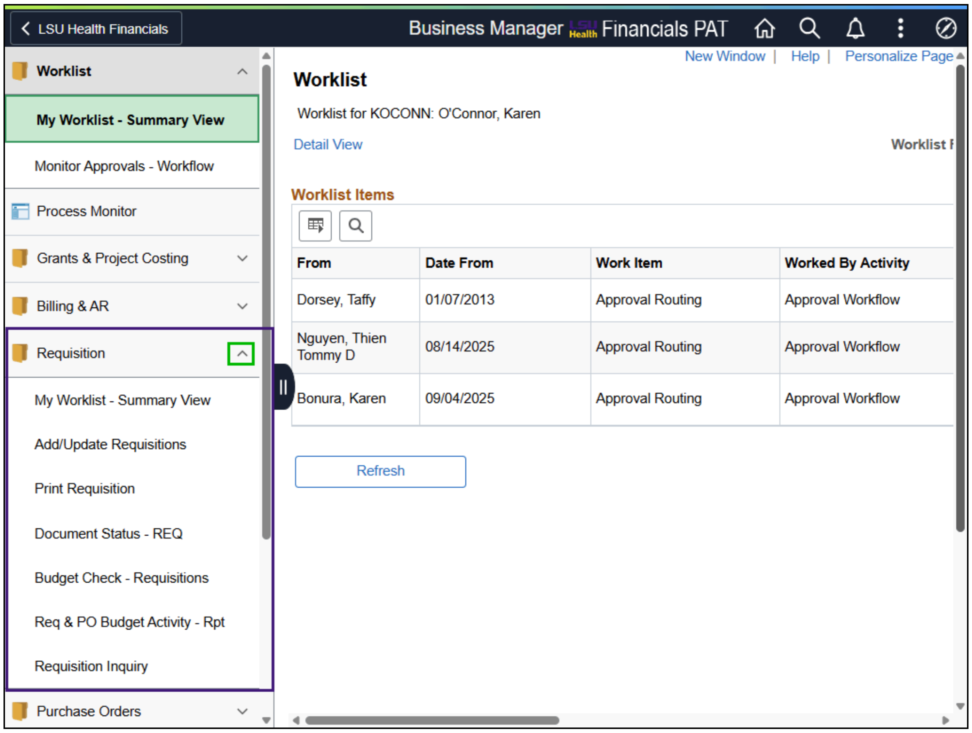
Step	Action
1.	***NOTE: This topic was completed using the PS9FSPAT database for training purposes only. Normally, these actions will be performed by users in the PS9FSPRD (Production) database.***



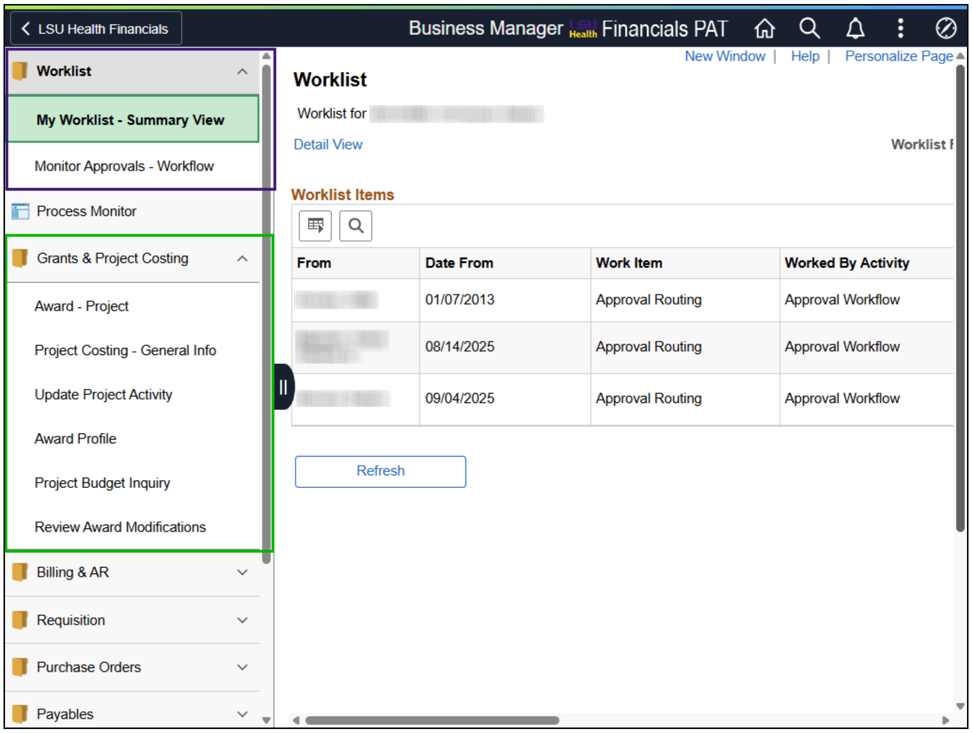
Step	Action
2.	Select the **Business Manager Tile** to view *Navigation Collections*. Click the **Business Manager** button.
3.	The landing page for the **Business Manager** tile is the *Worklist* where you can approve requisitions and/or vouchers and payment requests.



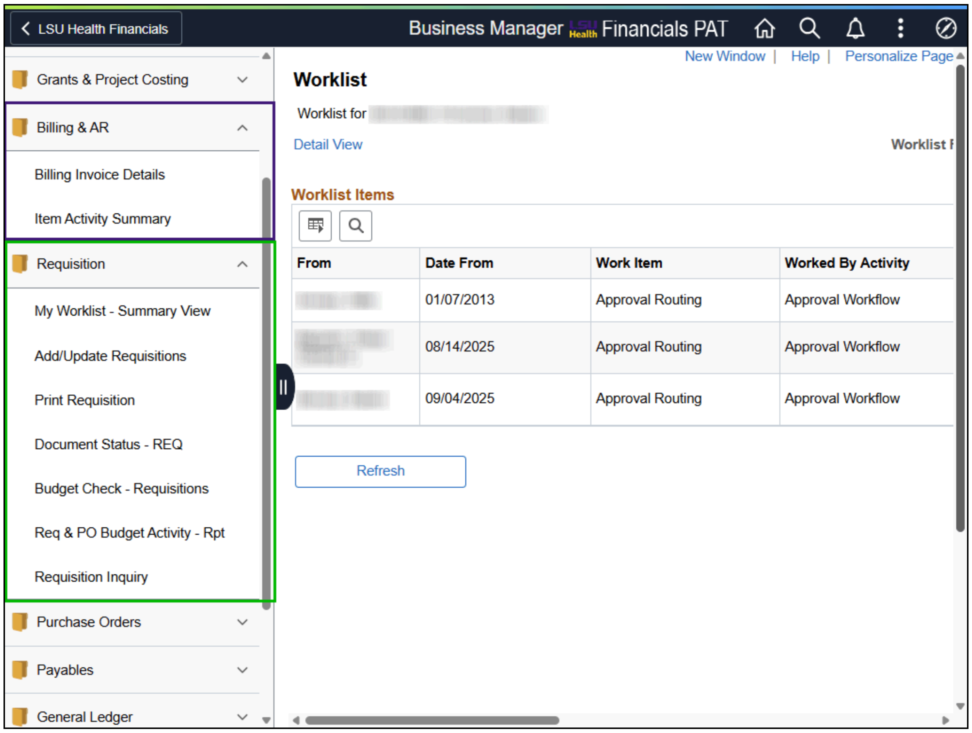
Step	Action
4.	Notice the screen is divided into two **(2)** parts. The *left side* of the screen is like a *menu selection* with grey folder tiles containing an arrow that expands the folder when selected. Each folder section contains links to commonly used menu options. On the *right side* of the screen is the *work area*.



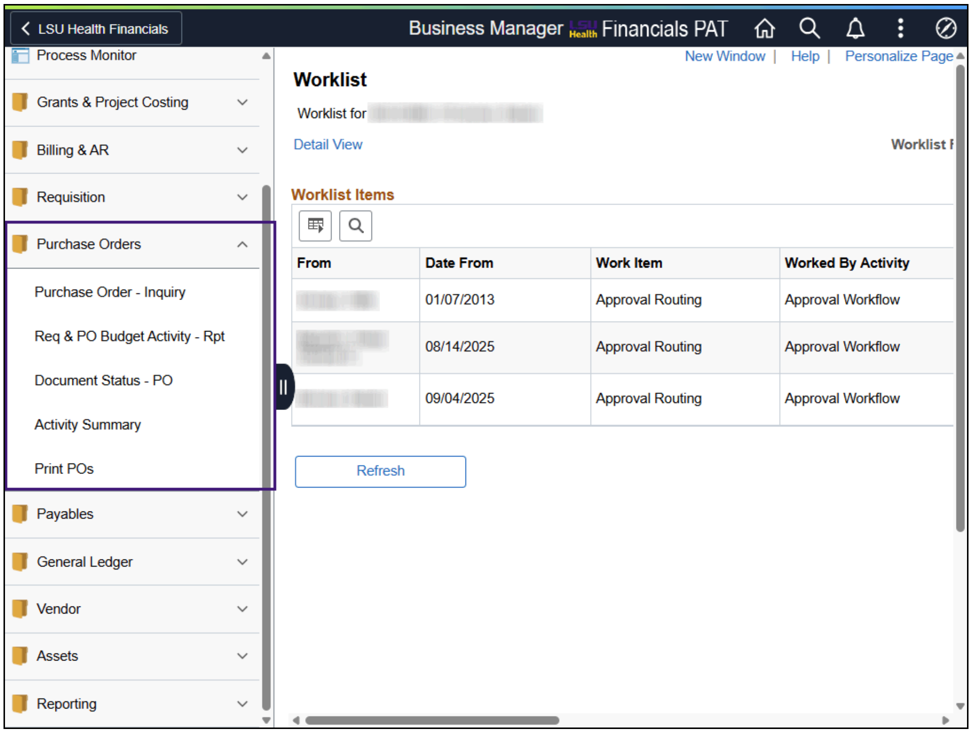
Step	Action
5.	*Each folder* is a *navigation collection* containing links to pages you may use while you work. There are *action pages* such as *entering a requisition*, *creating a payment request*, or the *worklist* where you may *approve a requisition or voucher*. There are many *inquiry pages* where you can *view status information* on your *projects*, *awards*, *purchase orders*, *departmental assets*, etc. Each navigation collection will be expanded and collapsed in this topic for your review. By exploring navigations, you will see how you *gain efficiency* by using the navigation collection.



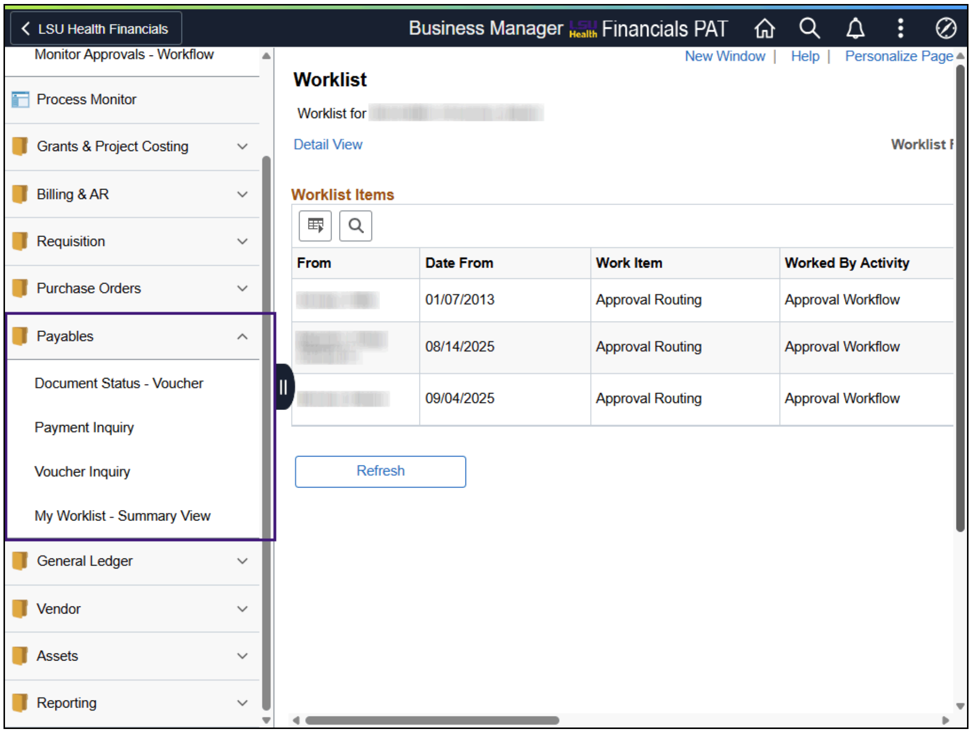
Step	Action
6.	**What is included in the navigation collection?** **1. Worklist** a. **My Worklist** - Summary View b. **Monitor Approvals** - Workflow **2. Grants & Project Costing** a. **Award** - project inquiry for a project associated with an award b. **Project Costing** - General information - 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 information e. **Project Budget Inquiry** - inquiry on a project budget f. **Review Award Modifications**



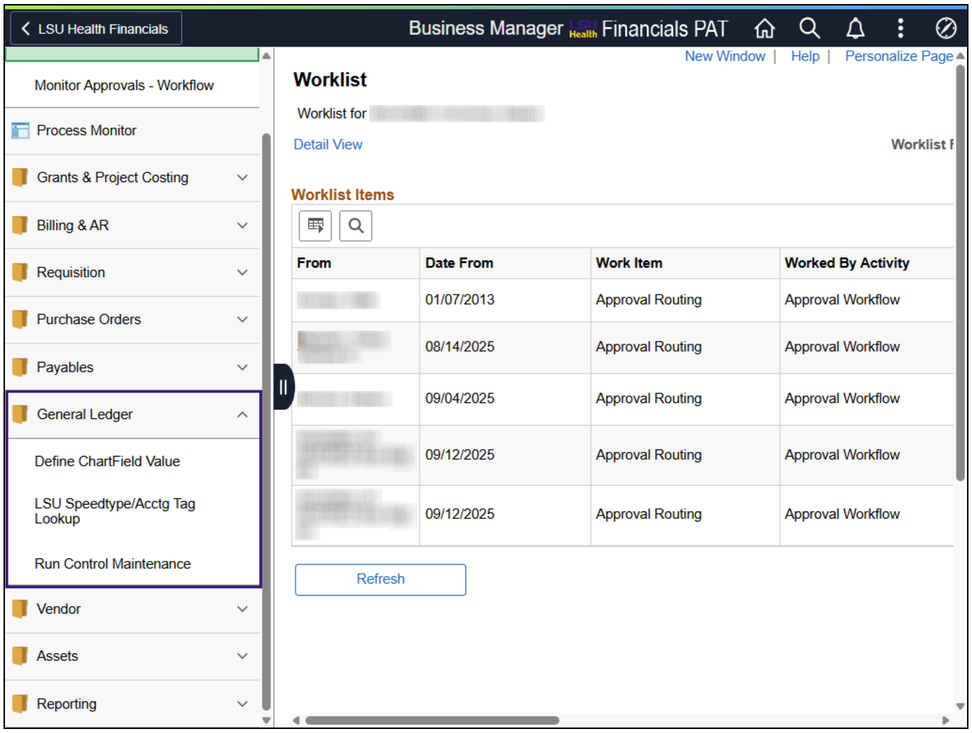
Step	Action
7.	**What is included in the navigation collection?** (continued) **3. Billing & A/R** a. **Billing Invoice Details** - inquiry into the billing invoices for a report b. **Item Activity Summary** - inquiry into AT item activity by billing item **4. Requisition** a. **Worklist** - link to 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-encumbrances



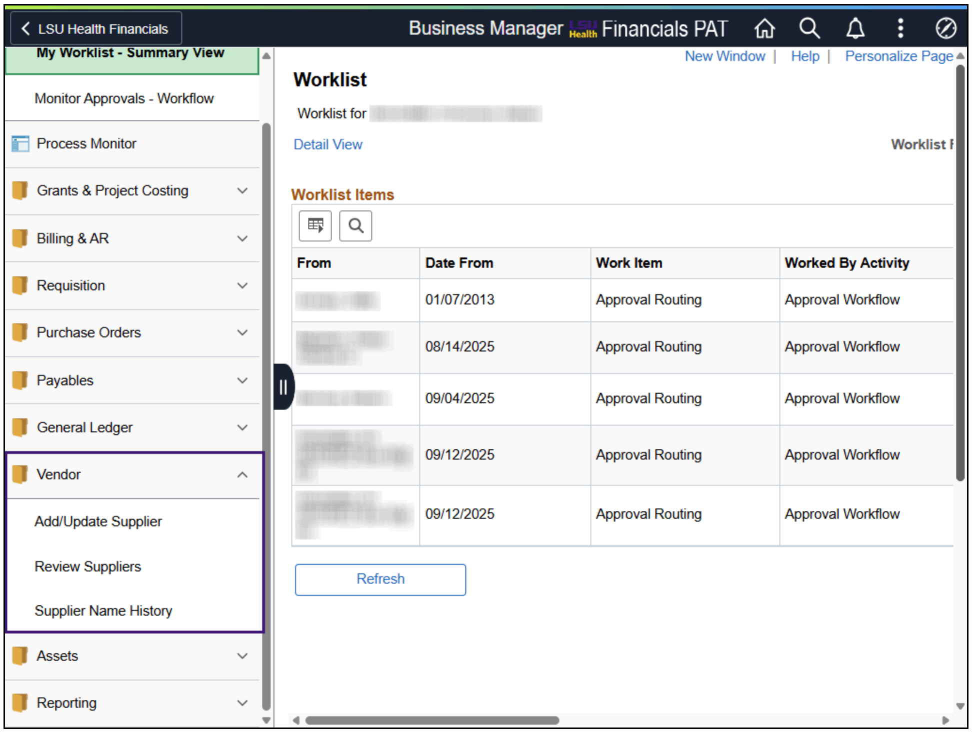
Step	Action
8.	**What is included in the navigation collection?** (continued) **5. Purchase Orders** a. **Purchase Order** - inquiry into purchase order b. **Activity Summary** - inquiry into PO activity c. **Document Status** - inquiry into PO document status and all associated documents d. **Print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



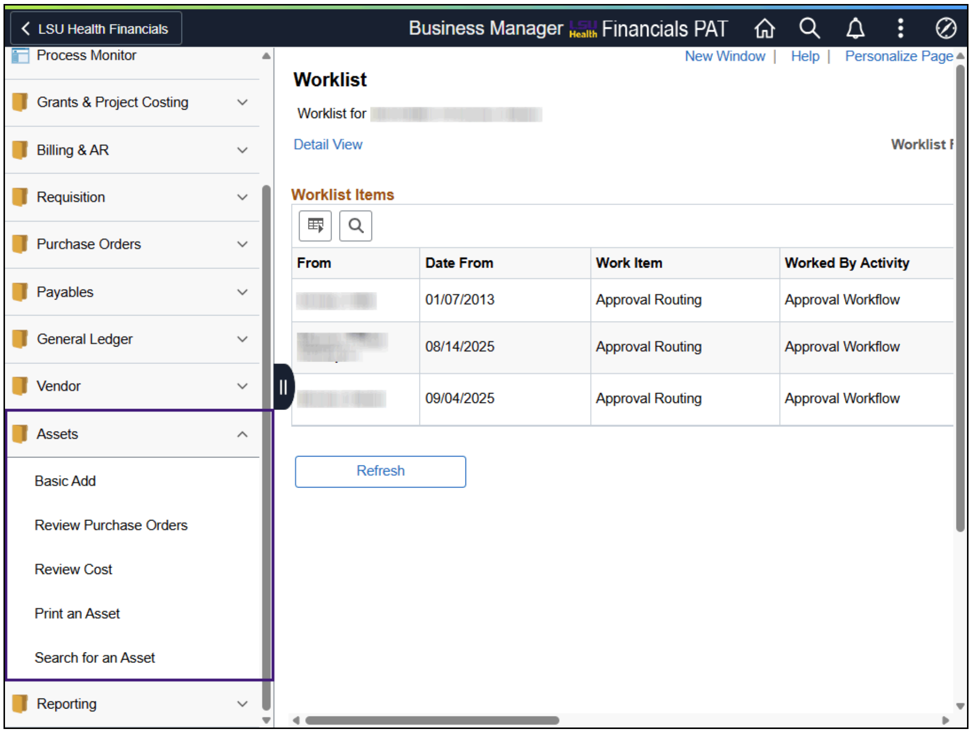
Step	Action
9.	**What is included in the navigation collection?** (continued) **6. Payables** a. **Payment Request Center** - add/update a payment request b. **Document Status** - inquiry into voucher and payment document status and all associated documents c. **Worklist** - link to the Worklist d. **Payment**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



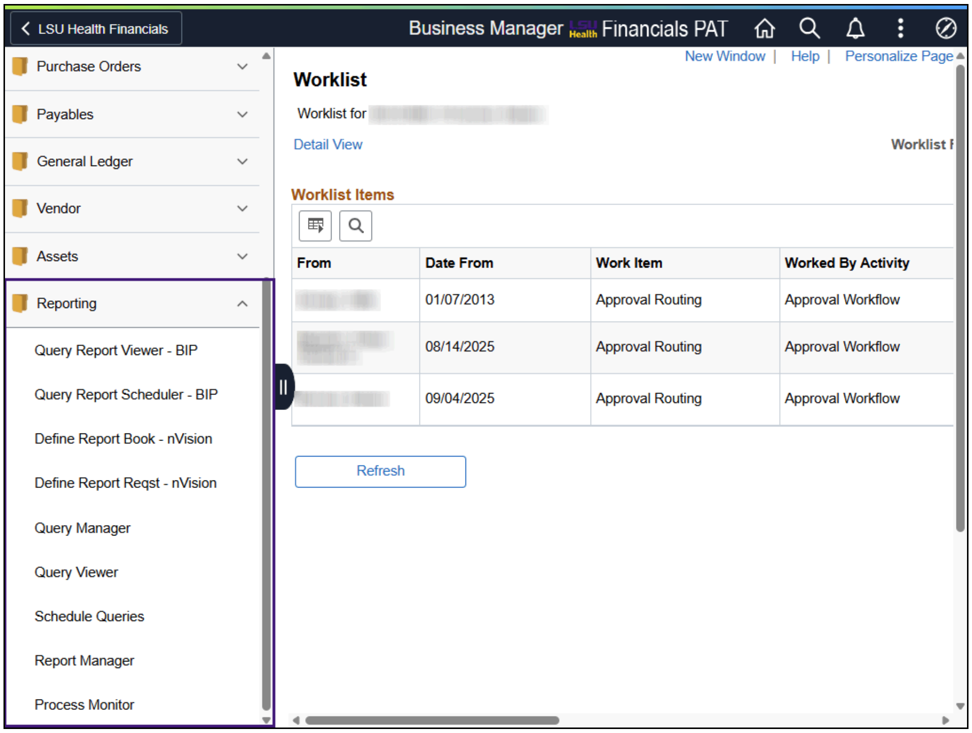
Step	Action
10.	**What is included in the navigation collection?** (continued) **7. General Ledger** a. **Chartfield Values -** inquiry to the chartfields pages b. **LSU Speedtype Lookup -** LSU Health's custom chartstring (speedtype) lookup c. **Run Control Maintenance -** provides the user with the ability to delete run controls that are not needed



