



**LSU Health
Reporting Homepage
PUM 51**

Version Date: September 5, 2025

Training Guide
PUM 51

Table of Contents

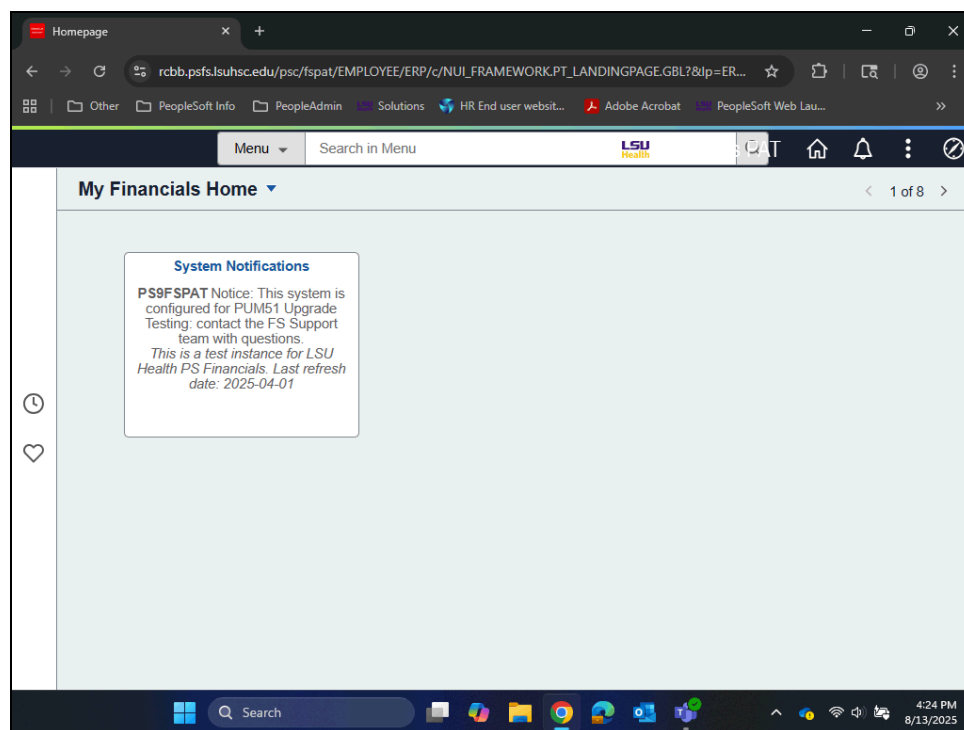
LSU Health Reporting Homepage.....	1
 LSU Health Reporting Homepage – PUM 51	1

LSU Health Reporting Homepage

LSU Health Reporting Homepage – PUM 51

Procedure

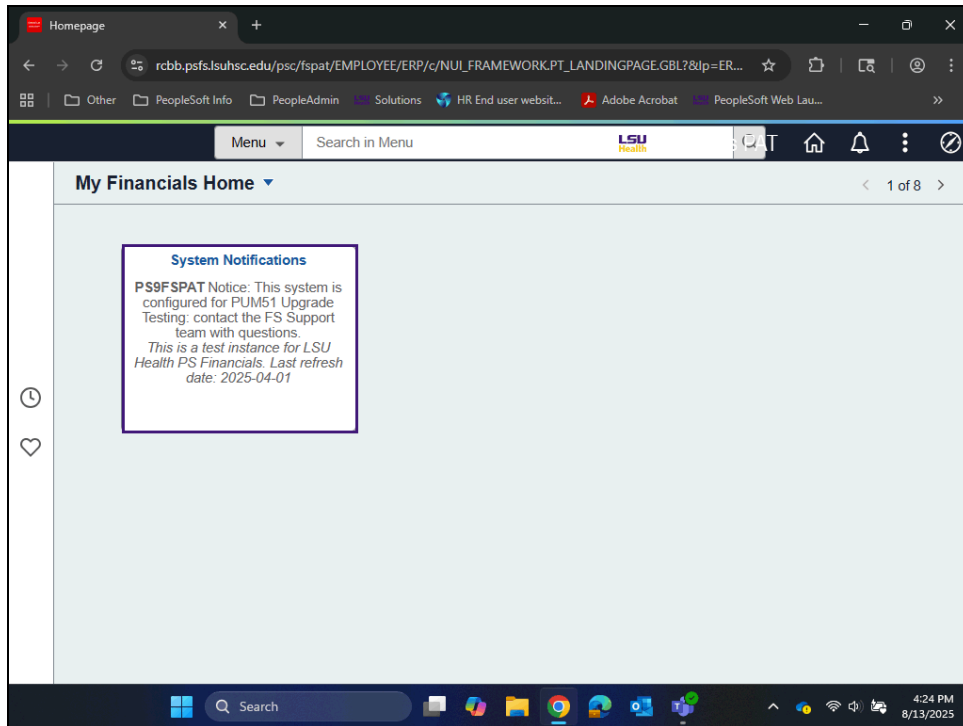
In this topic you will learn how to use the **LSU Health Reporting Homepage**.



