

PeopleSoft Training Document

Financials 9.2

Buyers First Use and Set up Filters

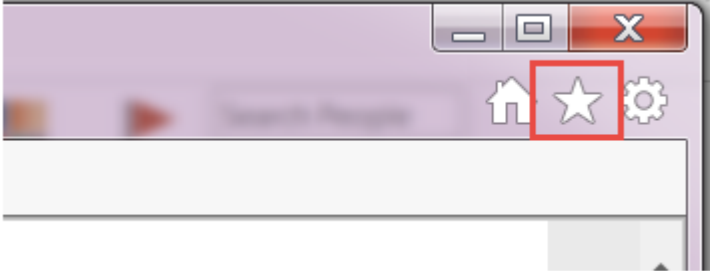
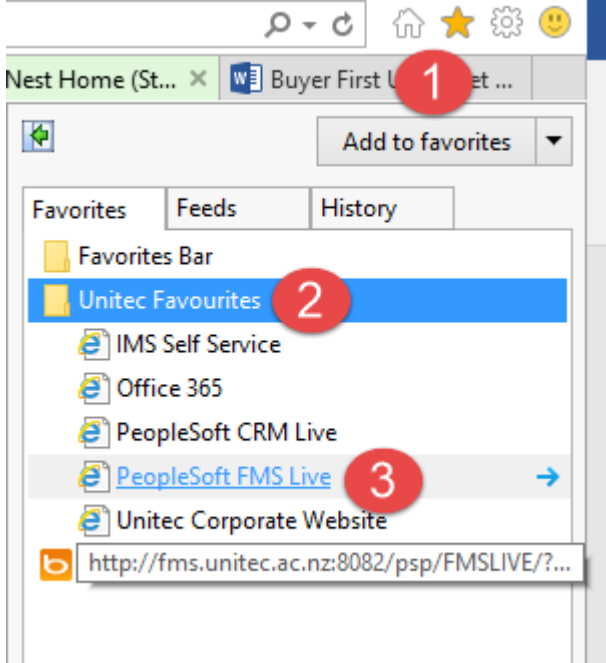

Functional Area	Purchasing
Process Area	Set up Filters
Processes covered in this document	1.1.1 Access via Favourites 1.1.2 Set up Filters
Process Map Reference	Unitec Processes 9.2

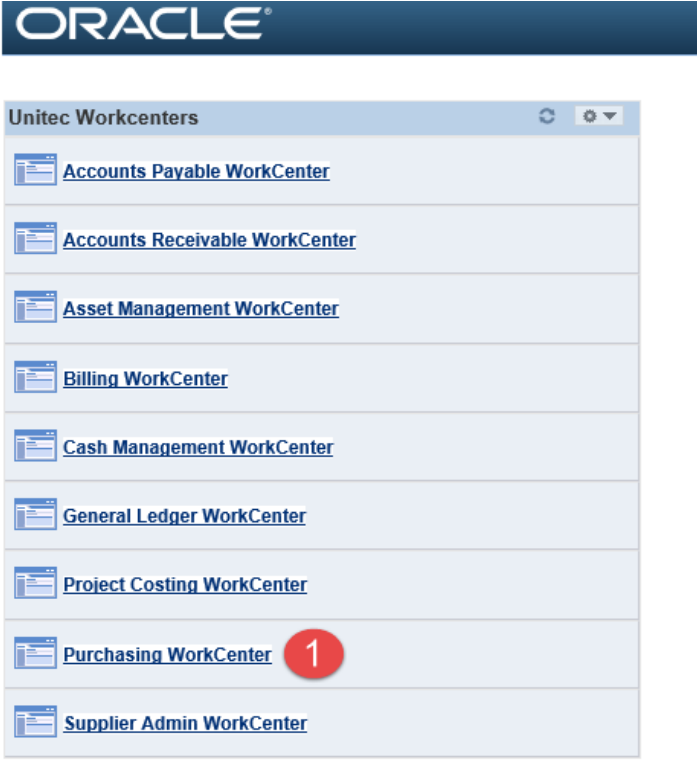
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Buyer –First Use and Set Up of Filters

