



Business Manager Tile and Navigations

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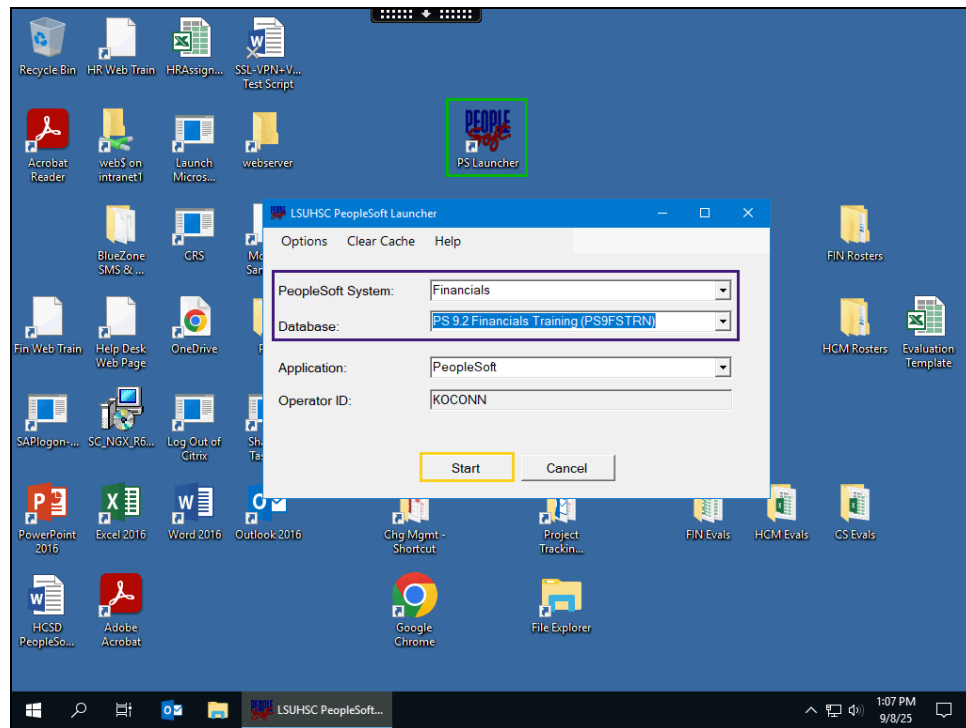
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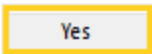
Business Manager Tile and Navigations

LSUHSC PeopleSoft Homepages

Procedure

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

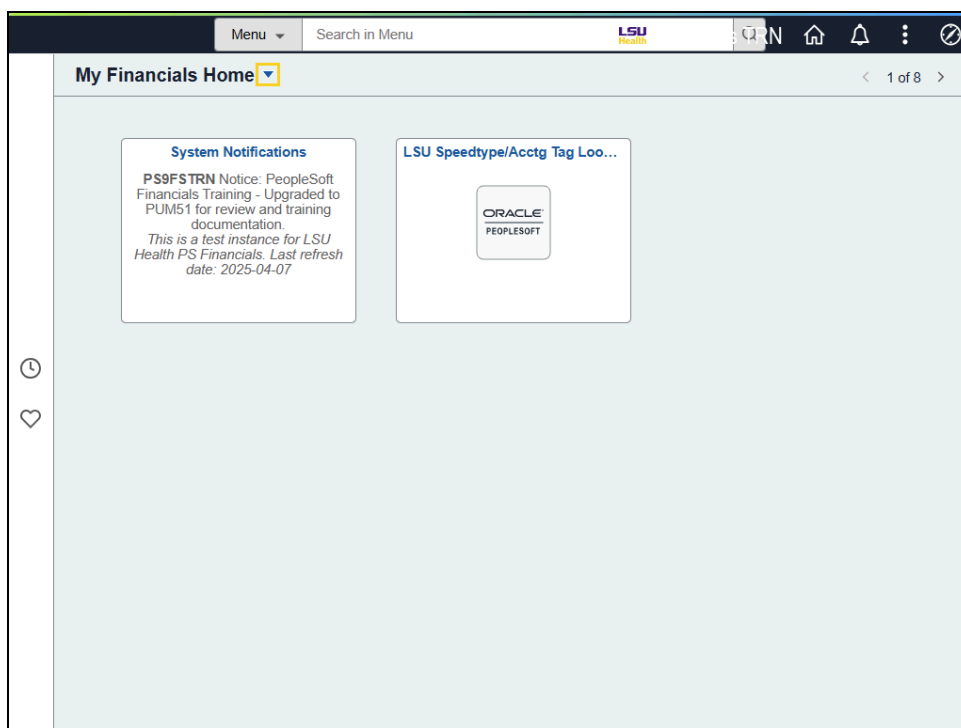


Step	Action
1.	Launch PeopleSoft Financials. NOTE: <i>In this example, the Training (PS9FSTRN) database is used. This is for <u>training purposes only</u>. Normally, users will launch the <u>Production (PS9FSPRD) database</u>.</i> Click the Start button. 
2.	A warning message displays stating this is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

Training Guide

Tile and Navigations

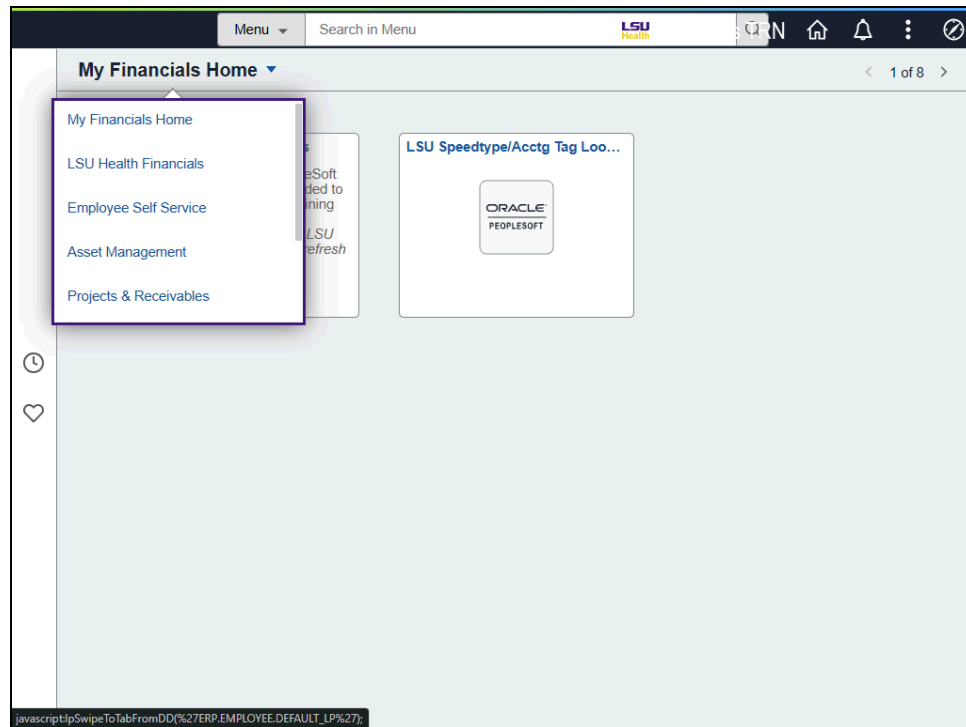
Step	Action
3.	Users must authenticate. Enter the desired information into the User ID field. Enter " koconn ".
4.	Enter the desired information into the field. Enter " ***** ".
5.	Click the Sign In button. 
6.	"My Financials Home" is the <i>default landing page</i> when users log into a PeopleSoft Financials database. The <i>name</i> of the Homepage is seen at the <i>top left</i> of the screen. My Financials Home is where users can <i>personalize and add quick navigations</i> that direct you to frequently used pages. My Financials Home can be the <i>user's favorite or more generic</i> . Users have <i>access to modify</i> 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. 

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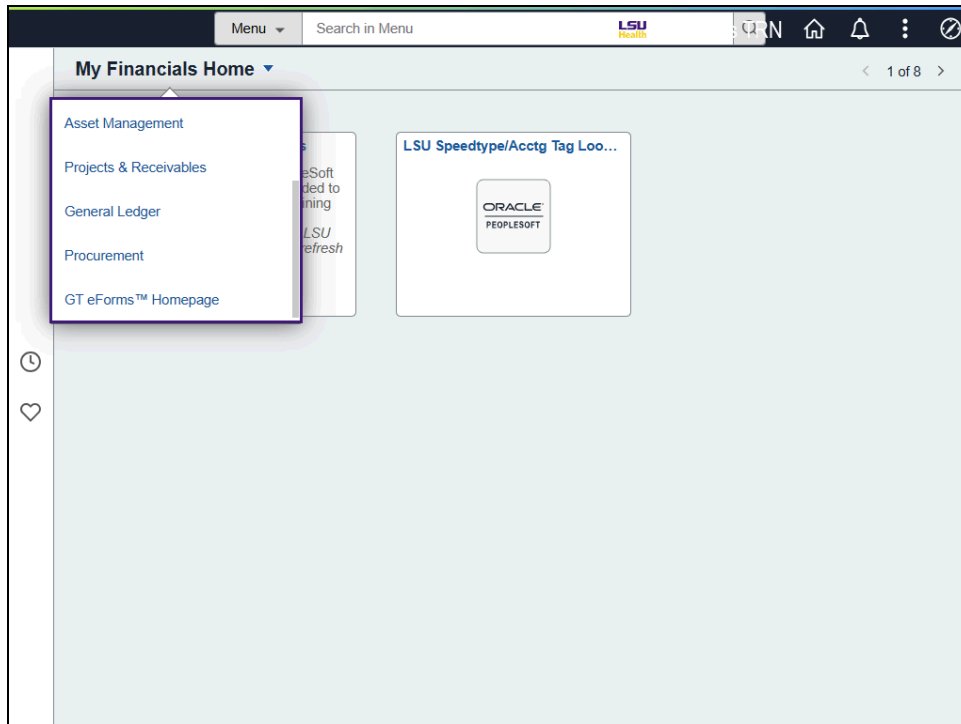
Tile and Navigations



Step	Action
8.	View available homepages.

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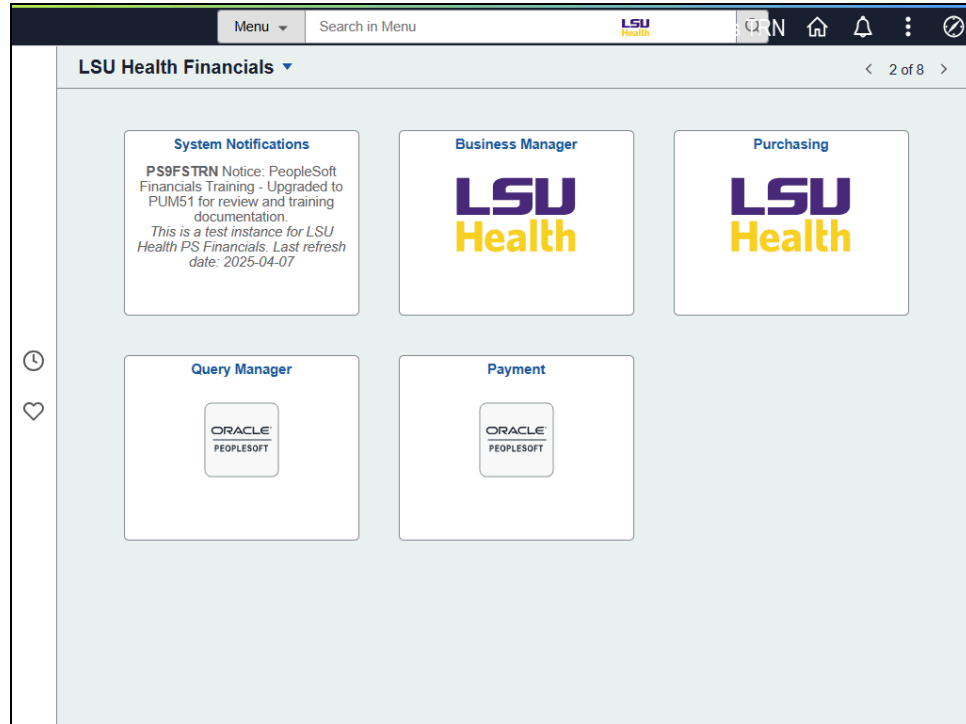
Tile and Navigations



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

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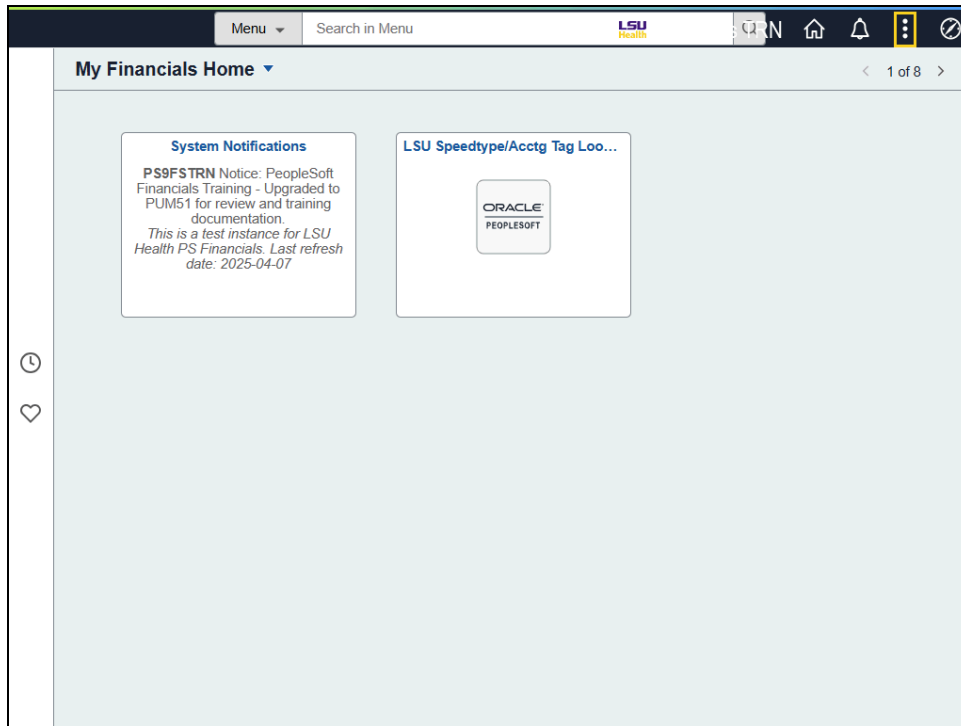
Tile and Navigations



Step	Action
11.	"LSU Health Financials" is the Financials homepage where you will access the <i>tiles and navigation collections</i> 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 <i>personalize</i> the page by <i>adding tiles or pages</i> to the page that are often used. Tiles that you may see on the LSU Health Financials are <i>Business Manager, Purchasing, and ePro Requisitions (LSUSH only)</i>. New tiles to be added to the LSU Health Financials Home are the <i>Approvals Tile, Payment Request Tile, and the LSU Speedtype/Accounting Tag Lookup, Process Monitor and Report Manager</i>. 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. 

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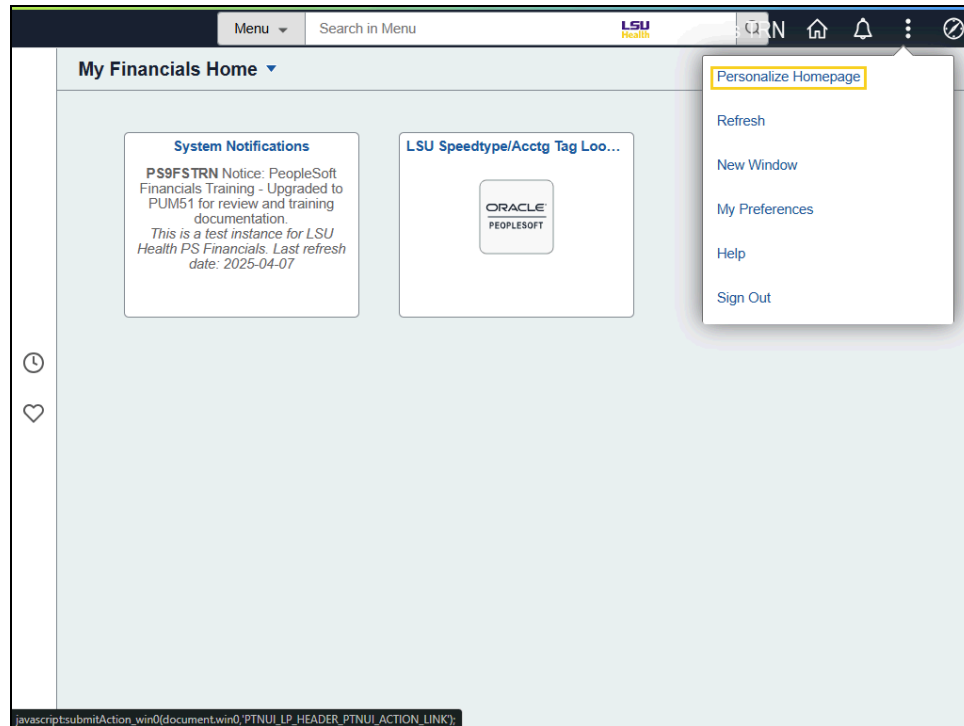
Tile and Navigations



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

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Tile and Navigations



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

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Tile and Navigations

Cancel

Personalize Homepage

Save

Add Homepage

My Financials Home

LSU Health Financials

Employee Self Service

Asset Management

Projects & Receivables

General Ledger

Procurement

GT eForms™ Homepage

Common Settings

Show Notifications Panel ☐ No ⓘ

Selected Homepage Settings

Add Tile

Homepage

My Financials Home

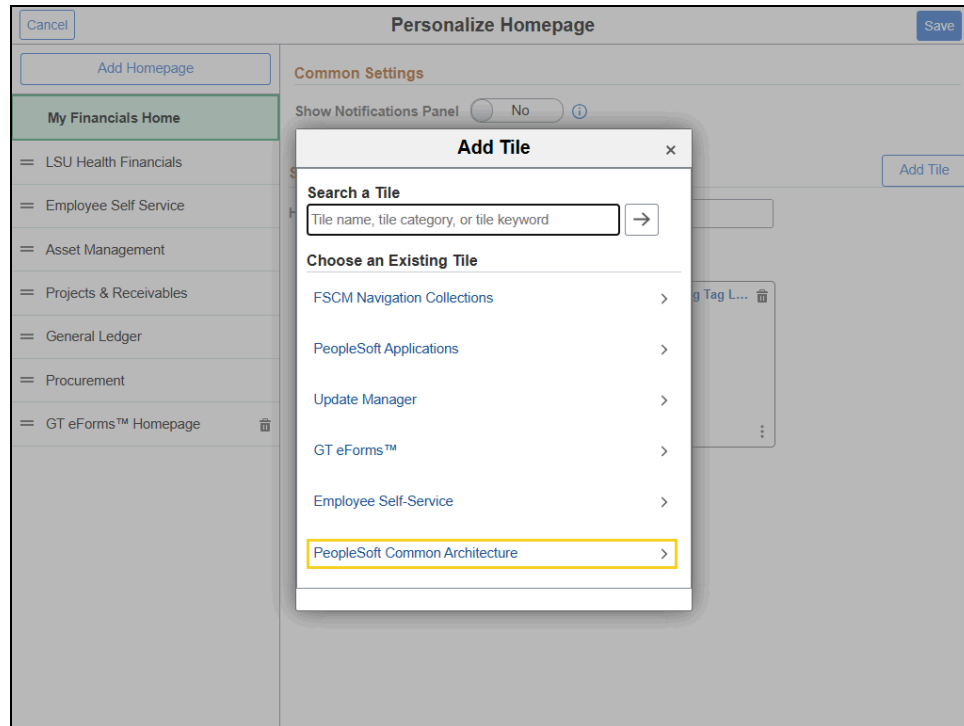
System Notifications

LSU Speedtype/Acctg Tag L...

