



Fluid Homepages for Core Team Departmental Usage - General Ledger

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Training Guide
Fluid Homepages for Core Team Departmental
Usage - General Ledger

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Navigate to Homepage

Procedure

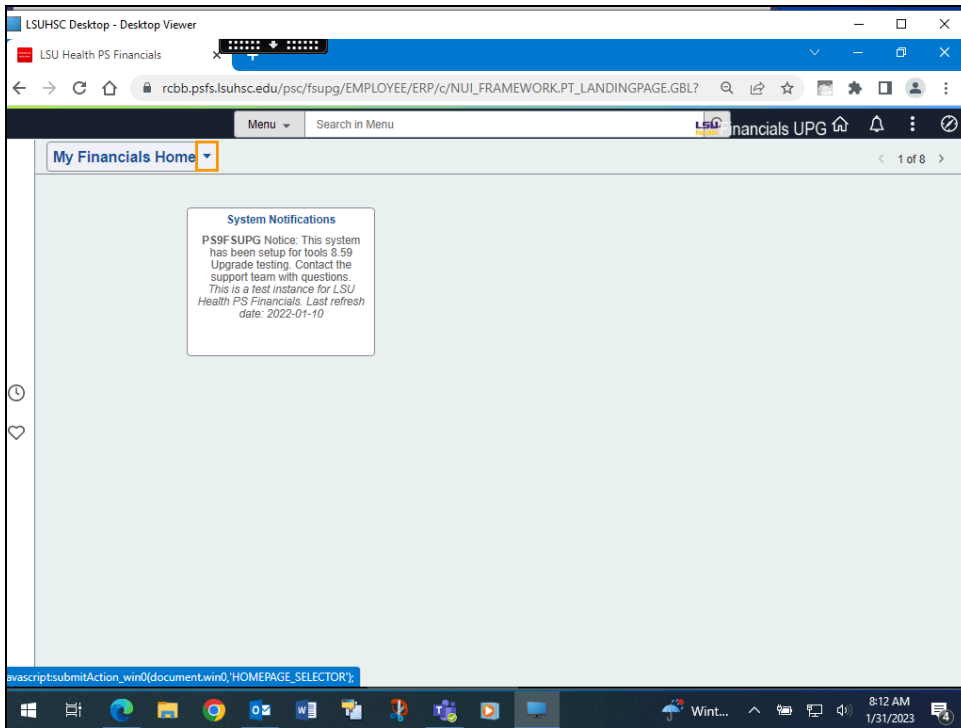
Topic Contents:



1. Introduction to **General Ledger 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 **General Ledger** homepage and Navigation Collections.
4. **Import Journals** landing page options.
5. Return to homepage and select new tile.
6. **Allocations** landing page:
 - a. Expand/collapse menu options; and
 - b. Available links
7. Navigate back to **General Ledger** homepage.

Step	Action
1.	LSUHSC PeopleSoft Financials provides a custom homepage for General Ledger to facilitate use by the General Accounting Department. Access to the homepage will be granted via security role to those users who maintain the General Ledger functions for the institution. <u><i>This homepage is not intended for the end-user community.</i></u> End-users would instead select the LSU Health Financials option.
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>NOTE: For purposes of this training, the assumption is that the user has already been trained to perform the General Ledger tasks. This guide simply instructs the user in the use of the General Ledger homepage.</i>
3.	Upon launching PeopleSoft Financials, the default fluid homepage is " My Financials Home ". This homepage is meant to be modified by each user to suit their needs. Documentation on adding tiles to My Financials Home may be found in the Documentation library. Each user will see a different number of homepages based upon the security access. <u>There are two methods to navigate to the desired homepage.</u> Each method will be demonstrated and the user may determine which method is preferred for their use.