Logging into Peoplesoft FMS

STEP	LOG INTO PEOPLESFT FMS
1. When using Internet Explorer the link to the Peoplesoft FMS system can be accessed via Favourites	
1. Click Internet Explorer Favourites link 2. Expand Unitec Favourites 3. Click on the link PeopleSoft FMS live	
1. Log in to PeopleSoft FMS using you standard Unitec login and password	

STEP	LOG INTO PEOPLESOFT FMS
<p>You will be taken to a screen listing different WorkCenters</p> <p>1. Click on the link for the Purchasing WorkCenter</p>	



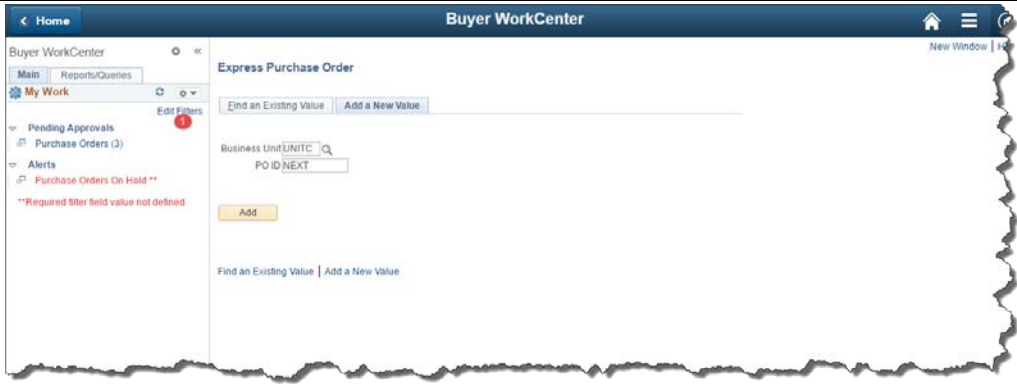
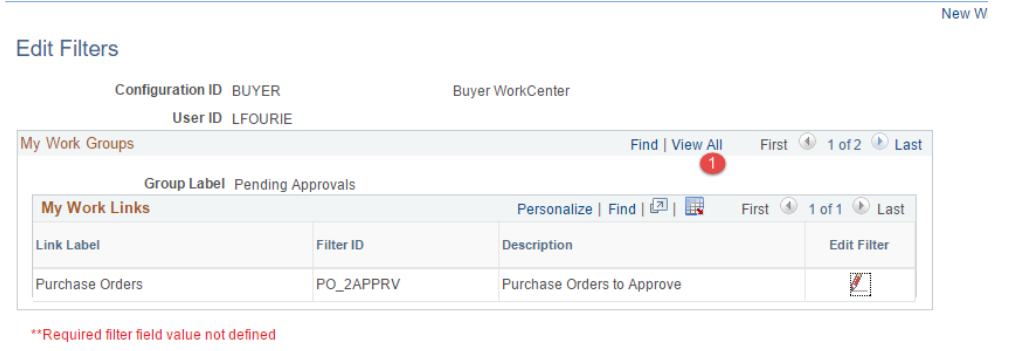
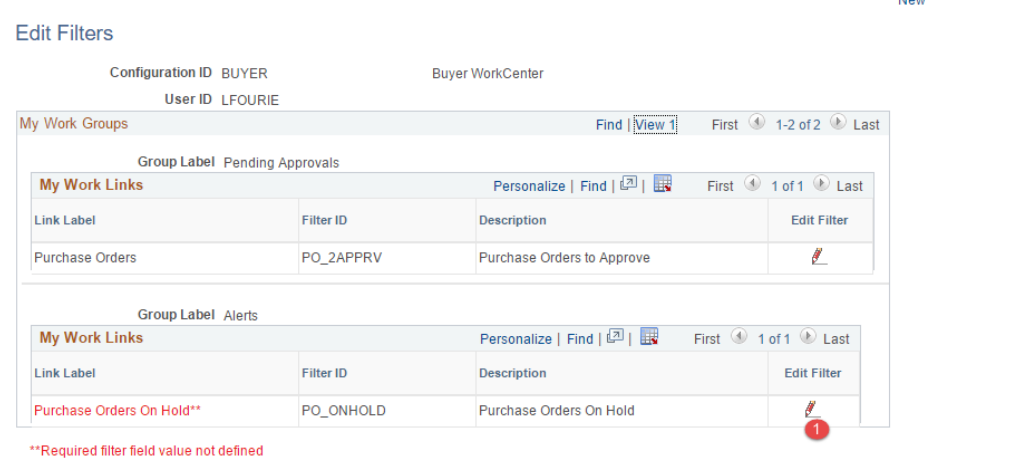
If you want to use a browser other than Internet Explorer, open the link in explorer, cut and paste into your favourite browser, and save to favourites.