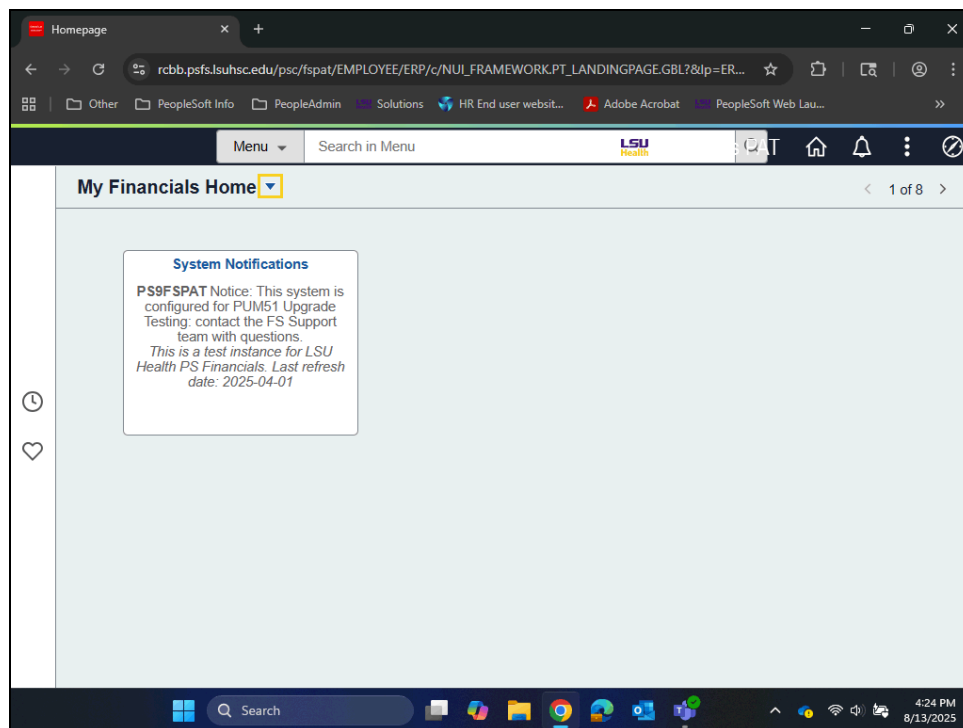
Step	Action
1.	LSU Health Reporting Homepage The LSU Health Reporting Homepage is granted to users in <i>PS Financials Reporting Database (PS9FSRPT)</i> . The Homepage provides a quick <i>navigational tool</i> to Query, nVision and BI Publishing reporting.
2.	My Financials Home To access the LSU Health Reporting Homepage , <i>launch PS(FSRPT), PeopleSoft Financials Reports. My Financials Home</i> is the <i>landing page</i> for users as shown in the screenshot here. Tiles on <i>My Financials Home</i> will vary by user.