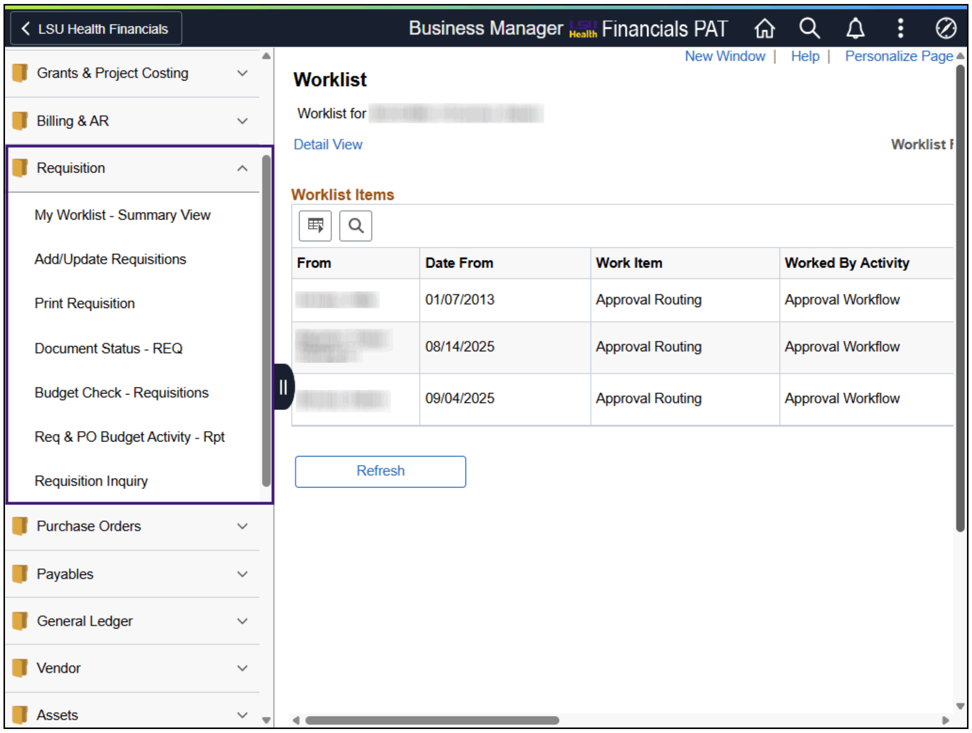
Step	Action
11.	**What is included in the navigation collection?** (continued) **8. Vendor (Supplier)** a. **Supplier** - inquiry into supplier information such as id, address, location, phone information by navigating through the identifying information tabs b. **Review Suppliers** - inquiry into supplier information - basic vendor information inquiry c. **Supplier Name History** - inquiry to show all vendor's names for those who have had them updated in the system



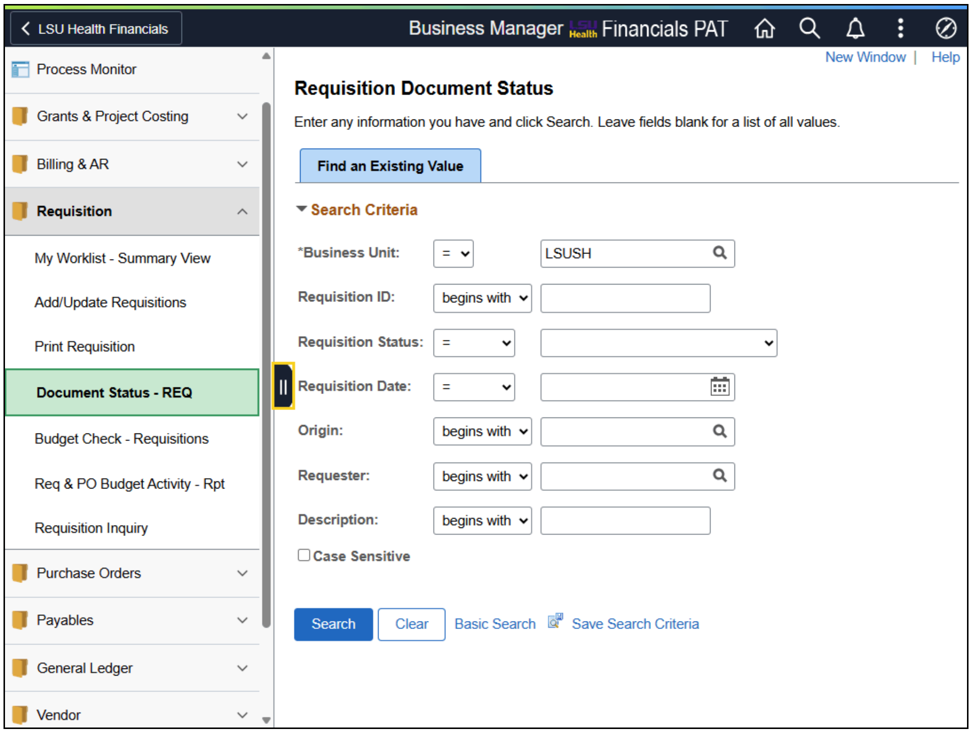
Step	Action
12.	**What is included in the navigation collection?** (continued) **9. Assets** a. **Basic Add** - inquiry for users into the asset acquisition information and basic asset details b. **Review Purchase Order** - inquiry into the PO assigned to an asset c. **Review Cost** - inquiry on the 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



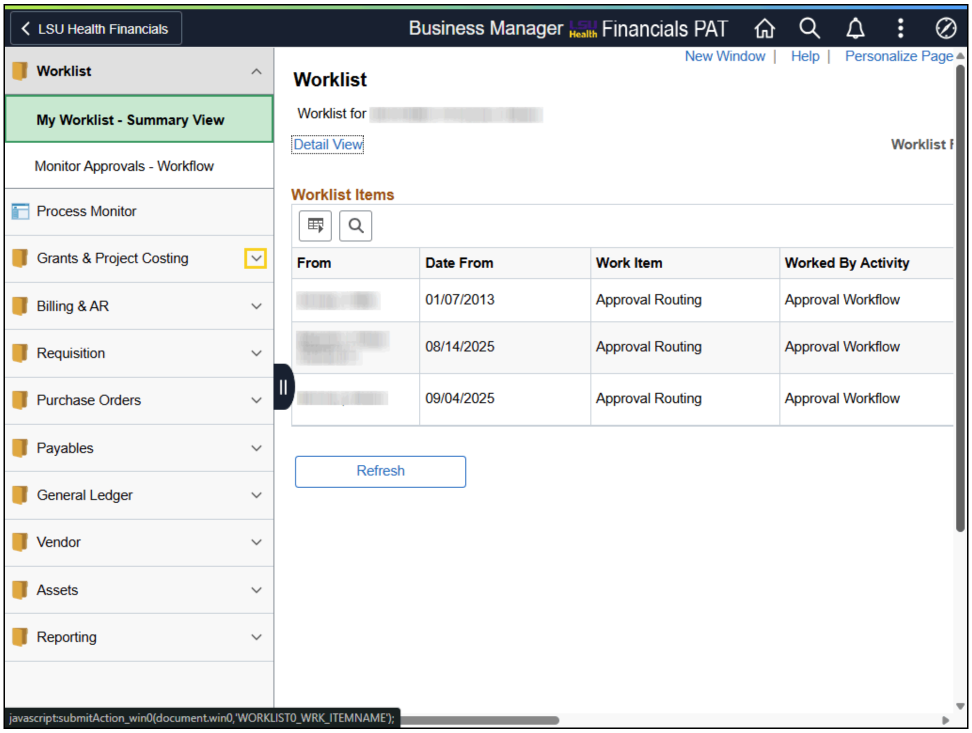
Step	Action
13.	**What is included in the navigation collection?** (continued) **10. Reporting** - You may see different links based on your security as some items are more readily assigned in RPT. a. **Query Report Manager** - granted in PRD for a limited number of BI Publisher reports written in the 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 only for users granted access in PRD e. **Query Manager** - allowed for users who are explicitly granted access to run query 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**
14.	Click the button to the right of the **Requisition** field.

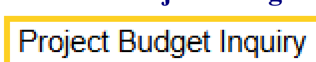


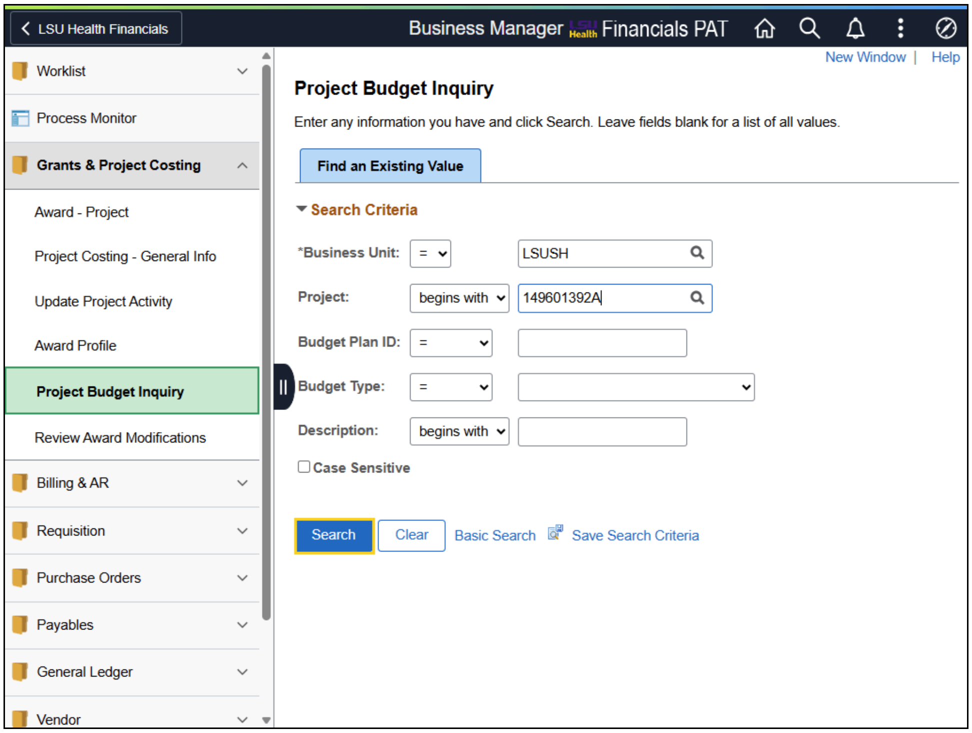
Step	Action
15.	The **Requisitions** nav collection contains links to *add or update requisitions*, *print a requisition*, *inquire on a requisition*, *budget check*, *inquire on the document status* and *run the req and po budgetary activity report*. An additional navigation link to *access the worklist* has also been included. ***NOTE: Business Managers at the Shreveport campus will have a separate eProcurement Tile for requisitions.***
16.	Click the **Document Status - REQ** button. Document Status - REQ
17.	The **Requisition Document Status** page allows you to *search for/select a requisition* to view all associated *purchase orders*, *receipts*, *vouchers* and *payments*.



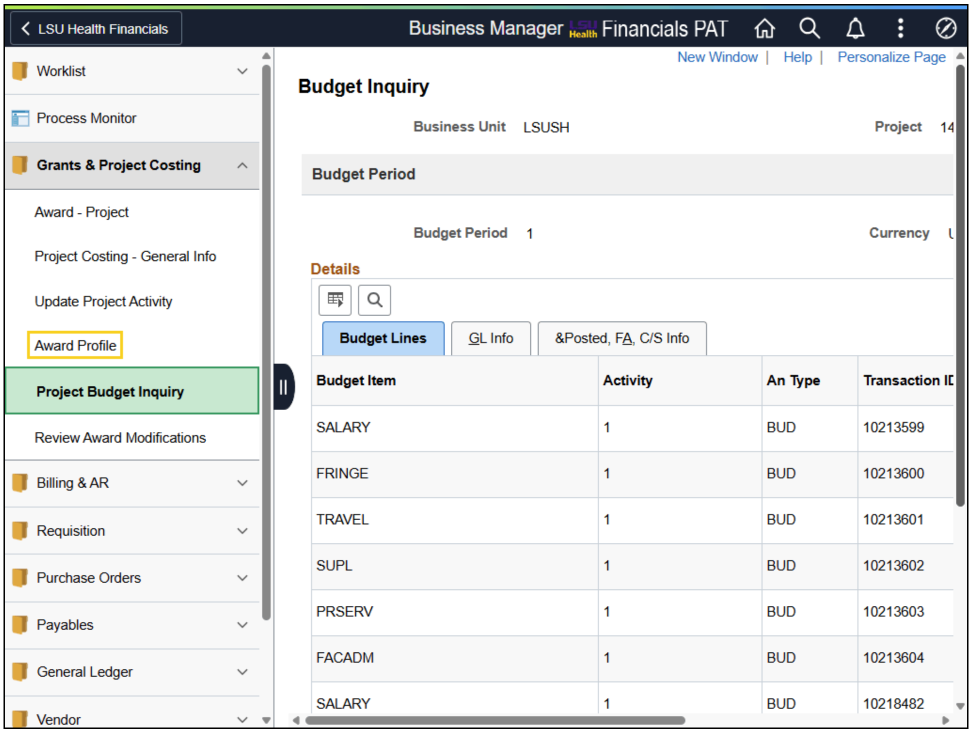
Step	Action
18.	On the screenshot, please note the icon that displays immediately to the *left* of the *Requisition Date* field that looks like **"ll"**. This icon collapses the menu on the left to allow a larger viewing area on the page. Click the **Close Navigation Area** button. 
19.	To expand the menu, select the "ll" button again. Click the **Open Navigation Area** button. 
20.	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.



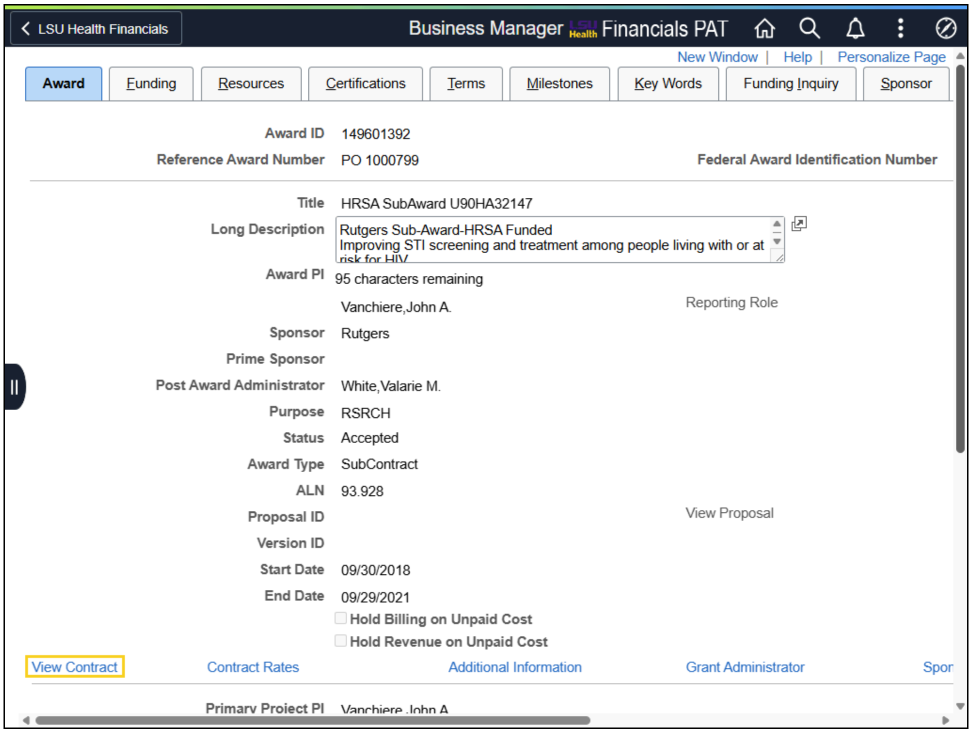
Step	Action
21.	**Project Budget, Award, Billing Invoice Review** If, for example, you want to review the information for a project budget to see what type of expenses are allowed on your chartstring, expand the **Grants & Project Costing** folder, then select *Project Budgetary Inquiry*. Click the button to the right of the **Grants & Project Costing** field.
22.	Click the **Project Budgetary Inquiry** button. 
23.	In this example, **LSUSH** project *1496013924* will be entered. Enter the desired information into the ***Business Unit** field. Enter "**LSUSH**".
24.	Enter the desired information into the **Project** field. Enter "**149601392A**".



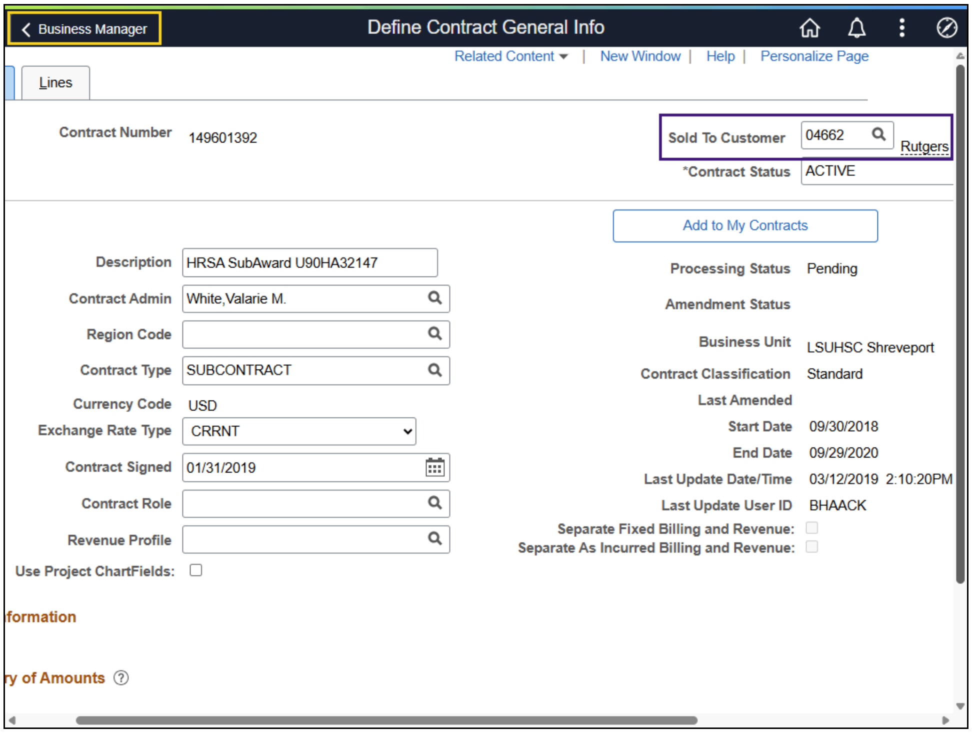
Step	Action
25.	Click the **Search** button. 
26.	Click the **Close Navigation Area** button. 
27.	For this project *Salary*, *Fringe*, *Supplies*, *Travel*, *Other*, *Professional Services*, *F&A*, and *Operating Services* are allowable expenses. For other project ids, you may only see one, or a handful, as allowable expenses depending upon the agreement. Notice also that the displayed budget is for budgeted period 1 where this project has 3 budget periods.
28.	Click the **Open Navigation Area** button. 



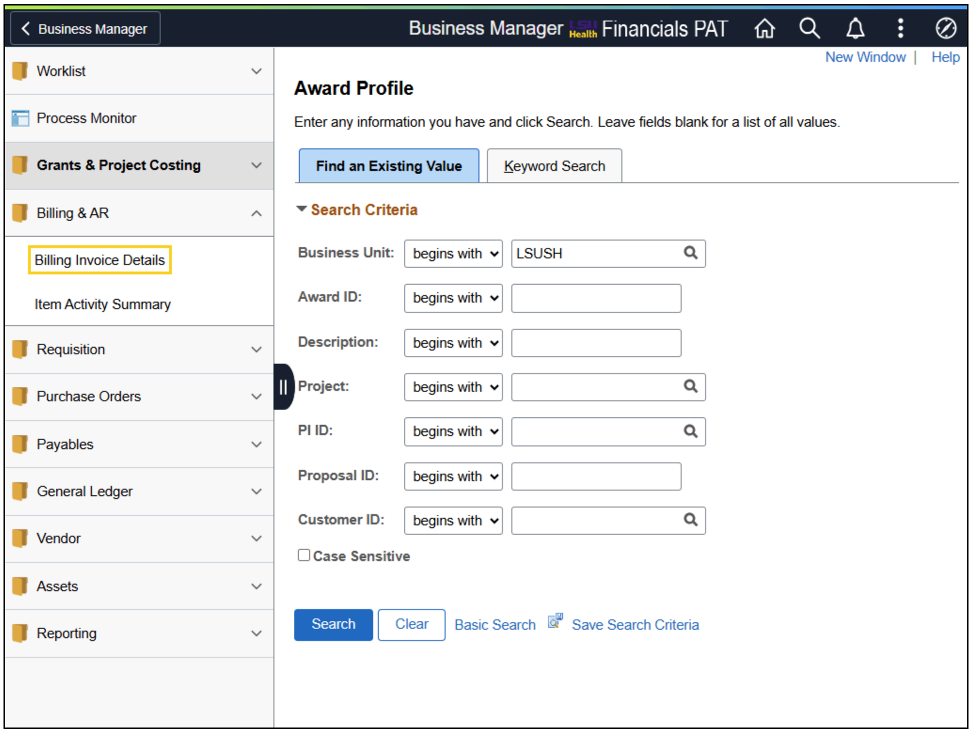
Step	Action
29.	If you then want to view billing invoice information for that project id, you will need to know the sponsor/customer id for the contract or just the contract id. The contract id is generally the project id excluding the alpha character. If you want to identify the sponsor/customer, select the **Award Profile** button from the **Grants & Project Costing** folder. Click the **Award Profile** button. 
30.	Enter the desired information into the **Project** field. Enter "**149601392**".
31.	Click the **Search** button. 
32.	Click the **Close Navigation Area** button. 

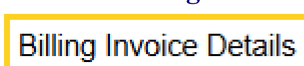


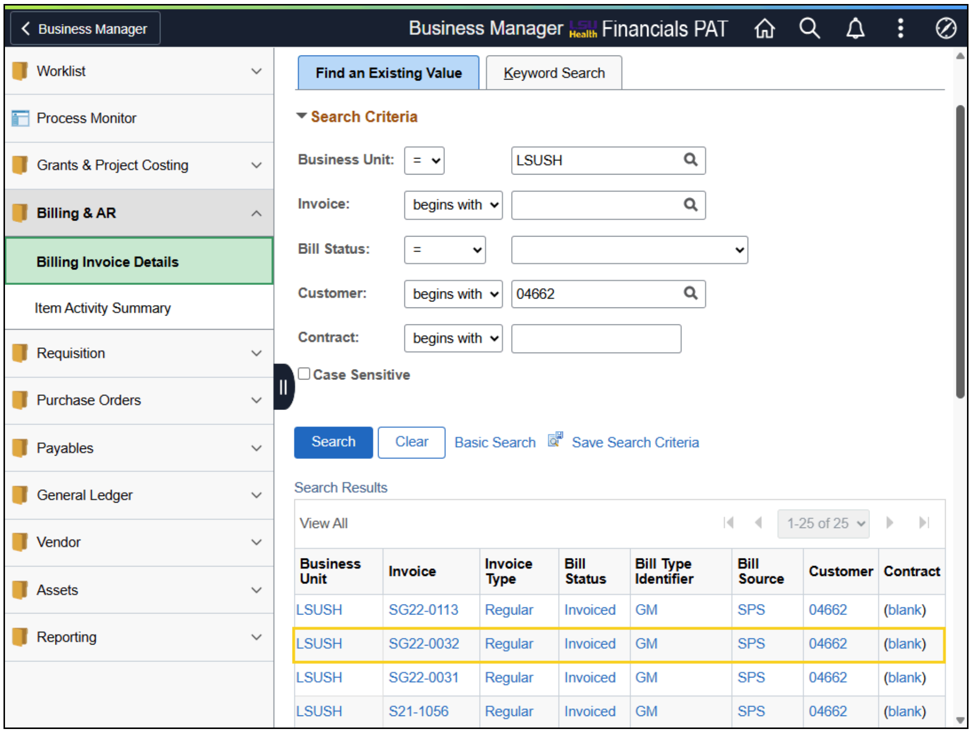
Step	Action
33.	On the **Award Profile** screen, the Sponsor name is displayed below the Description and Award PI. However, to view the Sponsor ID, you must select the **View Contract** link. Click the **View Contract** link. 