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

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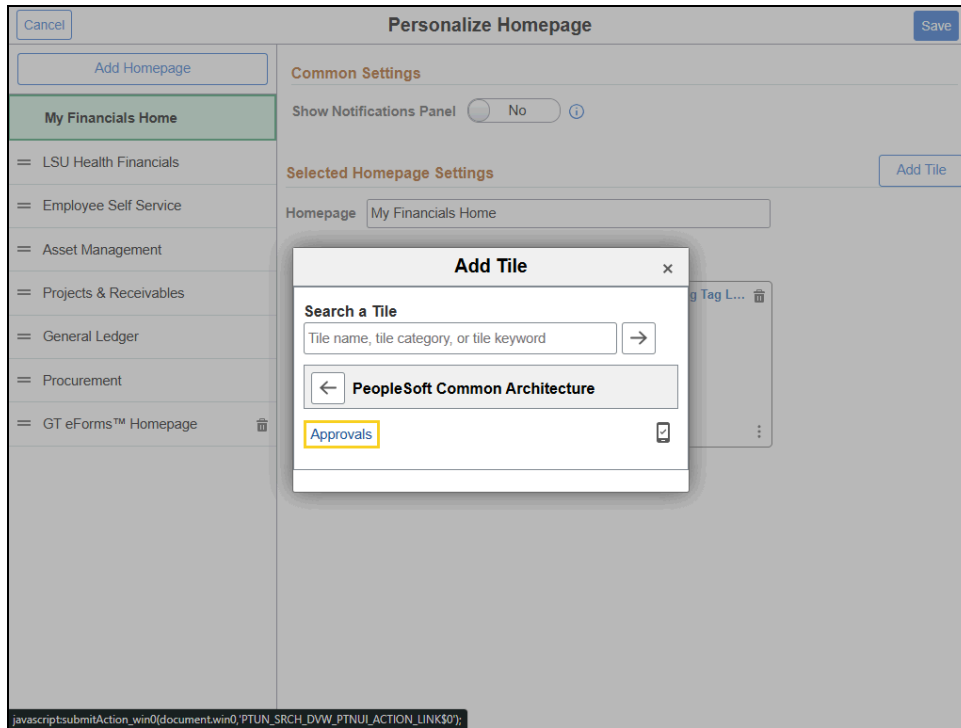
Tile and Navigations



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

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Step	Action
18.	Click the Approvals link. Approvals

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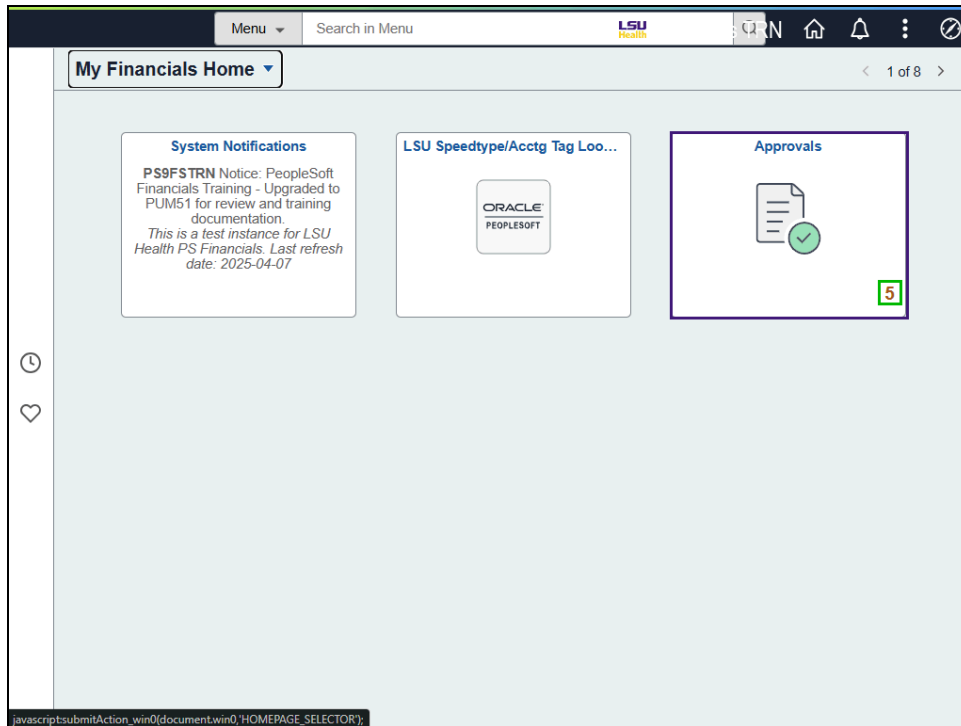
Tile and Navigations

The screenshot shows the 'Personalize Homepage' interface. On the left, a sidebar lists various navigation options, with 'My Financials Home' selected. The main panel is divided into sections: 'Common Settings' with a toggle for 'Show Notifications Panel' set to 'No'; 'Selected Homepage Settings' where 'My Financials Home' is the selected homepage; and a grid of tiles including 'System Notifications', 'LSU Speedtype/Acctg Tag L...', and 'Approvals'. A 'Save' button is highlighted in the top right corner of the dialog.

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. 

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

Icons and Terminology used in Fluid Navigation

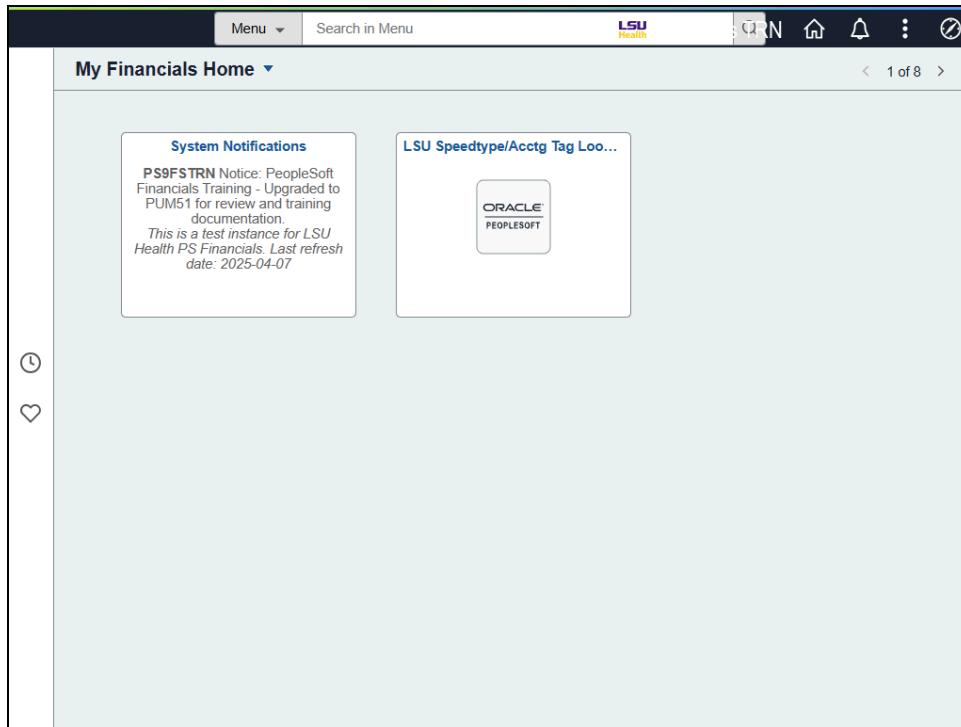
Procedure

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.

Training Guide

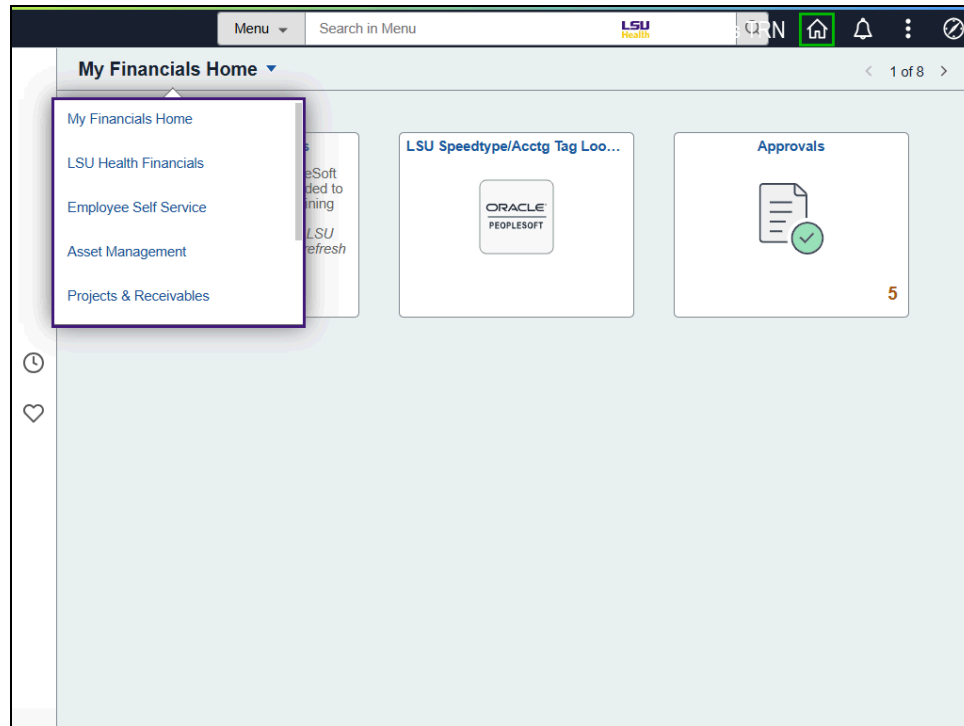
Tile and Navigations



Step	Action
2.	Icons and Terminology used in Fluid Navigation The <i>landing page</i> when logging into PeopleSoft Financials is called My Financials Home. Each user may <i>personalize My Financials Home</i> with navigations they frequently utilize. LSUHSC IT has created the <i>Business Manager tile and navigations</i> to provide <i>access to frequently used menu options</i> in PeopleSoft Financials. The navigation collection will save time by <i>grouping frequently used navigations together</i> and by <i>reducing the number of clicks</i> a user must perform. This <i>tile may be added to My Financials Home</i>.

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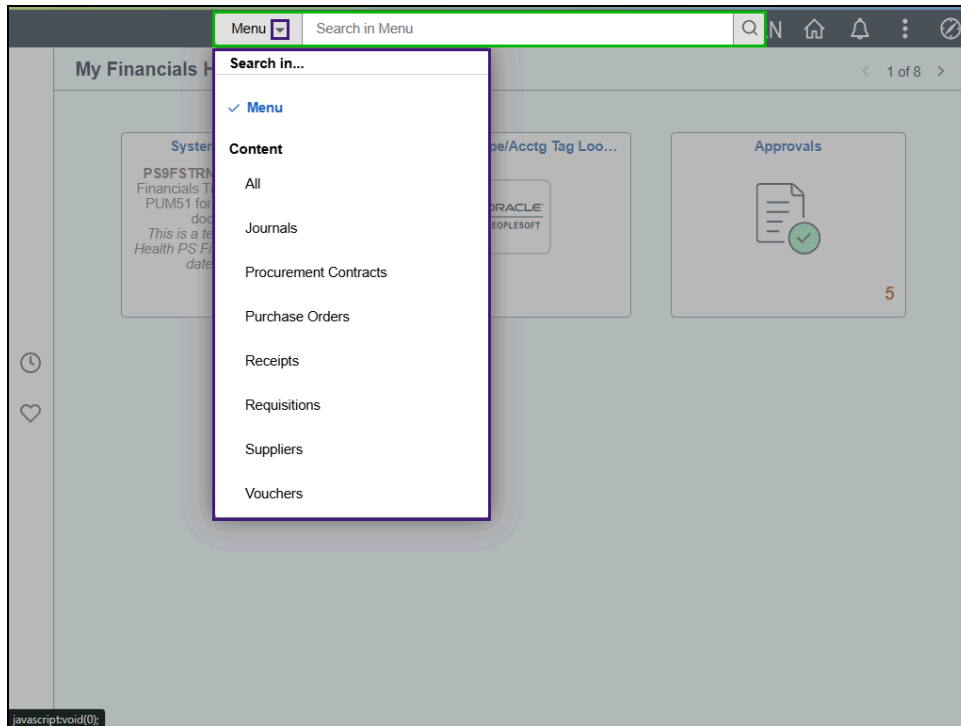
Tile and Navigations



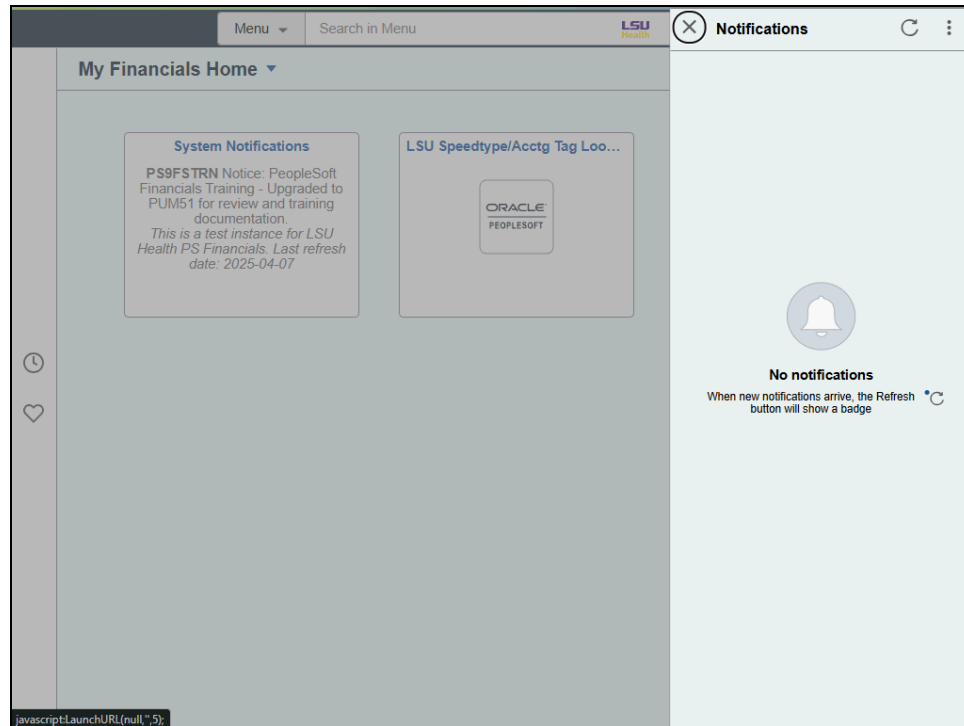
Step	Action
3.	Icons and Terminology used in Fluid Navigation (continued) Home Icon - returns users to the homepage The My Financials Home is the default landing homepage for all users. <i>Additional homepages can be viewed by clicking the drop-down arrow to the right of My Financials Home. GTeForms and LSU Health Financials are commonly used homepages.</i>
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.

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Tile and Navigations



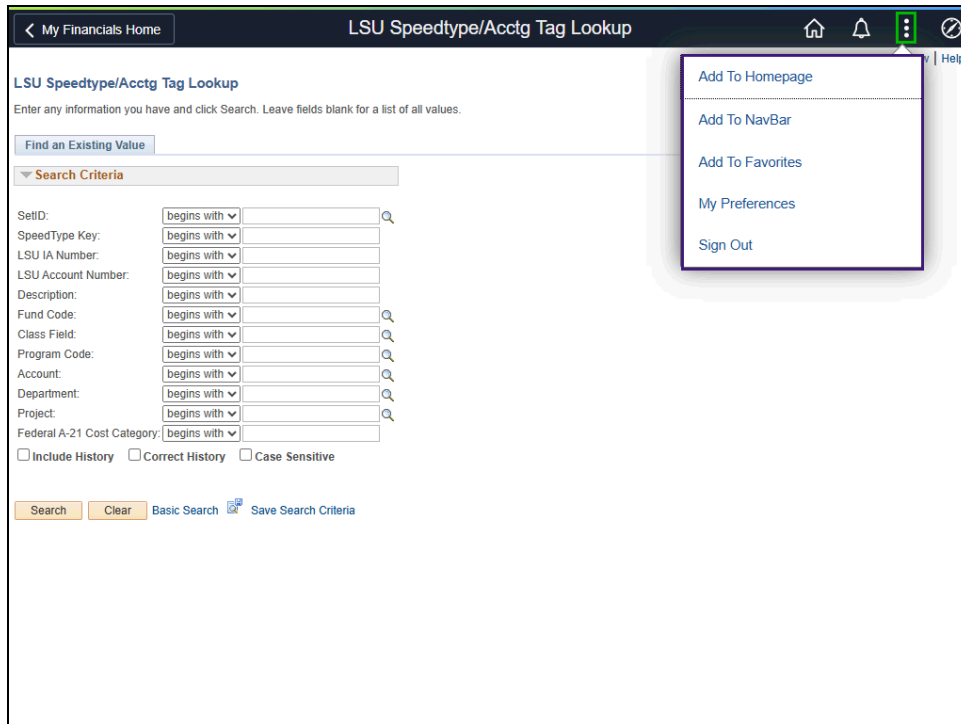
Step	Action
5.	Icons and Terminology used in Fluid Navigation (continued) Use the Search field to locate pages when you are <i>not sure of the navigation</i>. Select the <i>drop-down button</i> to the right of Menu to <i>search by a specific topic</i> (e.g., Requisitions, Grants, Vouchers, etc.)



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. <i>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.</i> Users will utilize their <i>Worklist</i> and the <i>Approvals Tile</i> for managing their approval items. The My Financials Home screenshot provides an example of the Notifications Panel. The <i>Notification Bell</i> does <u>not</u> display when the <i>Notification Panel</i> is shown. When a user navigates into a page, the <i>Notification Bell</i> displays at the <i>top right</i>, next to the icon for Home, NavBar and the ellipses.

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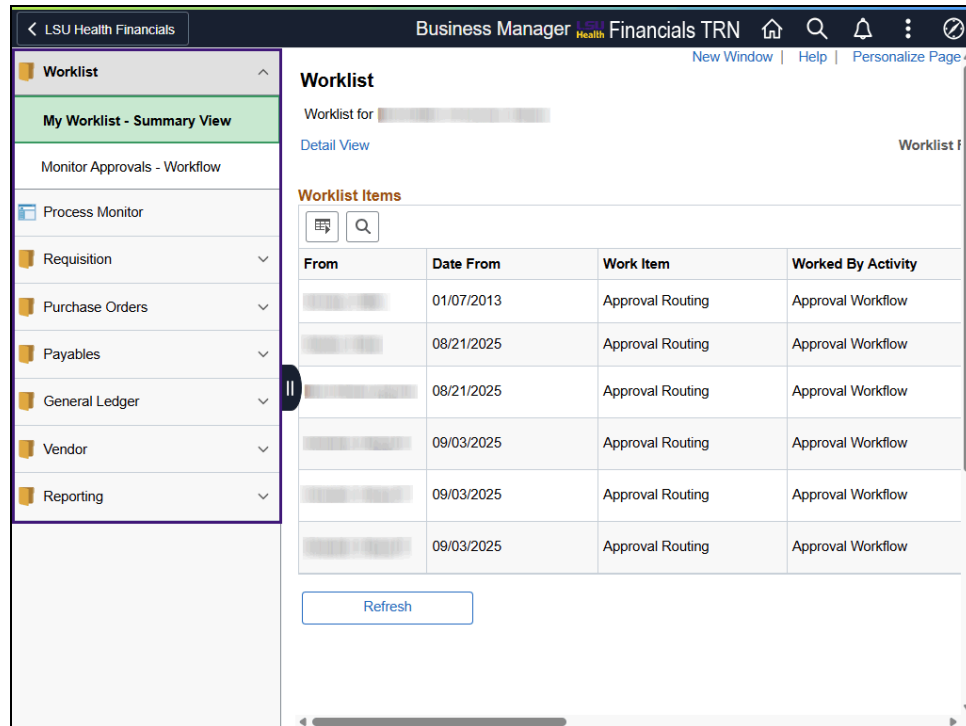
Tile and Navigations



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 <i>change depending on the page</i> 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

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Tile and Navigations



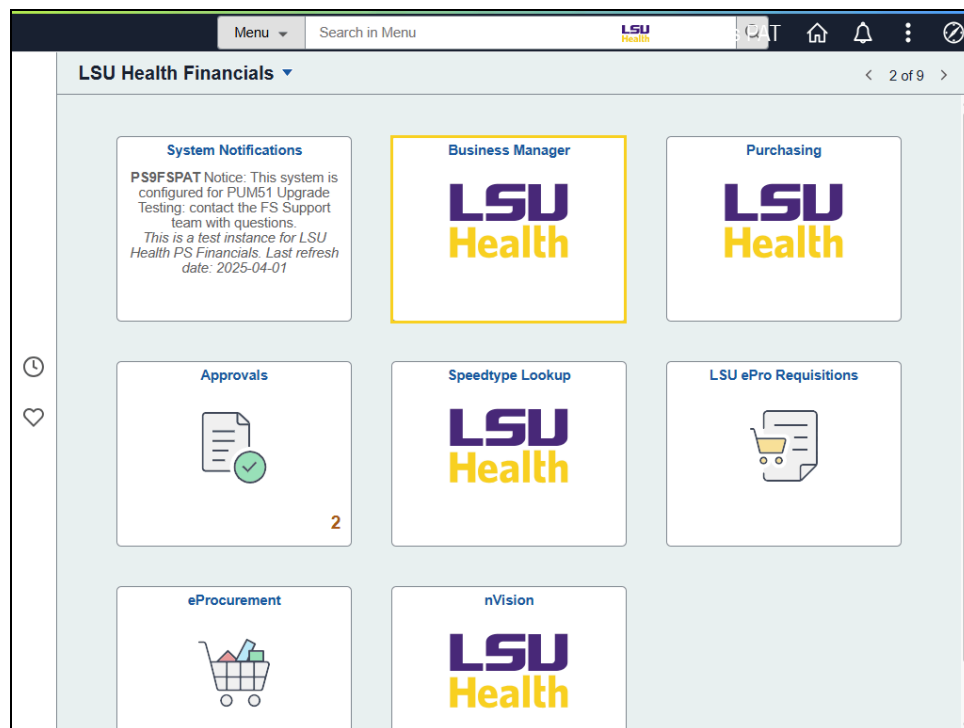
Step	Action
10.	Icons and Terminology used in Fluid Navigation (continued) Navigation Collection - This is also known as a <i>Nav Collection</i>. These are groups frequently used menu navigation links grouped together on a tile to facilitate ease of access in the system. The tiles and navigation collections 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 <i>Icons and Terminology used in Fluid Navigation</i>. 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](#).