Training Guide

PUM 51



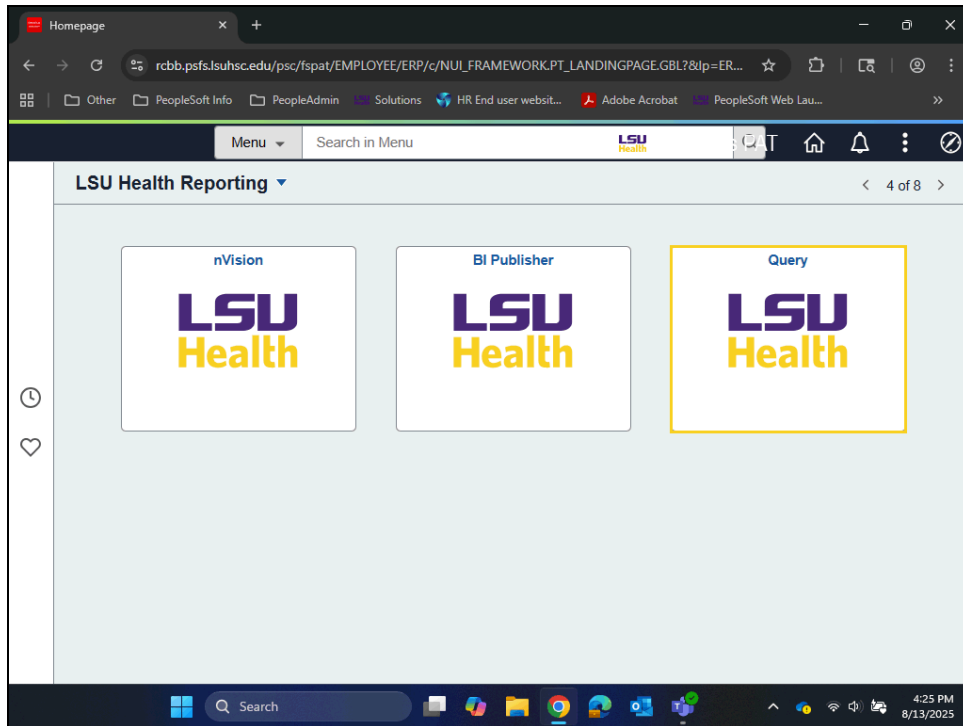
Step	Action
3.	Systems Notification Box The System Notification tile <i>defaults onto all homepages</i>. This informational tile will be <i>used</i> to alert users to events such as <i>downtime, or maintenance</i> as well as <i>new feature information</i>.



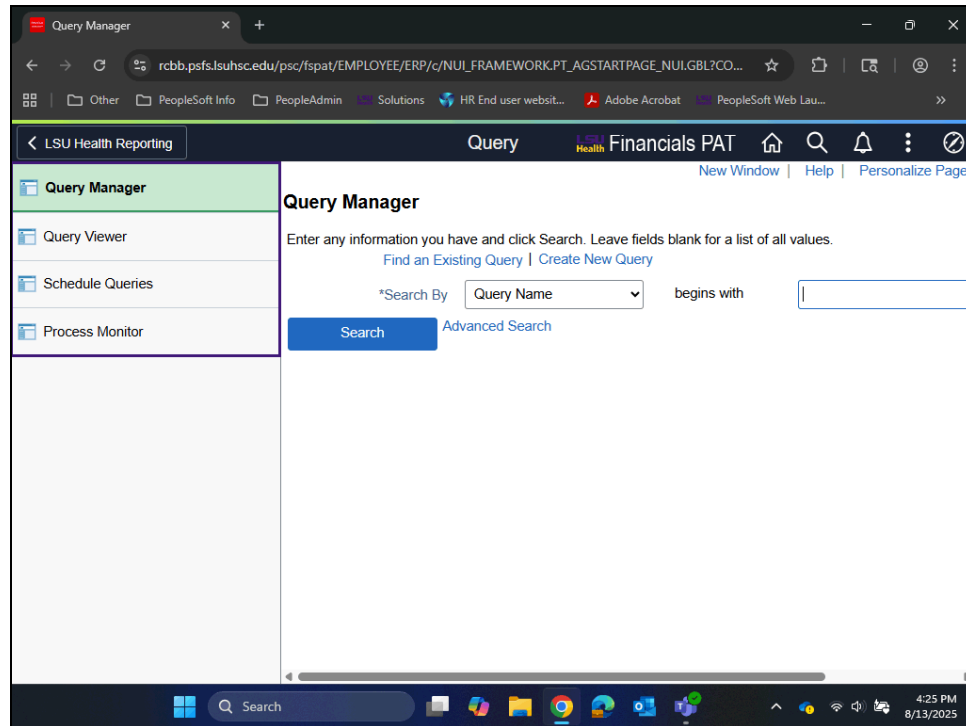
Step	Action
4.	To navigate to the LSU Health Reporting Homepage, choose the <i>drop-down selection</i> at the top of the page next to the words 'My Financials Home' and choose LSU Health Reporting. Click the button to the right of the My Financials Home field. 
5.	Click the LSU Health Reporting list item. 