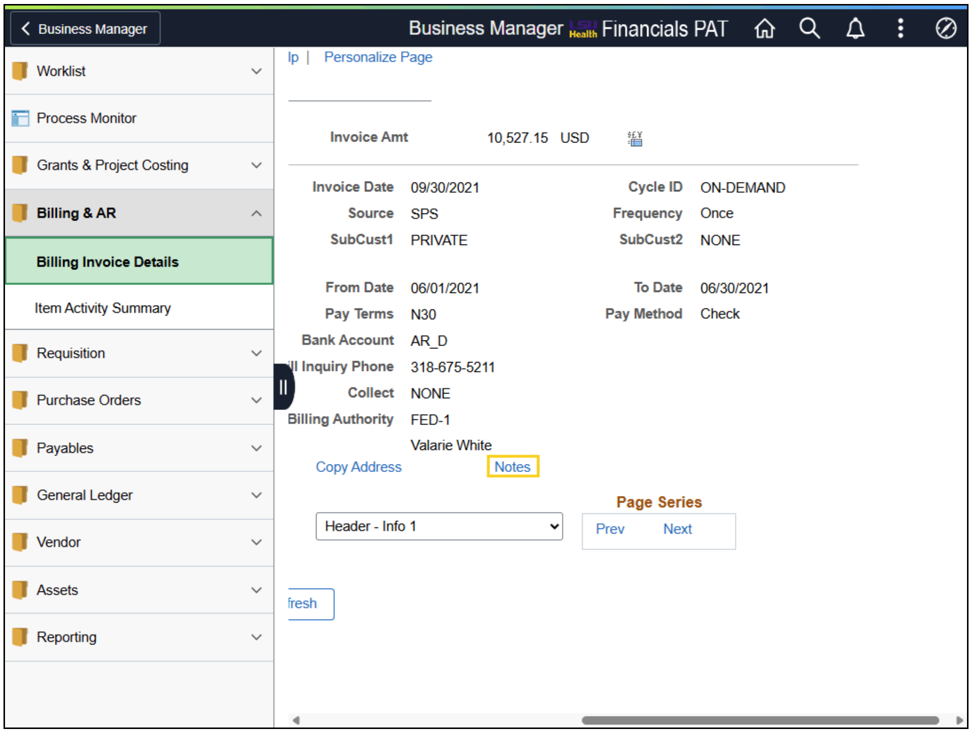
Step	Action
34.	The **Sponsor ID** is displayed in the ***"Sold To Customer"*** field. In this example, it is LSUSH customer *04662*. If you need to review other ***Award Profile*** information, at the bottom of the page, you might select the **Return to Award Profile** link. Click the **< Business Manager** button. 
35.	You will land back on the **Award Profile** search page. Select the **Grants & Project Costing** button to *collapse* the menu. Click the button to the right of the **Grants & Project Costing** field.
36.	After noting the sponsor/customer id, open the **Billing & A/R folder**, then select **Billing Invoice Details**. Click the button to the right of the **Billing & A/R** field.



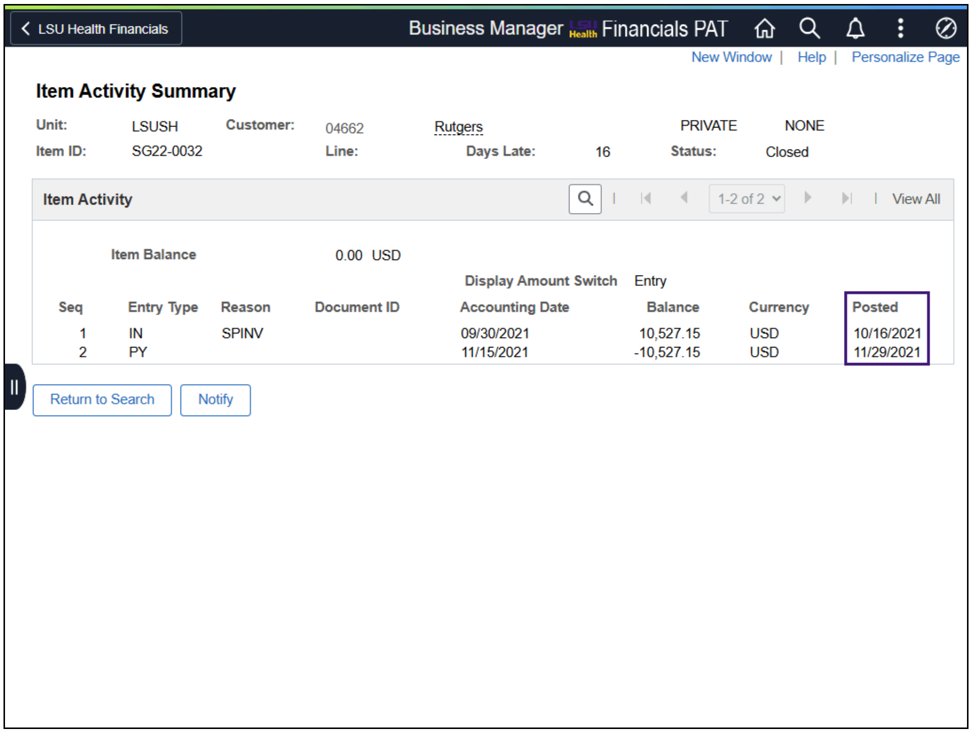
Step	Action
37.	Click the **Billing Invoice Details** button. 
38.	The **Business Unit (BU)** defaults into the *Business Unit* field. If the **BU** does not default, *enter it or select it* by clicking the **Look up Business Unit** button to the right of the field. Enter the desired information into the **Customer** field. Enter "**04662**".
39.	Click the **Search** button. 

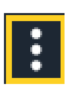


Step	Action
40.	A list of invoices for the customer displays. To identify if the invoice is for the project id, select the invoice id. For this example, select **SG22-0032**. Click the **SG22-032** link.



Step	Action
41.	Click the **Notes** link. Notes
42.	Note the Invoice: **SG22-0032.** Click the **Item Activity Summary** button. Item Activity Summary
43.	The **Business Unit (BU)** defaults into the *Business Unit* field. If the **BU** does not 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**".
44.	Click the **Search** button. Search



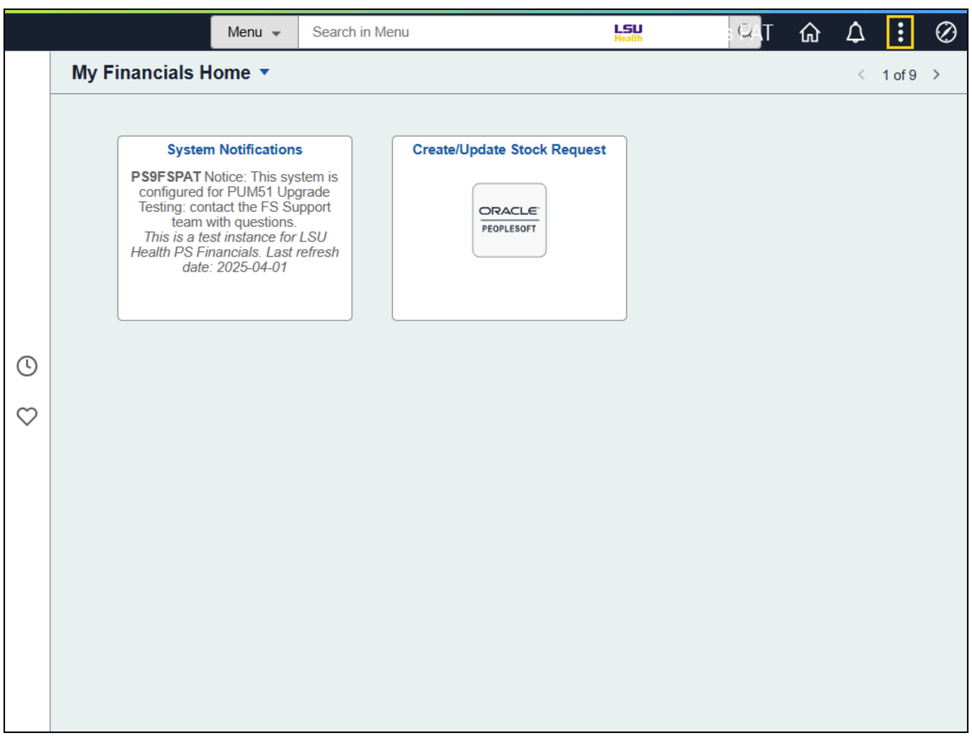
Step	Action
45.	This invoice was *entered* in *October 2021,* and the *payment* was *received* in *November 2021*. As you can see, this can be a helpful way to keep *track* of the *billing and payments* for your projects.
46.	Users should continue to *explore* all options included with the **Business Manager** tile. The ***Sandbox*** database can be *utilized* to further *explore expanding folders* and *selecting links* to try.
47.	To *sign out* of PeopleSoft Financials, select the **Actions (3 stacked dots)** icon at the top right and then select **Sign Out**. Click the **Actions** menu. 
48.	Click the **Sign Out** link. Sign Out
49.	This completes ***Access and Navigate the Business Manager Tile***. **End of Procedure.**

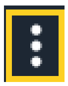
Action Icon Options

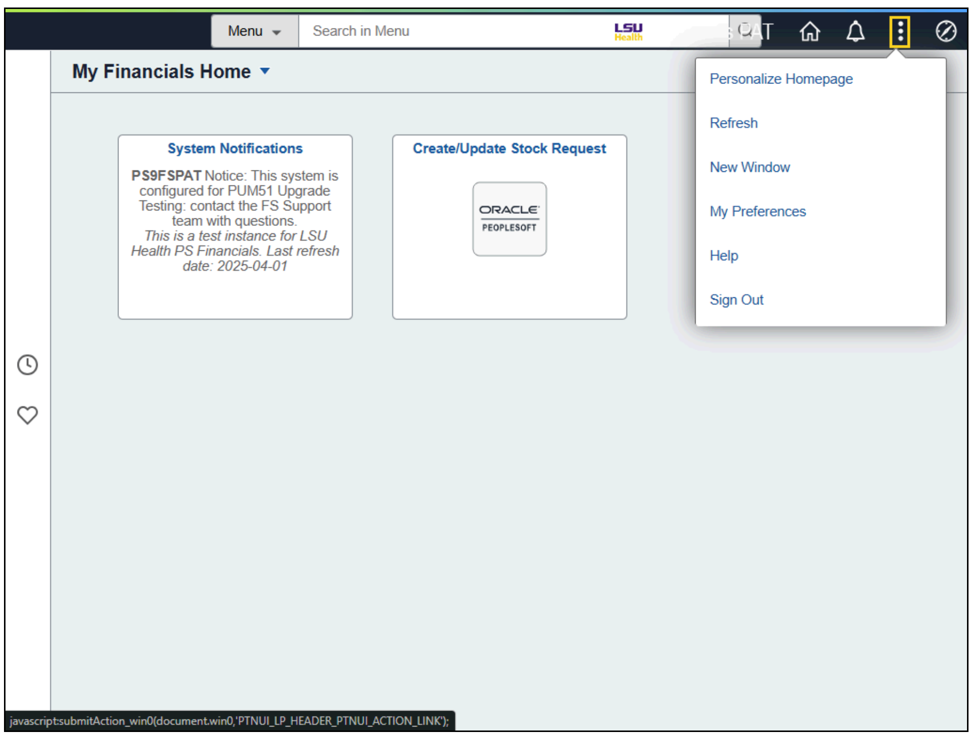
Procedure

In this topic you will learn how to use **Action 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 ***Favorites***, using ***My Preferences***.

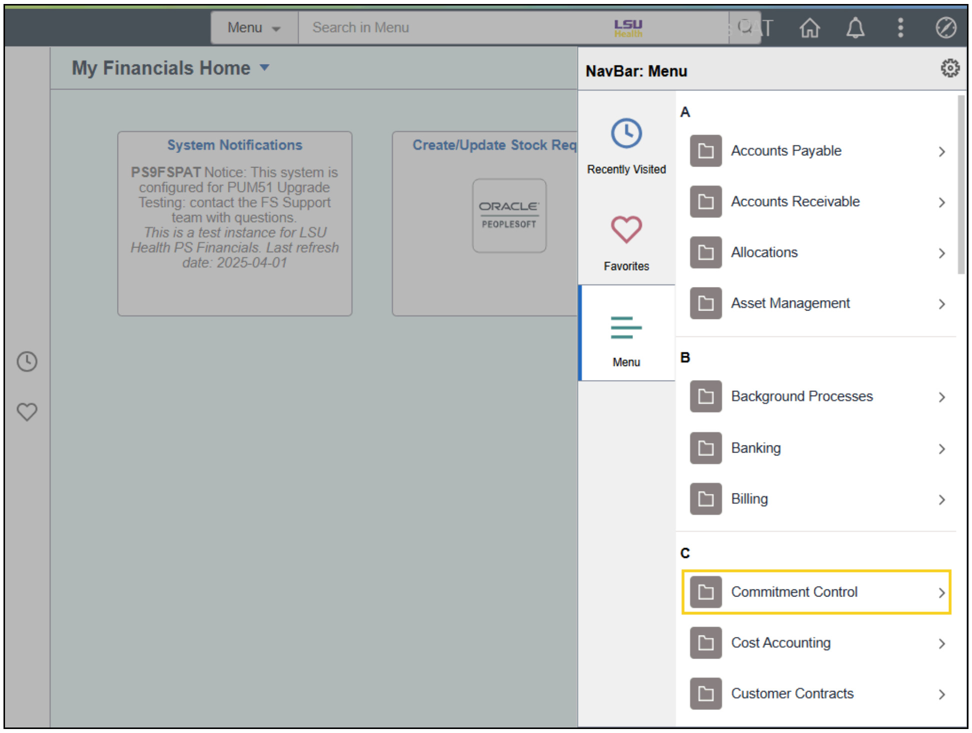


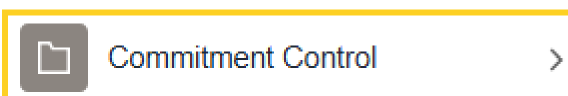
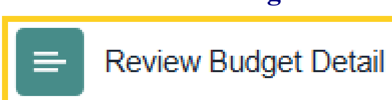
Step	Action
2.	**Action Item Options** Making changes to the **My Financials Home** page may be accomplished using the ***Actions* ellipsis (3 stacked dots)**. The ***Actions*** menu list on **My Financials Home** is different than when the user is on a specific page such as ***Add/Update Requisitions***. Click the **Actions** menu. 

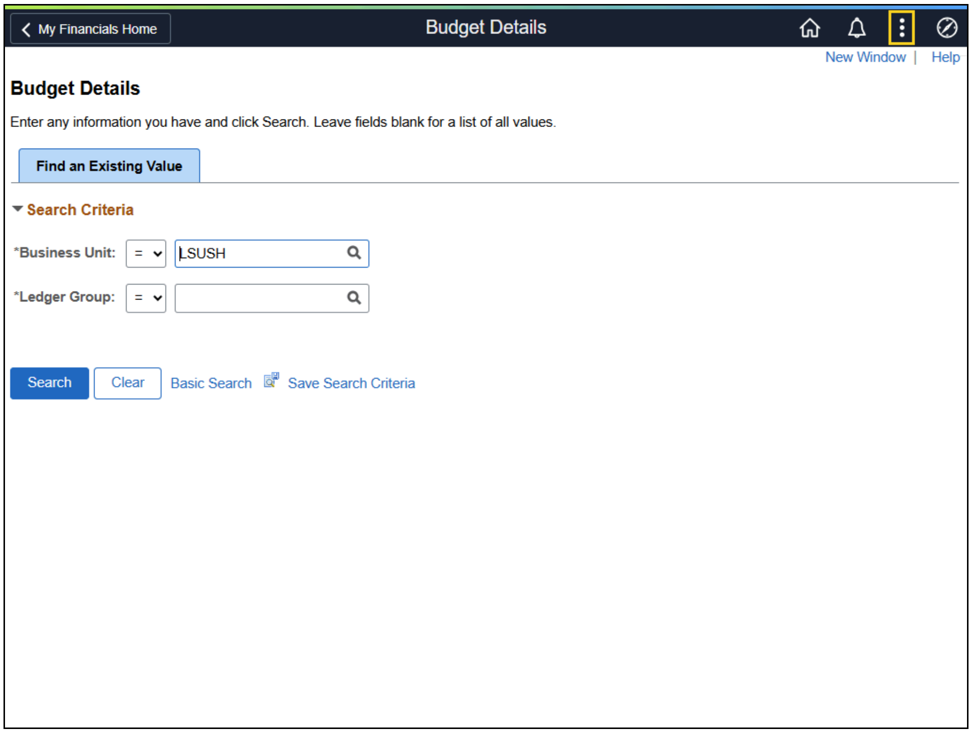


Step	Action
3.	The menu options for the Actions ellipses are the same for <u>all</u> <u>Homepages</u>. The available menu options are: • **Personalize Homepage** • **Refresh** • **New Window** • **My Preferences** • **Help** • **Sign Out** Click the **Actions** ellipses to close the menu. 

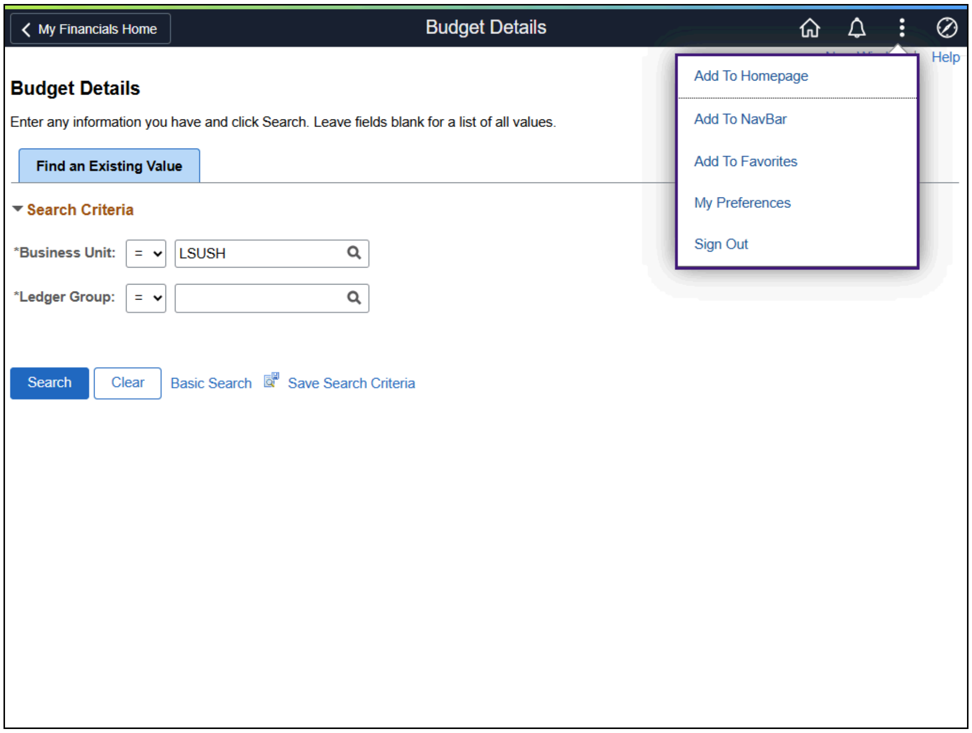
Step	Action
4.	The **NavBar** is available on any page in the system. When you click the **NavBar** button at the top right of the page, its *menu* will *pop out* from the *right side*. Other options, such as *personalizations* and *preference settings*, are available through the **NavBar**. For instance, 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. 



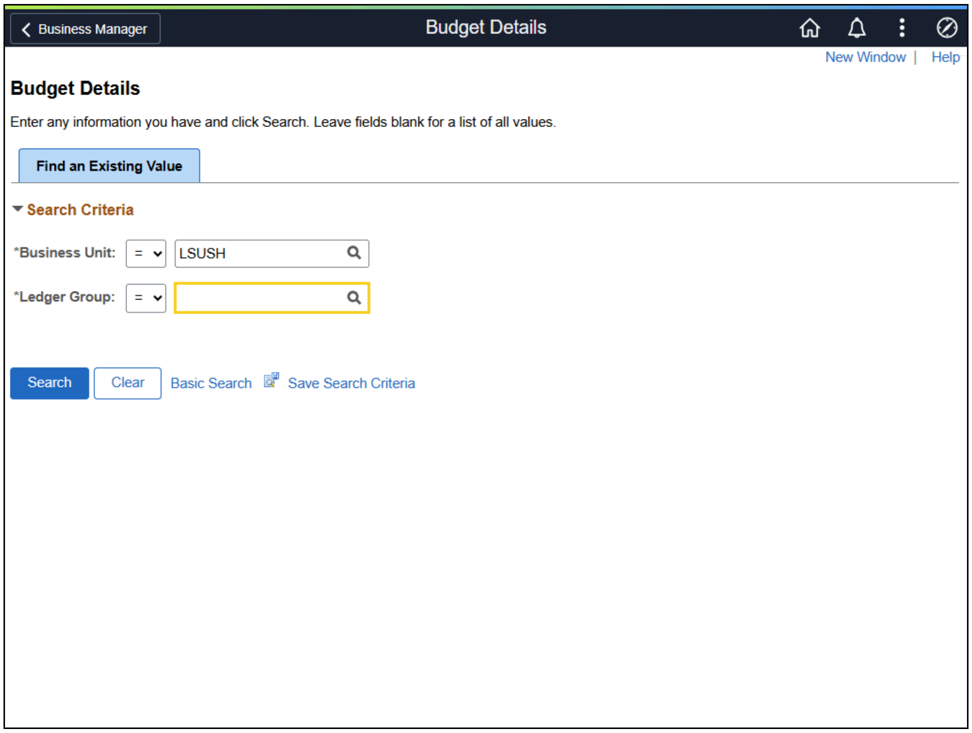
Step	Action
6.	Click the **Commitment Control** button. 
7.	Click the **Review Budget Activities** button. 
8.	Click the **Review Budget Detail** button. 



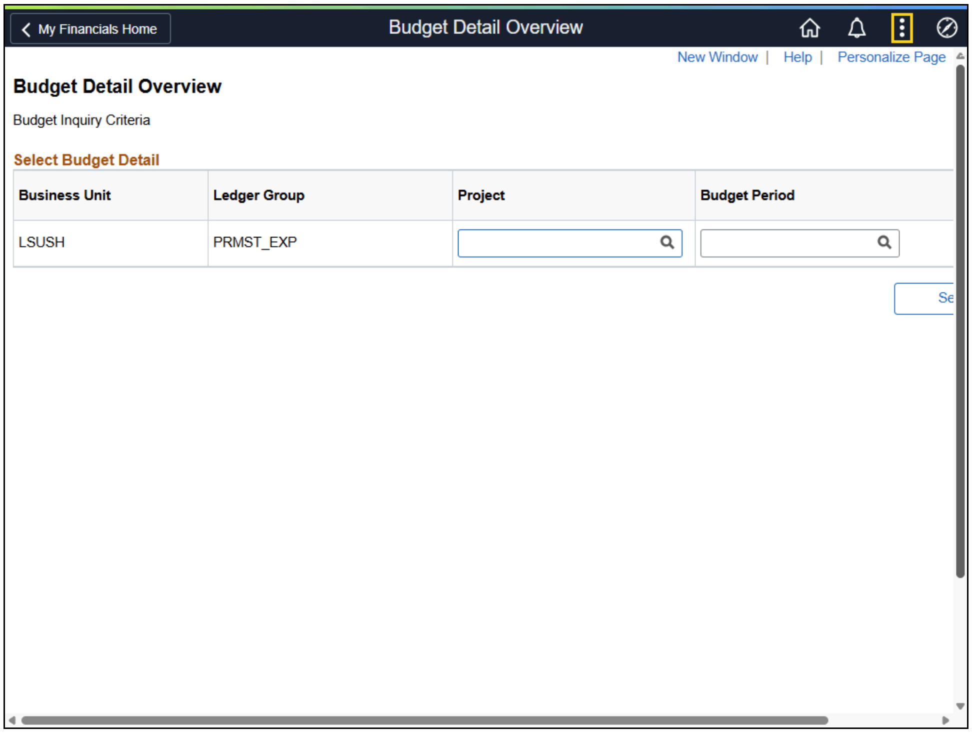
Step	Action
9.	Click the **Actions** menu. 

