



**Fluid Homepages for
Core Team Departmental Usage
Projects & Receivables**

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Training Guide
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Navigate to Homepage

Topic Contents:

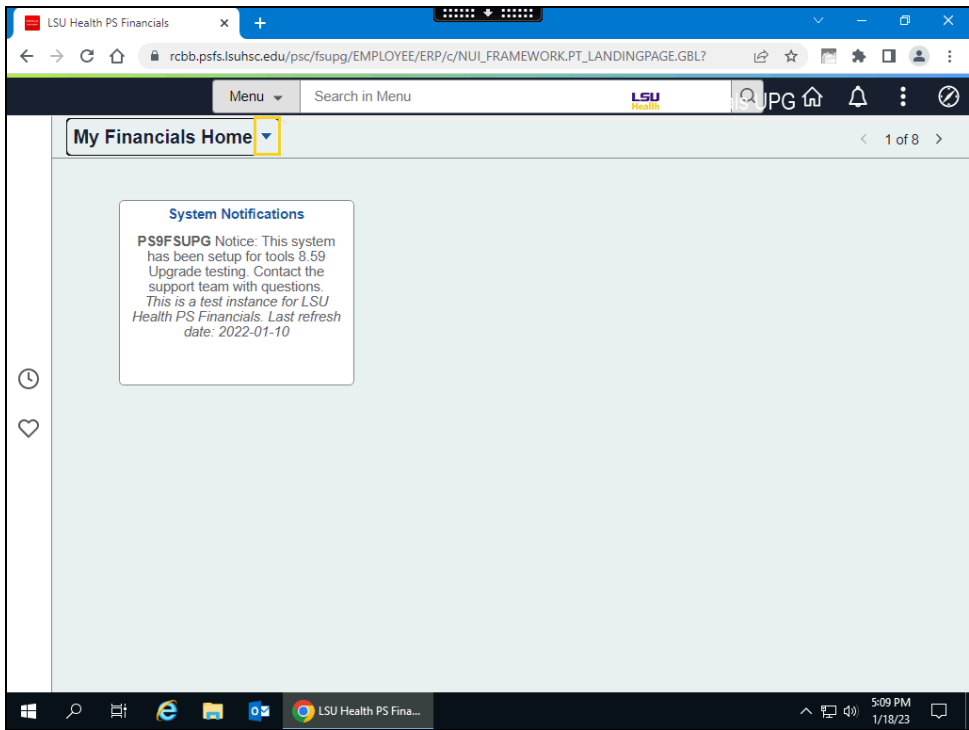
1. Introduction to **Project & Receivables** homepage.
2. Two (2) methods of navigating to homepage:
 - a. Use the drop-down arrow to the right of **My Financials Home**, and/or
 - b. In the top right corner of the screen, use the left and right arrows to move between pages.
3. Introduction to **Project & Receivables** homepage and Navigation Collections.
4. **Customers** tile and landing page options.
 - a. Return to **Projects & Receivables** page
5. Select **Grants** tile
 - a. Review each nav collection folder
 1. Expand/collapse menu options
 - b. Expand/Collapse Navigation Area
6. Navigate back to **Projects & Receivables** homepage.


Step	Action
1.	LSUHSC PeopleSoft Financials provides a custom homepage for Projects & Receivables to facilitate use by the <i>Sponsored Projects, Billing and Accounts Receivables Departments</i> . The Homepage will be granted via security role to those users who maintain the customer, customer contracts, project costing, grants, commitment control project budgets, billing and accounts receivables functions for the institution at each campus. This homepage is not intended for the end-user community. This Homepage is not intended for the end-user community. End-Users will instead select <i>LSU Health Financials Home</i> and select the <i>Business Manager</i> tile for inquiries on their projects.
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. Users may supplement their use of the Homepage with the NavBar as needed. <i>For purposes of this document, the assumption is that the user has already been trained to perform these tasks in their department. 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 their security access.</i>

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Step	Action
3.	<p>Upon launching PeopleSoft Financials, the default fluid Homepage is "My Financials Home". This Homepage is meant to be modified by each user to suit his/her needs. Documentation on adding tiles to My Financials Home may be found in the Navigational Tools topic in this manual. Each user will see a different number of homepages based upon the security access.</p> <p>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.</p>



Step	Action
4.	<p>Method 1</p> <p>On the top left of the screenshot, 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.</p> <p>Click the Homepage Selector dropdown button to activate the menu.</p> 