Training Guide

PUM 51



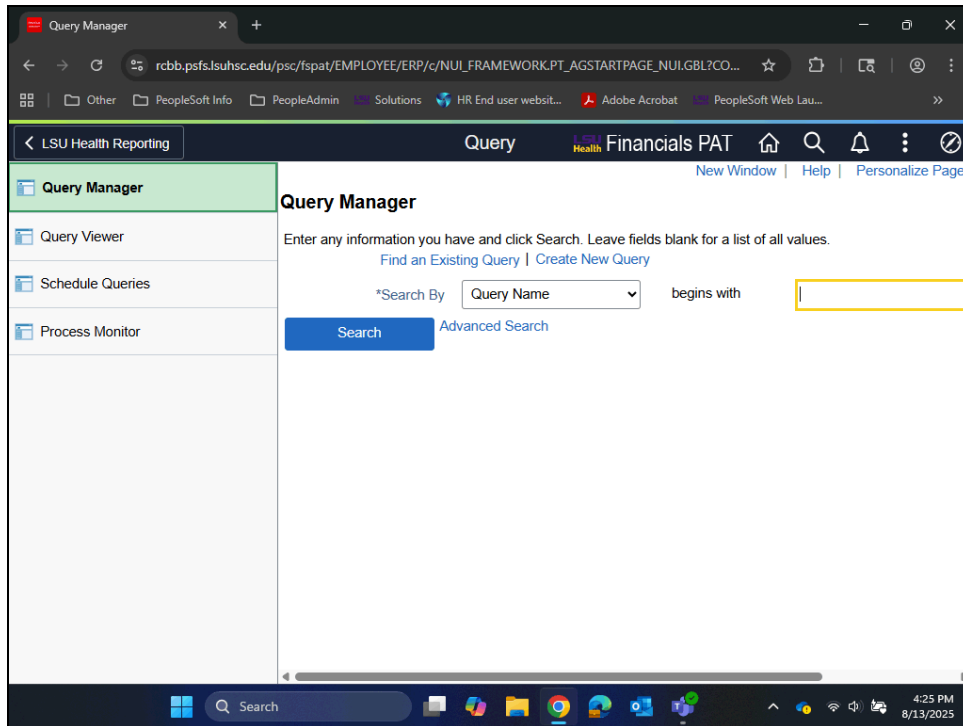
Step	Action
6.	The LSU Health Homepage includes 3 tiles, one each for <i>BI Publisher</i>, <i>nVision</i> and <i>Query</i>. Each of these tiles represents a navigation collection that includes all the menu features you need to use these tools. Click the Query button.



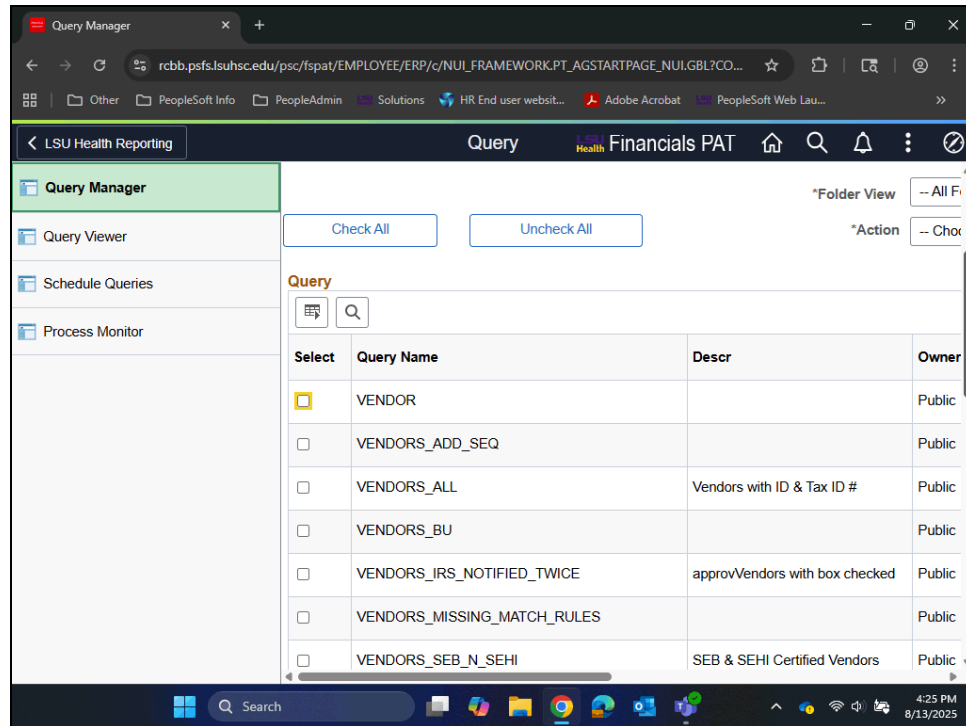
Step	Action
7.	The <i>navigation collection</i> displays the menu options on the left of the screen and the work area on the right. <i>Your menu options may differ based on your access to Query Manager or Query Viewer.</i> The screen is very familiar to query users. The <i>only difference</i> is the navigations on the left. By selecting an option on the left, you may then search for a query to <i>run to HTML, Excel, or Schedule it to run at a specific time.</i>