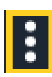


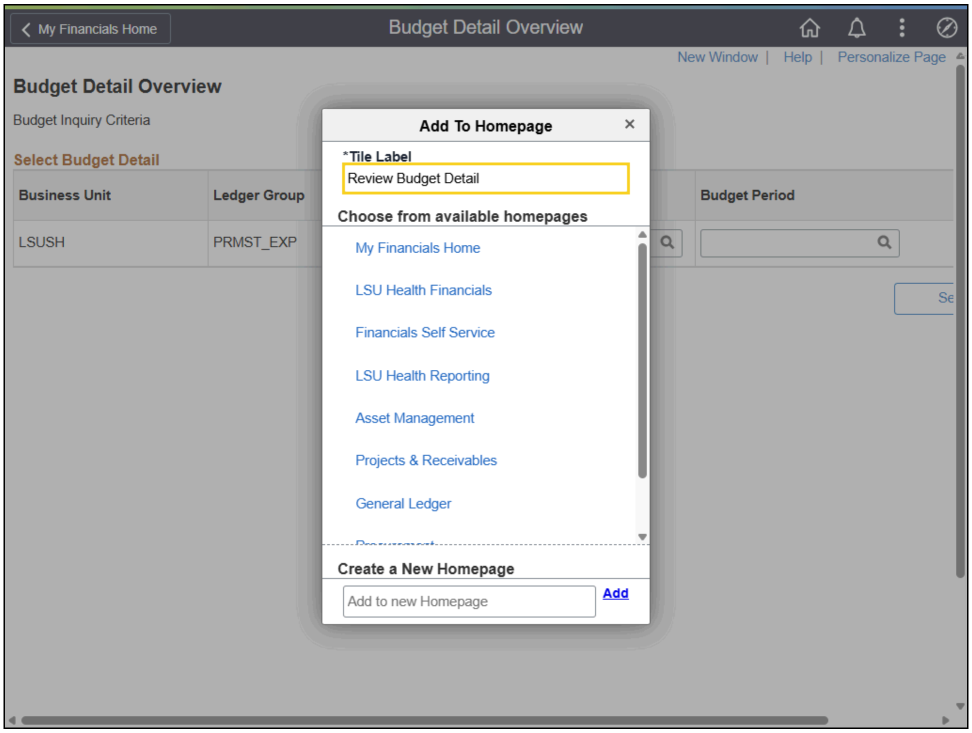
Step	Action
10.	Once the user lands on a page, the **Actions** ellipsis options change to an ***Add To*** drop-down list. The new list can be used to perform various actions such as: • **Add to Homepage** • **Add to NavBar** • **Add to Favorites** • **My Preferences** • **Sign Out**
11.	In this example, 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
12.	The **Business Unit (BU)** defaults into the ***Business Unit*** field. If the **BU** does not 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**".
13.	Click the **Search** button. 

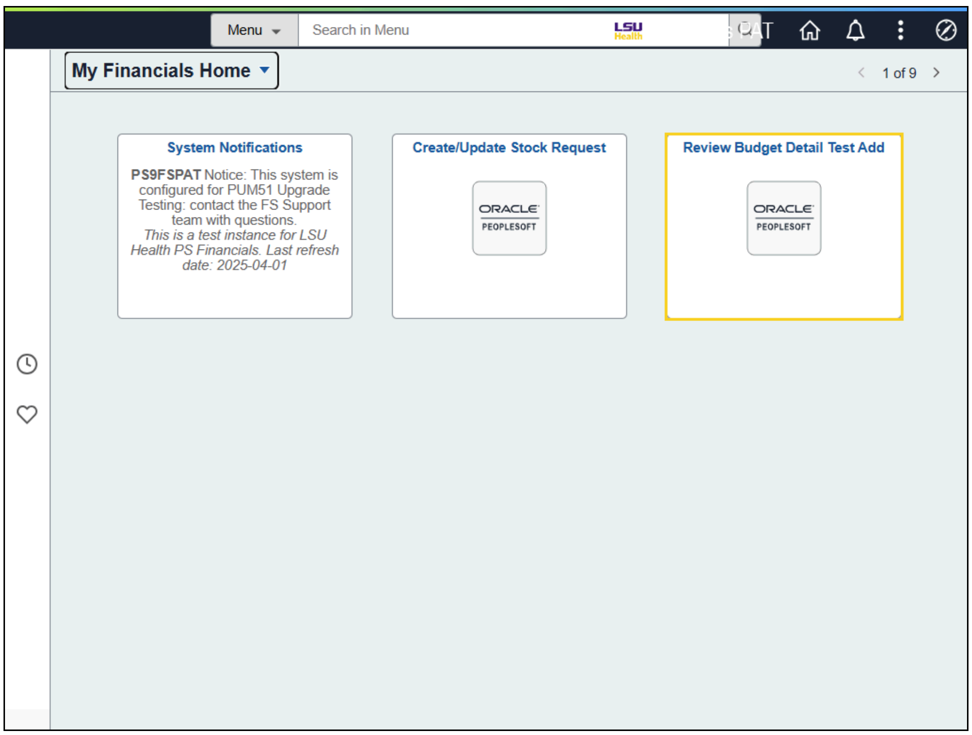


Step	Action
14.	Click the **Actions** button. 
15.	**Add to My Financials Home - Add to Homepage** The **Add to Homepage** option allows users to add the selected page to the **My Financials Home** screen. Imagine that you frequently review the budget available on a project through the *Commitment Control > 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 simply used as an example of adding a page to My Financials Home.***
16.	**Add to My Financials Home - Add to Homepage** Click the **Add to Homepage** link. 

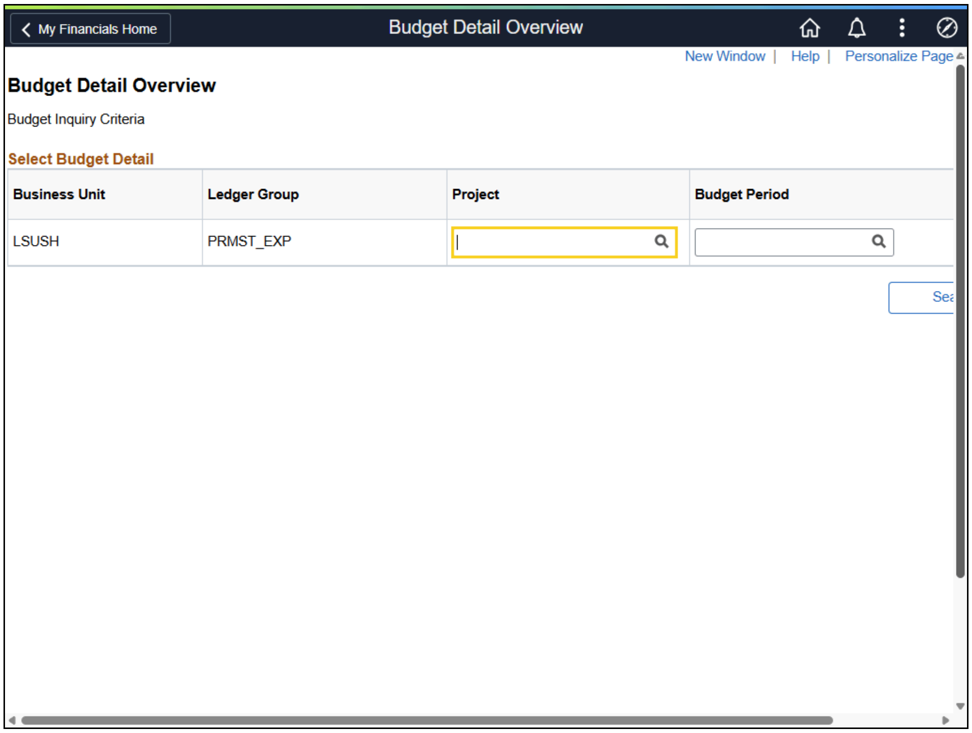


Step	Action
17.	**Add to My Financials Home - Add to Homepage** Enter the desired information into the ***Tile Label** field. Enter "**Review Budget Detail Test Add**".
18.	**Add to My Financials Home - Add to Homepage** Click the **My Financials Home** link. My Financials Home
19.	**Add to My Financials Home - Add to Homepage** A confirmation message displays. Click the **OK** button. OK

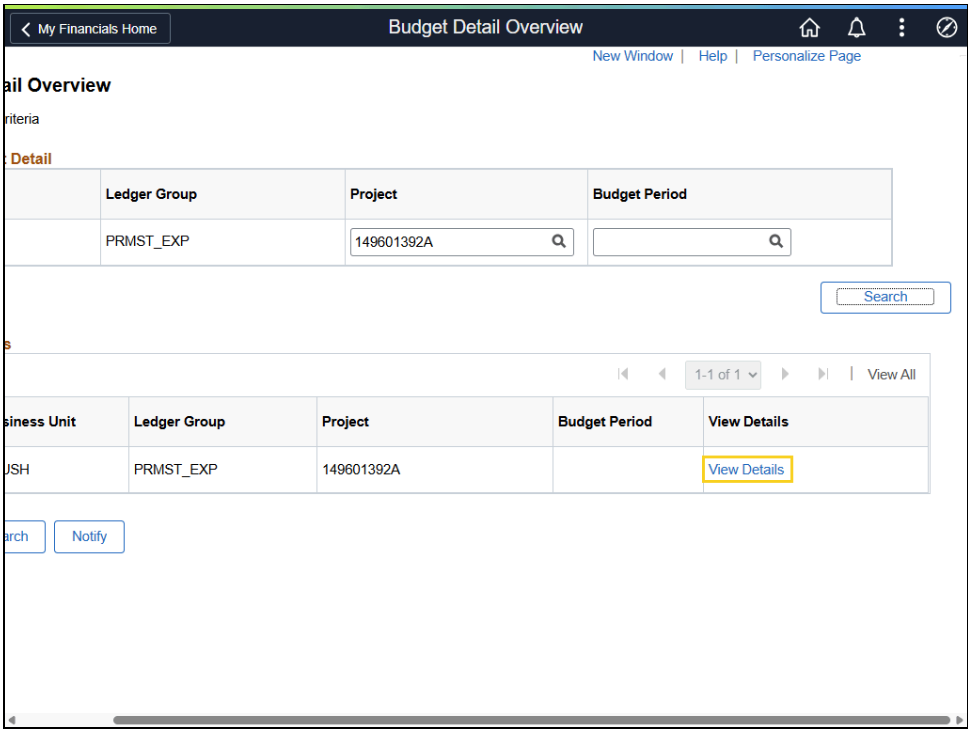
Step	Action
20.	**Add to My Financials Home -** **Add to Homepage** Click the **Home** button. 



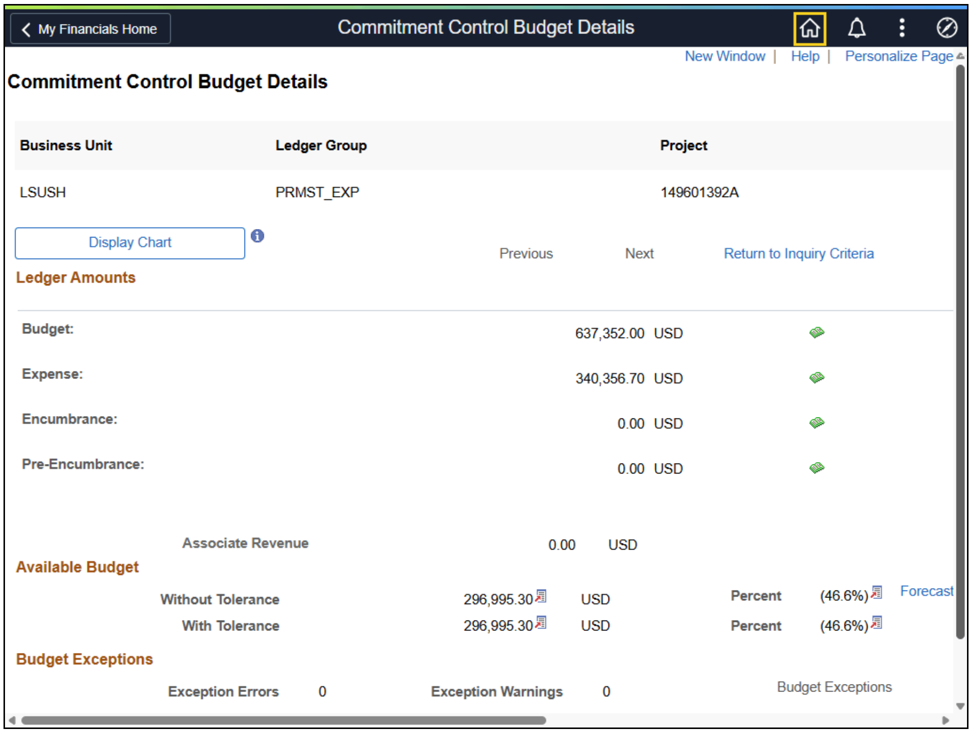
Step	Action
21.	**Add to My Financials Home -** **Add to Homepage** Click the **Review Budget Detail Test Add** button.



Step	Action
22.	**Add to My Financials Home -** **Add to Homepage** Enter the desired information into the **Project** field. Enter "**149601392A**".
23.	**Add to My Financials Home -** **Add to Homepage** Click the **Search** button. 



Step	Action
24.	**Add to My Financials Home -** **Add to Homepage** Click the **View Details** link. View Details

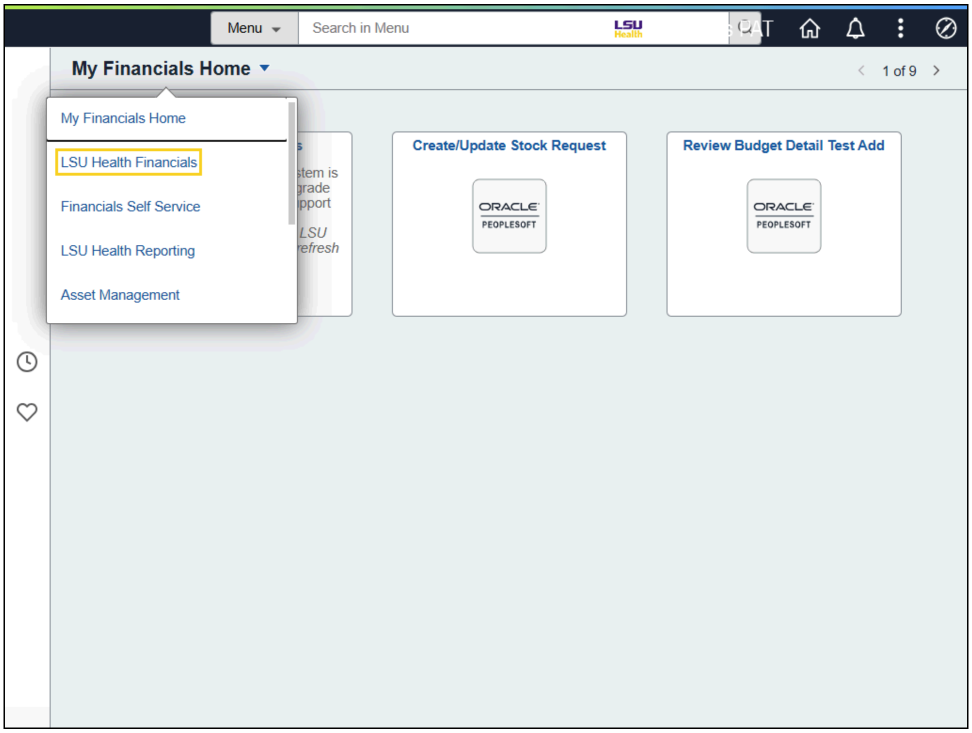


<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>25.</td><td>This completes Add to My Financials Home -
Add to Homepage.

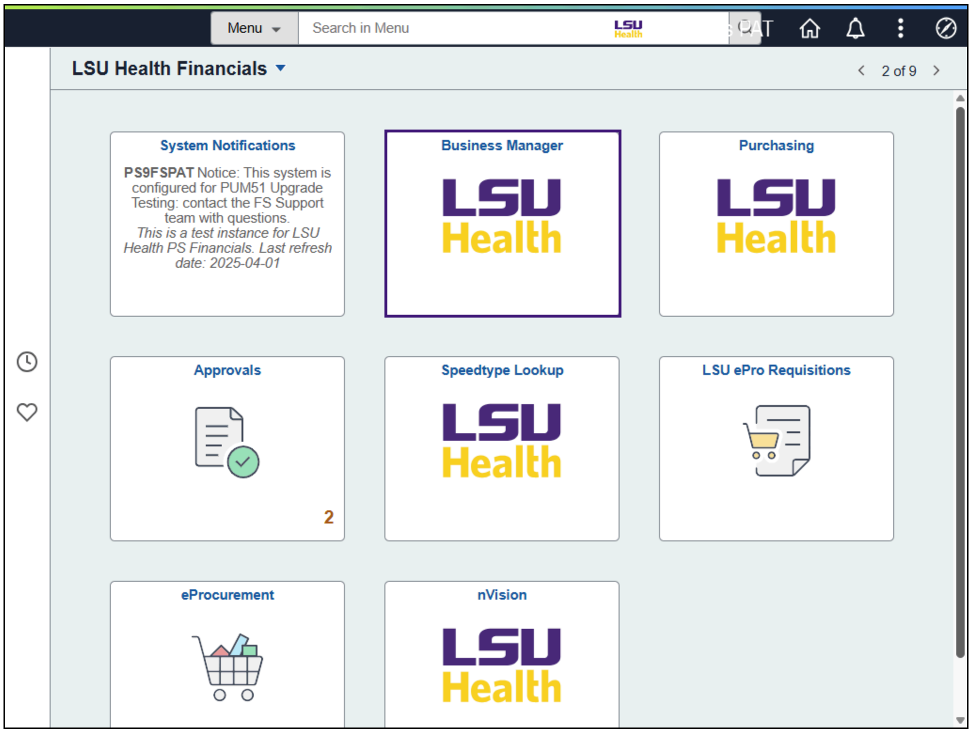
The Commitment Control Budget Details page displays.

Click the Home button.
</td></tr>
<tr><td>26.</td><td>Add to NavBar

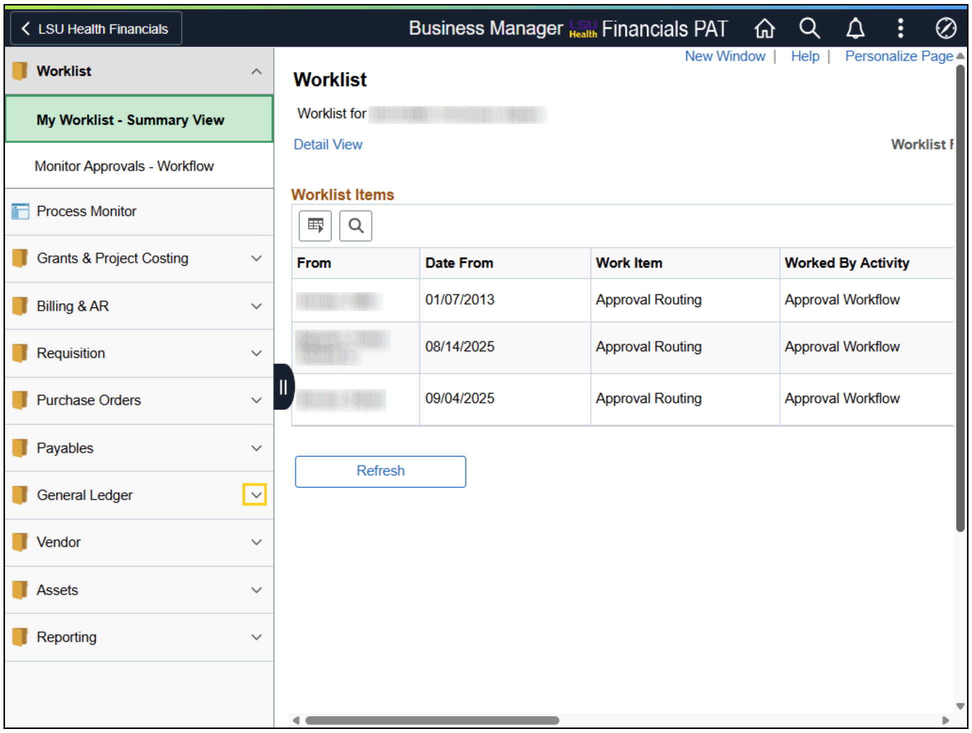
Click the My Financials dropdown button to activate the menu.
</td></tr>
</table>



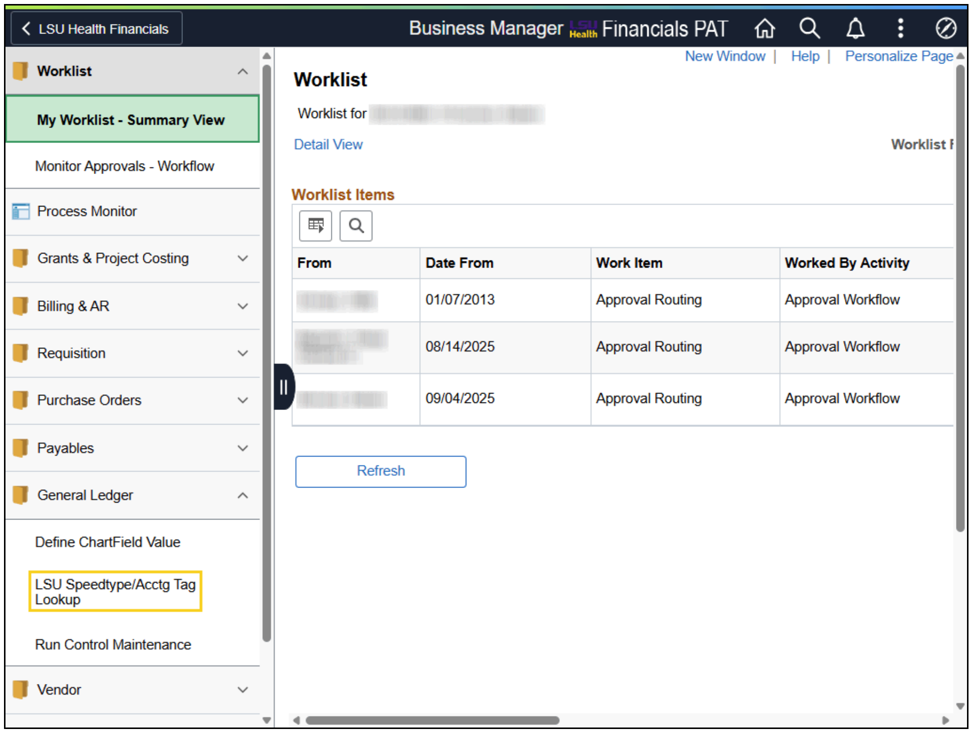
Step	Action
27.	**Add to NavBar** Click the **LSU Health Financials** link. LSU Health Financials

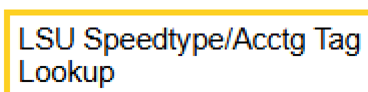


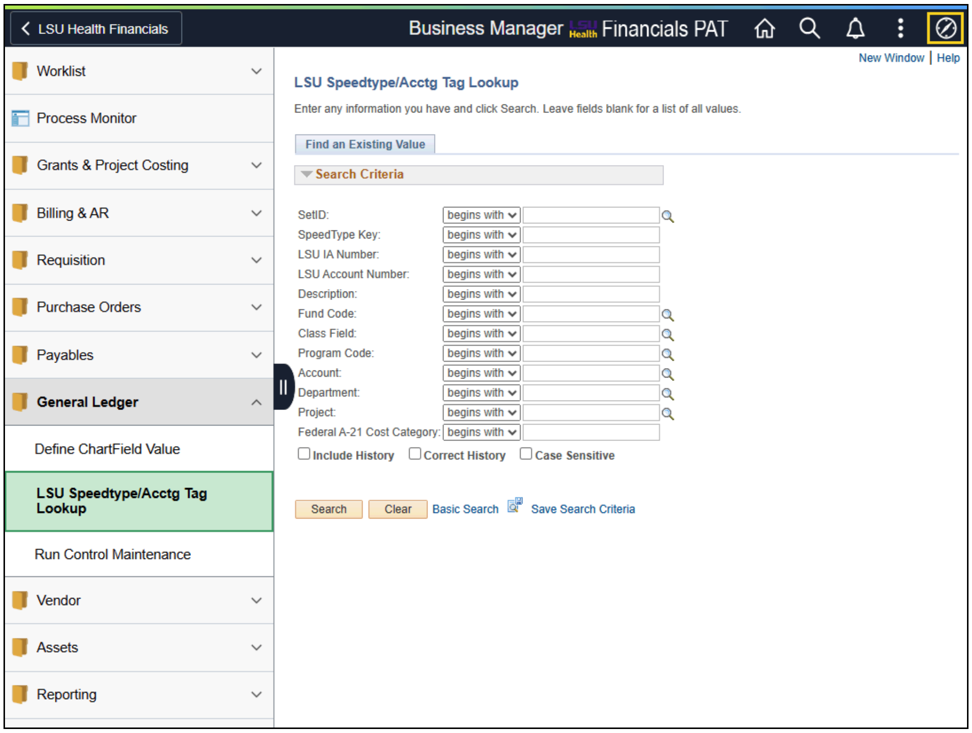
Step	Action
28.	**Add to NavBar** *****WARNING****** ***Users should <u>not</u> add pages to My Financials Home, Add to NavBar or Add to Favorites using navigations from the Business Manager tile. When adding a page from inside the Business Manager tile, users are adding the <u>entire</u> navigation collection rather than the <u>individual page</u>. Users will need to navigate through the NavBar to the desired page, and then add the page to My Financials Home, Add to NavBar or Add to Favorites.***
29.	**Add to NavBar** Click the **Business Manager** button.