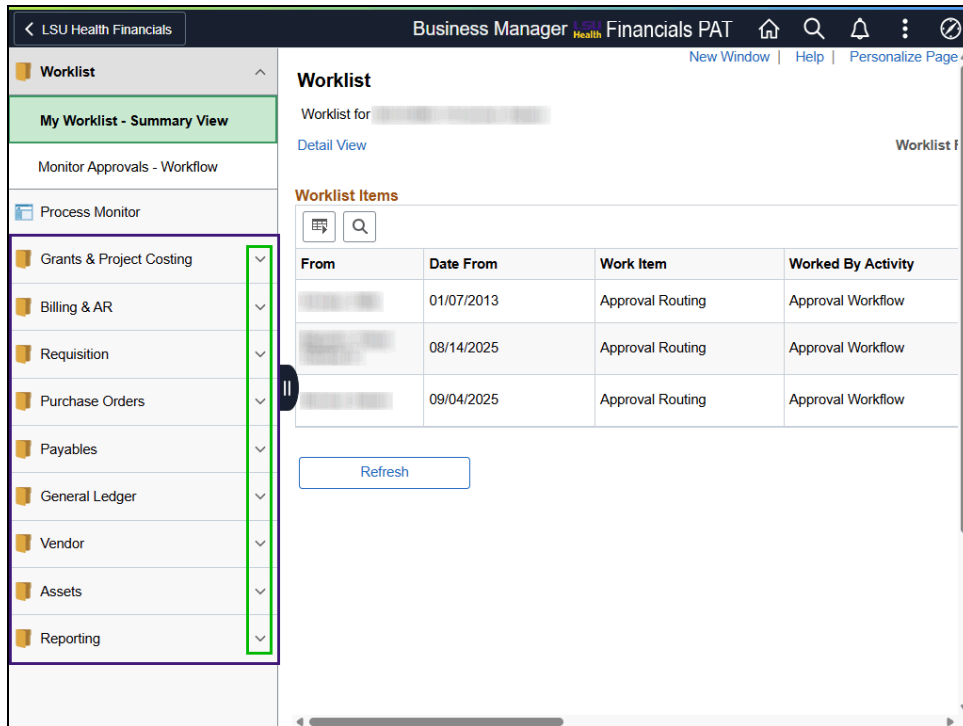
Step	Action
1.	<i>NOTE: This topic was completed using the PS9FSPAT database for training purposes only. Normally, these actions will be performed by users in the PS9FSPRD (Production) database.</i>



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

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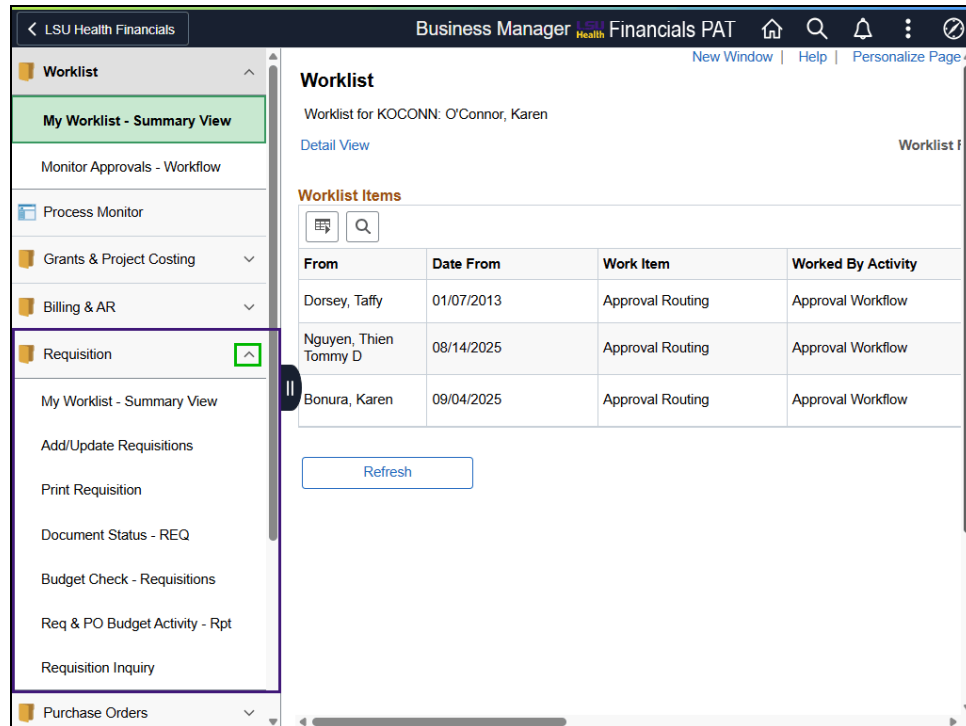
Tile and Navigations



Step	Action
4.	Notice the screen is divided into two (2) parts. The <i>left side</i> of the screen is like a <i>menu selection</i> 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 <i>right side</i> of the screen is the <i>work area</i> .

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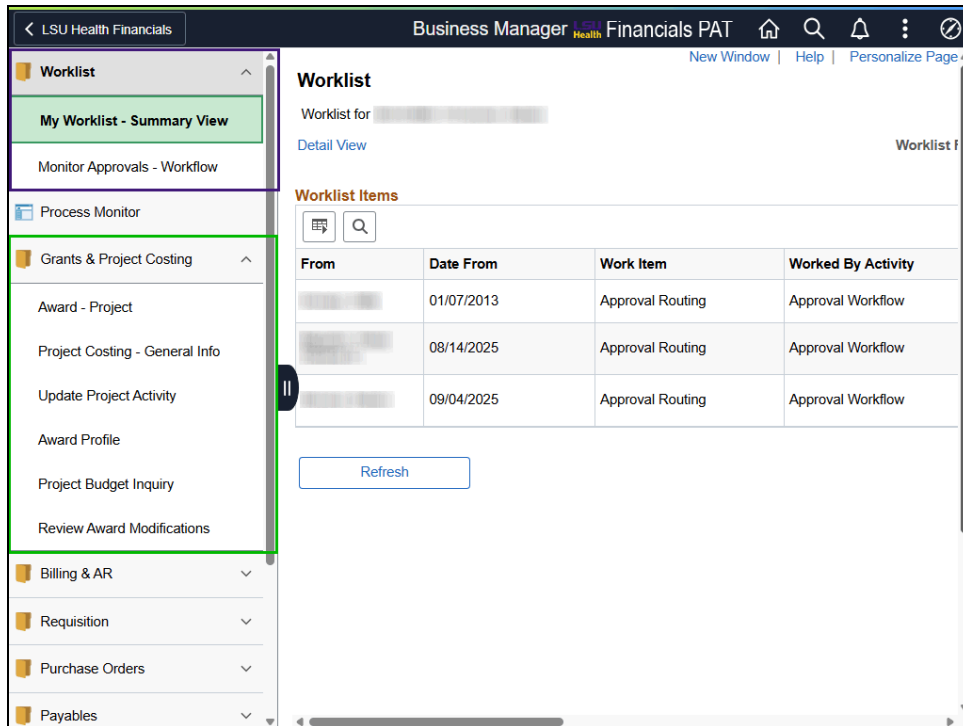
Tile and Navigations



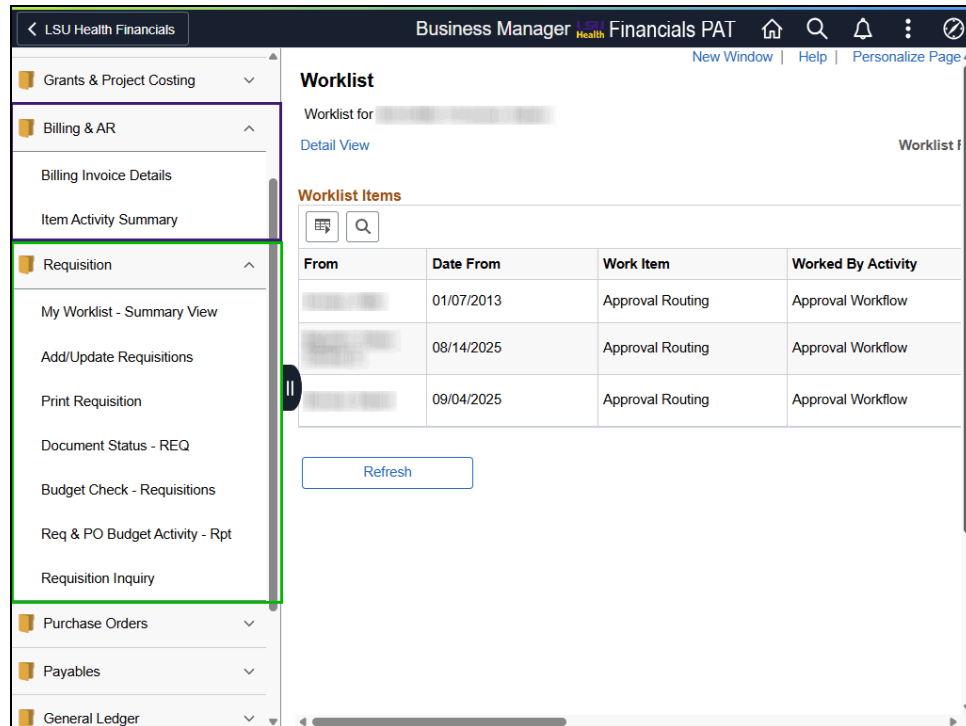
Step	Action
5.	<i>Each folder is a navigation collection containing links to pages you may use while you work. There are action pages such as entering a requisition, creating a payment request, or the worklist where you may approve a requisition or voucher. There are many inquiry pages where you can 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.</i>

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Tile and Navigations



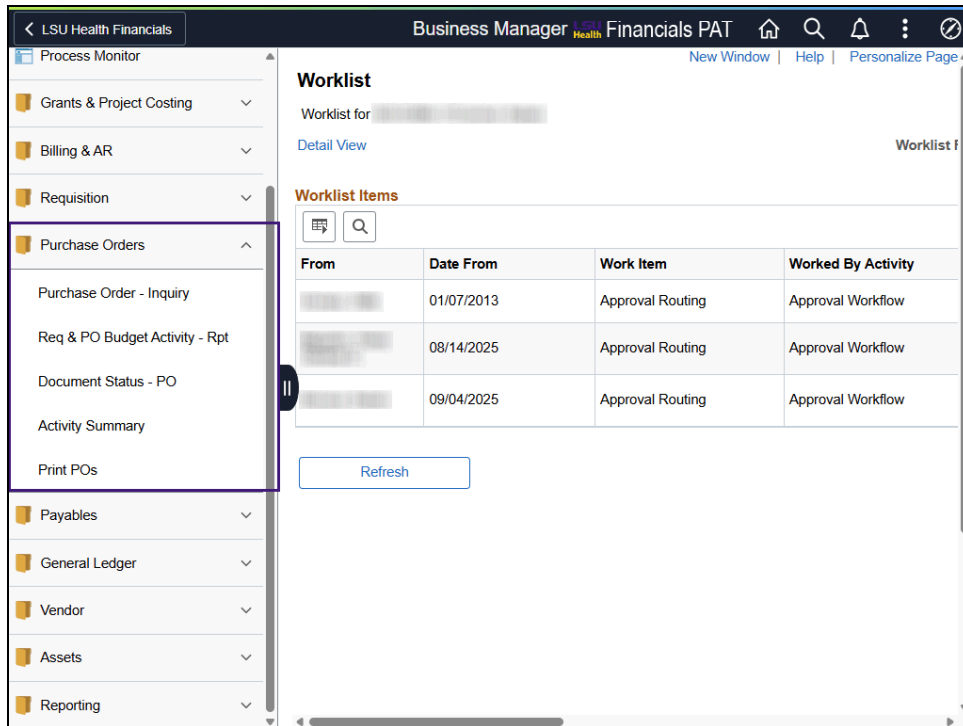
Step	Action
6.	What is included in the navigation collection? Worklist My Worklist - Summary View Monitor Approvals - Workflow Grants & Project Costing Award - project inquiry for a project associated with an award Project Costing - General information - project inquiry on a project from the project costing module Project Activity - inquiry page for activities associated with a project Award Profile - award inquiry where users can navigate to associated contract or project information Project Budget Inquiry - inquiry on a project budget 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

Training Guide

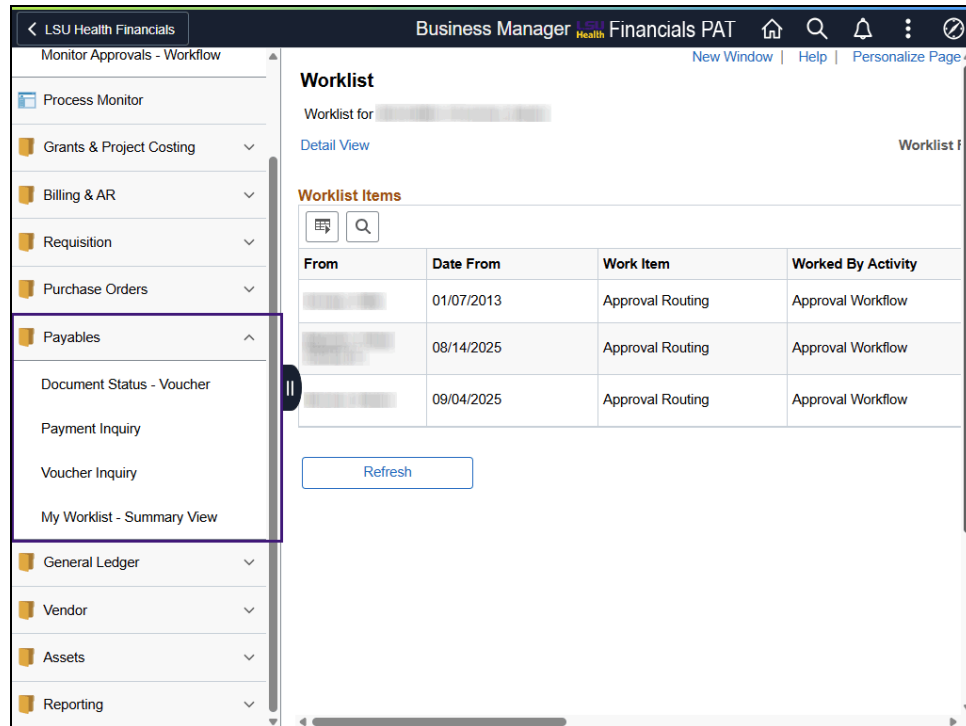
Tile and Navigations



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

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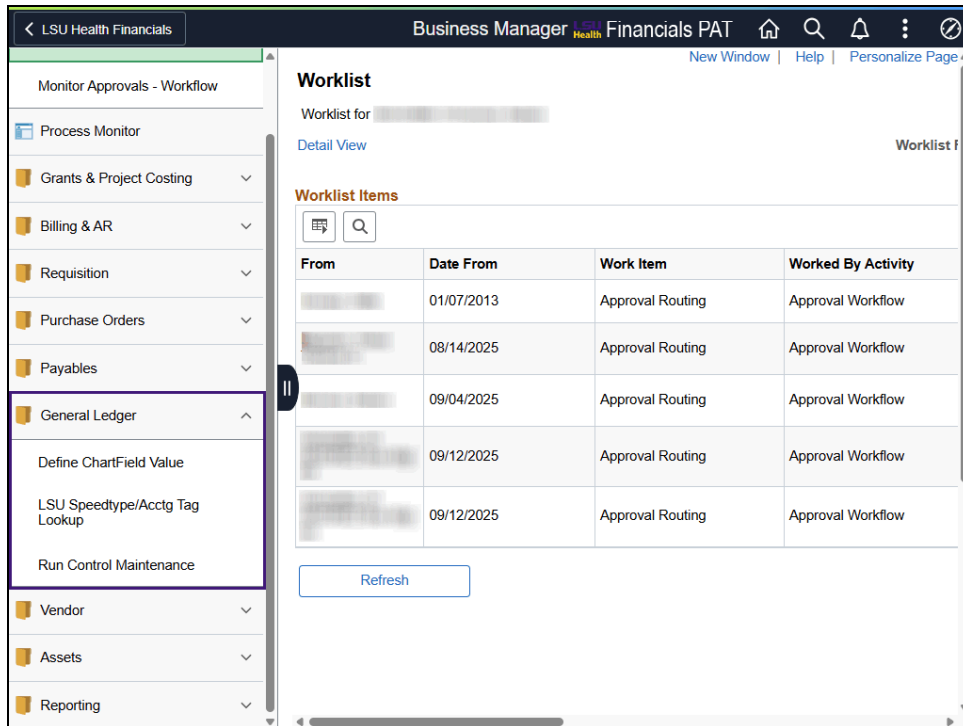
Tile and Navigations



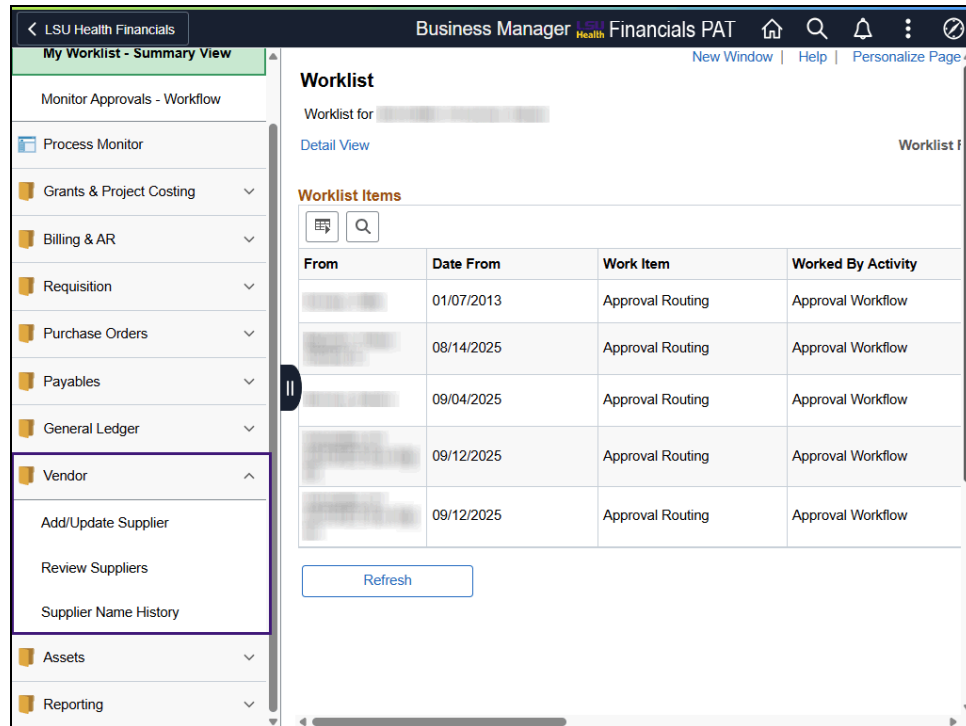
Step	Action
9.	What is included in the navigation collection? (continued) 6. Payables a. Payment Request Center - add/update a payment request b. Document Status - inquiry into voucher and payment document status and all associated documents c. Worklist - link to the Worklist d. Payment - inquiry into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