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Step	Action
4.	<p><u>Method 1</u></p> <p>On the top left of the screen, note the drop-down selection arrow next to My Financial Home. Selecting the arrow allows the user to see a list of each of the homepages for which the user has been granted access. Select the desired homepage from the list.</p> <p>Click the My Financials Home button.</p> 
5.	<p>The first five (5) options will display in the drop-down window. There are up to eight (8) homepage options available depending upon your security access. Scroll down to view additional options.</p>
6.	<p><u>Method 2</u></p> <p>At the top right of the screen, note that the user sees "< 1 of 8 >". Selecting the left and right arrows moves the user from one homepage to the next.</p> <p>Click the Next Homepage button.</p> 


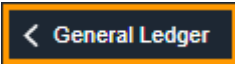
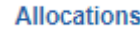


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Step	Action
7.	The LSU Health Financials page displays. The user would continue to click the right Next Homepage arrow until the desired homepage displays.
8.	Return to the My Financials Home page. Click the Home button. 
9.	For the remainder of this exercise, the user will be using the General Ledger homepage. Click the Homepage Selector dropdown button to activate the menu. 
10.	Using the mouse, click the scrollbar and drag the mouse down to the desired selection. Click the button of the scrollbar. 
11.	Click the General Ledger link. 
12.	The General Ledger homepage displays. It includes Tiles/Nav Collections for General Ledger WorkCenter, General Ledger Journals, Allocations, Speedtype Lookup, Tree Manager, Commitment Control, and GL Close .
13.	Each of the tiles on the General Ledger homepage represent a Navigation Collection (Nav Collection) . A Navigation Collection is simply a grouping of menu items. The Nav Collections on the General Ledger homepage are the most commonly used features by the accounting staff. However, it does not include every single page that the team uses. The NavBar menu may be used to supplement access to those pages.
14.	The most commonly used pages are journal entries, so select the General Ledger tile from the General Ledger homepage. Click the General Ledger button. 
15.	The General Ledger Nav Collection displays the menus and pages used with journals. The default landing page is in the Import Journals menu for External Flat Files . If the Spreadsheet Journals import is desired instead, select that menu option.

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Step	Action
16.	<p><i>NOTE: Each of the menu options includes an arrow to the right of the menu option name. Click that arrow to expand and collapse each of those menu options to view the various features you may access from the Nav Collection.</i></p> <p>Click the button to the right of the Journal Entry field.</p> 
17.	<p>As you can see, there are two menu options: Copy Journals and Create/Update Journal Entries.</p> <p>Navigate to the different menu options as desired. These should all be familiar to the GL user.</p>
18.	<p>You may navigate back to the General Ledger homepage and choose a different Nav Collection, by selecting the General Ledger option that is displayed in the black bar at the top left of the screen.</p> <p>Click the General Ledger link.</p> 
19.	<p>From the General Ledger homepage, select another tile to view the Nav Collection. In the next example, the Allocations tile was selected.</p> <p>Click the Allocations button.</p> 
20.	<p><u>Collapsing the Menu</u></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 " " to the left of the Search button. Selecting this will collapse the menu.</p> <p>Click the Navigation Area button.</p> 
21.	<p><u>Expanding the Menu</u></p> <p>Select the tab again to expand the Nav Collection menu.</p> <p>Click the Navigation Area button.</p> 

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Step	Action
22.	This completes the <i>Navigate to Homepage</i> . End of Procedure.