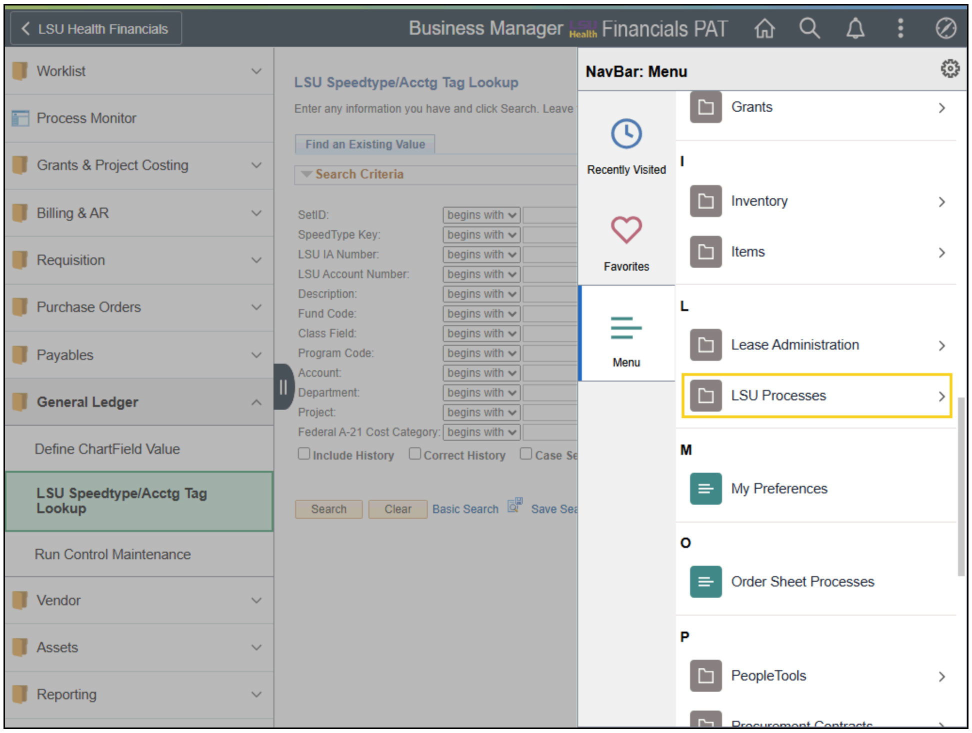
Step	Action
30.	**Add to NavBar** Click the **General Ledger** dropdown button to activate the menu.

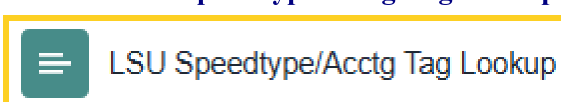


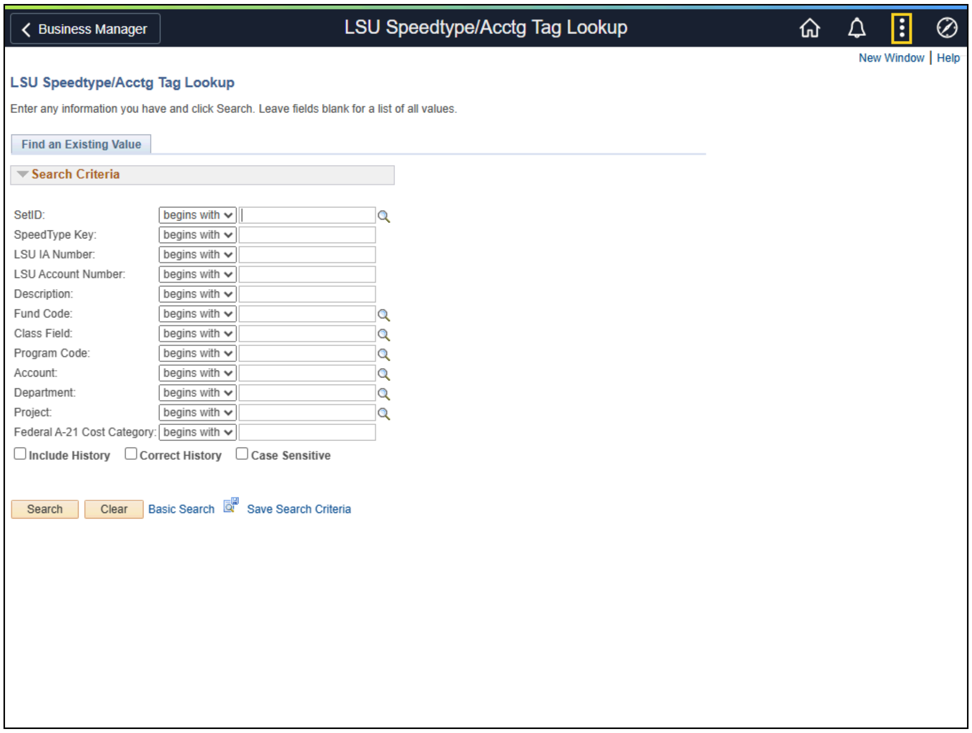
Step	Action
31.	**Add to NavBar** Click the **LSU Speedtype/Acctg Tag Lookup** button. 



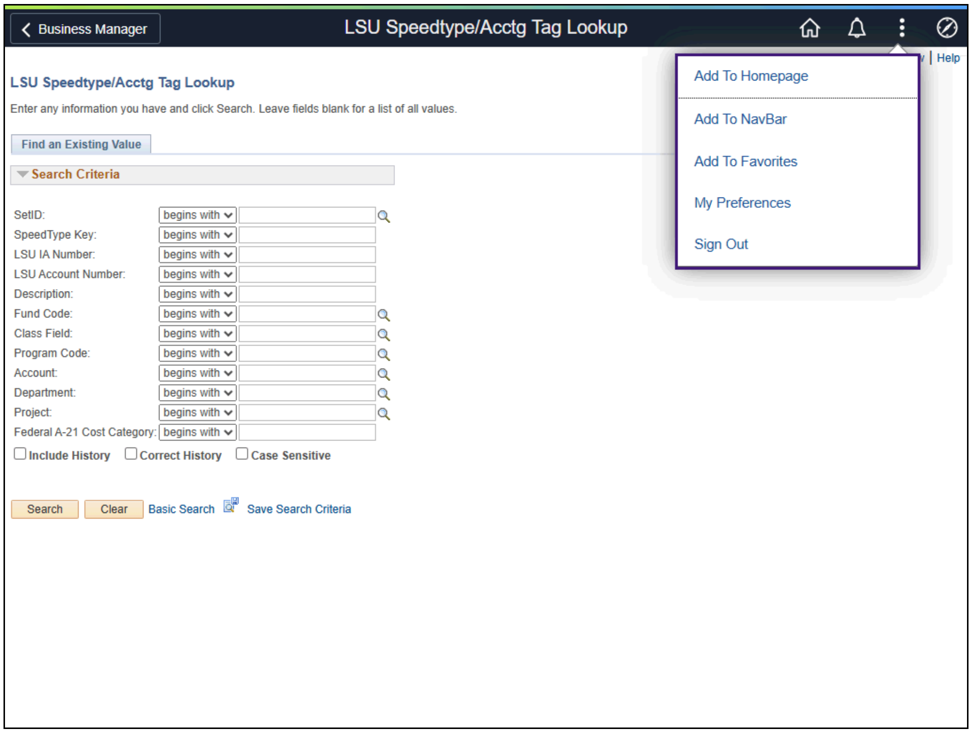
Step	Action
32.	**Add to NavBar** ***NOTE: You are <u>inside</u> the Navigation Collection for Business Manager. Do not use the Actions menu to add this page to the NavBar. From this position, you would be adding the entire Business Manager nav collection.*** Click the **NavBar** menu. 
33.	**Add to NavBar** Click the **Menu** button. 



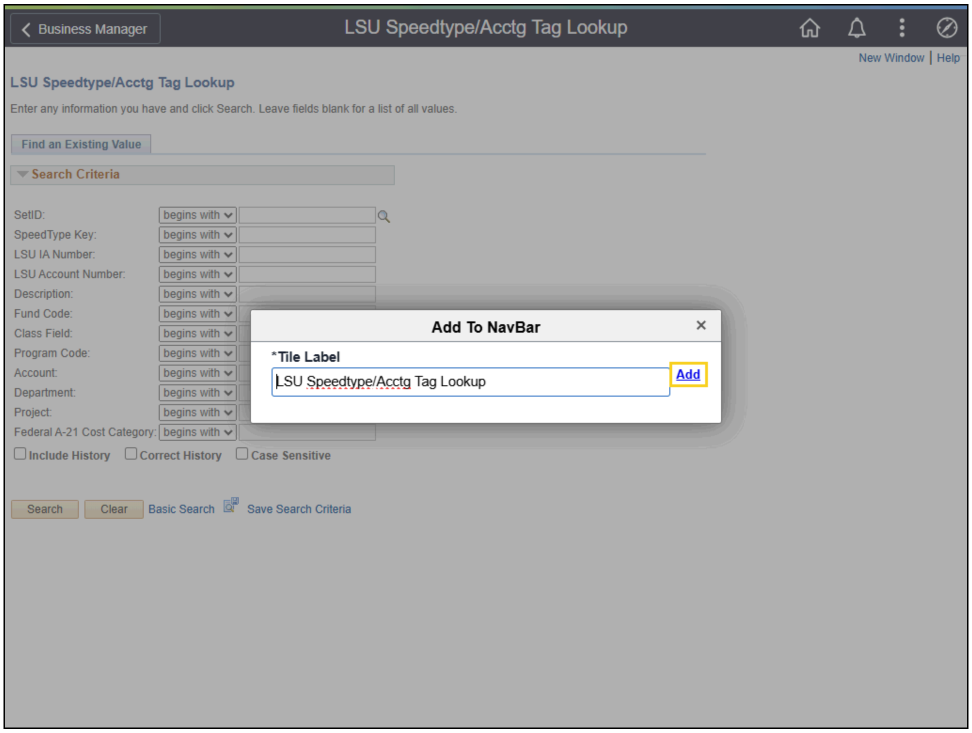
Step	Action
34.	**Add to NavBar** Click the **LSU Processes** button. 
35.	**Add to NavBar** Click the **LSU Speed type/Acctg Tag Lookup** button. 



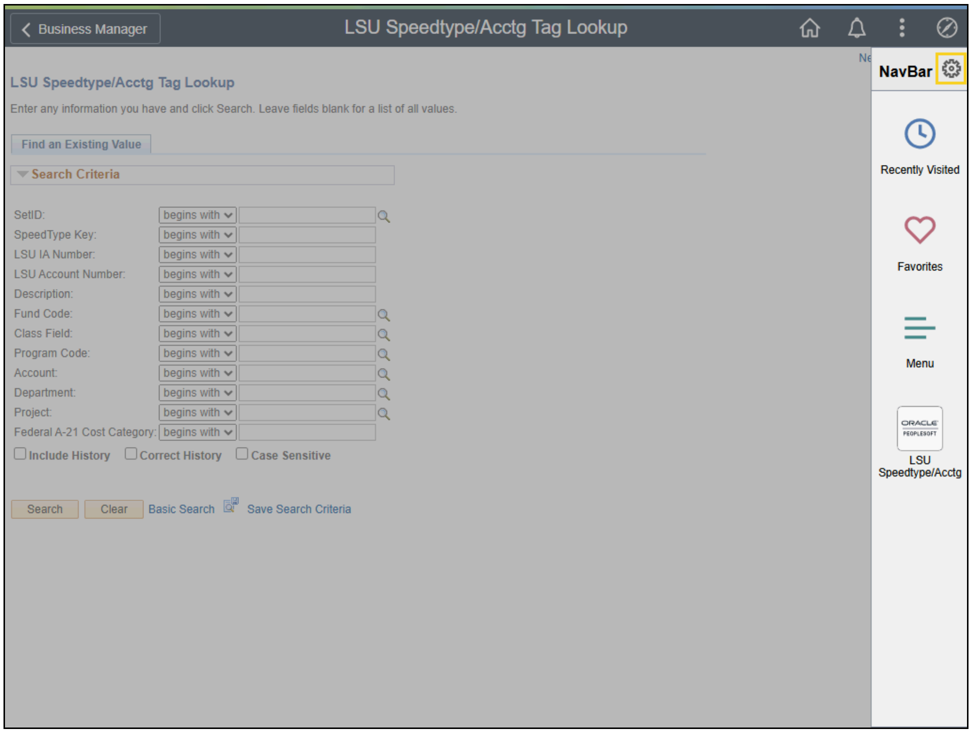
Step	Action
36.	**Add to NavBar** The search page is convenient to look up the **speedtype** for a *project* or *department*. This is a *frequently used page* for the user, and s/he will want to add it to the **NavBar** for ease of access. Click the **Actions** menu. 



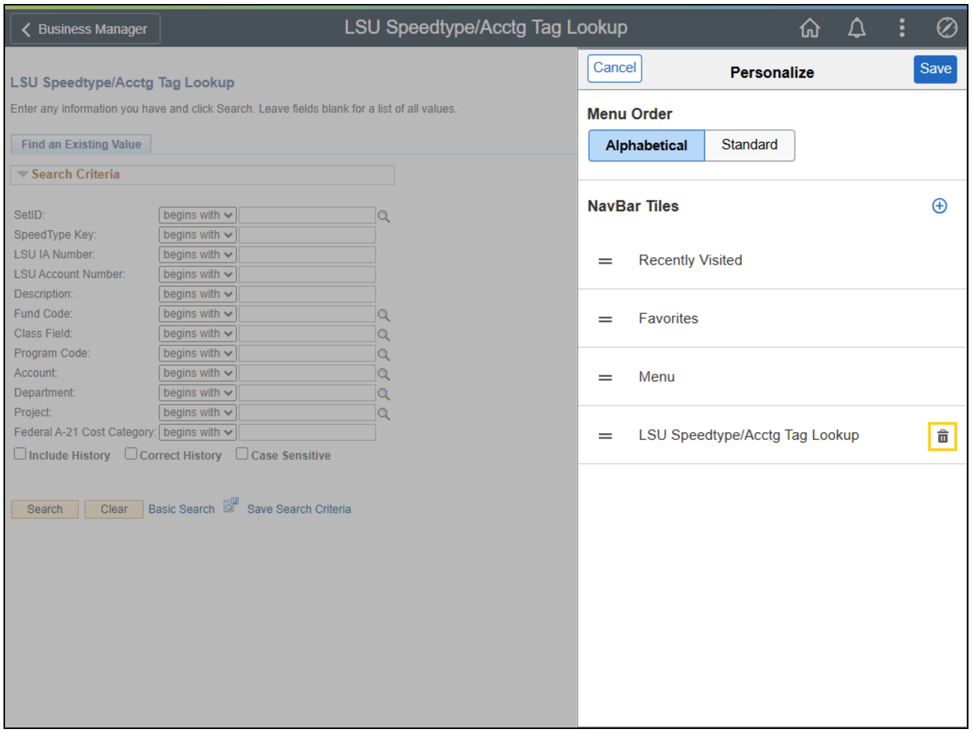
Step	Action
37.	**Add to NavBar** In this example, the user selects the **Actions** icon. A different list of ***Actions items*** displays because the user is performing the action **<u>outside</u>** a navigation collection (i.e., the Business Manager tile). The new list can be used to perform various actions such as: • **Add to Homepage** • **Add to NavBar** • **Add to Favorites** • **My Preferences** • **Sign Out**
38.	**Add to NavBar** Click the **Add To NavBar**. 



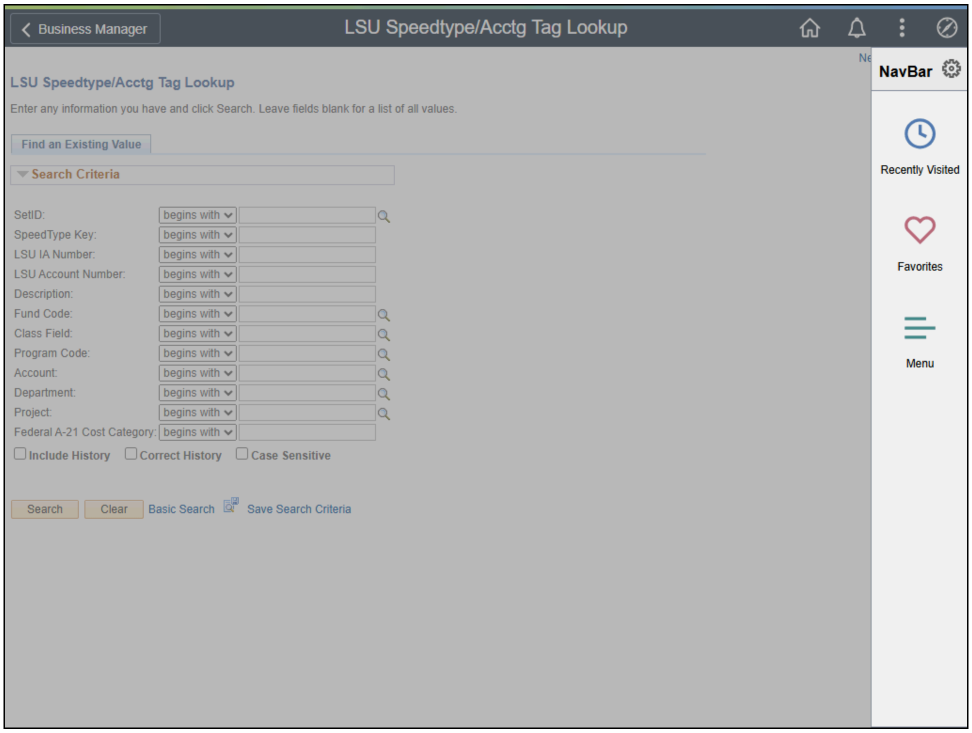
Step	Action
39.	**Add to NavBar** The title of the page defaults into the ***Tile Label***. Click the **Add** link. 
40.	**Add to NavBar** A confirmation message is displayed. Click the **OK** button. 
41.	**Add to NavBar** Click the **NavBar** menu. 

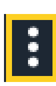


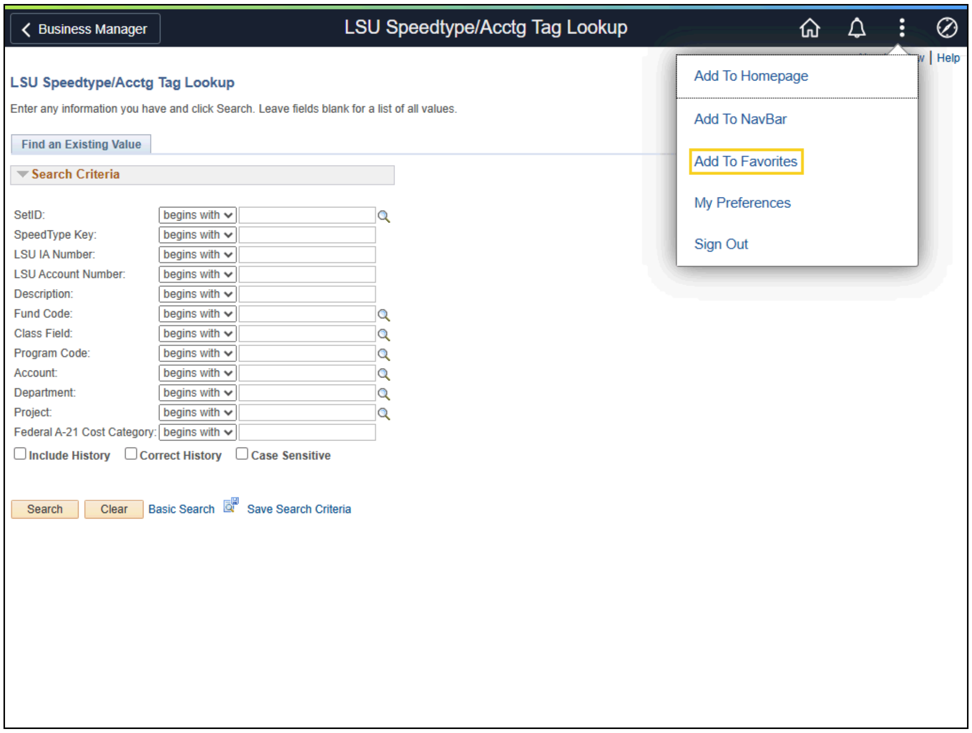
Step	Action
42.	**Add to NavBar** The *LSU Speedtype/Acctg Tag Lookup* button has been added to the **NavBar**. Users can <u>remove</u> a tile or page that has been added to the **NavBar**. Click the **Personalize NavBar** button. 



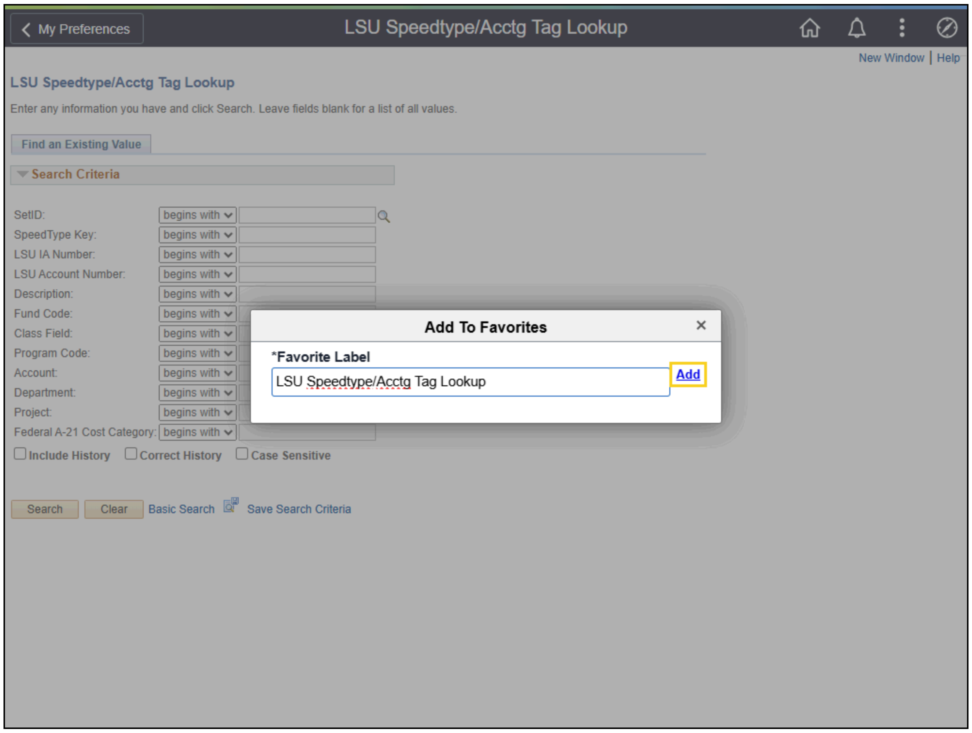
Step	Action
43.	**Add to NavBar** Notice the *Recently Visited*, *Favorites* and *Menu* options do <u>not</u> have a *delete* button. These icons are *LSUHSC IT defaulted*, so they <u>cannot</u> be <u>removed</u> from the list. Click the **Delete LSU Speedtype/Acctg Tag Lookup** button. 
44.	**Add to NavBar** The user <u>must</u> **Save** to complete the delete process. Click the **Save** button. 