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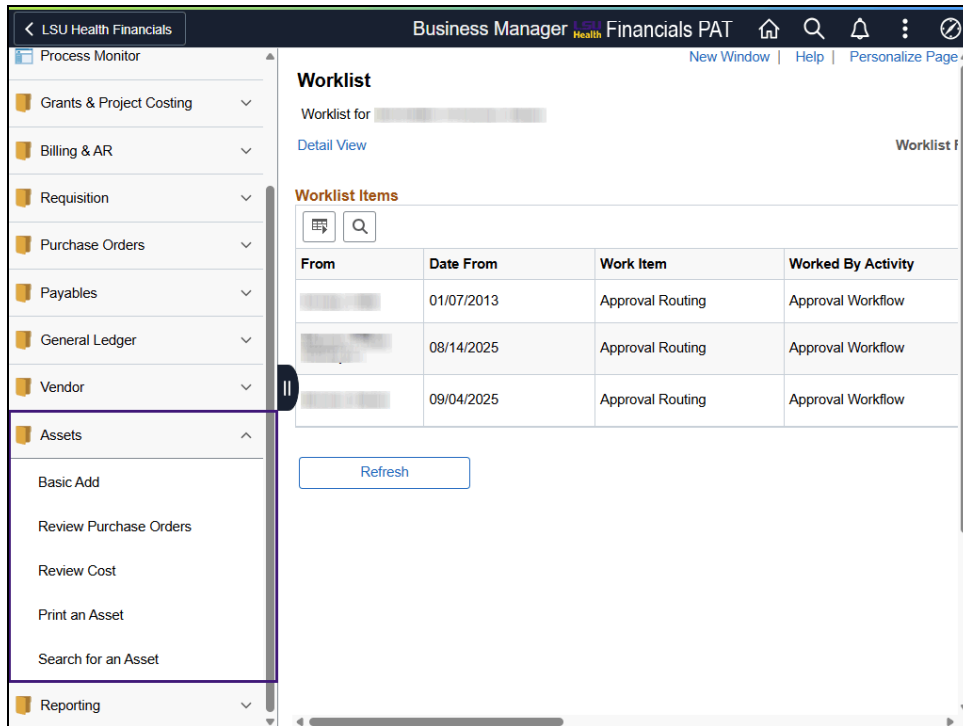
Step	Action
10.	What is included in the navigation collection? (continued) 7. General Ledger a. Chartfield Values - inquiry to the chartfields pages b. LSU Speedtype Lookup - LSU Health's custom chartstring (speedtype) lookup c. Run Control Maintenance - provides the user with the ability to delete run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



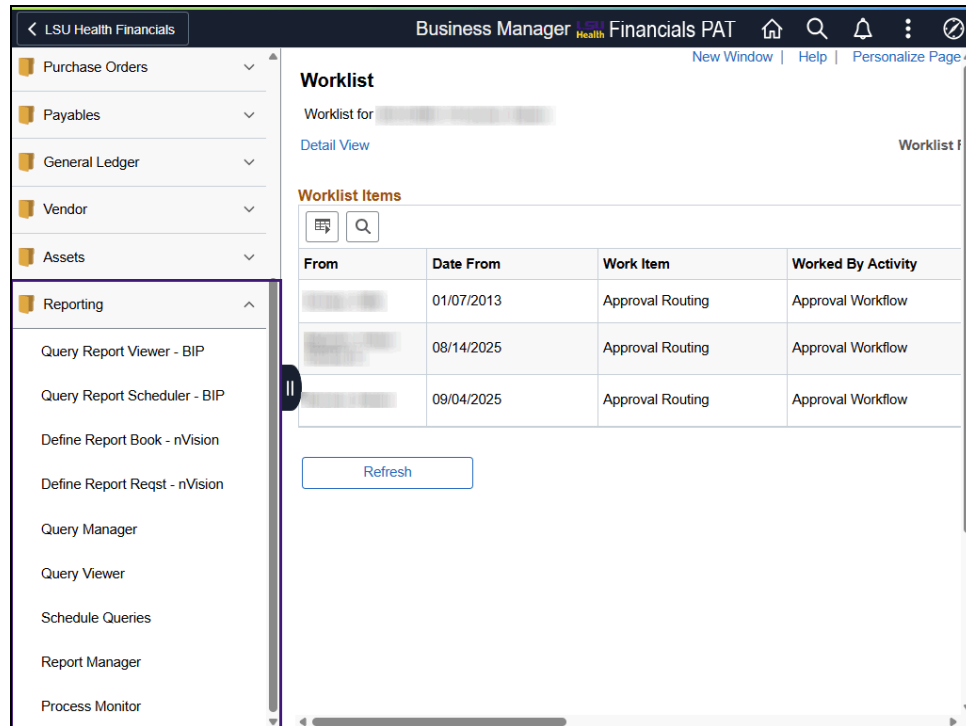
Step	Action
11.	What is included in the navigation collection? (continued) 8. Vendor (Supplier) a. Supplier - inquiry into supplier information such as id, address, location, phone information by navigating through the identifying information tabs b. Review Suppliers - inquiry into supplier information - 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

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Tile and Navigations



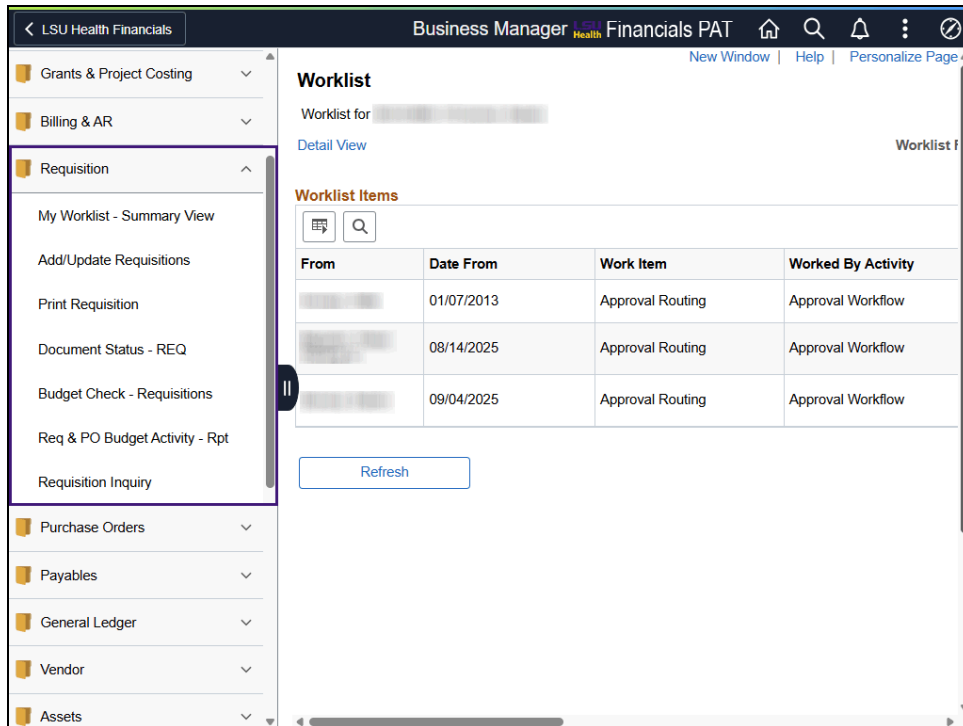
Step	Action
12.	What is included in the navigation collection? (continued) 9. Assets a. Basic Add - inquiry for users into the asset acquisition information and basic asset details b. Review Purchase Order - inquiry into the PO assigned to an asset c. Review Cost - inquiry on the asset cost screen d.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

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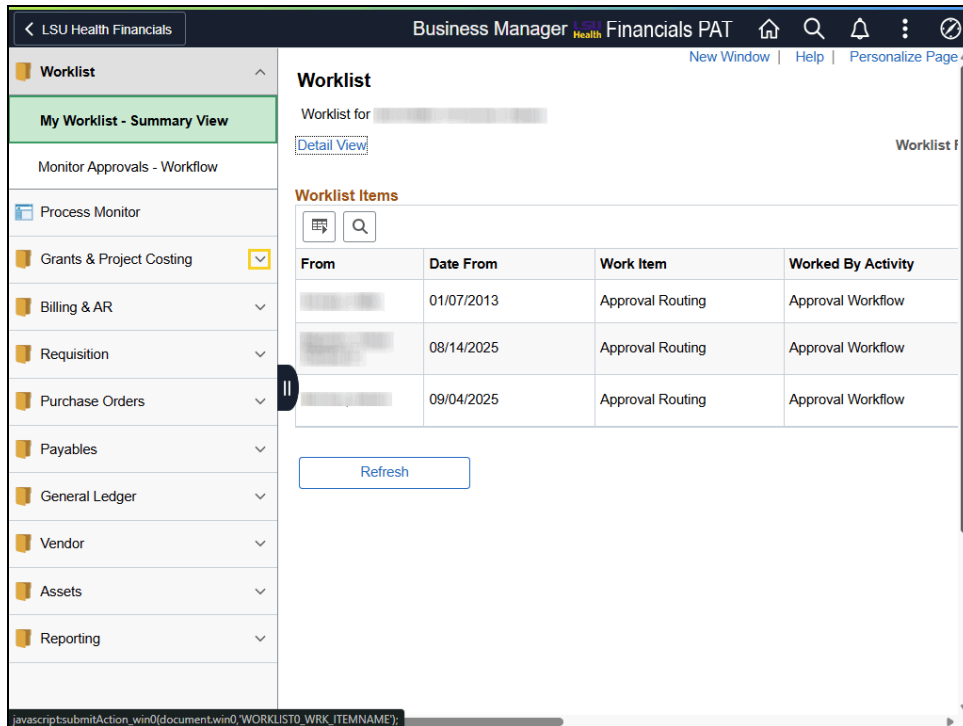
Step	Action
15.	The Requisitions nav collection contains links to <i>add or update requisitions</i>, <i>print a requisition</i>, <i>inquire on a requisition</i>, <i>budget check</i>, <i>inquire on the document status</i> and <i>run the req and po budgetary activity report</i>. An additional navigation link to <i>access the worklist</i> 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 <i>search for/select a requisition</i> to view all associated <i>purchase orders, receipts, vouchers and payments</i>.

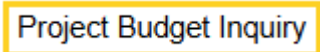
The screenshot shows the 'Business Manager Financials PAT' interface. On the left, a navigation pane is expanded, with 'Document Status - REQ' highlighted. A yellow box highlights the 'Close Navigation Area' button (two vertical bars) next to this option. The main content area is titled 'Requisition Document Status' and contains a search form with fields for Business Unit (set to LSUSH), Requisition ID (begins with), Requisition Status, Requisition Date, Origin, Requester, and Description. A 'Search' button is at the bottom of the form.

Step	Action
18.	On the screenshot, please note the icon that displays immediately to the <i>left</i> of the <i>Requisition Date</i> field that looks like "II". 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 "II" 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.

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Tile and Navigations



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 <i>Project Budgetary Inquiry</i>. 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 <i>149601392A</i> 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".

LSU Health Financials | Business Manager Financials PAT | New Window | Help

Project Budget Inquiry

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

*Business Unit: [dropdown] [LSUSH] [Q]

Project: [begins with] [149601392A] [Q]

Budget Plan ID: [=] [dropdown]

Budget Type: [=] [dropdown]

Description: [begins with] [dropdown]

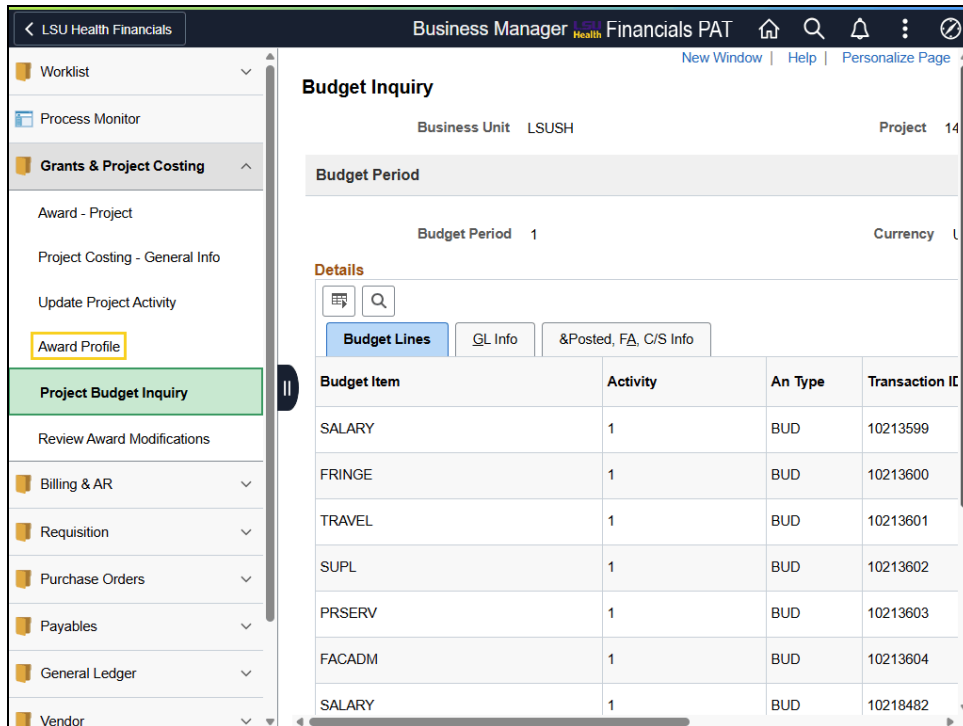
☐ Case Sensitive

Search [Clear] Basic Search [Save Search Criteria]

Step	Action
25.	Click the Search button. 
26.	Click the Close Navigation Area button. 
27.	For this project <i>Salary, Fringe, Supplies, Travel, Other, Professional Services, F&A, and Operating Services</i> 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. 

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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. 

LSU Health Financials Business Manager Financials PAT

Award ID 149601392
Reference Award Number PO 1000799
Federal Award Identification Number

Title HRSA SubAward U90HA32147
Long Description Rutgers Sub-Award-HRSA Funded Improving STI screening and treatment among people living with or at risk for HIV
Award PI 95 characters remaining
Sponsor Rutgers
Prime Sponsor
Post Award Administrator White, Valarie M.
Purpose RSRCH
Status Accepted
Award Type SubContract
ALN 93.928
Proposal ID
Version ID
Start Date 09/30/2018
End Date 09/29/2021
View Proposal
Hold Billing on Unpaid Cost
Hold Revenue on Unpaid Cost

[View Contract](#) [Contract Rates](#) [Additional Information](#) [Grant Administrator](#) [Sponsor](#)

Primary Project PI Vanchiere, John A.

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. View Contract

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Step	Action
34.	The Sponsor ID is displayed in the <i>"Sold To Customer"</i> field. In this example, it is LSUSH customer <i>04662</i>. If you need to review other <i>Award Profile</i> 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 <i>collapse</i> 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. 

Training Guide Tile and Navigations

The screenshot shows the 'Business Manager Financials PAT' interface. On the left is a navigation pane with a tree view containing: Worklist, Process Monitor, Grants & Project Costing, Billing & AR, Billing Invoice Details (highlighted with a yellow box), Item Activity Summary, Requisition, Purchase Orders, Payables, General Ledger, Vendor, Assets, and Reporting. The main area is titled 'Award Profile' and includes a search section with a 'Find an Existing Value' button and a 'Keyword Search' input field. Below this is the 'Search Criteria' section with several search fields: Business Unit (beginning with 'LSUSH'), Award ID, Description, Project, PI ID, Proposal ID, and Customer ID. Each field has a 'begins with' dropdown and a search icon. There is also a 'Case Sensitive' checkbox. At the bottom of the search section are 'Search' and 'Clear' buttons, along with links for 'Basic Search' and 'Save Search Criteria'.

Step	Action
37.	Click the Billing Invoice Details button. 
38.	The Business Unit (BU) defaults into the <i>Business Unit</i> field. If the BU does <u>not</u> default, <i>enter it or select it</i> 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. 

Training Guide

Tile and Navigations

Business Manager Financials PAT

Worklist Process Monitor Grants & Project Costing **Billing & AR** Billing Invoice Details Item Activity Summary Requisition Purchase Orders Payables General Ledger Vendor Assets Reporting

Find an Existing Value Keyword Search

Search Criteria

Business Unit: = LSUSH

Invoice: begins with

Bill Status: =

Customer: begins with 04662

Contract: begins with

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results

View All 1-25 of 25

Business Unit	Invoice	Invoice Type	Bill Status	Bill Type Identifier	Bill Source	Customer	Contract
LSUSH	SG22-0113	Regular	Invoiced	GM	SPS	04662	(blank)
LSUSH	SG22-0032	Regular	Invoiced	GM	SPS	04662	(blank)
LSUSH	SG22-0031	Regular	Invoiced	GM	SPS	04662	(blank)
LSUSH	S21-1056	Regular	Invoiced	GM	SPS	04662	(blank)

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.

Training Guide Tile and Navigations

The screenshot shows the Business Manager Financials PAT interface. The left sidebar contains a list of modules: Worklist, Process Monitor, Grants & Project Costing, Billing & AR (expanded), Billing Invoice Details (selected), Item Activity Summary, Requisition, Purchase Orders, Payables, General Ledger, Vendor, Assets, and Reporting. The main content area displays the 'Billing Invoice Details' for an invoice with an amount of 10,527.15 USD. Key details include Invoice Date 09/30/2021, Cycle ID ON-DEMAND, Source SPS, Frequency Once, SubCust1 PRIVATE, SubCust2 NONE, From Date 06/01/2021, To Date 06/30/2021, Pay Terms N30, Pay Method Check, Bank Account AR_D, Bill Inquiry Phone 318-675-5211, Collect NONE, and Billing Authority FED-1. A 'Notes' link is highlighted in the Billing Authority section. Other elements include a 'Copy Address' link, a 'Page Series' dropdown set to 'Header - Info 1', and a 'fresh' button.

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 <i>Business Unit</i> field. If the BU does <u>not</u> default, <i>enter it or select it</i> 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

Training Guide

Tile and Navigations

LSU Health Financials Business Manager Financials PAT

New Window | Help | Personalize Page

Item Activity Summary

Unit: LSUSH Customer: 04662 Rutgers PRIVATE NONE
 Item ID: SG22-0032 Line: Days Late: 16 Status: Closed

Item Activity

Item Balance 0.00 USD

Seq	Entry Type	Reason	Document ID	Display Amount Switch	Entry Accounting Date	Balance	Currency	Posted
1	IN	SPINV			09/30/2021	10,527.15	USD	10/16/2021
2	PY				11/15/2021	-10,527.15	USD	11/29/2021

Return to Search Notify

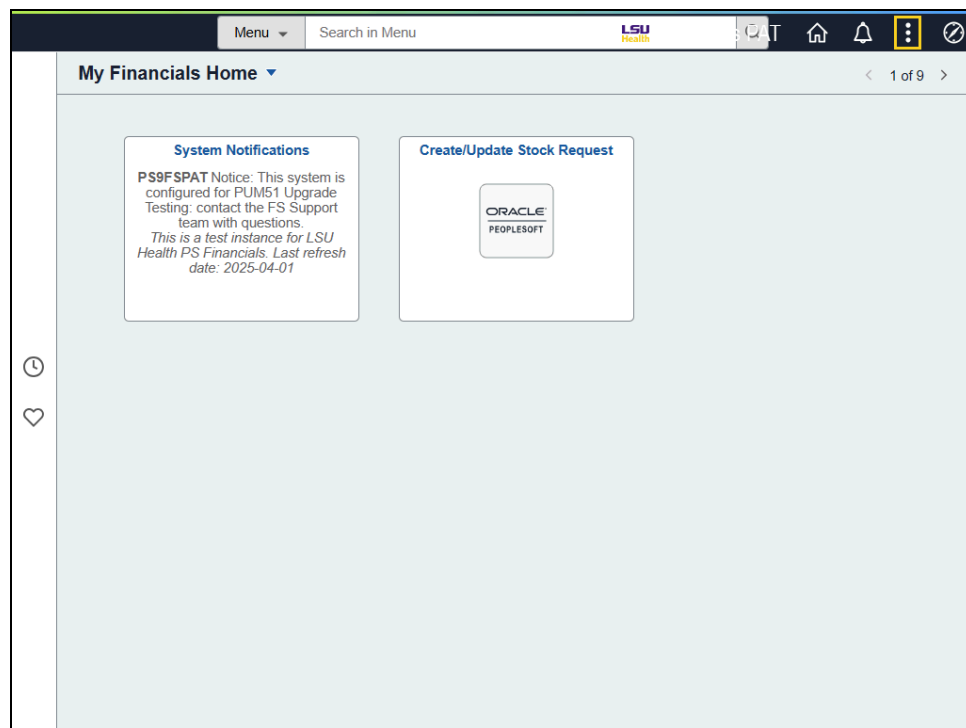
Step	Action
45.	This invoice was <i>entered</i> in <i>October 2021</i> , and the <i>payment</i> was <i>received</i> in <i>November 2021</i> . As you can see, this can be a helpful way to keep <i>track</i> of the <i>billing and payments</i> for your projects.
46.	Users should continue to <i>explore</i> all options included with the Business Manager tile. The Sandbox database can be <i>utilized</i> to further <i>explore expanding folders</i> and <i>selecting links</i> to try.
47.	To <i>sign out</i> 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. 
49.	This completes <i>Access and Navigate the Business Manager Tile</i> . End of Procedure.

Action Icon Options

Procedure

In this topic you will learn how to use [Action Icon Options](#).