Training Guide

PUM 51



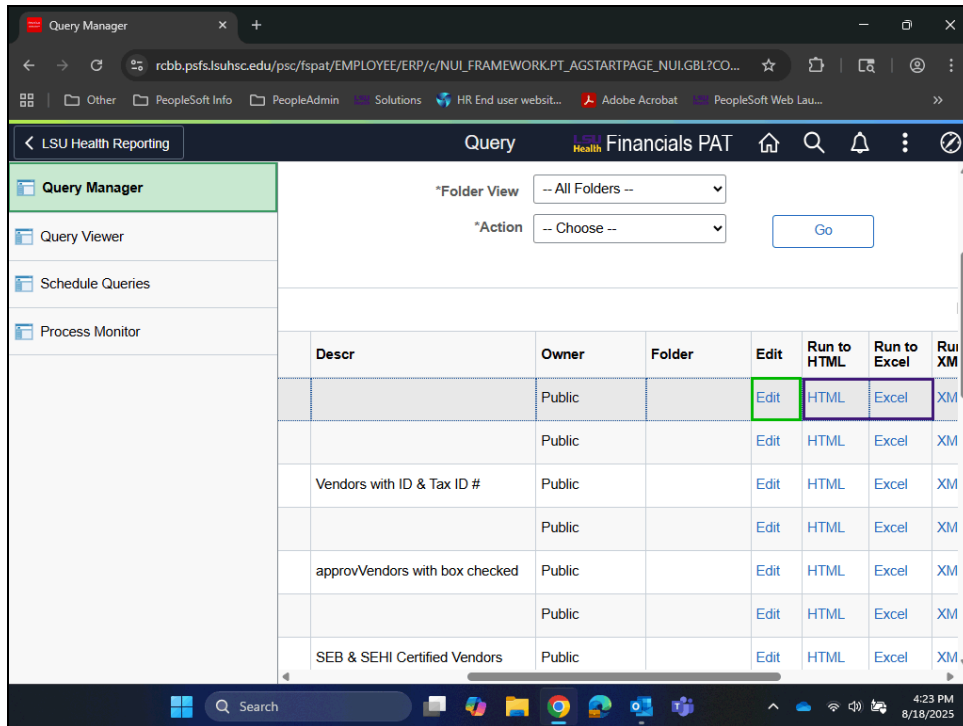
Step	Action
8.	In this example, the user will search for a query named 'Vendor'. To search for a query, <i>enter the first few letters</i> of the query name and <i>press search</i>. Enter the desired information into the Search by field. Enter "VENDOR".
9.	Click the Search button. 