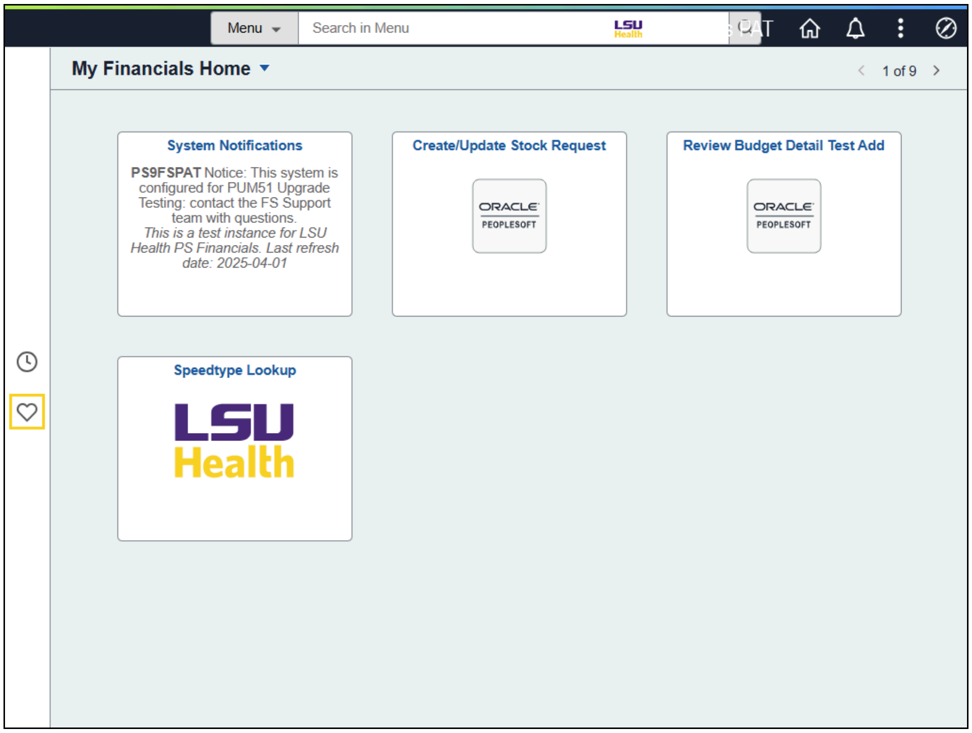
Step	Action
45.	**Add to NavBar** The *LSU Speedtype/Acctg Tag Lookup* button has been <u>removed</u> from the **NavBar**.
46.	Select the **NavBar** to close the ***NavBar menu***. *This completes Add to NavBar.* Click the **NavBar** button to close the menu. 
47.	**Add to Favorites** In this example, the user will *add* the *LSU Speedtype/Acctg Tag Lookup* to **Favorites** using ***Add to Favorites***. The user is still on the *LSU Speedtype/Acctg Tag Lookup* page <u>outside</u> the **Business Manager** navigation collection. Click the **Actions** menu. 



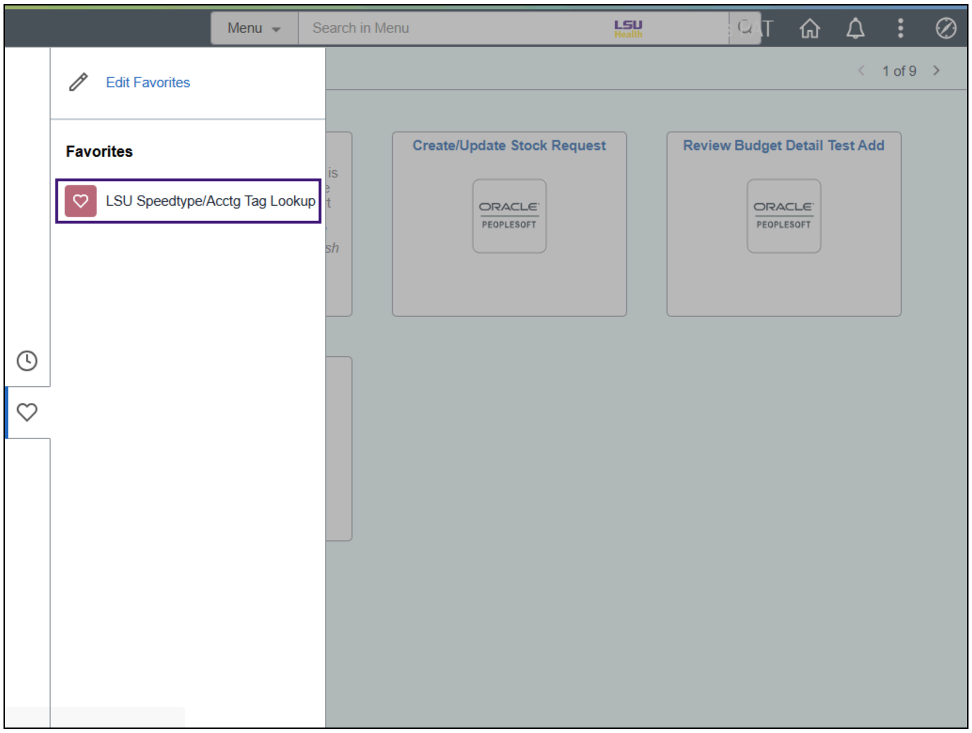
Step	Action
48.	**Add to Favorites** Click the **Add to Favorites** link. 



Step	Action
49.	**Add to Favorites** The page name defaults into the ***Favorite Label*** field. Click the **Add** link. 
50.	**Add to Favorites** A confirmation message is displayed. Click the **OK** button. 
51.	**Add to Favorites** Click the **Home** button. 



Step	Action
52.	**Add to Favorites** Click the **Favorites (Heart) icon** button. 



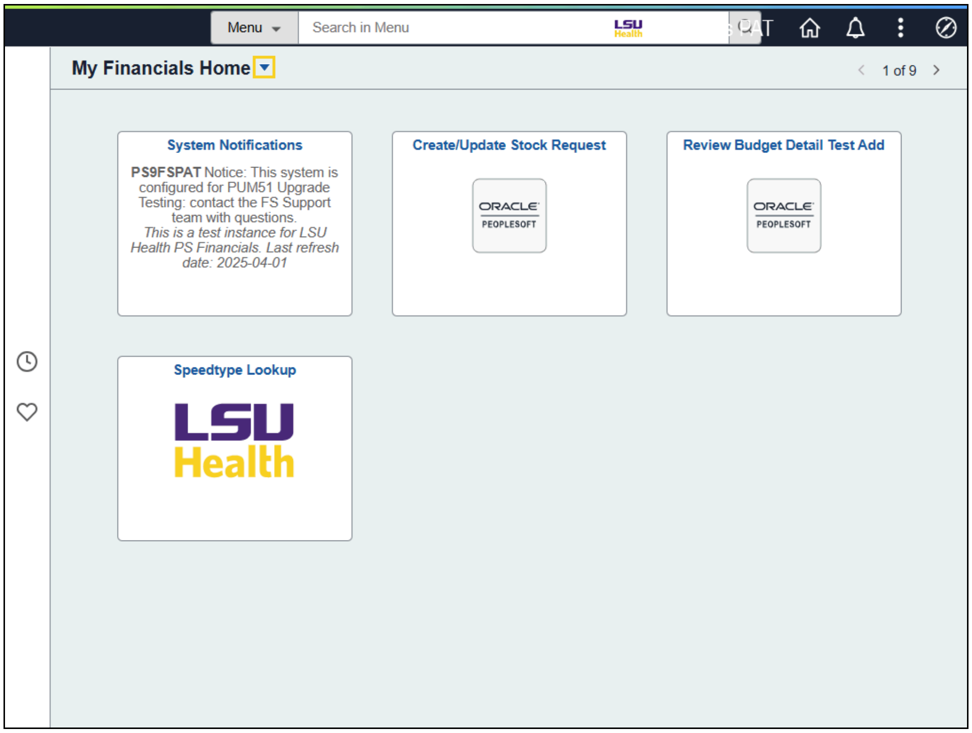
Step	Action
53.	*The completes Add to Favorites.* The *LSU Speedtype/Acctg Tag Lookup* button displays in the **Favorites** page. The user will simply click the button to go directly to the page.
54.	***NOTE: Additional documentation for utilizing PeopleSoft Financials is located on the PeopleSoft Support End User Training pages of LSUHSC.edu.*** **https://www.lsuhsc.edu/ps/support/fin_9_manuals.aspx**
55.	This completes ***Action Icon Options***. **End of Procedure.**

Example Inquiries using the Business Manager Tile

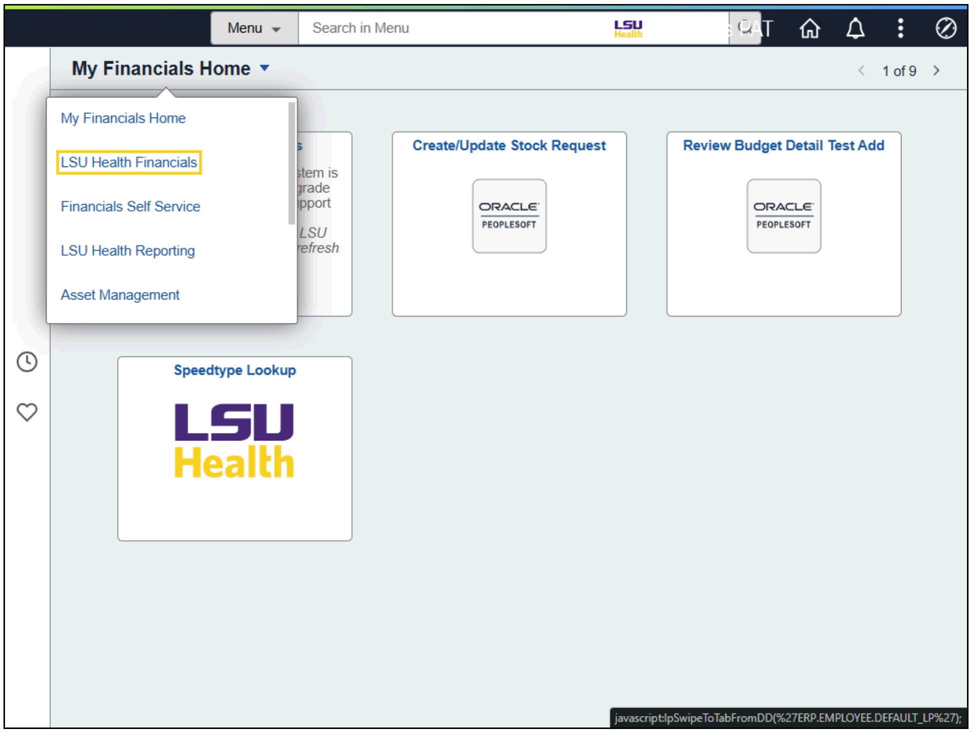
Procedure

In this topic you will learn about **Example Inquiries using the Business Manager Tile**.

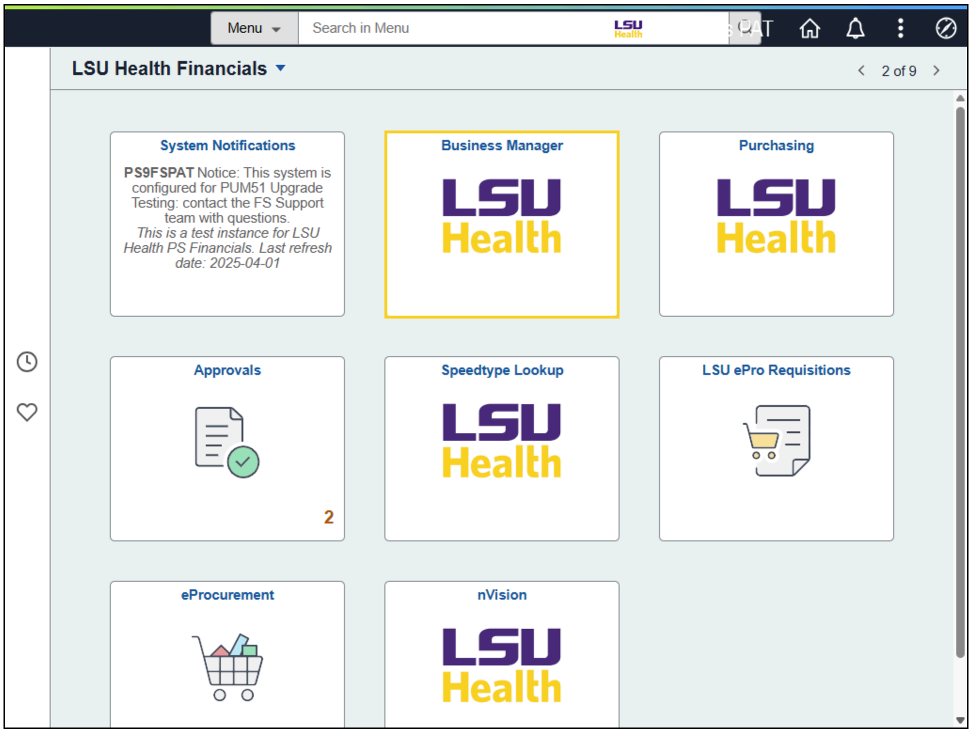
Step	Action
1.	**Example of Inquiries a Business Manager Might Make using the Business Manager Tile** In the course of your work, you may find there is a need to check information related to a billing invoice for your department's project/grant. For this example, you will use *Business Unit LSUNO*, *Customer: 04198 - Our Lady of the Lake* - and *invoice NG25-0294*.



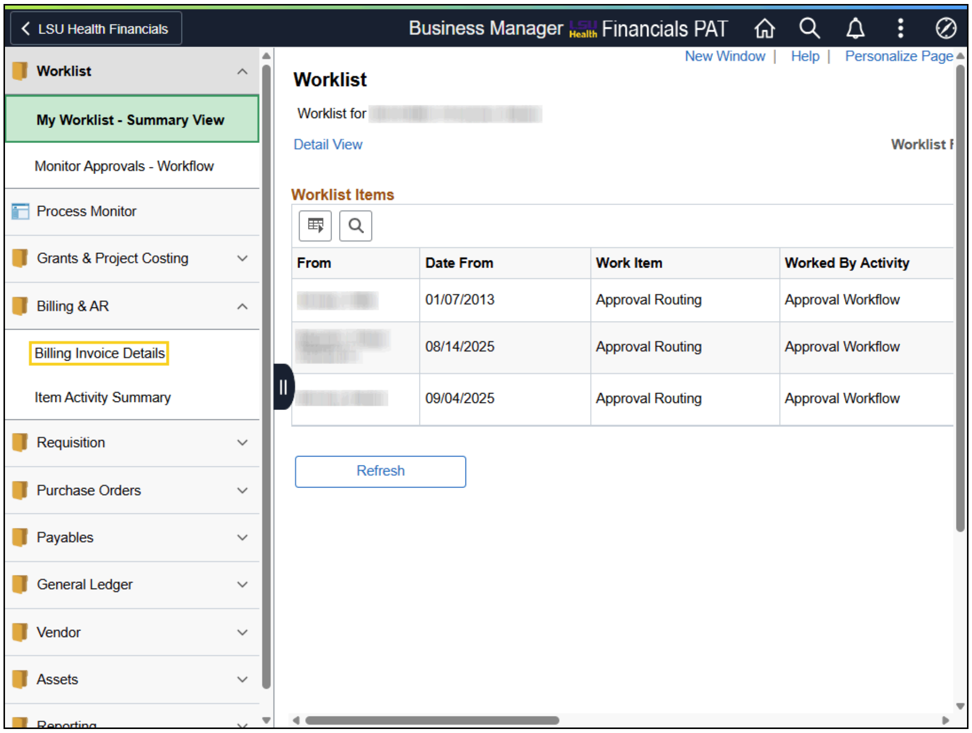
Step	Action
2.	*Launch PeopleSoft Financials* within **Citrix**. Select the drop-down menu button to the right of **My Financials Home**. Click the **My Financials Home** dropdown button to activate the menu.



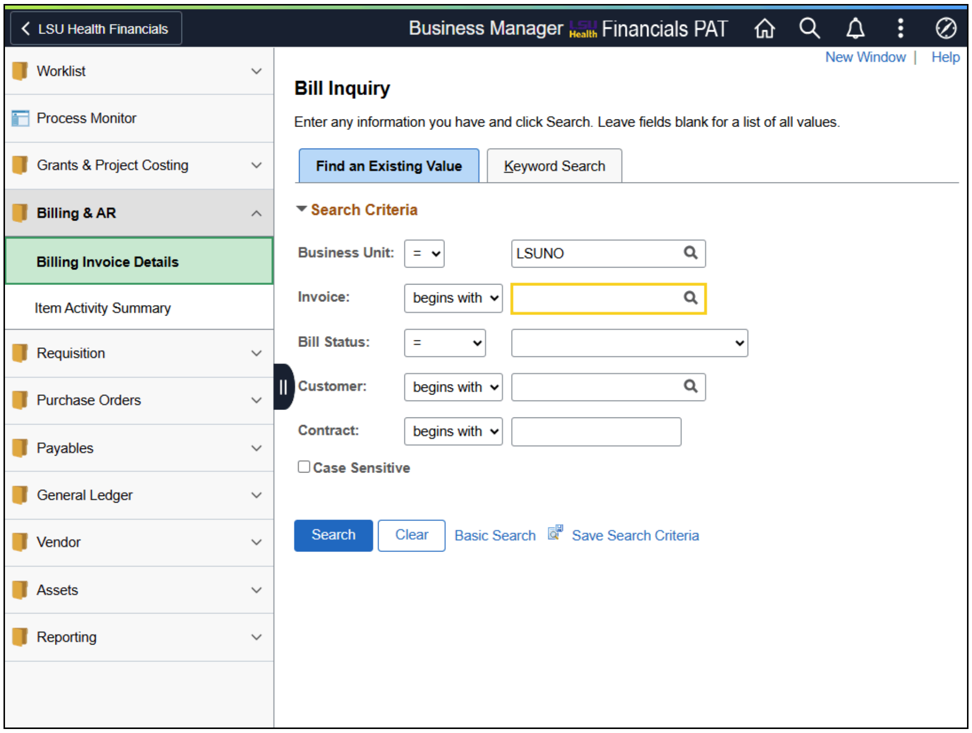
Step	Action
3.	Click the **LSU Financials Home** menu. LSU Health Financials



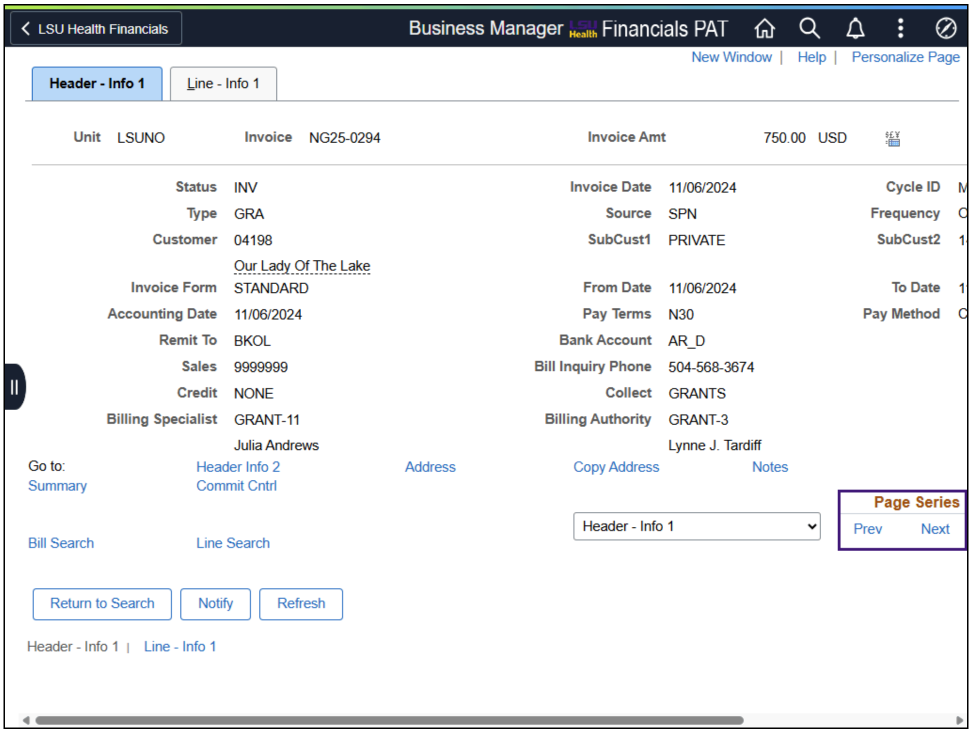
Step	Action
4.	Click the **Business Manager** button.
5.	Once the Worklist displays and you see the navigation collection menus on the left side of the page, select the ***Billing & A/R*** (Accounts Receivables) menu options. Click the **Billing & A/R** dropdown button to activate the menu.



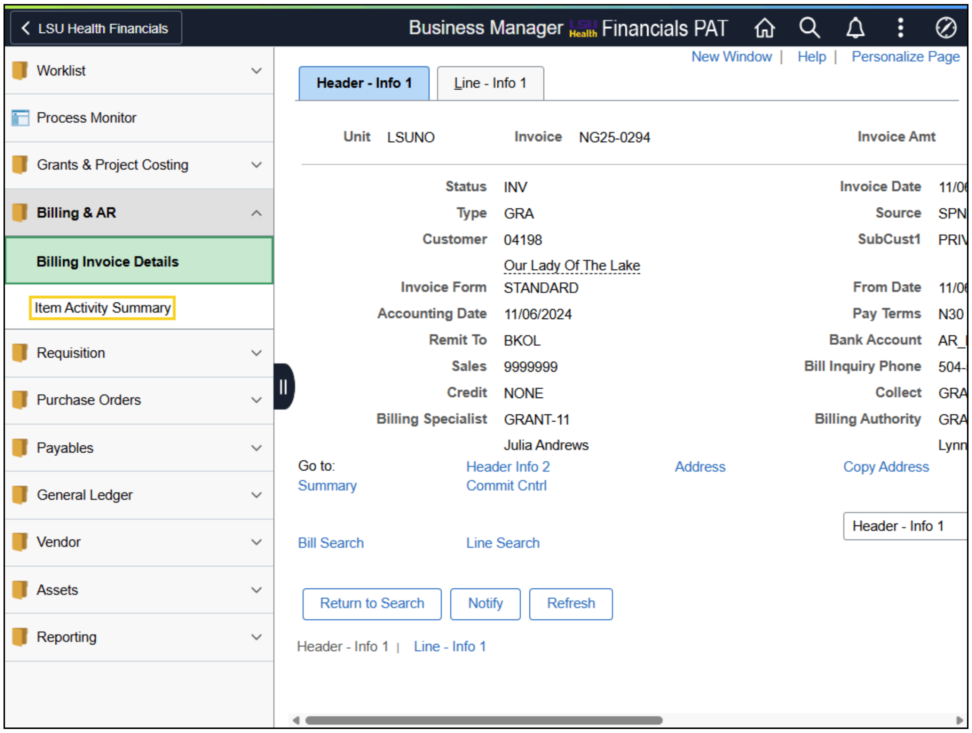
Step	Action
6.	Click the **Billing Invoice Details** button. Billing Invoice Details



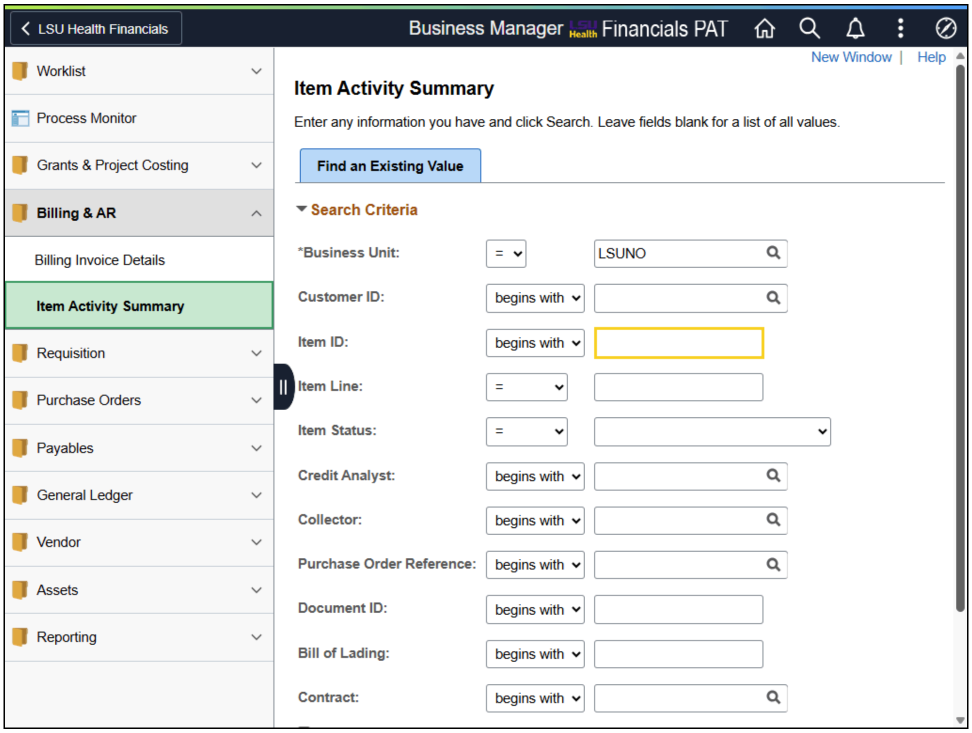
Step	Action
7.	In this example, the **Business Unit (BU)** defaults. If the **BU** does <u>not</u> default, enter it or select it using the *Look up Business Unit* button. Enter the desired information into the **Invoice:** field. Enter "**NG25-0294**".
8.	Click the **Search** button. 