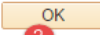








Please note that Peoplesoft does not currently support the Microsoft *edge* browser. Chrome, Firefox and Safari are supported.

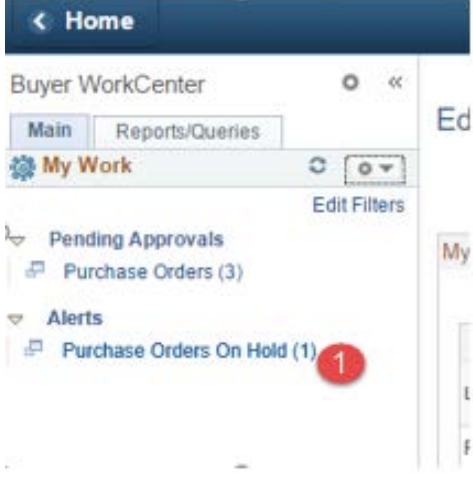
Applying and Editing Filters – a once only task

The My Work area displays an 'Alerts' link in red. This indicates that a filter needs to be applied for PeopleSoft to display the items relevant to you. You will only need to do this once, the system will remember.

Once the filter is configured, a number in brackets beside it shows how many POs you raised are currently on hold.

STEP	APPLY A FILTER
1. Click Edit Filters	
4. Click View All	
1. Click Edit Filter Icon (pencil) beside the link to be filtered.	

STEP	APPLY A FILTER
<p>1. Apply Filter Requirements</p> <p>2. Click</p> 	<p>Configure Filter Values</p> <p>User ID LFOURIE</p> <p>Filter ID PO_ONHOLD Purchase Orders On Hold</p> <p>Buyer = <input type="text" value="DLORIGAN"/>  1</p> <p>Business Unit = <input type="text"/> </p> <p> 2  </p>
<p>1. Click</p> 	<p>Message</p> <p>Refresh the pagelet to see your changes. (7980,22)</p> <p> 1</p>
<p>1. Click Refresh</p> 	<p>Buyer WorkCenter</p> <p>Main Reports/Queries</p> <p> My Work  1  Edit Filters</p> <p>▼ Pending Approvals</p> <p> Purchase Orders (3)</p> <p>▼ Alerts</p> <p> Purchase Orders On Hold **</p> <p> **Required filter field value not defined</p>

STEP	APPLY A FILTER
<p>1. Alerts – Purchase Orders On Hold, is now coloured black.</p> <p>PO's on hold, are indicated by the number in brackets.</p>	 <p>The screenshot shows the 'Buyer WorkCenter' interface. At the top, there is a 'Home' button and a 'Buyer WorkCenter' header. Below the header, there are tabs for 'Main' and 'Reports/Queries'. The 'Main' tab is active, and it shows a 'My Work' section. Under 'My Work', there are two main categories: 'Pending Approvals' and 'Alerts'. Under 'Alerts', there is a sub-item 'Purchase Orders On Hold (1)' which is highlighted with a red circle containing the number 1. To the right of the 'My Work' section, there is a sidebar with a 'My' button and a list of items.</p>