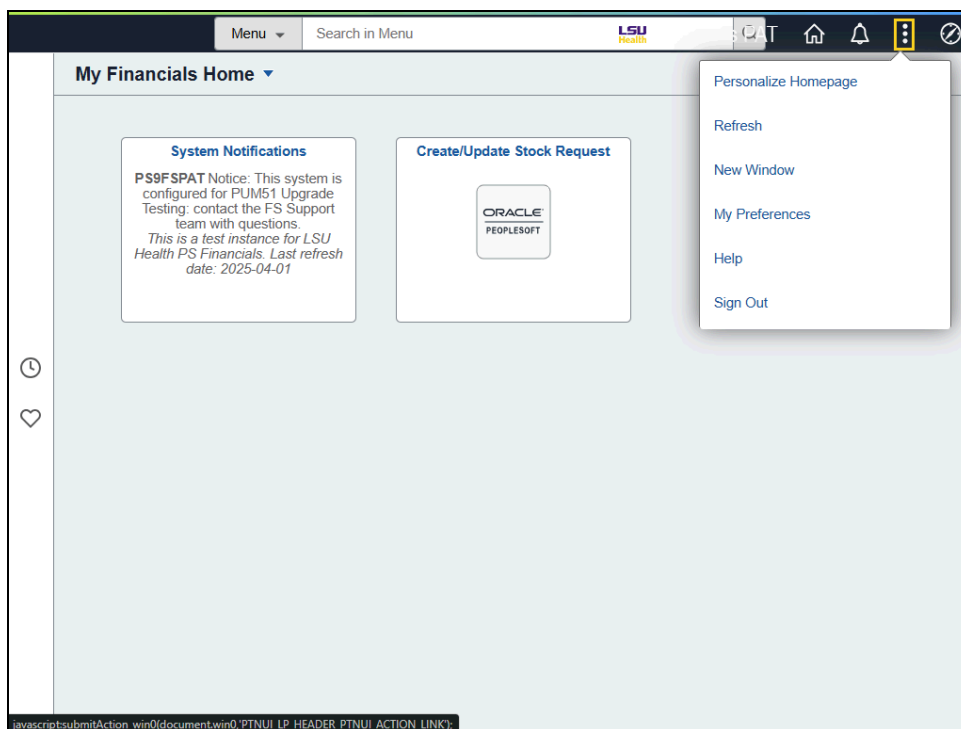
Step	Action
1.	Users can consider the My Financials Home page as their own personal <i>Favorites</i> page. A variety of individual pages can be added to the page to help users more efficiently navigate to often used pages. This topic provides the steps needed to add pages to the My Financials Home page, as well as adding a page to the <i>NavBar</i> and <i>Favorites</i>, using <i>My Preferences</i>.



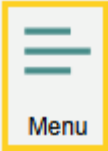
Training Guide

Tile and Navigations

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 <i>Add/Update Requisitions</i>. Click the Actions menu. 

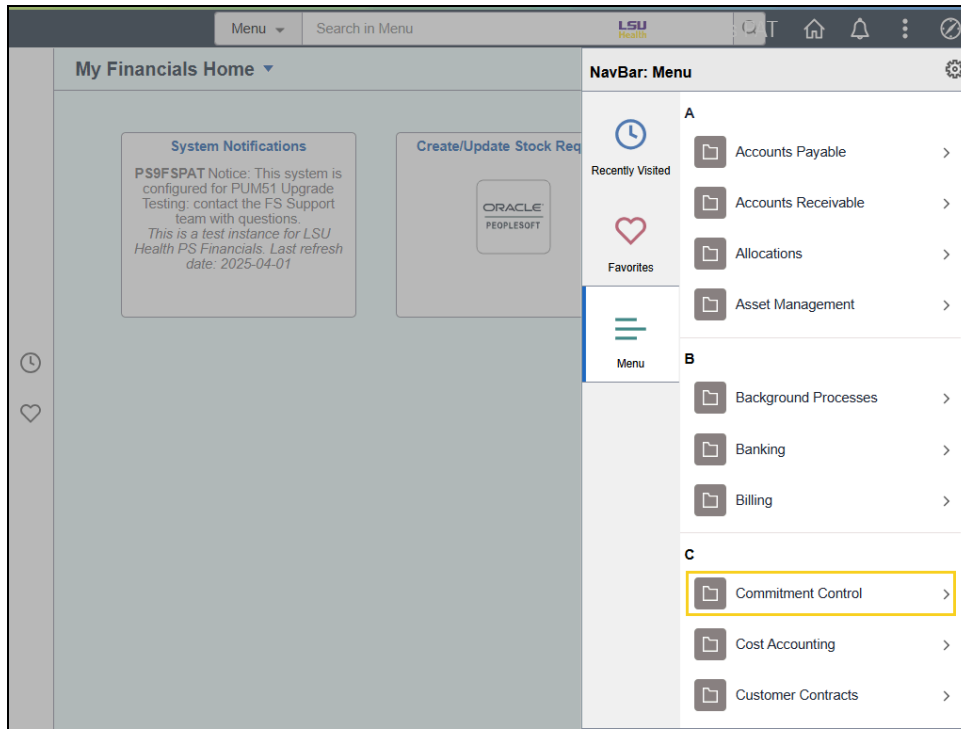


Step	Action
3.	The menu options for the Actions ellipses are the same for <u>all Homepages</u>. The available menu options are: • Personalize Homepage • Refresh • New Window • My Preferences • Help • Sign Out Click the Actions ellipses to close the menu. 

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 <i>menu</i> will <i>pop out</i> from the <i>right side</i>. Other options, such as <i>personalizations</i> and <i>preference settings</i>, are available through the NavBar. For instance, users may <i>set preferences</i> for the NavBar menu order, <i>add a navigation</i> button to the NavBar menu, and/or <i>add pages or reports</i> to the <i>Favorites</i> menu. Click the NavBar button. 
5.	Click the Menu button. 

Training Guide

Tile and Navigations



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

Training Guide

Tile and Navigations

< My Financials Home

Budget Details









New Window | Help

Budget Details

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

*Business Unit:

= ▼

LSUSH

Q

*Ledger Group:

= ▼

Q

Search

Clear

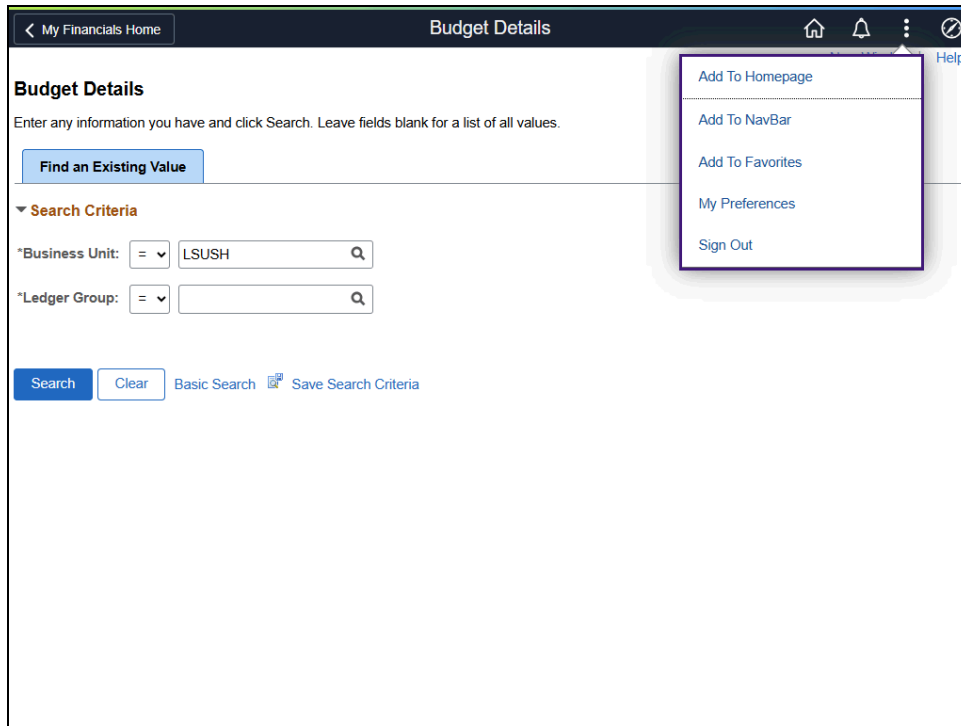
Basic Search 

Save Search Criteria

Step	Action
9.	Click the Actions menu. 

Training Guide

Tile and Navigations



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.

Training Guide

Tile and Navigations

< Business Manager
Budget Details
New Window | Help

Budget Details

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

*Business Unit: = LSUSH

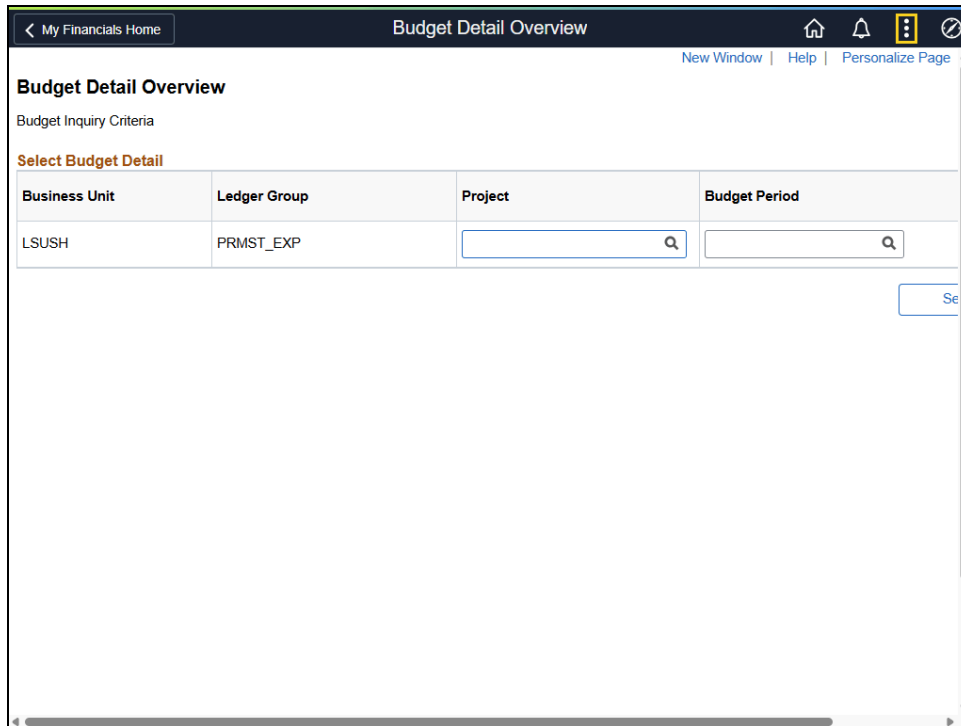
*Ledger Group: =

Search Clear Basic Search Save Search Criteria

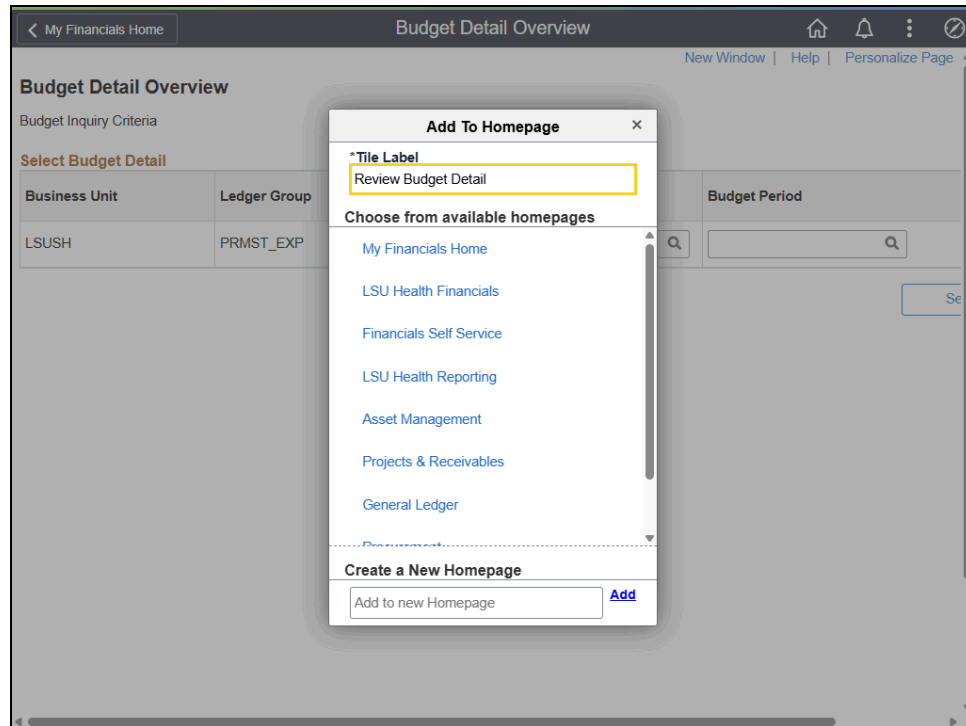
Step	Action
12.	The Business Unit (BU) defaults into the <i>Business Unit</i> field. If the BU does <u>not</u> default, <i>enter it or select it</i> by clicking the <i>Look up Business Unit</i> button to the right of the field. Enter the desired information into the Ledger Group: field. Enter "PRMST_EXP".
13.	Click the Search button. Search

Training Guide

Tile and Navigations



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 <i>Commitment Control > Review Budget Activities</i> navigation. You could add the inquiry to My Financials Home to make it easier to navigate to it and perform your inquiry. <i>NOTE: Not all users have access to the page. This simply used as an example of adding a page to My Financials Home.</i>
16.	Add to My Financials Home - Add to Homepage Click the Add to Homepage link. 

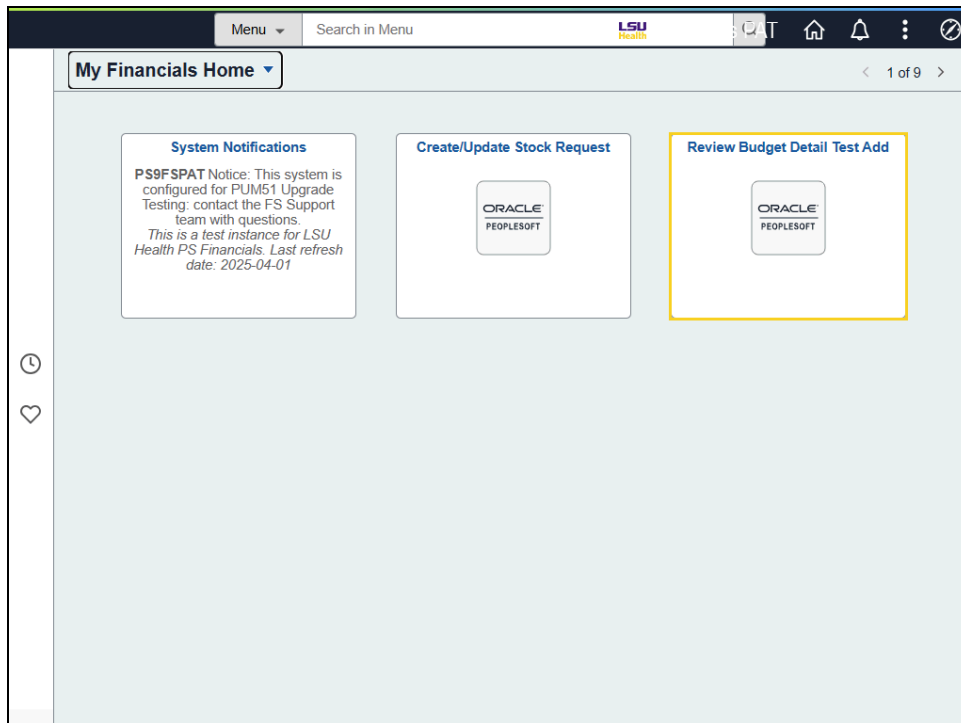


Step	Action
17.	Add to My Financials Home - Add to Homepage Enter the desired information into the *Tile Label field. Enter "Review Budget Detail Test Add".
18.	Add to My Financials Home - Add to Homepage Click the My Financials Home link. My Financials Home
19.	Add to My Financials Home - Add to Homepage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

Training Guide

Tile and Navigations

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.

Budget Detail Overview

Budget Inquiry Criteria

[Select Budget Detail](#)

Business Unit	Ledger Group	Project	Budget Period
LSUSH	PRMST_EXP		

[Search](#)

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. Search

Training Guide

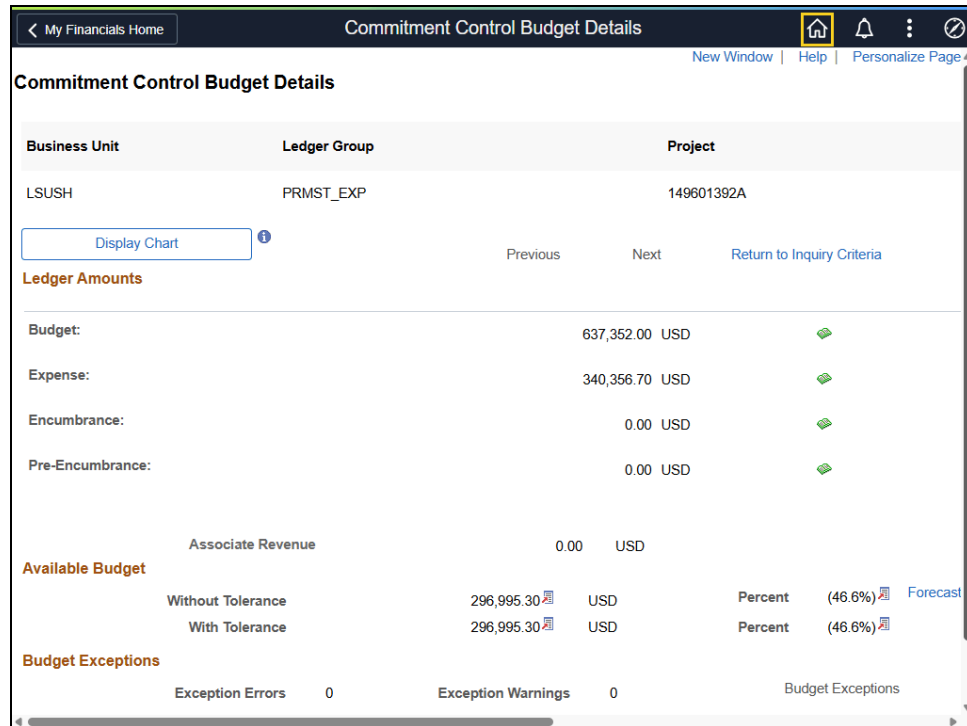
Tile and Navigations

The screenshot shows a web application interface titled "Budget Detail Overview". At the top, there is a navigation bar with a back arrow, "My Financials Home", and the title "Budget Detail Overview". To the right of the title are icons for home, notifications, and a menu. Below the navigation bar, there are links for "New Window", "Help", and "Personalize Page".

The main content area is titled "Detail Overview" and includes a "Criteria" section. Below this, there is a table with the following columns: "Business Unit", "Ledger Group", "Project", "Budget Period", and "View Details". The table contains one row with the following data: "USH", "PRMST_EXP", "149601392A", and an empty "Budget Period" cell. The "View Details" link in the last column is highlighted with a yellow box.

Below the table, there are two buttons: "Search" and "Notify".

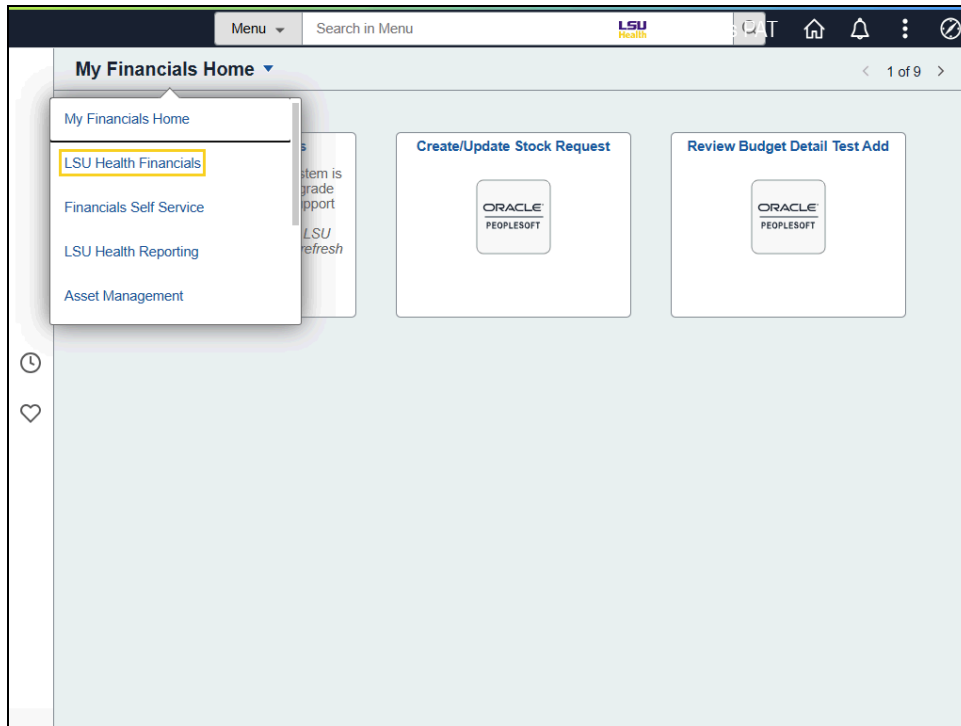
Step	Action
24.	Add to My Financials Home - Add to Homepage Click the View Details link. View Details



Step	Action
25.	This completes <i>Add to My Financials Home - Add to Homepage</i>. The Commitment Control Budget Details page displays. Click the Home button. 
26.	Add to NavBar Click the My Financials dropdown button to activate the menu. 