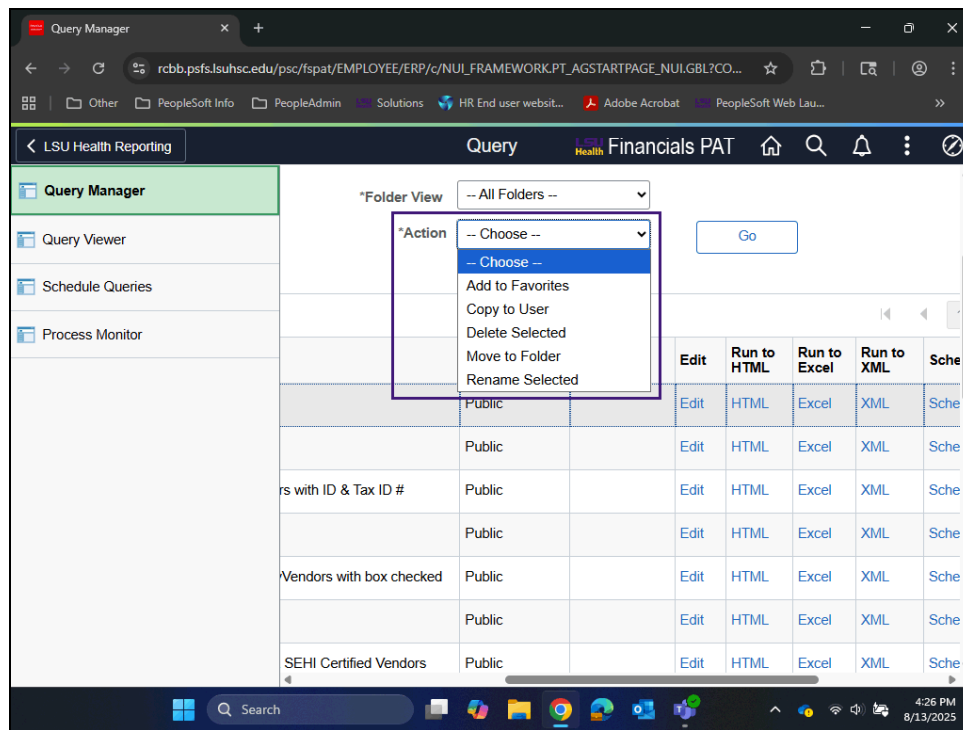
Step	Action
10.	Select the query you wish to run from the Query Results list that is displayed at the bottom of the page. Click the Select box for the Vendor option. 

Training Guide

PUM 51



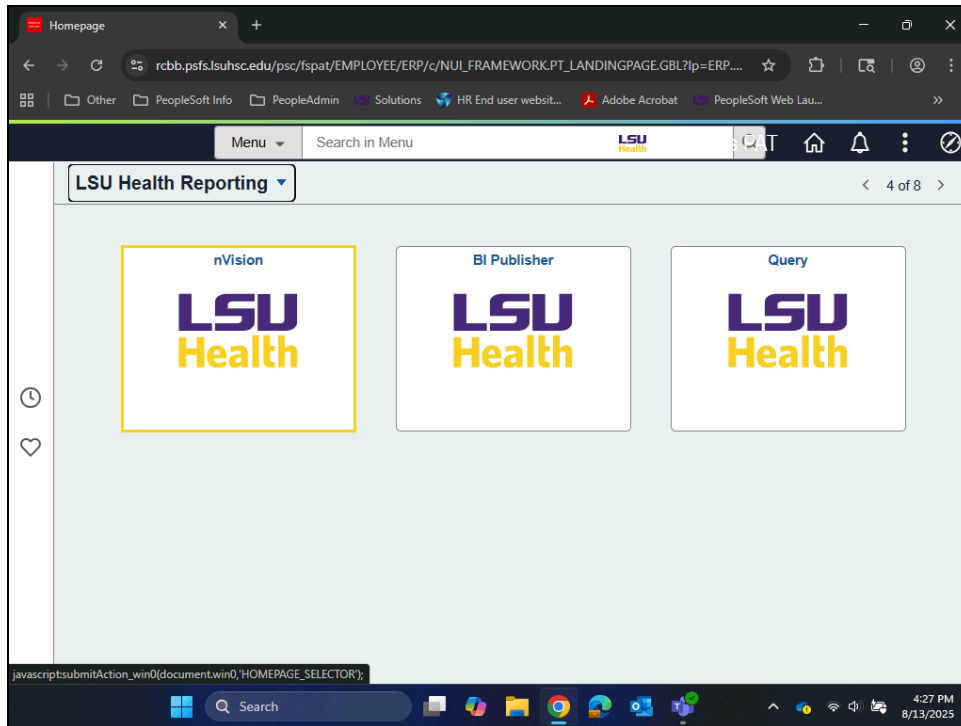
Step	Action
11.	Select the <i>HTML</i> or <i>Excel</i> option to <i>run</i> the query or select <i>Edit</i> to <i>modify</i> a query to a private query.