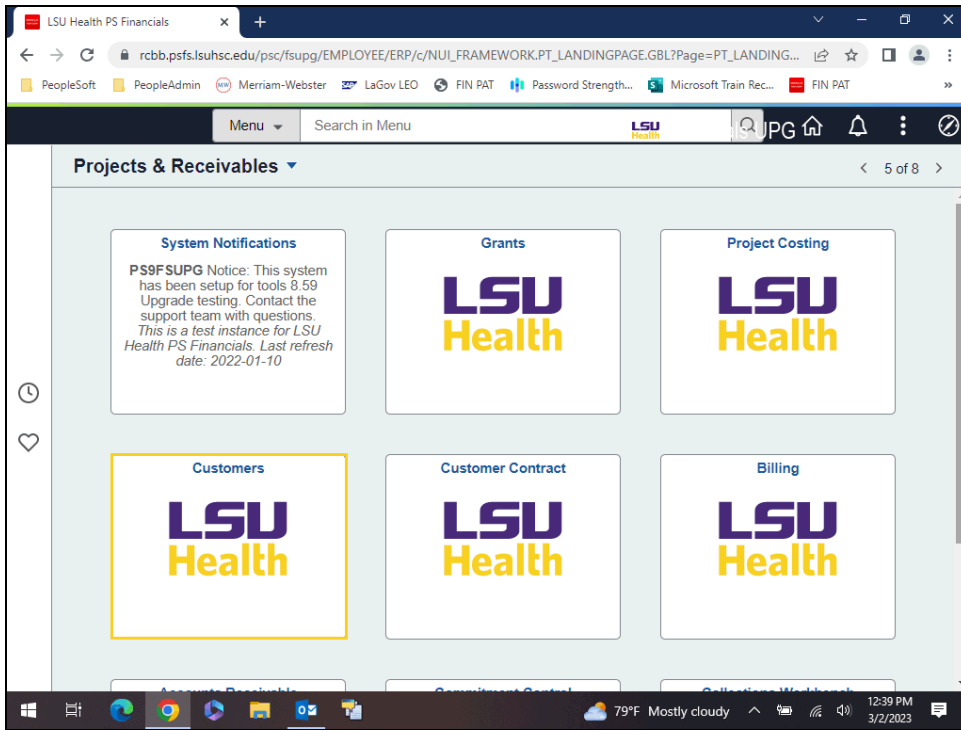
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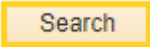
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Step	Action
5.	<p>Projects & Receivables displays in the first five (5) options in the drop-down window. There are a total of eight (8) homepage options available. Depending on your user access, you may not see all available options. Use the scroll down bar to view additional options.</p>
6.	<p>Method 2</p> <p>At the top right of the screenshot, note the user sees "< 1 of 8 >". Depending on your user access, you may see 1 of x where x is any number between 1 and 8. Selecting the left and right arrows moves the user from one homepage to the next.</p> <p>Click the Right Page arrow.</p> 
7.	<p>The LSU Health Financials page displays. The user would continue to click the Right Page arrow until the desired homepage displays.</p>
8.	<p>Return to the My Financials Home page.</p> <p>Click the Home button.</p> 
9.	<p>For the remainder of this exercise, the user will be using the Projects & Receivables homepage.</p> <p>Click the Homepage Selector dropdown button to activate the menu.</p> 
10.	<p>Click the Projects & Receivables menu.</p> 
11.	<p>The Projects & Receivables homepage displays. The homepage contains a large number of tiles or nav collections that are used by teams across the enterprise.</p>
12.	<p>Each of the tiles on the Projects & Receivables 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.</p>