Training Guide

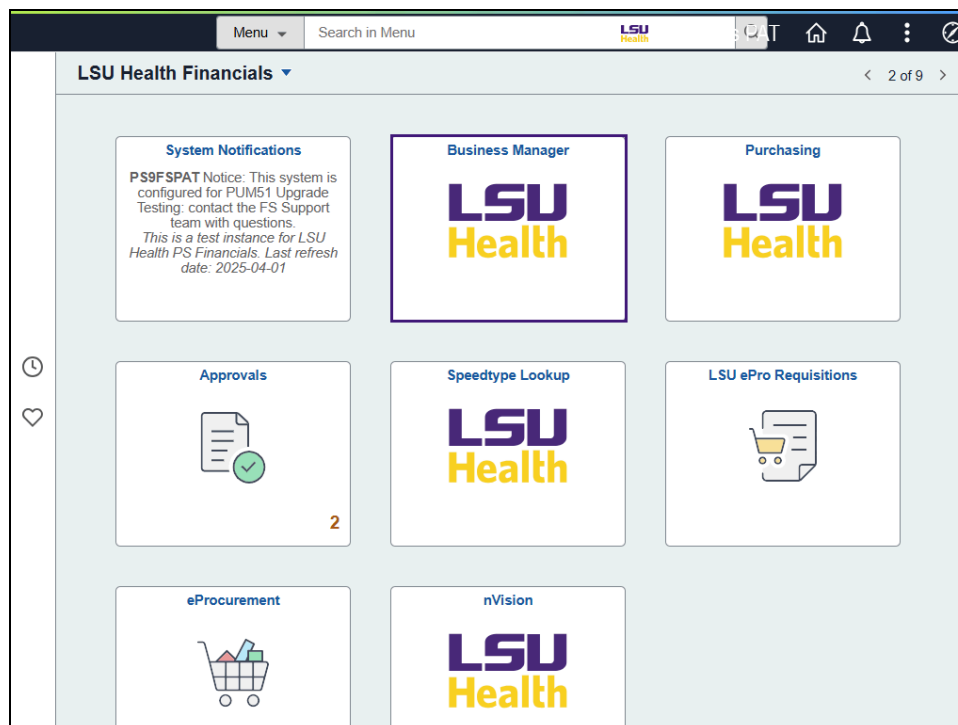
Tile and Navigations



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

Training Guide

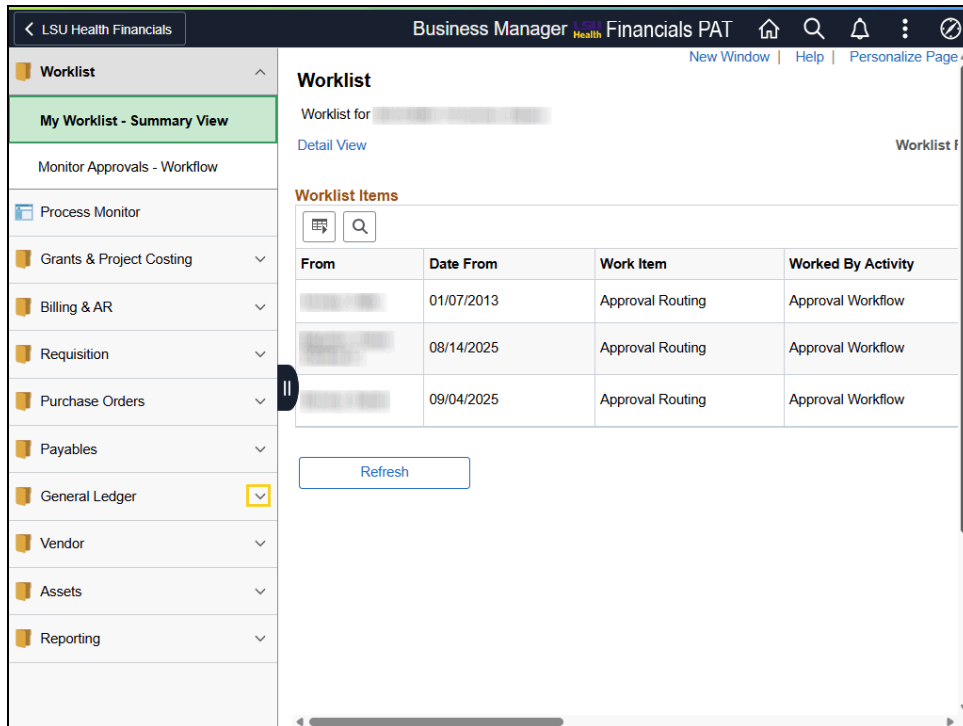
Tile and Navigations



Step	Action
28.	Add to NavBar *****WARNING***** <i>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.</i>
29.	Add to NavBar Click the Business Manager button.

Training Guide

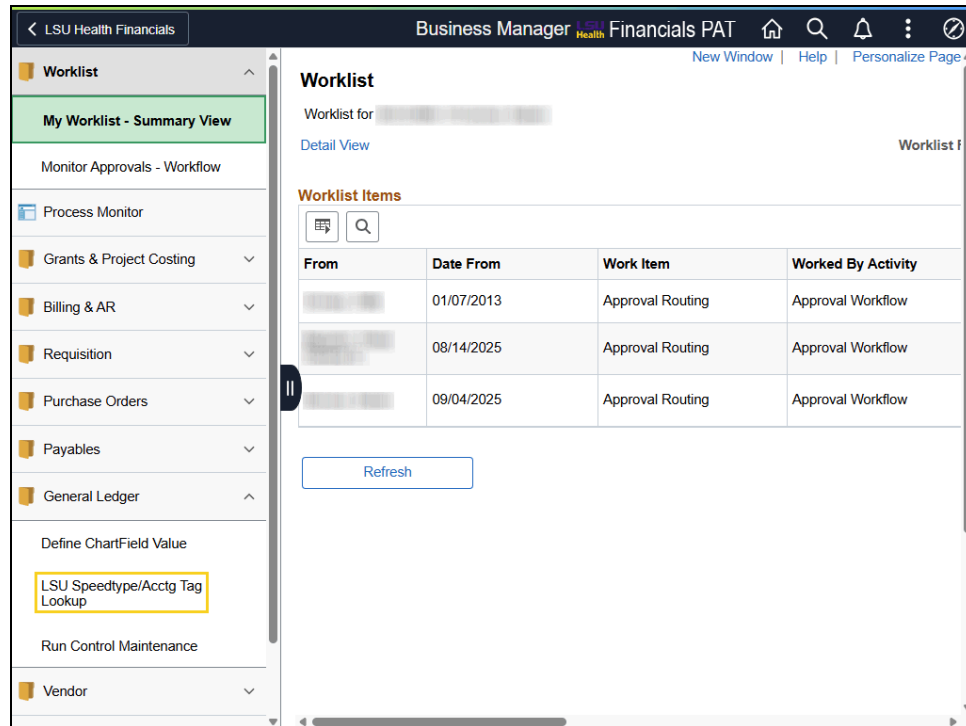
Tile and Navigations



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

Training Guide

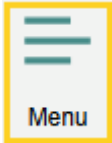
Tile and Navigations

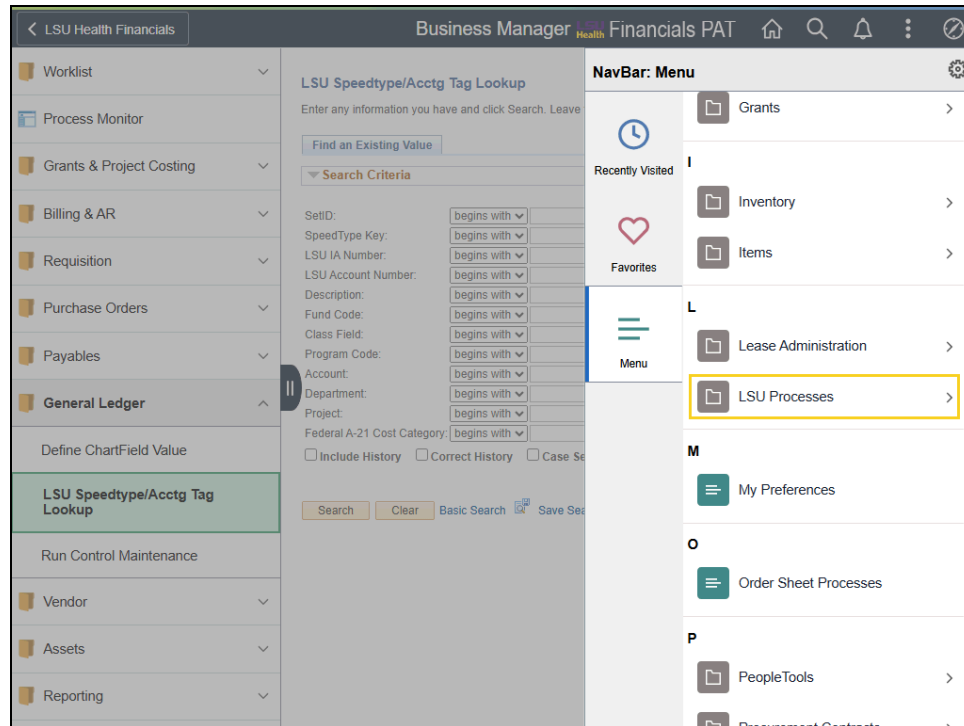


Step	Action
31.	Add to NavBar Click the LSU Speedtype/Acctg Tag Lookup button. LSU Speedtype/Acctg Tag Lookup

Training Guide

Tile and Navigations

Step	Action
32.	Add to NavBar <i>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.</i> Click the NavBar menu. 
33.	Add to NavBar Click the Menu button. 



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

Training Guide

Tile and Navigations

Business Manager

LSU Speedtype/Acctg Tag Lookup

Home

Notifications

Menu

New Window | Help

LSU Speedtype/Acctg Tag Lookup

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

SetID:	begins with ▼		🔍
SpeedType Key:	begins with ▼		
LSU IA Number:	begins with ▼		
LSU Account Number:	begins with ▼		
Description:	begins with ▼		
Fund Code:	begins with ▼		🔍
Class Field:	begins with ▼		🔍
Program Code:	begins with ▼		🔍
Account:	begins with ▼		🔍
Department:	begins with ▼		🔍
Project:	begins with ▼		🔍
Federal A-21 Cost Category:	begins with ▼		

☐ Include History

☐ Correct History

☐ Case Sensitive

Search

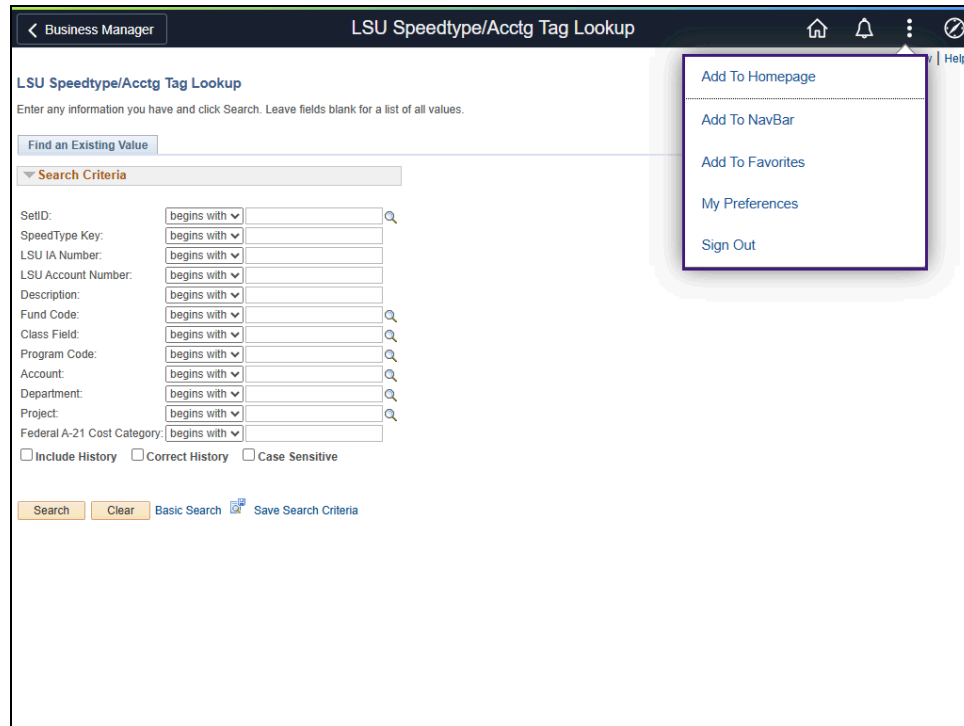
Clear

Basic Search

🔍

 Save Search Criteria

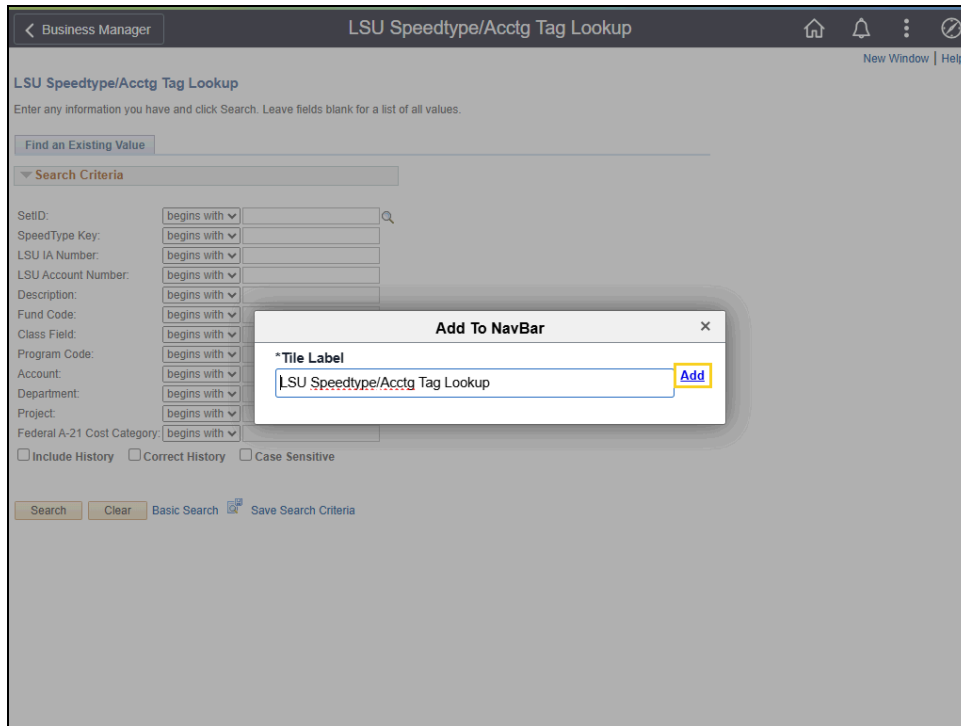
Step	Action
36.	Add to NavBar The search page is convenient to look up the speedtype for a <i>project</i> or <i>department</i>. This is a <i>frequently used page</i> for the user, and s/he will want to add it to the NavBar for ease of access. Click the Actions menu. 

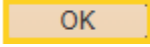


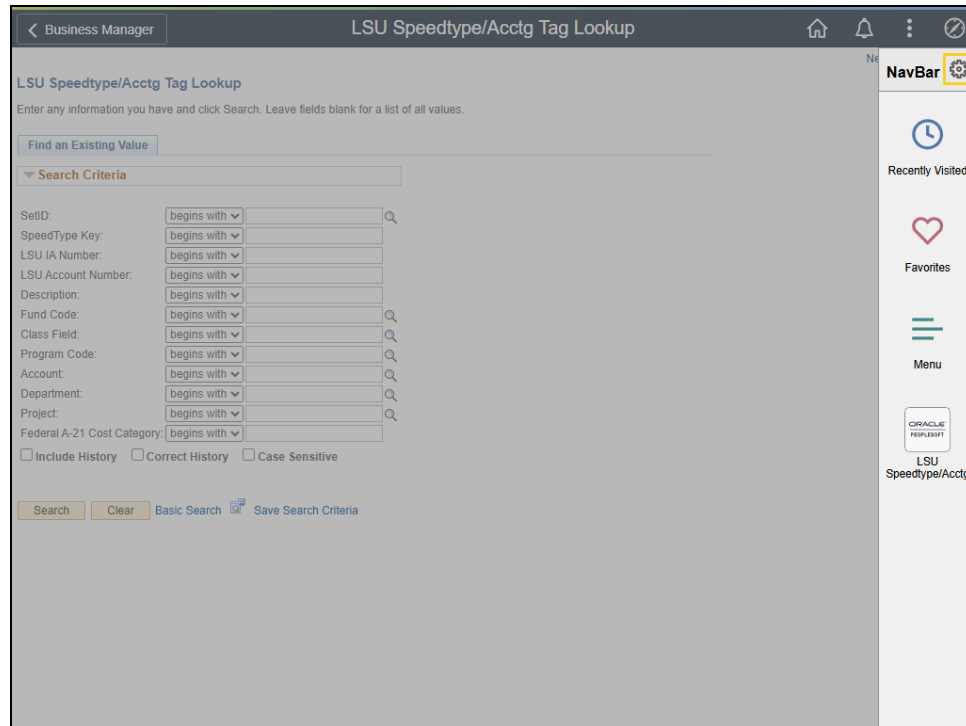
Step	Action
37.	Add to NavBar In this example, the user selects the Actions icon. A different list of <i>Actions items</i> displays because the user is performing the action outside a navigation collection (i.e., the Business Manager tile). The new list can be used to perform various actions such as: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

Training Guide

Tile and Navigations



Step	Action
39.	Add to NavBar The title of the page defaults into the <i>*Tile Label</i>. 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 <i>LSU Speedtype/Acctg Tag Lookup</i> 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. 

Training Guide

Tile and Navigations

Step	Action
43.	Add to NavBar Notice the <i>Recently Visited</i>, <i>Favorites</i> and <i>Menu</i> options do <u>not</u> have a <i>delete</i> button. These icons are <i>LSUHSC IT defaulted</i>, 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. 

Training Guide

Tile and Navigations

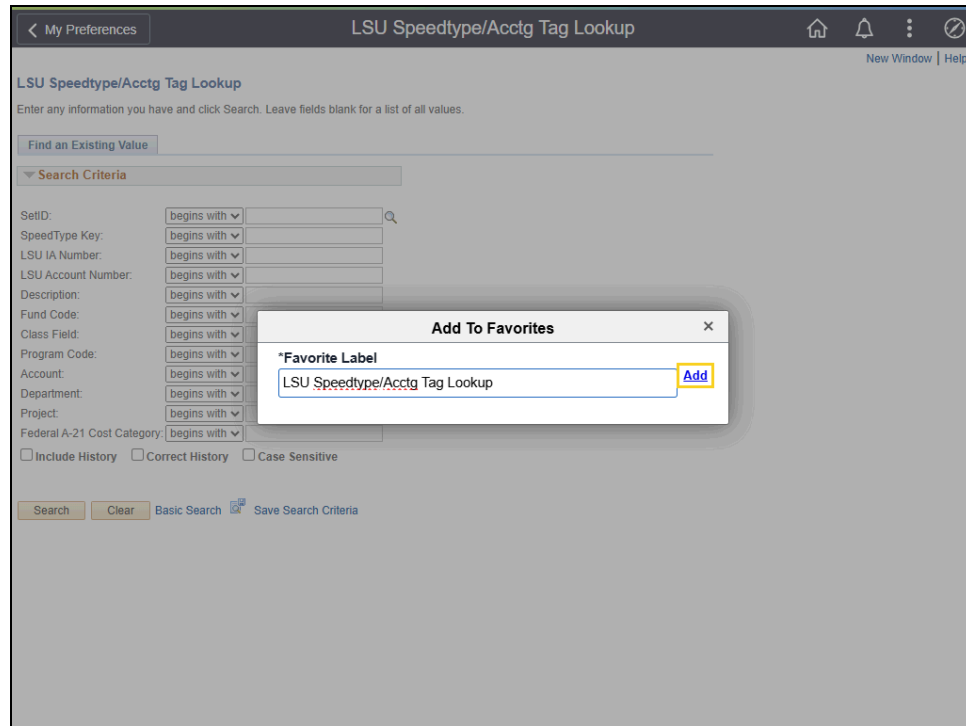
Step	Action
45.	Add to NavBar The <i>LSU Speedtype/Acctg Tag Lookup</i> button has been <u>removed</u> from the NavBar.
46.	Select the NavBar to close the <i>NavBar menu</i>. <i>This completes Add to NavBar.</i> Click the NavBar button to close the menu. 
47.	Add to Favorites In this example, the user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

Training Guide

Tile and Navigations

The screenshot shows the 'LSU Speedtype/Acctg Tag Lookup' application. The top navigation bar includes a 'Business Manager' link, the application title, and icons for home, notifications, and help. Below the title, there is a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' A 'Find an Existing Value' button is present. The 'Search Criteria' section contains a list of fields with dropdown menus and search icons: SetID, SpeedType Key, LSU IA Number, LSU Account Number, Description, Fund Code, Class Field, Program Code, Account, Department, Project, and Federal A-21 Cost Category. At the bottom of the search criteria, there are checkboxes for 'Include History', 'Correct History', and 'Case Sensitive'. Below these are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. A dropdown menu is open on the right side of the screen, showing options: 'Add To Homepage', 'Add To NavBar', 'Add To Favorites' (highlighted with a yellow box), 'My Preferences', and 'Sign Out'.