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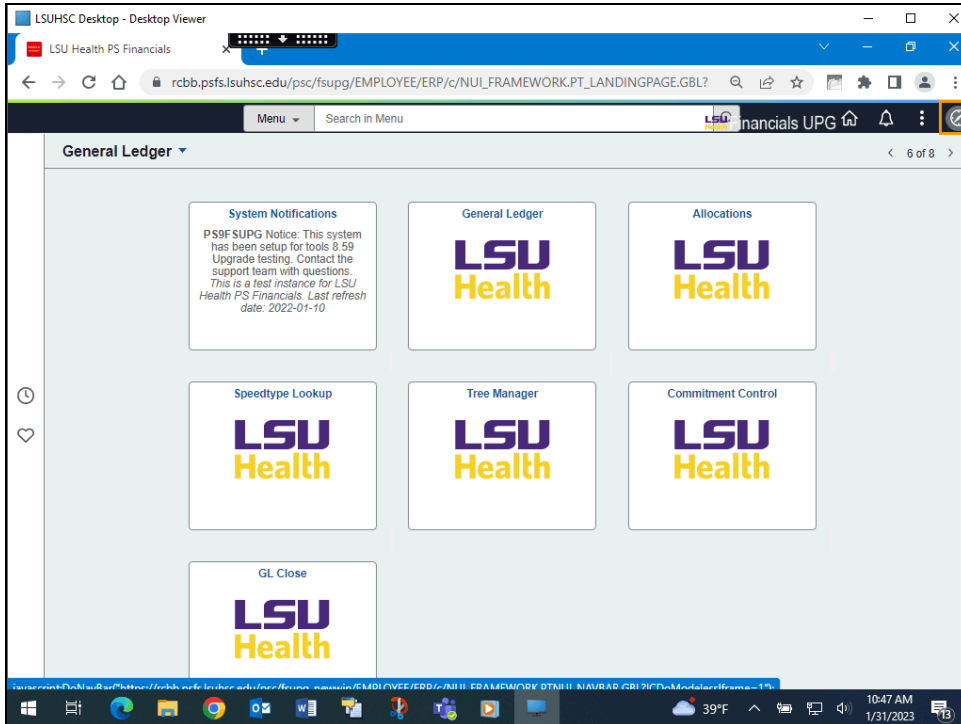
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
The NavBar Menu

Procedure

Topic Contents:

1. Access NavBar
2. NavBar Menu and navigation



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

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Step	Action
3.	<p>The menu may default to the General Ledger menu options. At the top of the NavBar menu, there are navigation breadcrumbs. You may use this by selecting General Ledger to navigate to a different General Ledger menu option.</p> <p>Or, as in this example, select the Menu link to display the entire menu in alphabetical order.</p>
4.	<p>The menu may default to the General Ledger menu options. For this example, Click the PeopleTools link.</p> <p style="margin-left: 20px;">PeopleTools</p>
5.	<p>Click the Process Scheduler link.</p> <p style="margin-left: 20px;">Process Scheduler</p>
6.	<p>Click the Process Monitor link.</p> <p style="margin-left: 20px;">Process Monitor</p>
7.	<p>The Process Monitor page was not available on the General Ledger homepage, but this is a page often navigated. Users may be Add to Favorites or to the My Financials Home by selecting Add to Homepage.</p>
8.	<p>This completes <i>The NavBar Menu</i>. End of Procedure.</p>