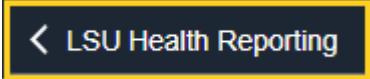


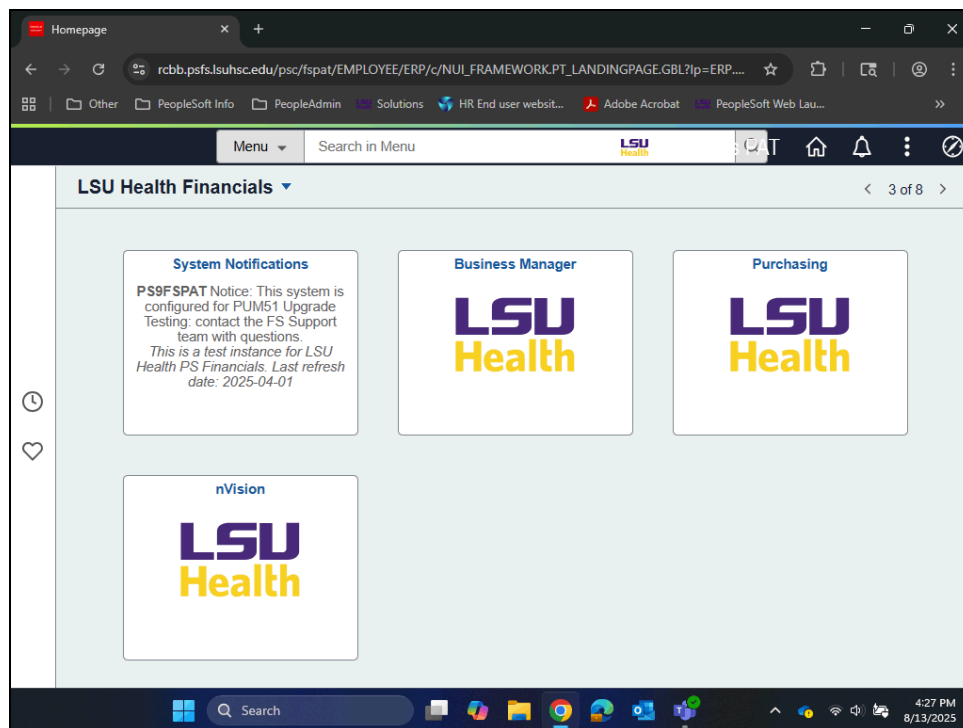
Step	Action
12.	Once you search for a query, the Action box is available for the user to <i>add to favorites, copy to another user, delete, or rename</i>. NOTE: <i>If you need a refresher on any of the features, please refer to the Query Training documentation located on the PeopleSoft Support homepages. Or you may reach out to the training team or support team.</i>
13.	To navigate back to the <i>LSU Health Reporting Homepage</i>, select "< LSU Health Reporting" above the left side navigation. Click the Back to page LSU Health Reporting button. < LSU Health Reporting

Training Guide

PUM 51



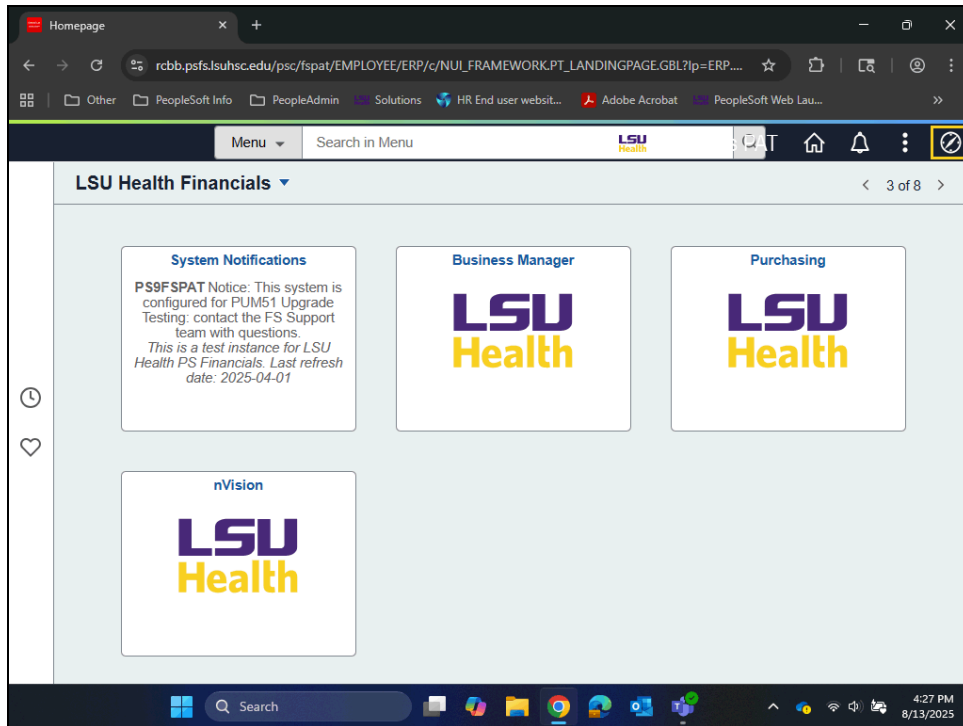
Step	Action
14.	You may select nVision or BI Publisher to view the navigation collection for each of those tiles. Click the nVision button.
15.	The system defaults you into the <i>PS/nVision Schedule Requests</i> panel where you can search for available nVision reports. Click the < LSU Health Reporting button. 
16.	To navigate to another Homepage to which you have access, select the <i>drop-down arrow</i> at the top of the page next to LSU Health Reporting and choose LSU Health Financials. Click the LSU Health Reporting dropdown button to activate the menu. 
17.	Click the LSU Health Financials menu. 