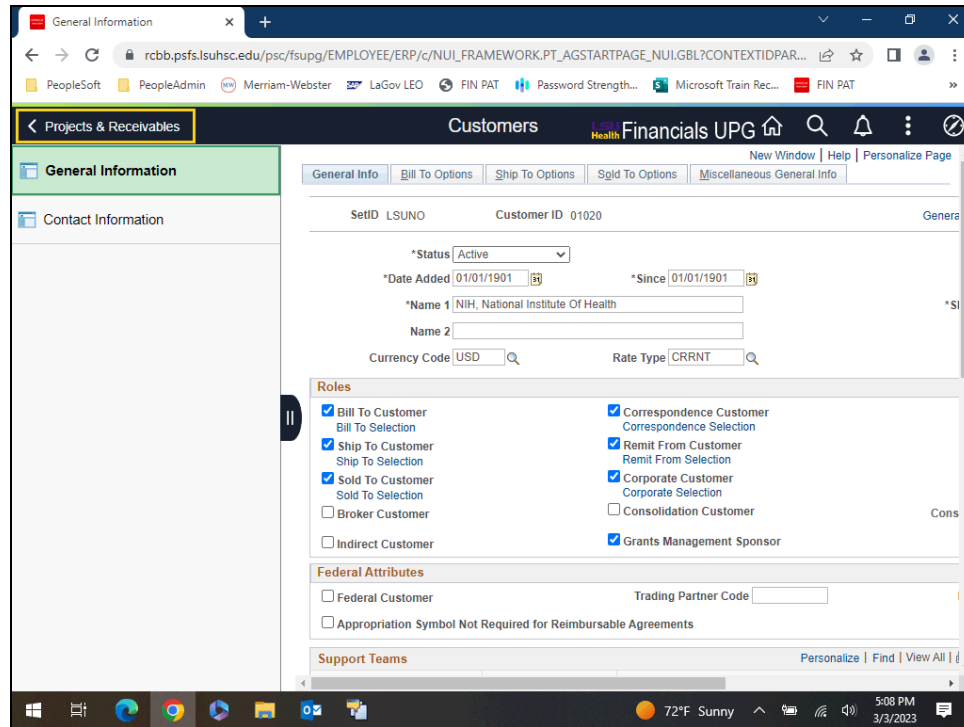
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Step	Action
13.	The Customers tile is a nav collection of customer related menu navigations. Click the Customers button.
14.	The landing page for the Customers tile has two menu options available: General Information and Contract Information . The system defaults you onto the General Information Search page. The SetID defaults to SHARE . In this example, you will change the Set ID to LSUNO . Enter the desired information into the SetID field. Enter " LSUNO ".
15.	Enter the desired information into the Customer ID field. Enter " 01020 ".
16.	Click the Search button. 












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Step	Action
17.	<p>You may use the links and panels to review and update the customer as your security permits.</p> <p>Navigate back to the Projects & Receivables page.</p> <p>Click the Projects & Receivables button.</p> 
18.	<p>Select the Grants tile to view the <i>Grants Navigation Collection</i>.</p> <p>Click the Grants button.</p>
19.	<p>The Grants nav collection includes many more menu and page options than the Customer nav collection. The default landing page is the Awards > Award Profile page. Note that in the menu section on the left side of the page, each of the menu options includes a folder to the left of the name and an arrow to the right.</p>
20.	<p>Select the arrow next to each of the menu names to explore the pages contained in each. Users will find that the majority of pages they frequent are included in the nav collection.</p> <p>Click the Collapse Awards button.</p> 



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Step	Action
21.	Click the Expand Monitor Awards button. 
22.	Click the Collapse Monitor Awards button. 
23.	Click the Expand Departments button. 
24.	Click the Collapse Department button. 
25.	Click the Expand Institutions button. 
26.	Click the Collapse Institutions button. 
27.	Click the Expand Professionals button. 
28.	Click the Collapse Professionals button. 
29.	Click the Expand Sponsors button. 
30.	Click the Collapse Sponsors button. 
31.	<p>Collapsing the Menu</p> <p>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 "H" to the right of the menu box. Selecting this will collapse the menu.</p> <p>Click the Navigation Area button to collapse the area.</p> 