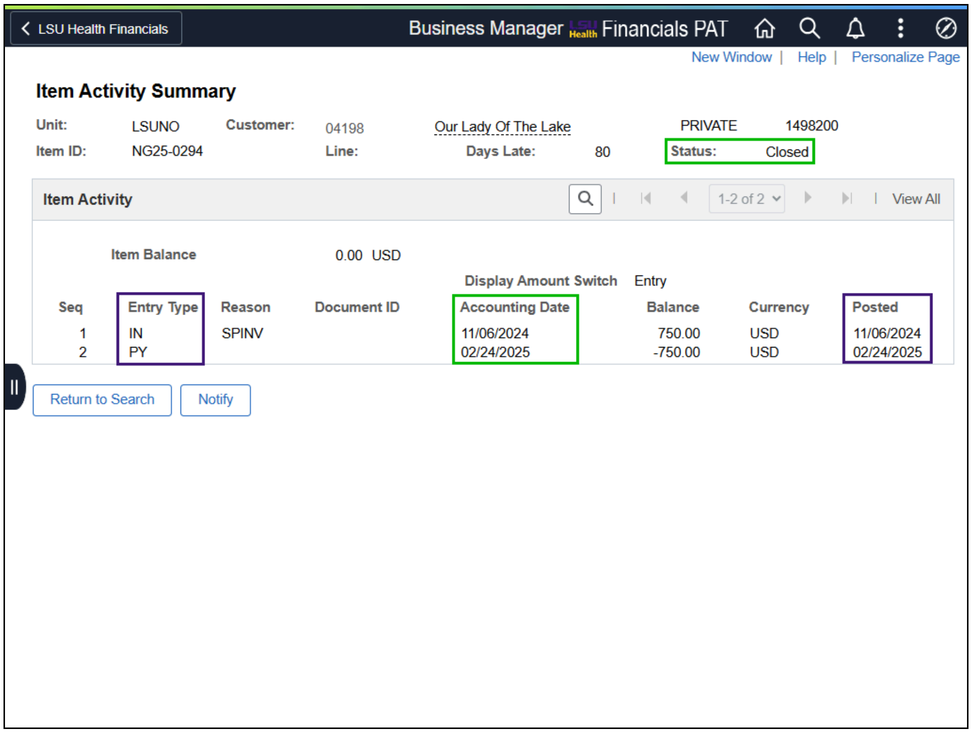
Step	Action
9.	To *scroll through the pages* of the invoice, select the ***Next*** link in the ***Page Series*** box at the bottom right of the page.



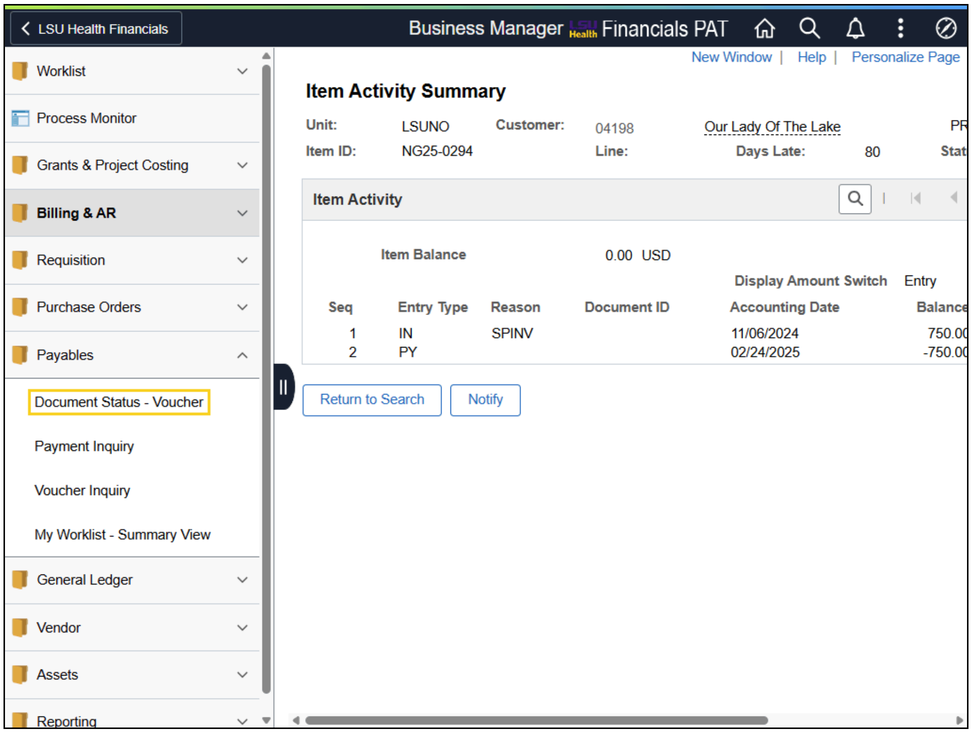
Step	Action
10.	In this example, the user wants to see if the *invoice has been paid or not*. To do that, in the left menu options, choose ***Item Activity Summary*** in **Billing & A/R**. Click the **Item Activity Summary** button. Item Activity Summary



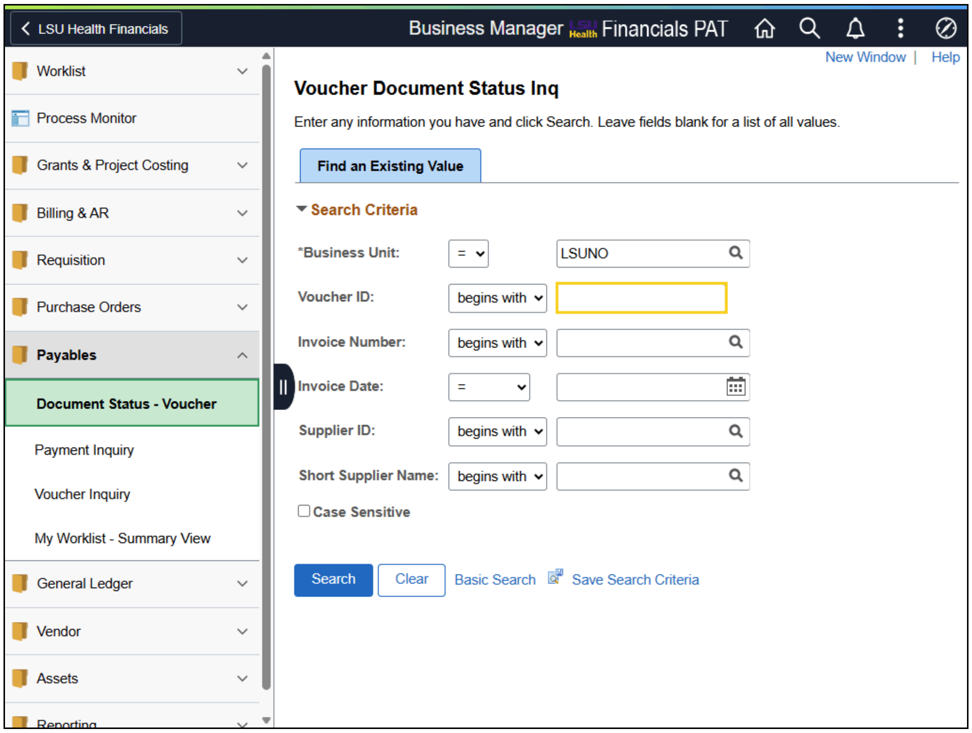
Step	Action
11.	In this example, the **Business Unit (BU)** defaults. If the **BU** does <u>not</u> default, enter it or select it using the *Look up Business Unit* button. The user will enter the invoice number in the **Item ID:** field. Enter the desired information into the **Item ID:** field. Enter "**NG25-0294**".
12.	Click the **Search** button. 



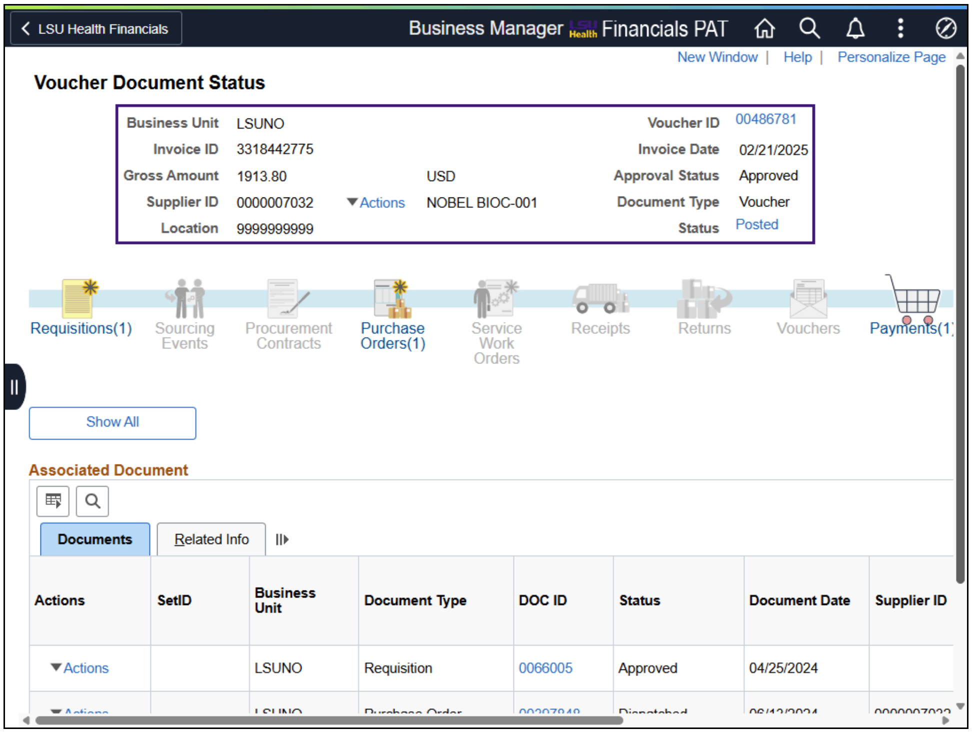
Step	Action
13.	In this example, the *invoice* was *generated* on *11/6/24*, *paid on 2/24/25*, and is now *closed*. Using this inquiry may be helpful when trying to review project activity before closing the project.
14.	Another example of inquiry that may be very helpful is the **Voucher Document Status**. This inquiry allows the user to *view* the *voucher information* along with *associated payments*, *receivers*, *purchase orders* and *requisitions*. Click the **Close Billing & A/R** menu.
15.	From the **Business Manager Navigation Collection** menu, select the arrow to the right of **Payables** to expand that menu. Click the **Payables** dropdown button to activate the menu.



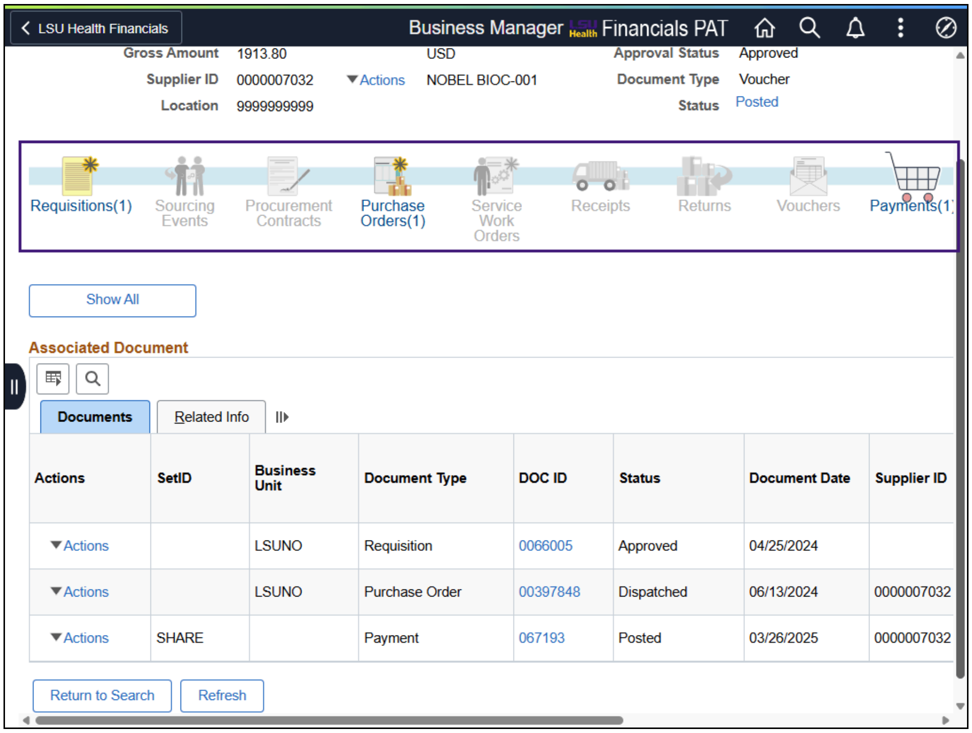
Step	Action
16.	Click the **Document Status - Voucher** button. Document Status - Voucher



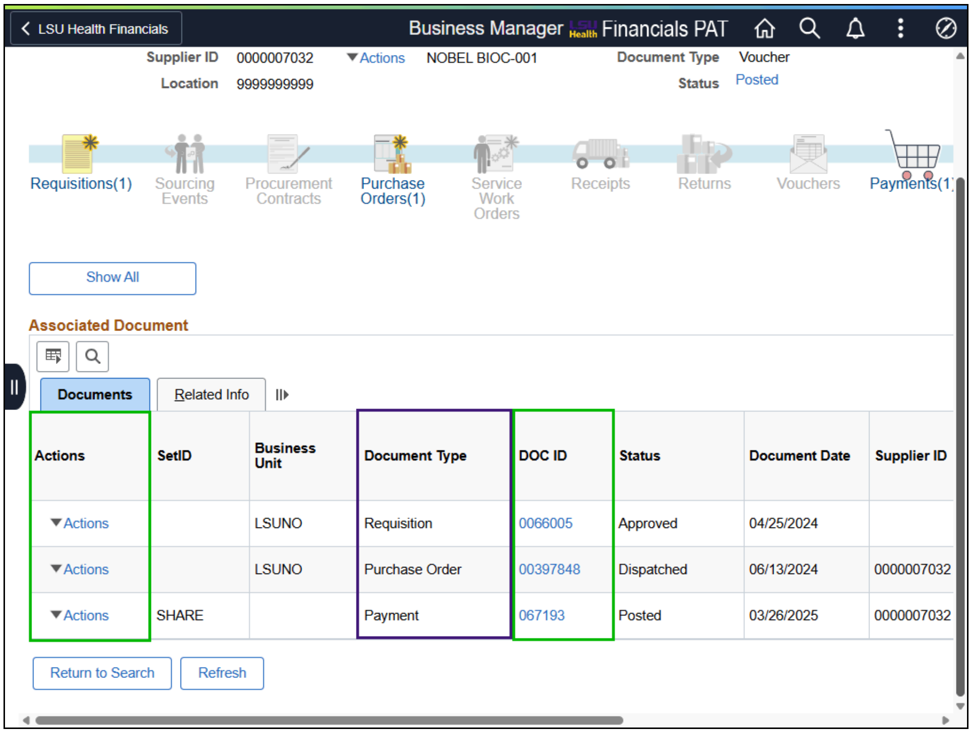
Step	Action
17.	In this example, the **Business Unit (BU)** defaults. If the **BU** does <u>not</u> default, enter it or select it using the *Look up Business Unit* button. Enter the desired information into the **Voucher ID:** field. Enter "**00486781**".
18.	Click the **Search** button. 



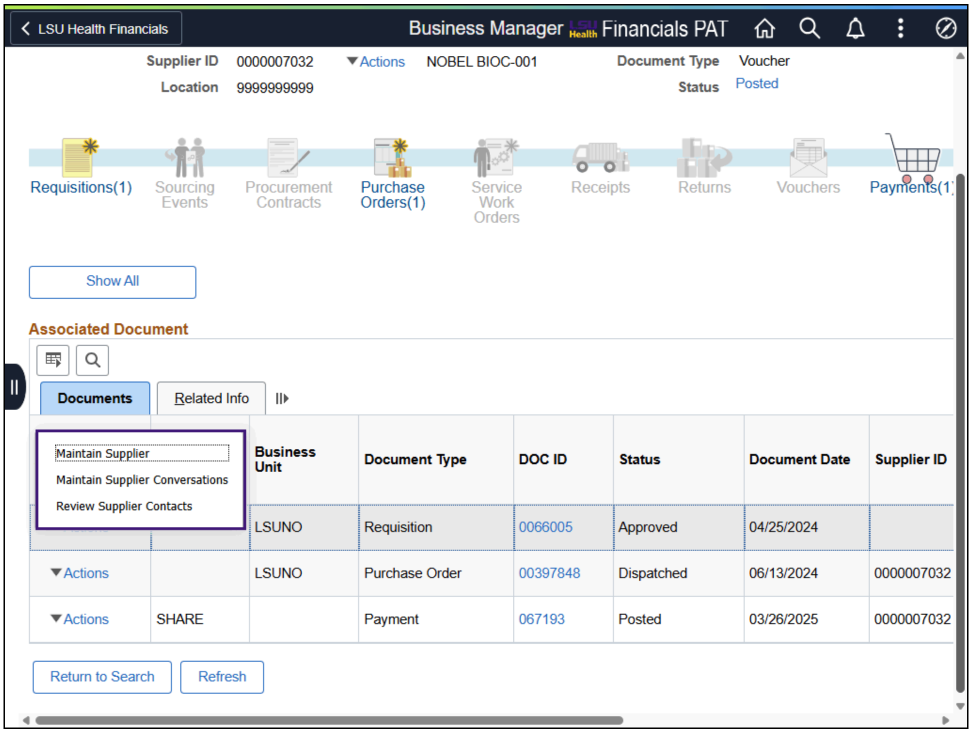
Step	Action
19.	The **Voucher Document Status** displays. At the *top* of the page, *header information* is shown.



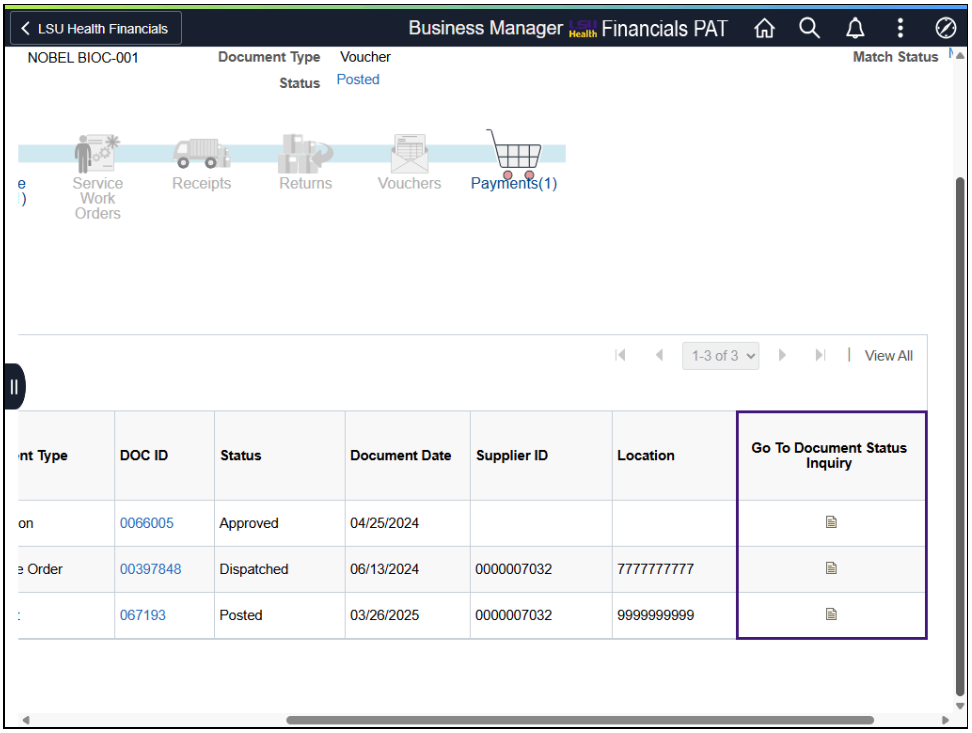
Step	Action
20.	Below the header information is a *graphic with icons for all phases* of the supply chain process. *Greyed out icons* are either *not used* by LSUHSC, or there is *not a related document* for the voucher and that process. In the graphic, you can see that *Requisition*, *Purchase Order* and *Payment* display in *color* as there *are associated documents*. But the *Receipts icon* is **greyed out** as there is *not* a *receiver* for this.



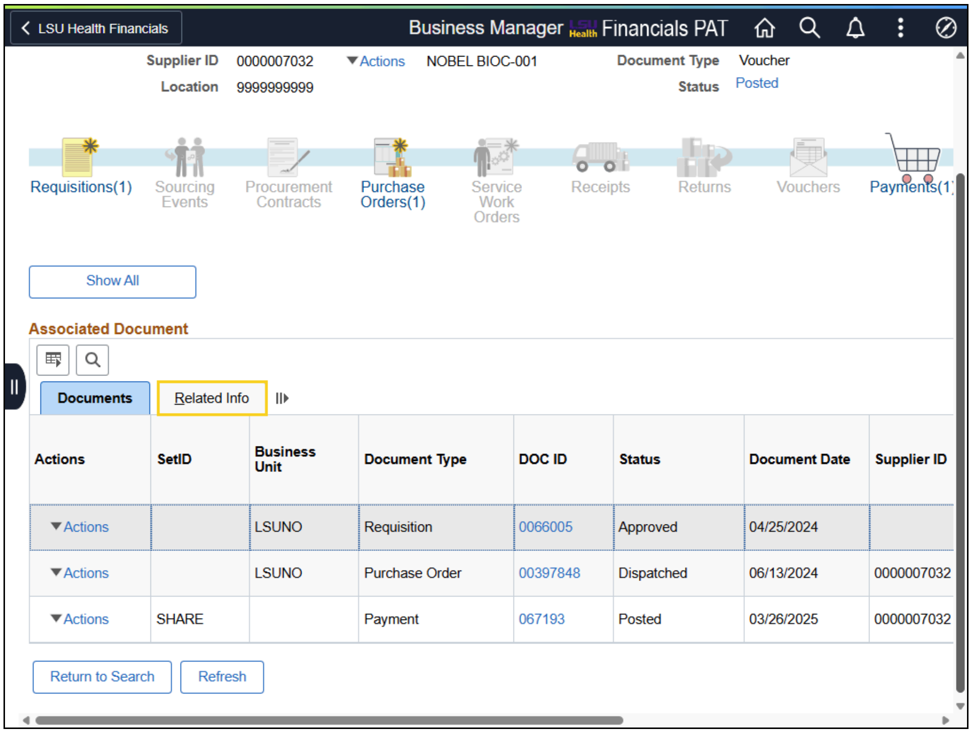
Step	Action
21.	Toward the bottom of the page are the *documents associated* with the *voucher*. Selecting a *blue link* in ***DOC ID*** column *navigates* you to that *document*. Also note, there are *action icons* for *each of the rows* to allow the users to *view additional information*.
22.	Click the **Requisition Actions** link. 