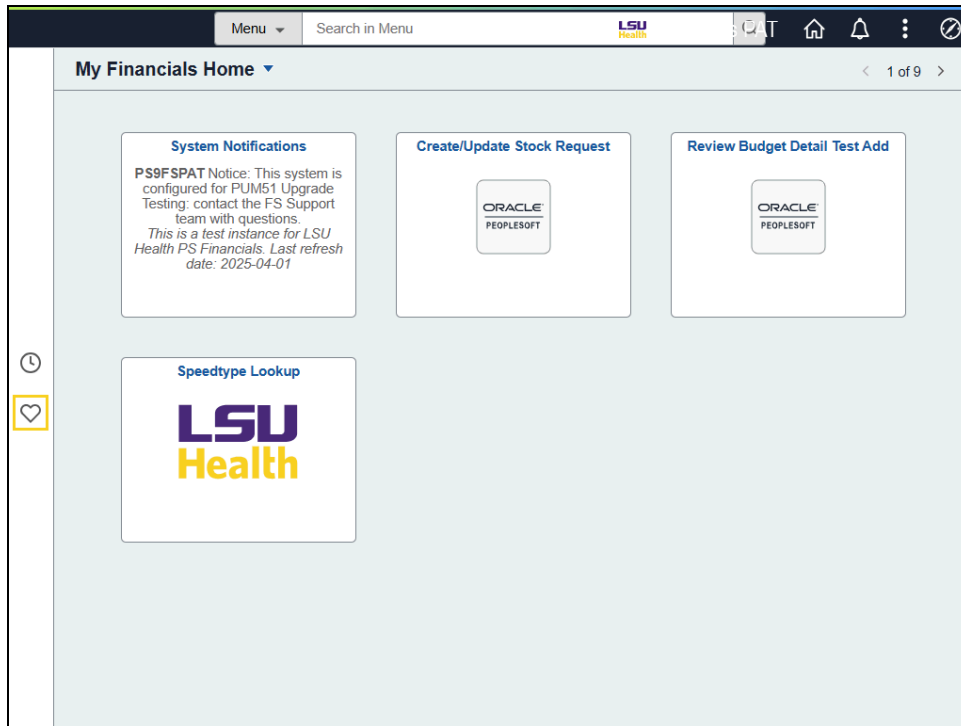
Step	Action
48.	Add to Favorites Click the Add to Favorites link. Add To Favorites



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

Training Guide

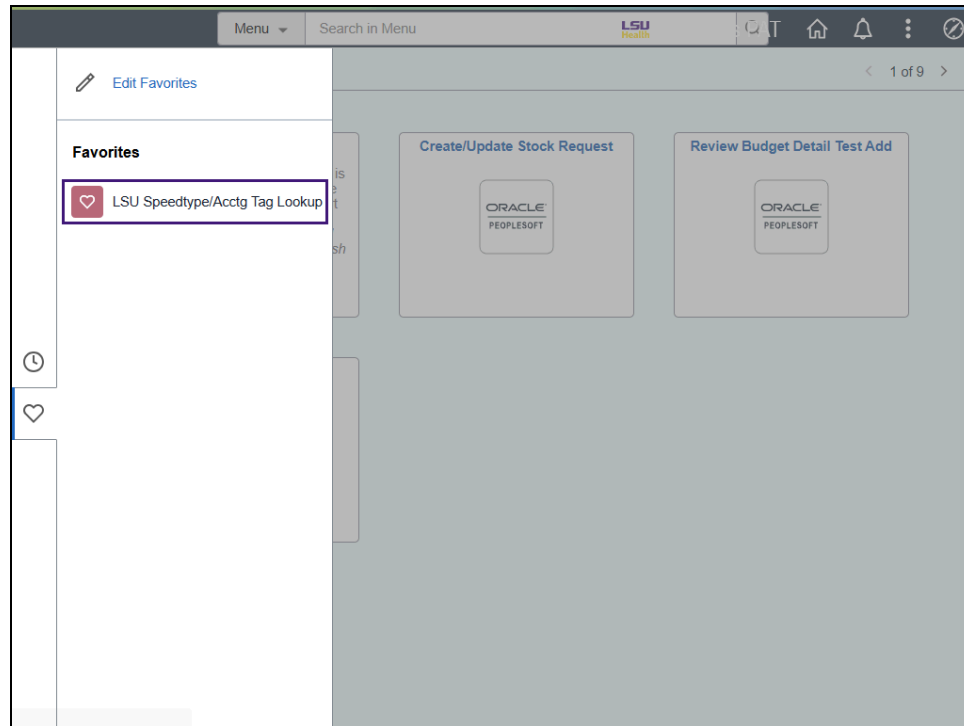
Tile and Navigations



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

Training Guide

Tile and Navigations



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

Example Inquiries using the Business Manager Tile

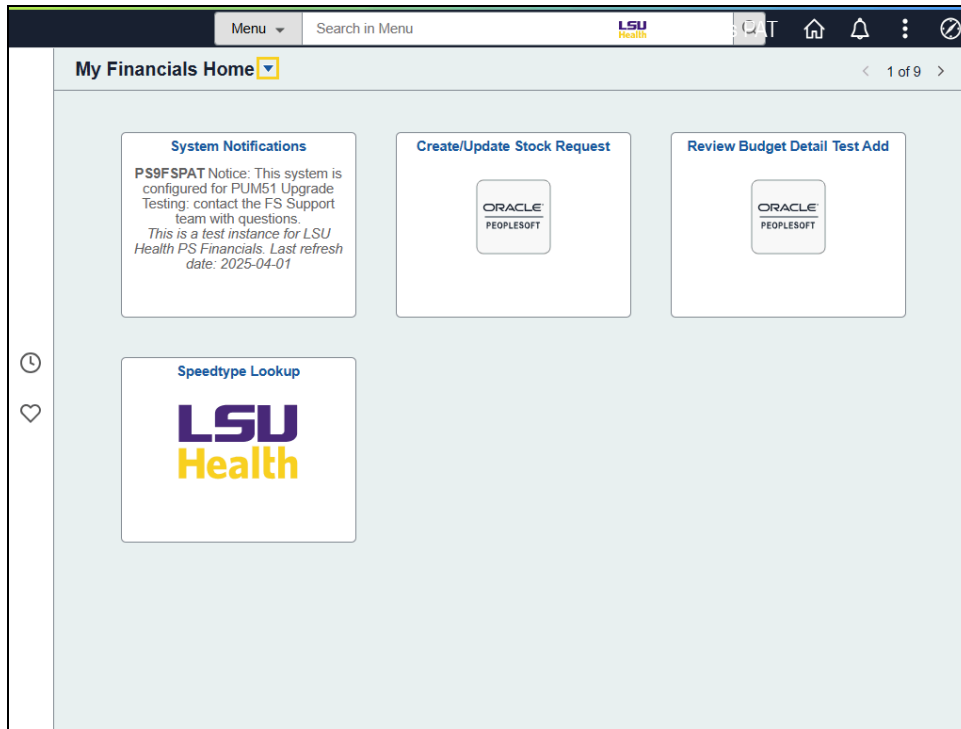
Procedure

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 <i>Business Unit LSUNO</i>, <i>Customer: 04198 - Our Lady of the Lake</i> - and <i>invoice NG25-0294</i>.

Training Guide

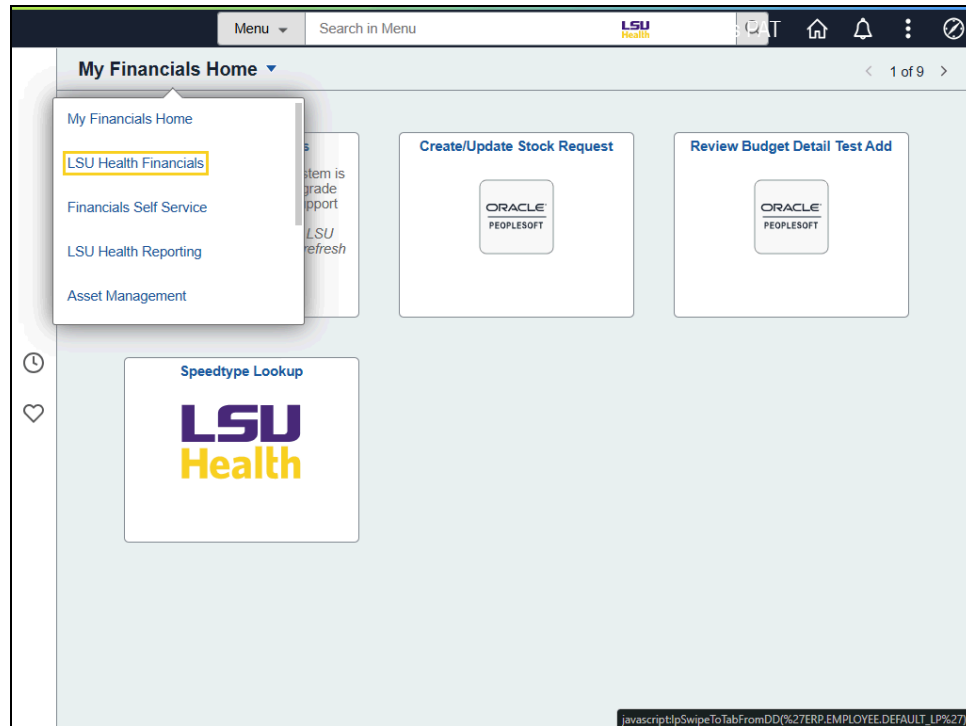
Tile and Navigations



Step	Action
2.	Launch <i>PeopleSoft Financials</i> 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. 

Training Guide

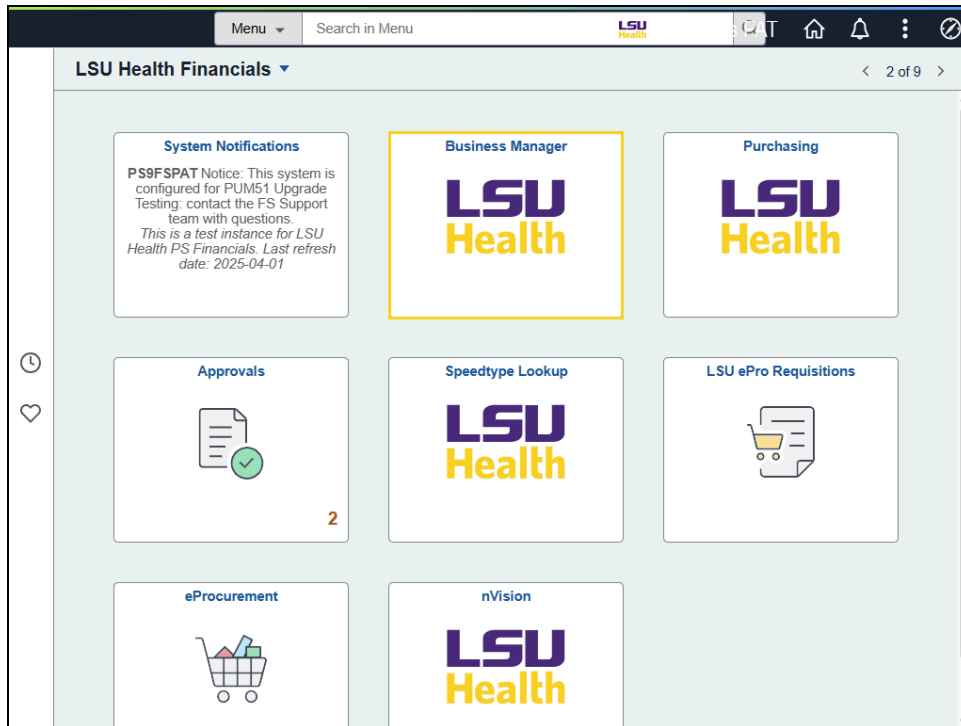
Tile and Navigations



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

Training Guide

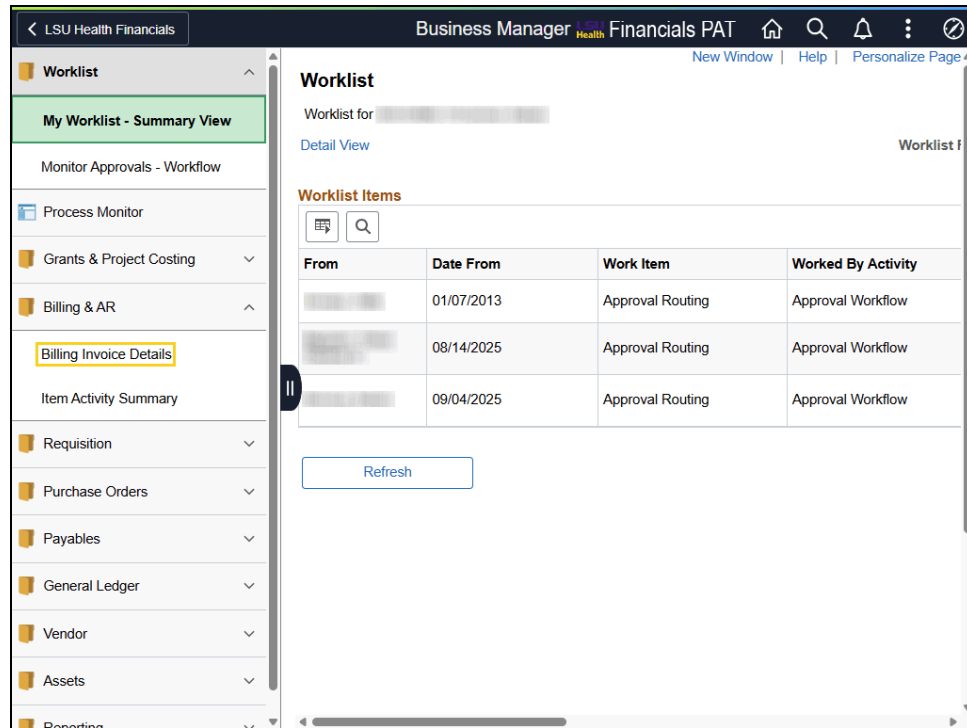
Tile and Navigations



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. 

Training Guide

Tile and Navigations



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

Training Guide

Tile and Navigations

The screenshot shows the 'Business Manager Financials PAT' interface. On the left is a navigation pane with categories like Worklist, Process Monitor, Grants & Project Costing, and Billing & AR. The 'Billing & AR' category is expanded, showing 'Billing Invoice Details' as the selected option. The main area is titled 'Bill Inquiry' and contains a search form. The form includes a 'Find an Existing Value' button, a 'Keyword Search' input, and a 'Search Criteria' section. The 'Search Criteria' section has fields for 'Business Unit' (set to 'LSUNO'), 'Invoice' (set to 'begins with' and highlighted with a yellow box), 'Bill Status' (set to '='), 'Customer' (set to 'begins with'), and 'Contract' (set to 'begins with'). There is also a 'Case Sensitive' checkbox. At the bottom of the search criteria are 'Search' and 'Clear' buttons, along with links for 'Basic Search' and 'Save Search Criteria'.

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 <i>Look up Business Unit</i> button. Enter the desired information into the Invoice: field. Enter "NG25-0294".
8.	Click the Search button. 

Training Guide Tile and Navigations

LSU Health Financials Business Manager Financials PAT

New Window | Help | Personalize Page

Header - Info 1 | Line - Info 1

Unit	LSUNO	Invoice	NG25-0294	Invoice Amt	750.00	USD	32
Status	INV	Invoice Date	11/06/2024	Cycle ID	M		
Type	GRA	Source	SPN	Frequency	C		
Customer	04198	SubCust1	PRIVATE	SubCust2	1		
	Our Lady Of The Lake						
Invoice Form	STANDARD	From Date	11/06/2024	To Date	1		
Accounting Date	11/06/2024	Pay Terms	N30	Pay Method	C		
Remit To	BKOL	Bank Account	AR_D				
Sales	9999999	Bill Inquiry Phone	504-568-3674				
Credit	NONE	Collect	GRANTS				
Billing Specialist	GRANT-11	Billing Authority	GRANT-3				
	Julia Andrews		Lynne J. Tardiff				

Go to: Summary | Header Info 2 | Commit Cntrl | Address | Copy Address | Notes

Bill Search | Line Search

Header - Info 1 | Line - Info 1

Return to Search | Notify | Refresh

Page Series: Prev | Next

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

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The screenshot shows the 'Business Manager' interface for 'LSU Health Financials PAT'. The left sidebar contains a navigation menu with the following items: Worklist, Process Monitor, Grants & Project Costing, Billing & AR (expanded), Billing Invoice Details, Item Activity Summary (highlighted with a yellow box), Requisition, Purchase Orders, Payables, General Ledger, Vendor, Assets, and Reporting. The main content area displays 'Header - Info 1' for invoice NG25-0294. It lists various details including Unit (LSUNO), Invoice (NG25-0294), Invoice Amt, Status (INV), Type (GRA), Customer (04198), Invoice Form (STANDARD), Accounting Date (11/06/2024), Remit To (BKOL), Sales (9999999), Credit (NONE), Billing Specialist (GRANT-11), and Billing Specialist Name (Julia Andrews). It also shows 'Our Lady Of The Lake' as the customer name. At the bottom, there are buttons for 'Return to Search', 'Notify', and 'Refresh', and a status bar indicating 'Header - Info 1 | Line - Info 1'.

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

Item Activity Summary

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

Search Criteria

- *Business Unit: [=] LSUNO
- Customer ID: [begins with]
- Item ID: [begins with]
- Item Line: [=]
- Item Status: [=]
- Credit Analyst: [begins with]
- Collector: [begins with]
- Purchase Order Reference: [begins with]
- Document ID: [begins with]
- Bill of Lading: [begins with]
- Contract: [begins with]

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 <i>Look up Business Unit</i> 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. Search

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Business Manager LSU Health Financials PAT

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Item Activity Summary

Unit: LSUNO

Customer: 04198

Our Lady Of The Lake

PRIVATE

1498200

Item ID: NG25-0294

Line: Days Late: 80

Status: Closed

Item Activity

1-2 of 2

View All

Item Balance

0.00 USD

Seq

Entry Type

Reason

Document ID

Display Amount Switch

Entry

Accounting Date

Balance

Currency

Posted

1

IN

SPINV

11/06/2024

750.00

USD

11/06/2024

2

PY

02/24/2025

-750.00

USD

02/24/2025

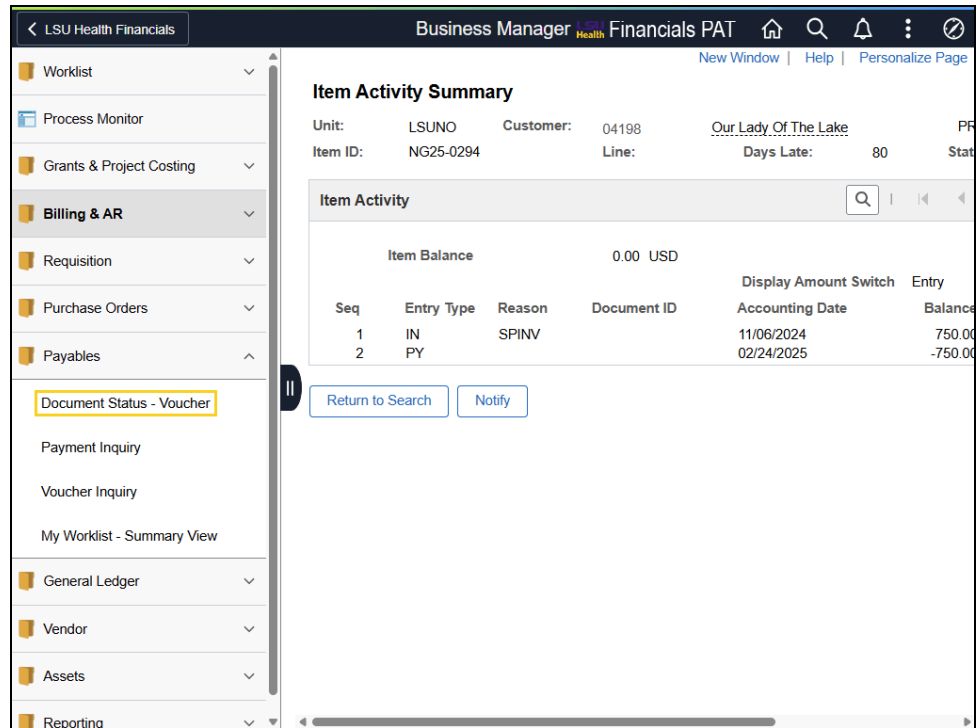
Return to Search

Notify

Step	Action
13.	In this example, the <i>invoice</i> was <i>generated</i> on 11/6/24, <i>paid</i> on 2/24/25, and is now <i>closed</i>. 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 <i>view</i> the <i>voucher information</i> along with <i>associated payments, receivers, purchase orders</i> and <i>requisitions</i>. 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. 