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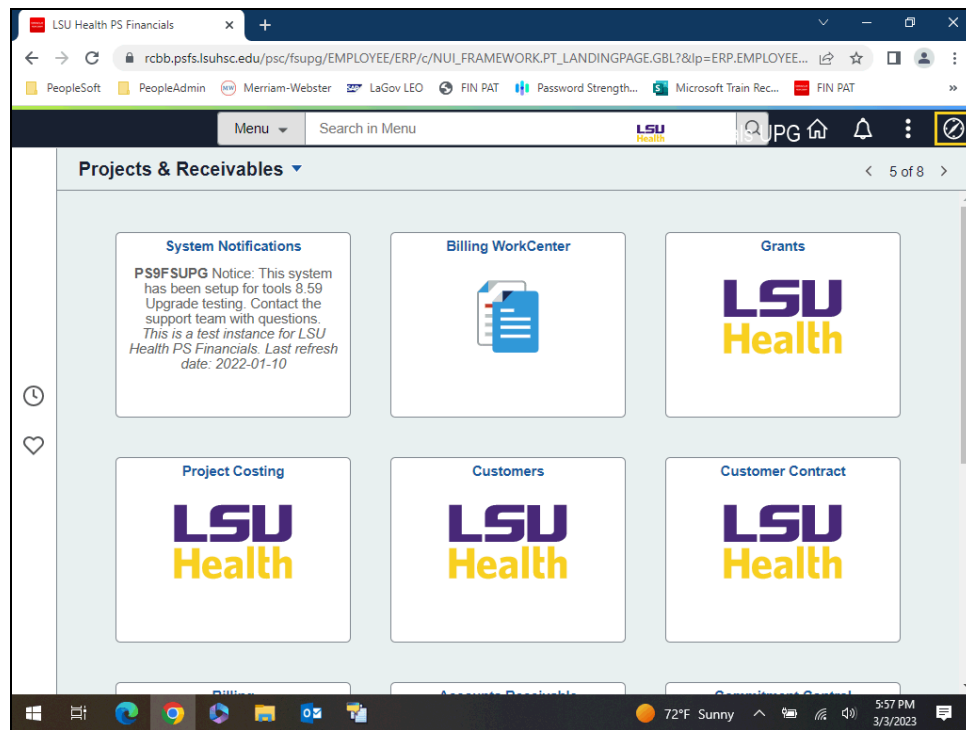
Step	Action
32.	<p>Select the tab once more to expand the menu display.</p> <p>Click the Navigation Area button to expand the area.</p> 
33.	<p>Return to the Projects & Receivables page.</p> <p>Click the Projects Receivables button.</p> 
34.	<p>This completes <i>Navigate to Homepage</i>.</p> <p>End of Procedure.</p>


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The NavBar Menu

Topic Contents:

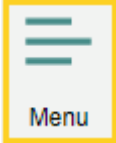

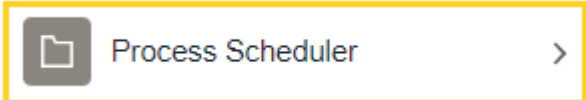


1. Access **NavBar**
2. **NavBar Menu** and navigation
3. Navigate to **Process Monitor**
4. Review **Process Monitor** page




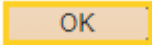
Step	Action
1.	<p>Users may need to access a menu option not included in their Projects & Receivables homepage or one of the tile navigation collections. Users can select the NavBar icon at the top right of the page to display the options to get to a more traditional menu. Once you select the icon, the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

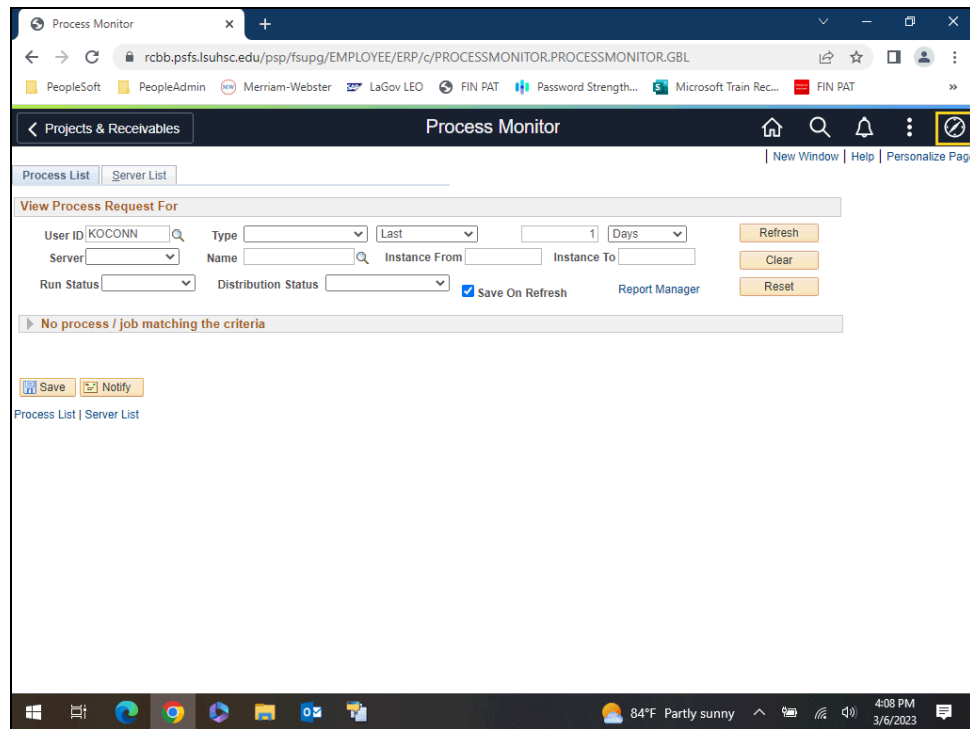
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Step	Action
2.	Click the Menu button. 
3.	<p>For purposes of this example, assume the Process Monitor is a frequent navigation for the user. However, it does not appear in the Projects & Receivables navigation collections. You may use the NavBar menu navigation on the right of the page to navigate to the Process Monitor.</p> <p>For this example, use the following navigation: PeopleTools > Process Scheduler > Process Monitor.</p> <p>Press the left mouse button over the scrollbar and drag the mouse to the "P" list menu.</p>
4.	Click the PeopleTools button. 
5.	Press the left mouse button and drag the mouse to the Process Scheduler option.
6.	Click the Process Scheduler button. 
7.	Click the Process Monitor button. 
8.	<p>For purposes of this exercise, users will add the Process Monitor page to their Favorites. The Actions icon, which looks like three (3) stacked dots, will be selected to perform this function.</p> <p><i>NOTE: Users could also choose to add the Process Monitor option to the My Financials Home page using the Actions icon.</i></p> <p>Click the Actions Ellipsis button. </p>
9.	Click the Add to Favorites link.