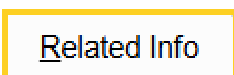


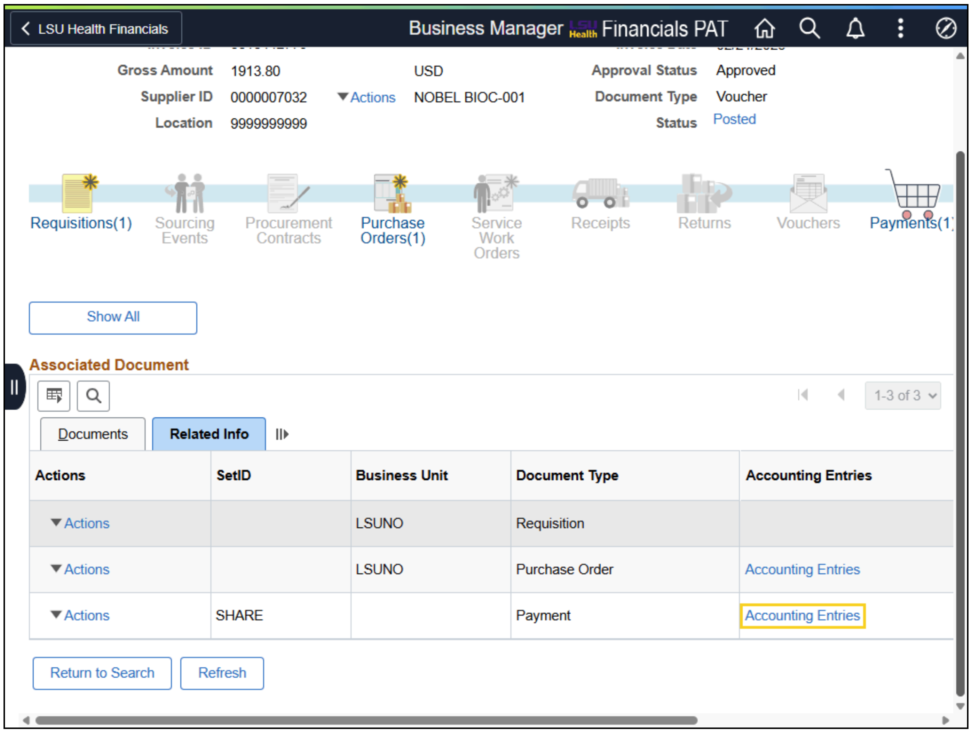
Step	Action
23.	The *Actions icon next to each row* allows the user to *view supplier information*.
24.	The **DOC ID** column displays the ***Requisition ID***, ***Purchase Order ID***, and ***Payment ID***.



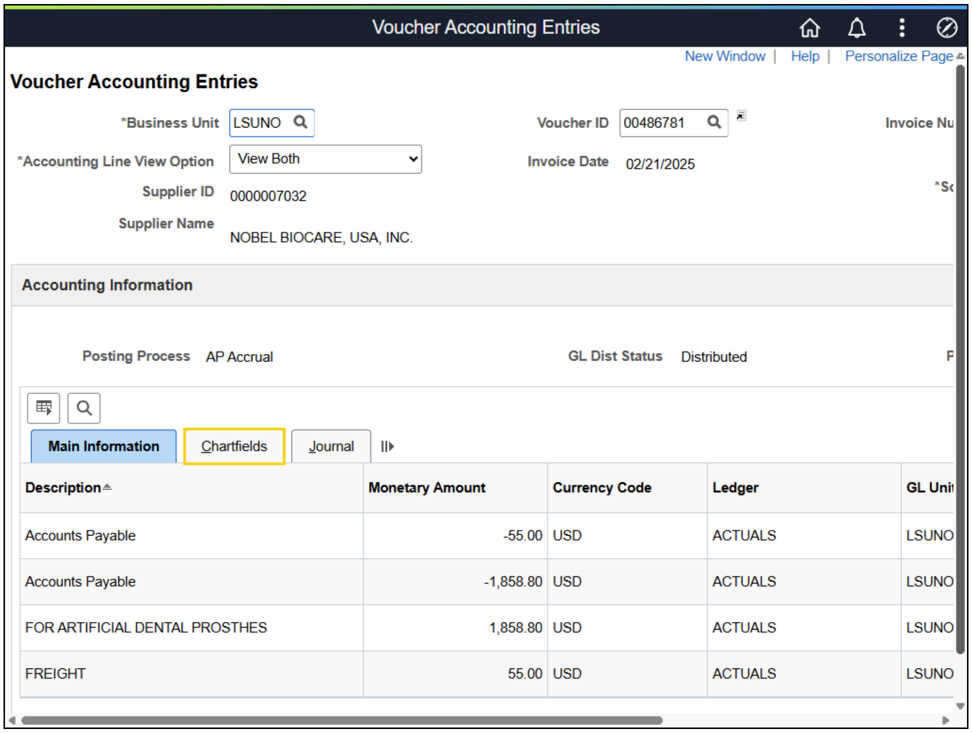
Step	Action
25.	At the far right of each row is an *icon* that *navigates* the user to the ***Document Status Inquiry*** page for each of the documents.



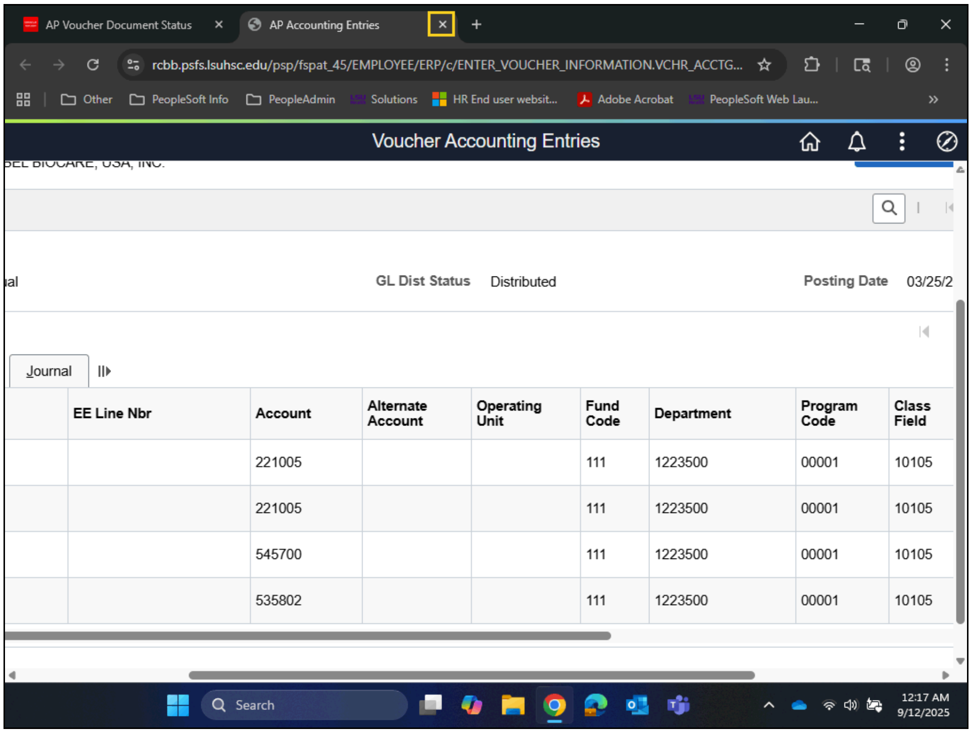
Step	Action
26.	Click the **Related Info** tab. 

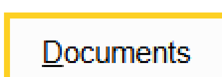


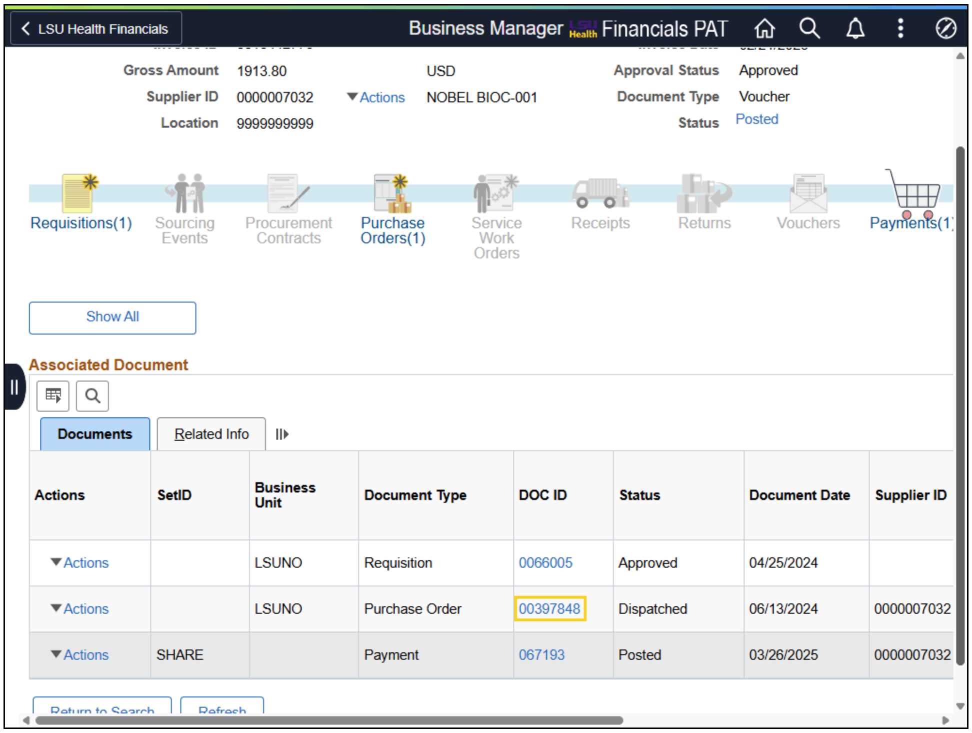
Step	Action
27.	The **Related Info** tab provides a link to view the ***Accounting Entries*** links for the *PO* and *Payment* documents. This will open a new window. Click the **Accounting Entries** link. Accounting Entries



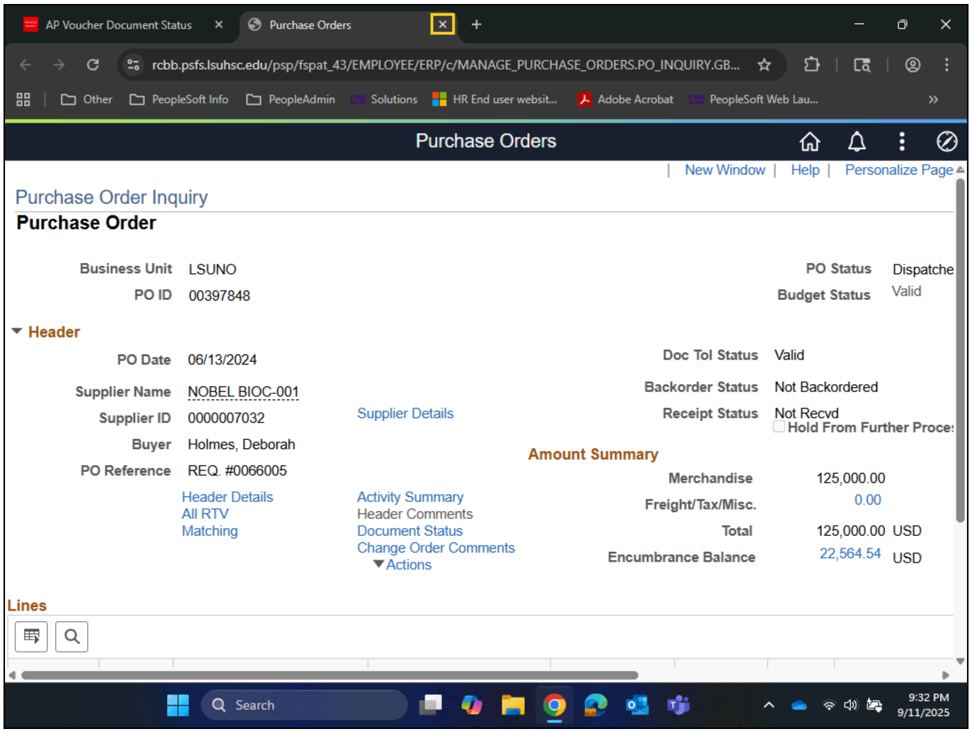
Step	Action
28.	The **Voucher Accounting Entries** page is displayed. Notice in addition to the displayed information, there is a *Chartfields tab*. Click the **Chartfields** tab. 



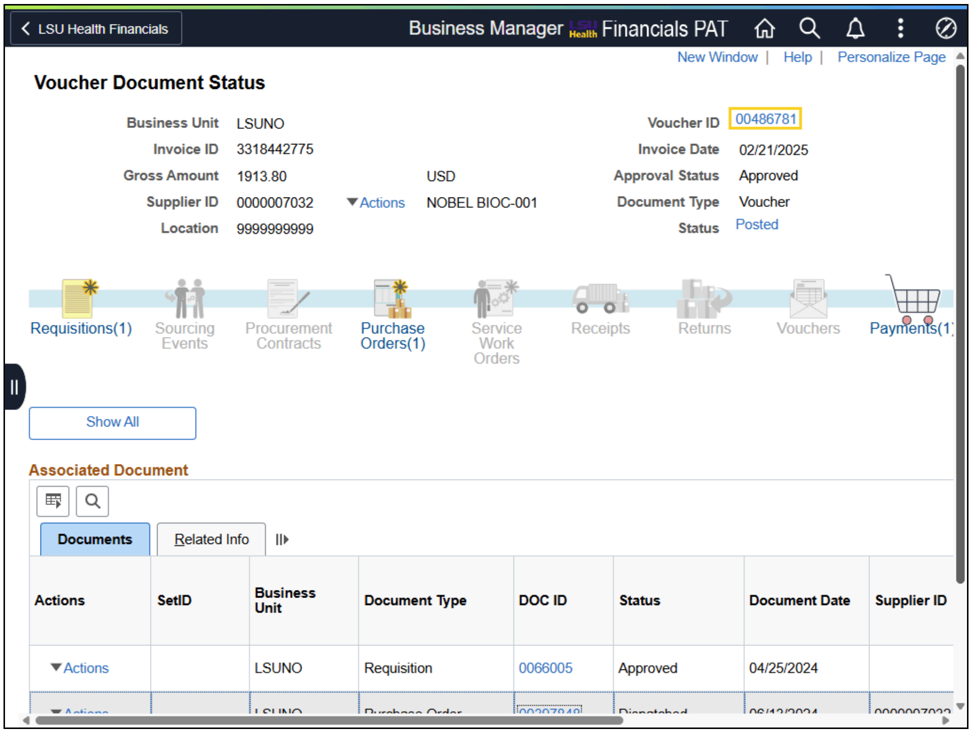
Step	Action
29.	Each row, as well as the Journal tab, provides the journal chartstring information for the voucher. Close the tab to *return* to the *Voucher Document Status Related Info* tab. Click the **Close AP Accounting Entries** tab. 
30.	Click the **Documents** tab. 



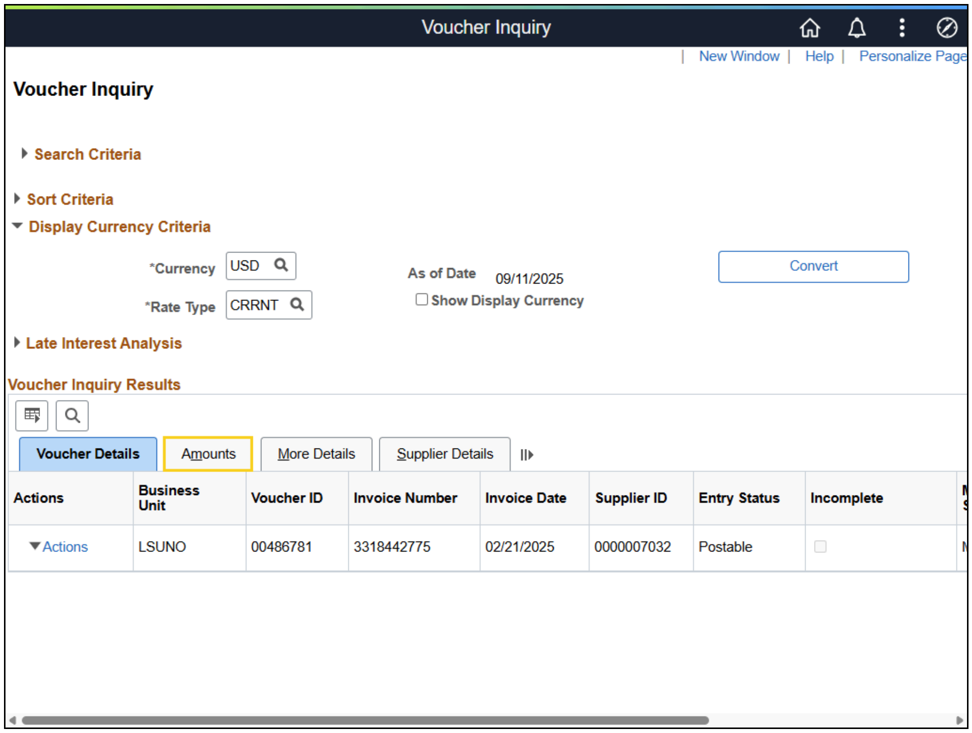
Step	Action
31.	If you want to review the actual *Purchase Order*, select the *link* for the document in the *DOC ID* column. Click the **00397848** link. 
32.	A new window opens to display the **Purchase Order Inquiry** page. Selecting the available *links* allows the user to *view comments*, as well as *chartfield information*.

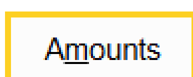


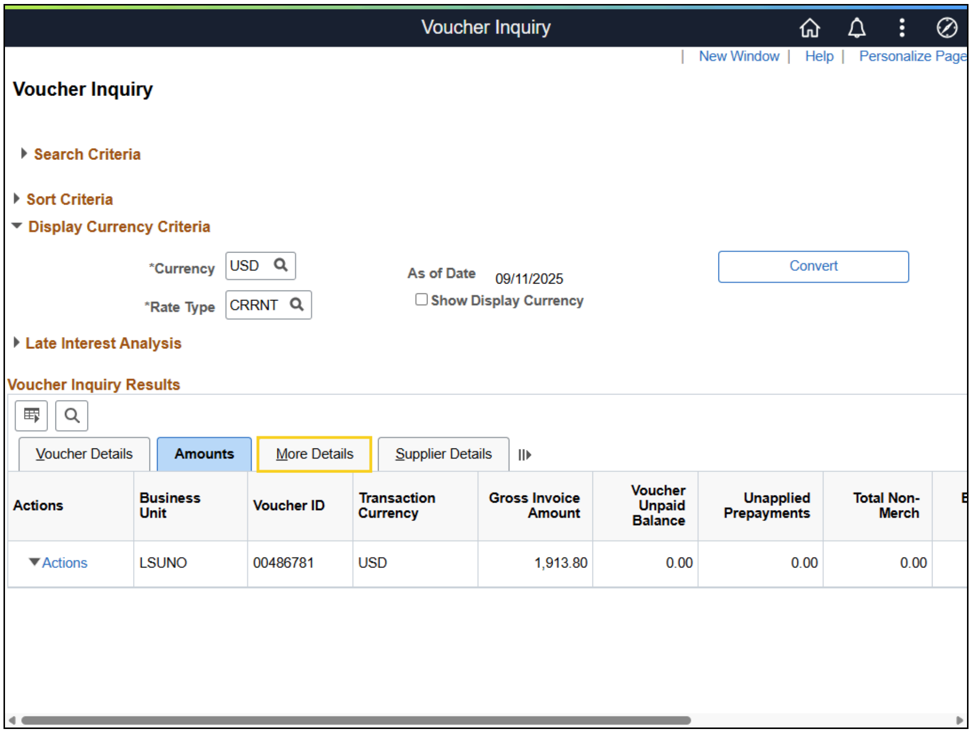
Step	Action
33.	Close the window to *return* to the V*oucher Document Status Inquiry* page on the *Documents* tab. Click the **Close Purchase Order** tab. 



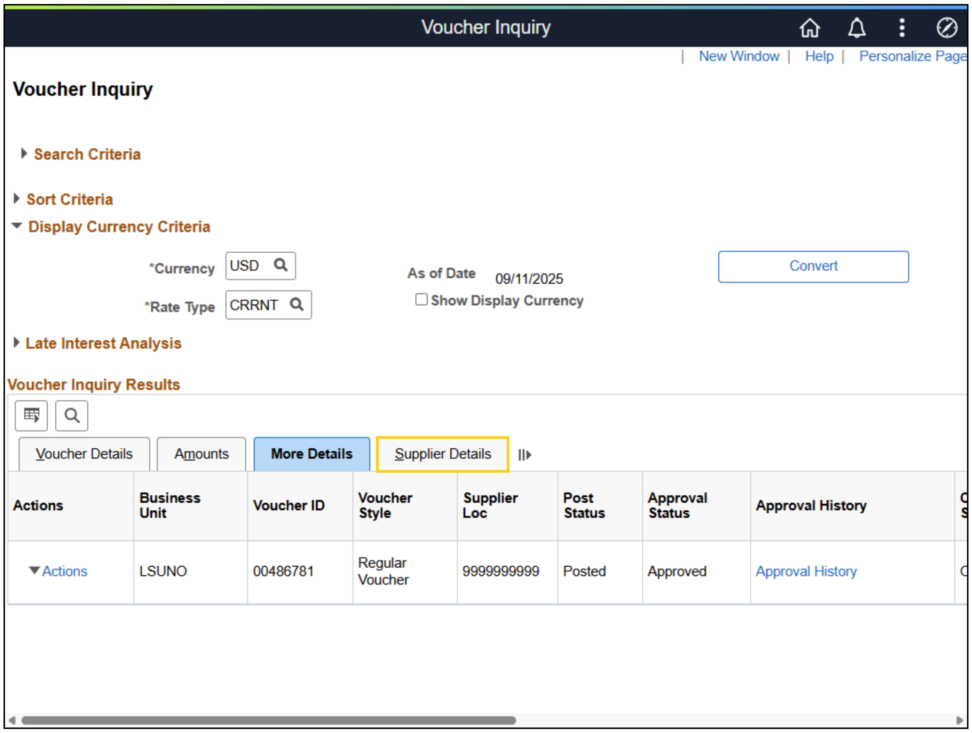
Step	Action
34.	If you need to review the *actual voucher information*, select the *Voucher ID* link at the top right of the page. Click the **Voucher ID** link. 00486781

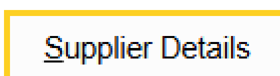


Step	Action
35.	The **Voucher Inquiry** page is displayed and includes *four tabs*: ***Voucher Details***, ***Amounts***, ***More Details*** and ***Supplier***. On the **Voucher Details** tab, users can view the Invoice number, the *Invoice Date*, *Supplier ID*, and to the far right of the page, but <u>not</u> shown in the screenshot, is the *Short Supplier Name*. Click the **Amounts** tab. 



Step	Action
36.	On the **Amount** tab, users will view the *Gross Invoice Amount*, and to the far right of the page, but <u>not</u> shown in the screenshot, the *Gross Amount Paid* and *Net Amount Paid*. Click the **More Details** tab. 



Step	Action
37.	The **More Details** tab is especially helpful. It includes an *Approval History link* where users may *review* the *approval chain*. Also, notice that the tabs include the ***Actions*** icon. The ***Actions*** icon on the **Voucher Inquiry** allows users to *view* the *attachments* as well as the ability to *view accounting details*, *payment information*, *matching*, *voucher details* and *document status*. Click the **Supplier Details** tab. 
38.	On the Supplier Details tab, the user will see the Supplier ID, Short Supplier Name, and Supplier Name. Click the **Close Voucher** tab. 
39.	This completes ***Example Inquiries using the Business Manager Tile***. **End of Procedure.**