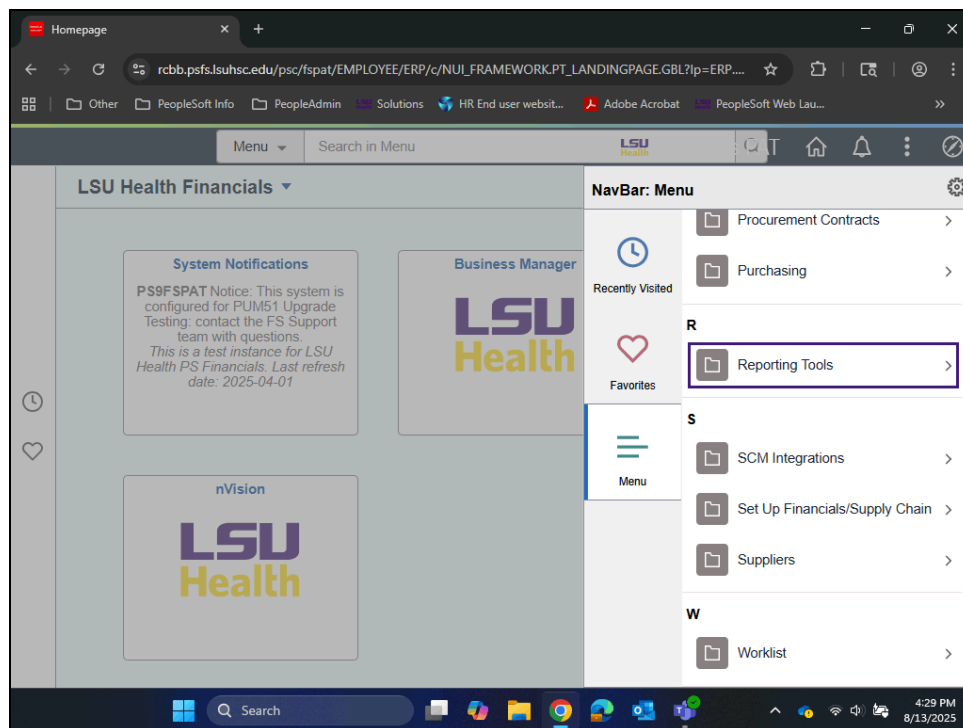
Step	Action
18.	The LSU Health Homepage displays. <i>NOTE: This tile displays tiles available to the user based on security roles and permissions. The user has access to the Purchasing tile/navigation collection and the Business Manager tile/navigation collection. Additionally, this user added a tile to LSU Health Financials for nVision.</i>

Training Guide

PUM 51



Step	Action
19.	NavBar Navigation to Reporting Tolls Users continue to have the ability to <i>navigate</i> through the use if <i>menus</i> to the Reporting Tools > Query or Reporting Tools > BI Publisher or Reporting Tools > PS/nVision menus through the NavBar. Click the NavBar button. 



Step	Action
20.	This navigation is a right sided menu that expands to allow navigation then collapses to allow greater screen visibility. <i>Please see documentation on NavBar navigation for a thorough explanation.</i> The screenshot below is to display the Reporting Tools options.
21.	This completes <i>LSU Health Reporting Homepage.</i> End of Procedure.