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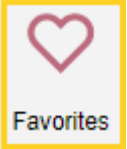
Step	Action
10.	<p>The page name defaults into the *Favorite Label field.</p> <p>Click the Add link.</p> 
11.	<p>A confirmation message displays stating your page has been added to Favorites.</p> <p>Click the OK button.</p> 



Step	Action
12.	<p>Verify the Process Monitor has been added to Favorites.</p> <p>Click the NavBar button.</p> 

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Step	Action
13.	Click the Favorites button. 
14.	The <i>Process Monitor</i> option displays in Favorites .
15.	This completes <i>The NavBar Menu</i> . End of Procedure.

Navigational Tools

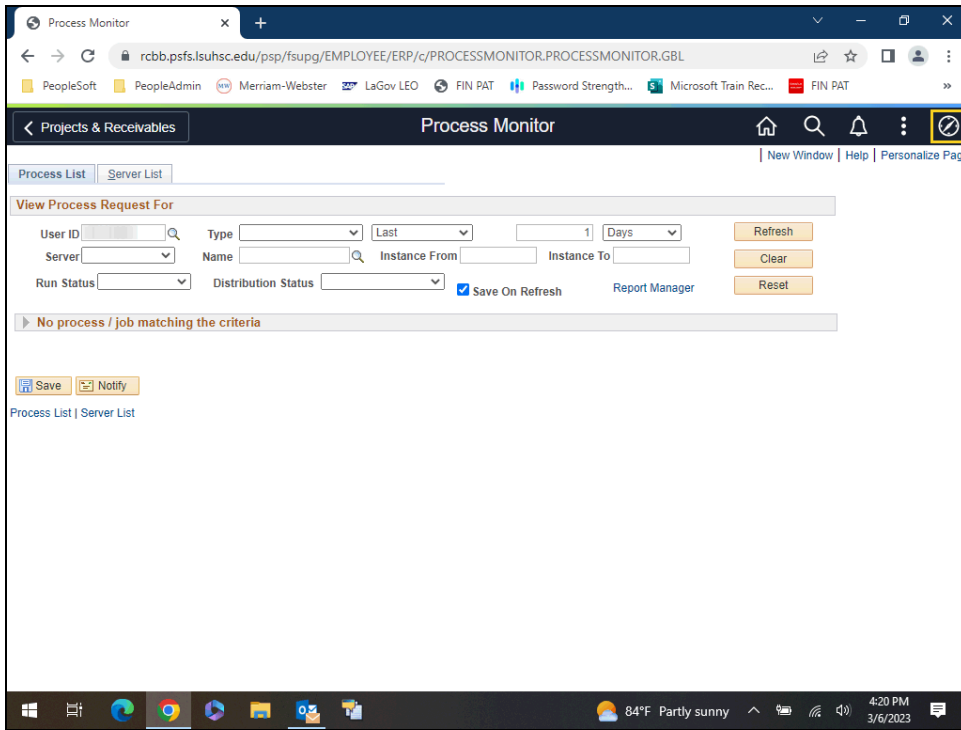
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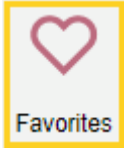