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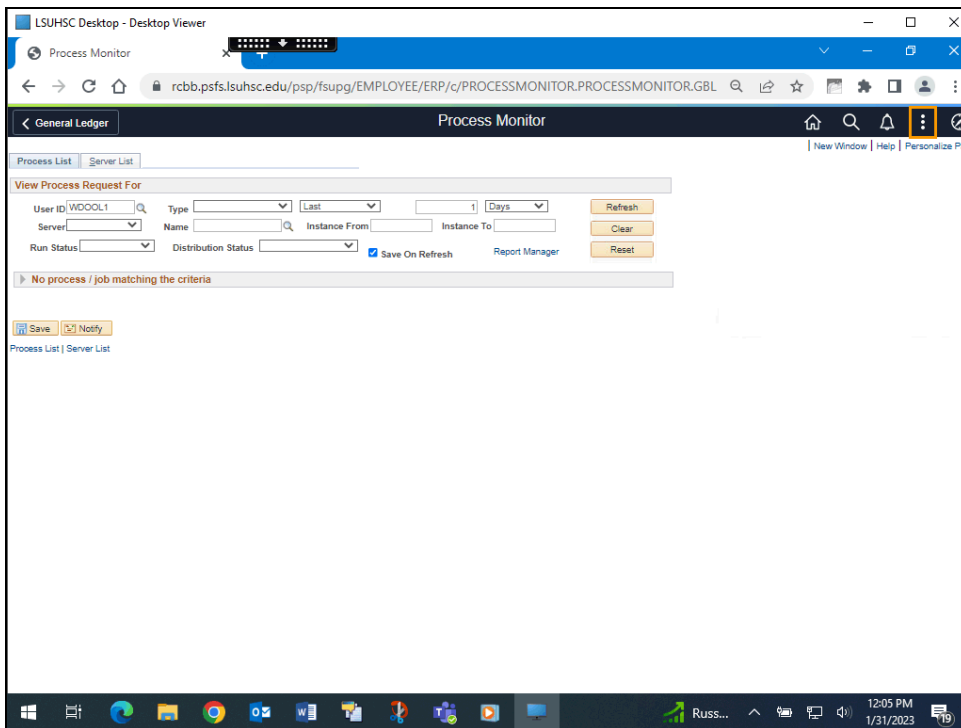
Navigational Tools

Procedure

Topic Contents:




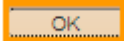

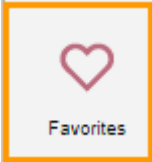
1. Add/Delete Process Monitor page to:
 - a. Favorites
 - b. NavBar
 - c. My Financials Homepage
2. Search for Process Monitor page using NavBar

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/or 3. My Financials Homepage (or other homepage of choice) <p>Examples will be demonstrated in the order listed.</p>








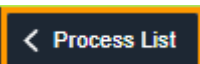

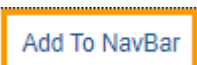
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Step	Action
2.	<p>NavBar My Favorites</p> <p>In this example, you are on the Process Monitor page, so all that is needed is to add this page to NavBar Favorites. Begin by selecting the Actions button in the toolbar. A list of options for adding the Process Monitor page displays.</p> <p>Click the Actions button.</p> 
3.	<p>In this example, users are adding the Process Monitor to the NavBar Favorites list.</p> <p>Click the Add To Favorites list item.</p> 
4.	<p>The name of the page defaults into the *Favorite Label field.</p> <p>Click the Add link.</p> 
5.	<p>A confirmation message displays.</p> <p>Click the OK button.</p> 
6.	<p>Verify the entry has been added to NavBar Favorites.</p> <p>Click the NavBar button.</p> 
7.	<p>Click the Favorites button.</p> 


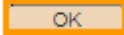






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Step	Action
8.	<p>The Process Monitor has been added to the Favorites page.</p> <p>If you have added this page in error, or no longer wish it to be a Favorite, you can remove the entry from your list.</p> <p>Click the Edit Favorites link.</p> 
9.	<p>Click the Select this row for the Process Monitor option.</p> 
10.	<p>Click the Delete Selected button.</p> 
11.	<p>A confirmation message will display asking you if you wish to delete the entry.</p> <p>Click the Yes button.</p> 
12.	<p>The Process Monitor page has been removed from NavBar Favorites. You must save the change before navigating away from the page.</p> <p>Click the Save button.</p> 
13.	<p>Click the Process List button.</p> 
14.	<p>NavBar</p> <p>You have been returned to the Process Monitor homepage. The Actions button does not provide an option for adding a page from a Homepage.</p> <p>Click the Actions button.</p> 
15.	<p>Click the Add To NavBar list item.</p> 


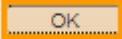





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Step	Action
16.	<p>The name of the page defaults into the *Tile Label field. Click the Add link.</p> 
17.	<p>A confirmation message displays stating that the page has been added. Click the OK button.</p> 
18.	<p>Verify that the page has been added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

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