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

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Tile and Navigations

Voucher Document Status Inq

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

*Business Unit: = LSUNO

Voucher ID: begins with

Invoice Number: begins with

Invoice Date: =

Supplier ID: begins with

Short Supplier Name: begins with

☐ Case Sensitive

Search **Clear** Basic Search **Save Search Criteria**

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 <i>Look up Business Unit</i> button. Enter the desired information into the Voucher ID: field. Enter "00486781".
18.	Click the Search button. Search

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Voucher Document Status

Business Unit	LSUNO	Voucher ID	00486781
Invoice ID	3318442775	Invoice Date	02/21/2025
Gross Amount	1913.80	USD	Approval Status
Supplier ID	0000007032	NOBEL BIOC-001	Document Type
Location	9999999999	Status	Posted

Requisitions(1) Sourcing Events Procurement Contracts Purchase Orders(1) Service Work Orders Receipts Returns Vouchers Payments(1)

Show All

Associated Document

Documents Related Info

Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID
▼ Actions		LSUNO	Requisition	0066005	Approved	04/25/2024	
▼ Actions		LSUNO	Purchase Order	00107040	Disputed	06/13/2024	0000007032

Step	Action
19.	The Voucher Document Status displays. At the <i>top</i> of the page, <i>header information</i> is shown.

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LSU Health Financials

Business Manager

LSU Health Financials PAT

Gross Amount1913.80

USD

Approval StatusApproved

Supplier ID0000007032

NOBEL BIOC-001

Document TypeVoucher

Location9999999999

StatusPosted

Requisitions(1)

Sourcing Events

Procurement Contracts

Purchase Orders(1)

Service Work Orders

Receipts

Returns

Vouchers

Payments(1)

Show All

Associated Document

Documents

Related Info

Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID
▼Actions		LSUNO	Requisition	0066005	Approved	04/25/2024	
▼Actions		LSUNO	Purchase Order	00397848	Dispatched	06/13/2024	0000007032
▼Actions	SHARE		Payment	067193	Posted	03/26/2025	0000007032

Return to Search

Refresh

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

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Supplier ID 0000007032 Actions NOBEL BIOC-001 Document Type Voucher
Location 9999999999 Status Posted

Requisitions(1) Sourcing Events Procurement Contracts Purchase Orders(1) Service Work Orders Receipts Returns Vouchers Payments(1)

Show All

Associated Document

Documents Related Info

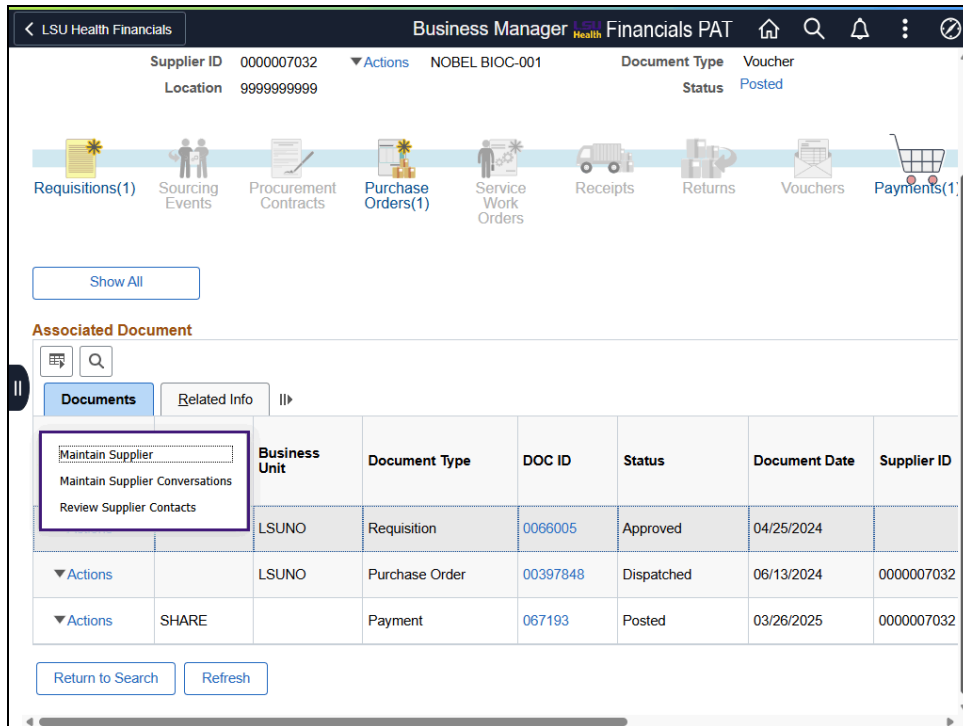
Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID
▼ Actions		LSUNO	Requisition	0066005	Approved	04/25/2024	
▼ Actions		LSUNO	Purchase Order	00397848	Dispatched	06/13/2024	0000007032
▼ Actions	SHARE		Payment	067193	Posted	03/26/2025	0000007032

Return to Search Refresh

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

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Step	Action
23.	The <i>Actions</i> 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 .

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NOBEL BIOC-001 Document Type Voucher Status Posted Match Status

Service Work Orders Receipts Returns Vouchers Payments(1)

1-3 of 3 View All

Document Type	DOC ID	Status	Document Date	Supplier ID	Location	Go To Document Status Inquiry
on	0066005	Approved	04/25/2024			
a Order	00397848	Dispatched	06/13/2024	0000007032	7777777777	
:	067193	Posted	03/26/2025	0000007032	9999999999	

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

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LSU Health Financials Business Manager LSU Health Financials PAT

Supplier ID 0000007032 Actions NOBEL BIOC-001 Document Type Voucher
 Location 9999999999 Status Posted

Requisitions(1) Sourcing Events Procurement Contracts Purchase Orders(1) Service Work Orders Receipts Returns Vouchers Payments(1)

Show All

Associated Document

Documents Related Info

Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID
▼ Actions		LSUNO	Requisition	0066005	Approved	04/25/2024	
▼ Actions		LSUNO	Purchase Order	00397848	Dispatched	06/13/2024	0000007032
▼ Actions	SHARE		Payment	067193	Posted	03/26/2025	0000007032

Return to Search Refresh

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

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Gross Amount 1913.80 USD Approval Status Approved
 Supplier ID 0000007032 Actions NOBEL BIOC-001 Document Type Voucher
 Location 9999999999 Status Posted

Requisitions(1) Sourcing Events Procurement Contracts Purchase Orders(1) Service Work Orders Receipts Returns Vouchers Payments(1)

Show All

Associated Document

Documents Related Info

Actions	SetID	Business Unit	Document Type	Accounting Entries
▼ Actions		LSUNO	Requisition	
▼ Actions		LSUNO	Purchase Order	Accounting Entries
▼ Actions	SHARE		Payment	Accounting Entries

Return to Search Refresh

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

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Voucher Accounting Entries

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Voucher Accounting Entries

*Business Unit Voucher ID Invoice Nu

*Accounting Line View Option Invoice Date 02/21/2025

Supplier ID 0000007032

Supplier Name NOBEL BIOCARE, USA, INC.

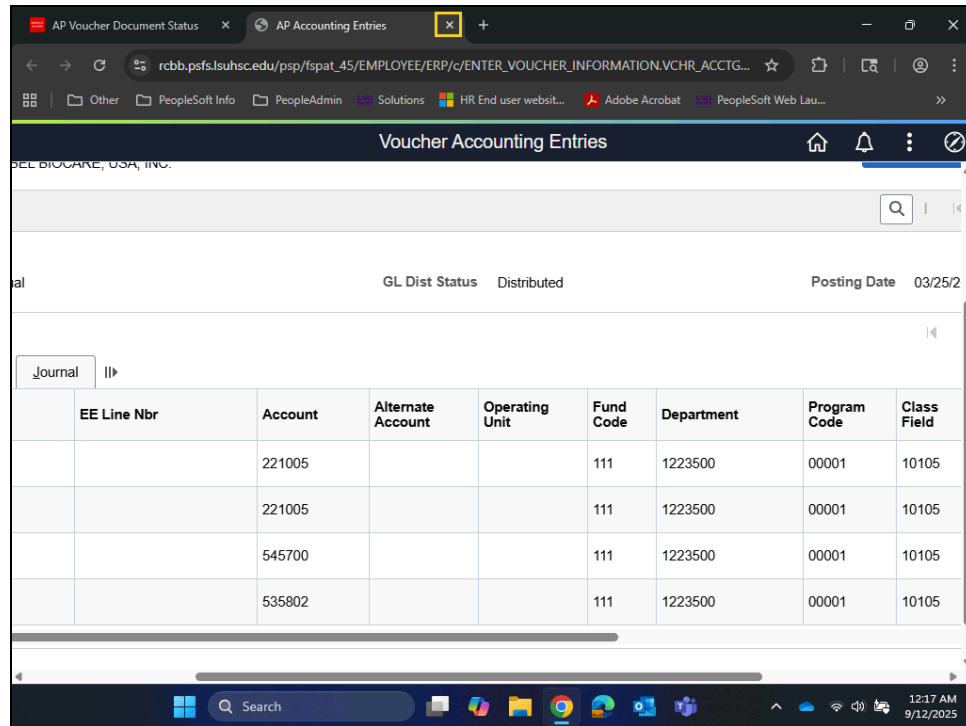
Accounting Information

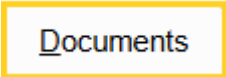
Posting Process AP Accrual GL Dist Status Distributed

Description^	Monetary Amount	Currency Code	Ledger	GL Unit
Accounts Payable	-55.00	USD	ACTUALS	LSUNO
Accounts Payable	-1,858.80	USD	ACTUALS	LSUNO
FOR ARTIFICIAL DENTAL PROSTHES	1,858.80	USD	ACTUALS	LSUNO
FREIGHT	55.00	USD	ACTUALS	LSUNO

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

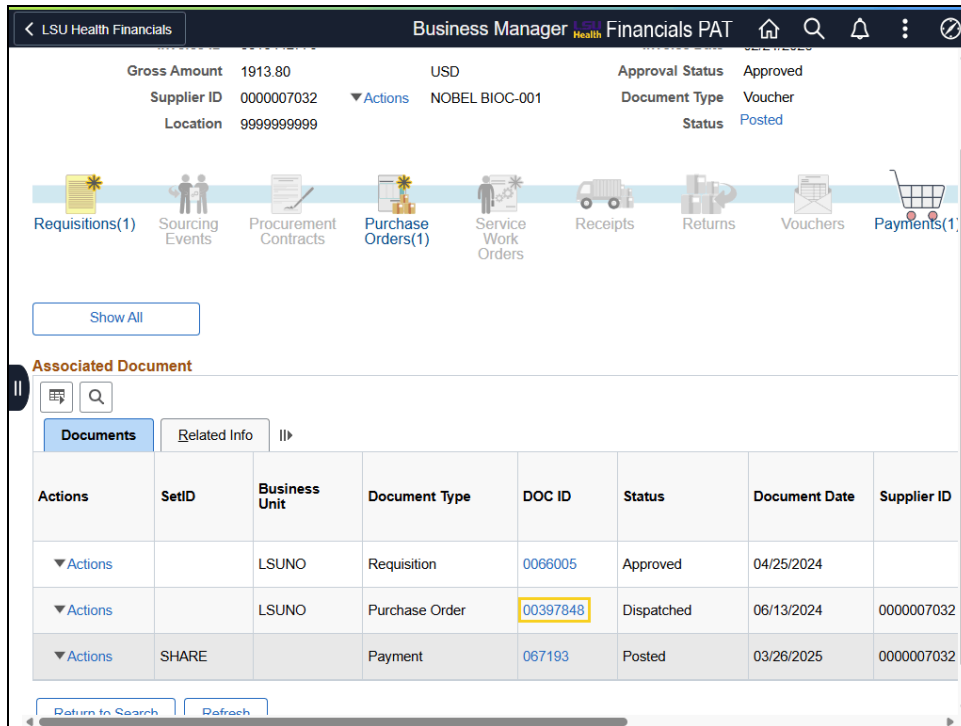
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Step	Action
29.	Each row, as well as the Journal tab, provides the journal chartstring information for the voucher. Close the tab to <i>return</i> to the <i>Voucher Document Status Related Info</i> tab. Click the Close AP Accounting Entries tab. 
30.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

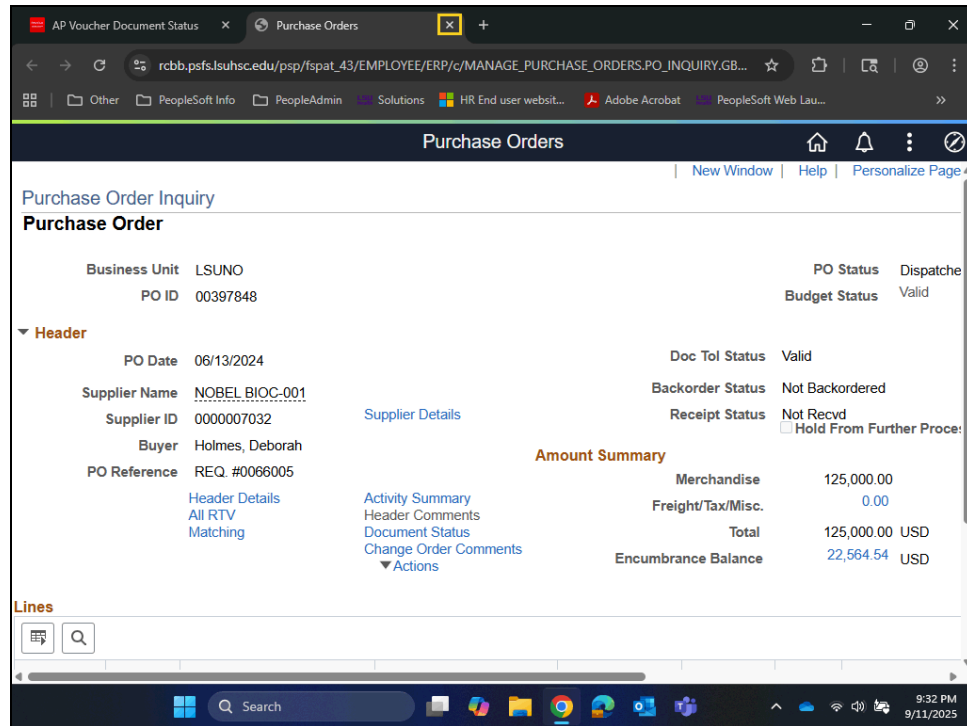
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Step	Action
31.	If you want to review the actual <i>Purchase Order</i>, select the <i>link</i> for the document in the <i>DOC ID</i> column. Click the 00397848 link. 00397848
32.	A new window opens to display the Purchase Order Inquiry page. Selecting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

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Step	Action
33.	Close the window to <i>return</i> to the <i>Voucher Document Status Inquiry</i> page on the <i>Documents</i> tab. Click the Close Purchase Order tab. 

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Voucher Document Status

Business Unit LSUNO Voucher ID **00486781**

Invoice ID 3318442775 Invoice Date 02/21/2025

Gross Amount 1913.80 USD Approval Status Approved

Supplier ID 0000007032 Actions NOBEL BIOC-001 Document Type Voucher

Location 9999999999 Status Posted

Requisitions(1) Sourcing Events Procurement Contracts Purchase Orders(1) Service Work Orders Receipts Returns Vouchers Payments(1)

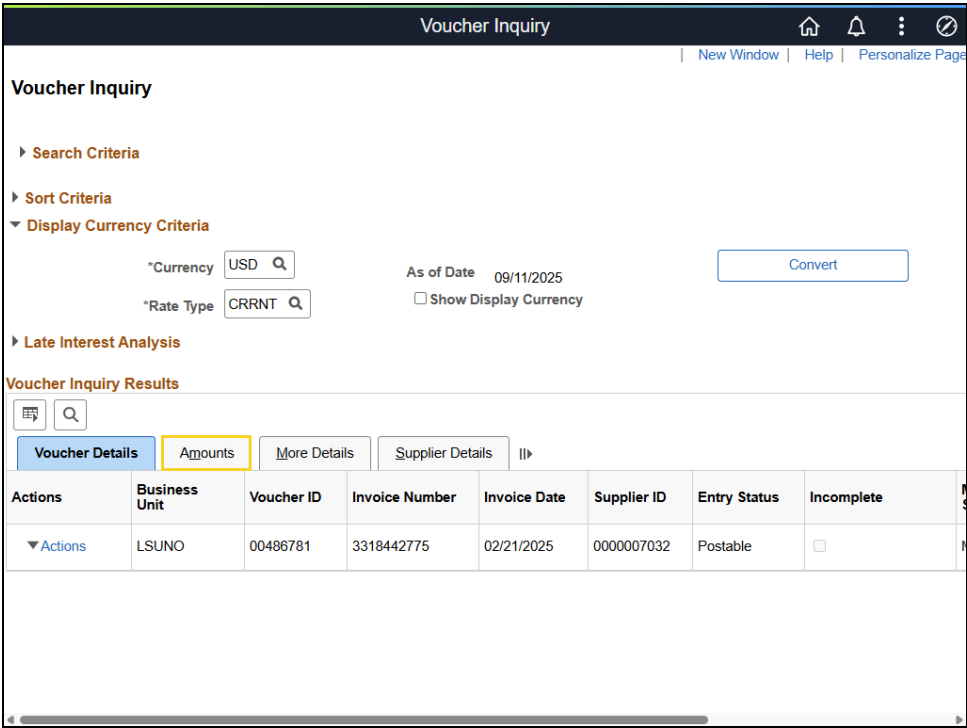
Show All

Associated Document

Documents Related Info

Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID
▼ Actions		LSUNO	Requisition	0066005	Approved	04/25/2024	
▼ Actions		LSUNO	Purchase Order	00486781	Posted	02/21/2025	0000007032

Step	Action
34.	If you need to review the <i>actual voucher information</i>, select the <i>Voucher ID</i> 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 <i>four tabs</i>: <i>Voucher Details</i>, <i>Amounts</i>, <i>More Details</i> and <i>Supplier</i>. On the Voucher Details tab, users can view the Invoice number, the <i>Invoice Date</i>, <i>Supplier ID</i>, and to the far right of the page, but <u>not</u> shown in the screenshot, is the <i>Short Supplier Name</i>. Click the Amounts tab. Amounts

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Voucher Inquiry

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[Help](#)
[Personalize Page](#)

Voucher Inquiry

Search Criteria

Sort Criteria

Display Currency Criteria

Currency

USD

As of Date

09/11/2025

Convert

Rate Type

CRRNT

Show Display Currency

Late Interest Analysis

Voucher Inquiry Results

Voucher Details

Amounts

More Details

Supplier Details

II>

Actions	Business Unit	Voucher ID	Transaction Currency	Gross Invoice Amount	Voucher Unpaid Balance	Unapplied Prepayments	Total Non-Merch	
▼ Actions	LSUNO	00486781	USD	1,913.80	0.00	0.00	0.00	

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

Voucher Inquiry

Search Criteria

Sort Criteria

Display Currency Criteria

*Currency: USD

*Rate Type: CRRNT

As of Date: 09/11/2025

☐ Show Display Currency

Late Interest Analysis

Voucher Inquiry Results

Voucher Details | Amounts | **More Details** | Supplier Details |

Actions	Business Unit	Voucher ID	Voucher Style	Supplier Loc	Post Status	Approval Status	Approval History
▼ Actions	LSUNO	00486781	Regular Voucher	999999999	Posted	Approved	Approval History

Step	Action
37.	The More Details tab is especially helpful. It includes an <i>Approval History</i> link where users may <i>review the approval chain</i>. Also, notice that the tabs include the Actions icon. The Actions icon on the Voucher Inquiry allows users to <i>view the attachments</i> as well as the ability to <i>view accounting details, payment information, matching, voucher details</i> and <i>document status</i>. Click the Supplier Details tab. Supplier Details
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 <i>Example Inquiries using the Business Manager Tile</i>. End of Procedure.