- 1.** Add/Delete **Process Monitor** page to:
 - a.** Favorites
 - b.** NavBar
 - c.** My Financials Homepage
- 2.** Search for **Process Monitor** page using **NavBar**

Step	Action
1.	<p>In this topic, we will discuss some navigational tools the user may find handy if a page is often used. Users may now add/delete often used pages to the following:</p> <ol style="list-style-type: none">1. NavBar Favorites;2. NavBar; and/or3. My Financials Homepage (or other homepage of choice) <p>Examples will be demonstrated in the order listed.</p>

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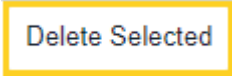


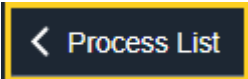



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Step	Action
2.	<p>In the previous topic, the Process Monitor page was added to Favorites. In this example, you will <u>remove</u> the Process Monitor page from Favorites.</p> <p>Click the NavBar button.</p> 
3.	<p>Click the Favorites button.</p> 
4.	<p>The Process Monitor page displays in the Favorites list. Favorite pages can be <u>removed</u> from the list using the Edit Favorites link.</p> <p>Click the Edit Favorites link.</p> 

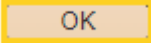






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Step	Action
5.	<p>Your current Favorites list items display.</p> <p>Click the Select this row box for the Process Monitor page.</p> 
6.	<p>Click the Delete Selected button.</p> 
7.	<p>A confirmation message will display asking you if you wish to delete the entry.</p> <p>Click the Yes button.</p> 
8.	<p>The Process Monitor page has been removed from NavBar Favorites. You must <u>save</u> the change before navigating away from the page.</p> <p>Click the Save button.</p> 
9.	<p>Click the Process List button.</p> 
10.	<p>NavBar</p> <p>You have been returned to the Process Monitor page. Just as you added the page to your Favorites, you can also add to the NavBar.</p> <p><i>NOTE: You must add the page to the NavBar from the page itself. The Actions button does not allow a page to be added from a Homepage.</i></p> <p>Click the Actions button.</p> 
11.	<p>Click the Add To NavBar link.</p> 
12.	<p>The name of the page defaults into the *Tile Label field.</p> <p>Click the Add link.</p> 


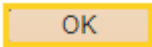




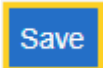
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Step	Action
13.	<p>A confirmation message displays stating that the page has been added.</p> <p>Click the OK button.</p> 
14.	<p>Verify the Process Monitor page has been added to the NavBar.</p> <p>Click the NavBar button.</p> 
15.	<p>The page has been added as a tile at the <i>bottom</i> of the NavBar list.</p> <p>If you have added this page in error, or no longer wish the tile to be on the NavBar, you can <u>remove</u> the tile from the NavBar.</p> <p>Click the Personalize NavBar button.</p> 
16.	<p>Click the Delete Process Monitor button.</p> 
17.	<p>You must <u>save</u> the changes before navigating away from the page.</p> <p>Click the Save button.</p> 
18.	<p>My Financials Homepage</p> <p>Frequently used pages can also be added to the Homepage of the user's choice.</p> <p>Click the Actions button.</p> 
19.	<p>Click the Add To Homepage link.</p> 

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Step	Action
20.	<p>A list of available Homepages displays. In this example, you will add the Process Monitor page to the My Financials Home.</p> <p>Click the My Financials Home link.</p> 
21.	<p>A confirmation message displays stating the page has been added.</p> <p>Click the OK button.</p> 
22.	<p>Verify that the page has been added to the My Financials Home.</p> <p>Click the Home button.</p> 
23.	<p>The Process Monitor tile has been added.</p> <p>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 <u>remove</u> the tile from the page</p> <p>Click the Actions button.</p> 
24.	<p>Click the Personalize Homepage link.</p> 
25.	<p>Click the Delete Process Monitor button.</p> 
26.	<p>You must <u>save</u> the changes before navigating away from the page.</p> <p>Click the Save button.</p> 
27.	<p>This completes <i>Navigational Tools</i>.</p> <p>End of Procedure.</p>