

PeopleSoft Training Document

Financials 9.2

Buyers First Use and Set up Filters

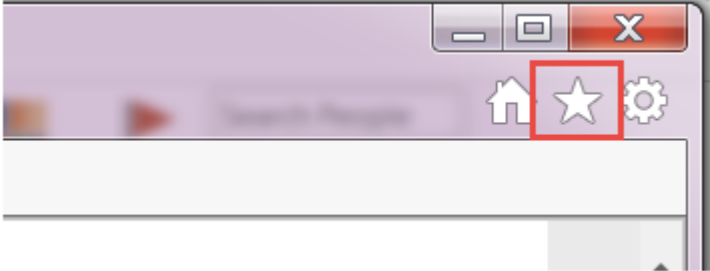
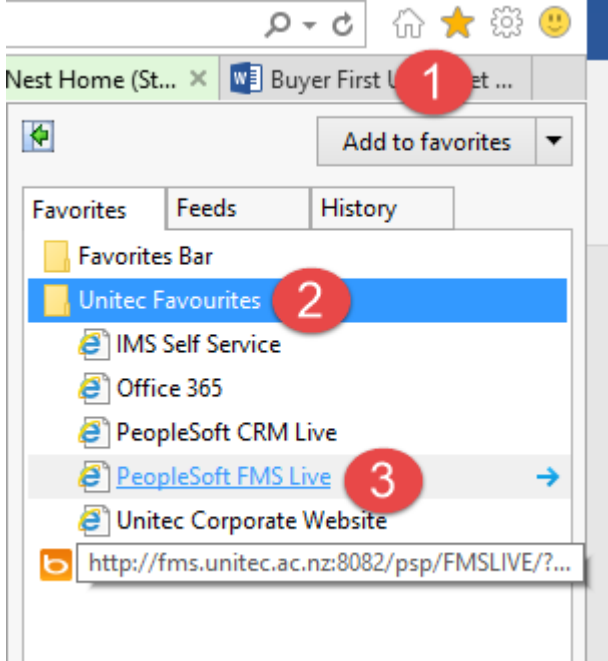

| | |
|------------------------------------|-----------------------------------------------------|
| Functional Area | Purchasing |
| Process Area | Set up Filters |
| Processes covered in this document | 1.1.1 Access via Favourites 1.1.2 Set up Filters |
| Process Map Reference | Unitec Processes 9.2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

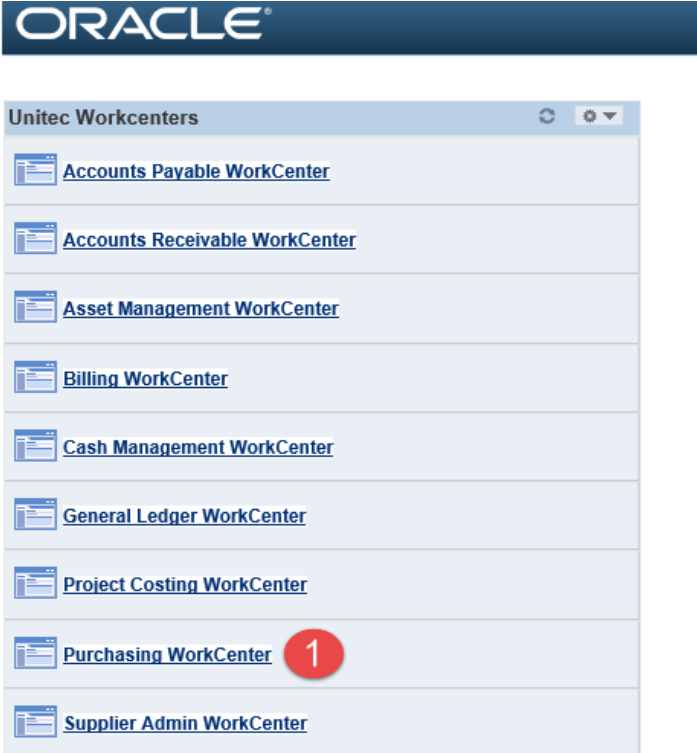
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Buyer –First Use and Set Up of Filters

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. Click to expand Unitec Favourites 3. Select the link PeopleSoft FMS live |  |
| 1. Log in to PeopleSoft FMS using your standard Unitec login and password |  |

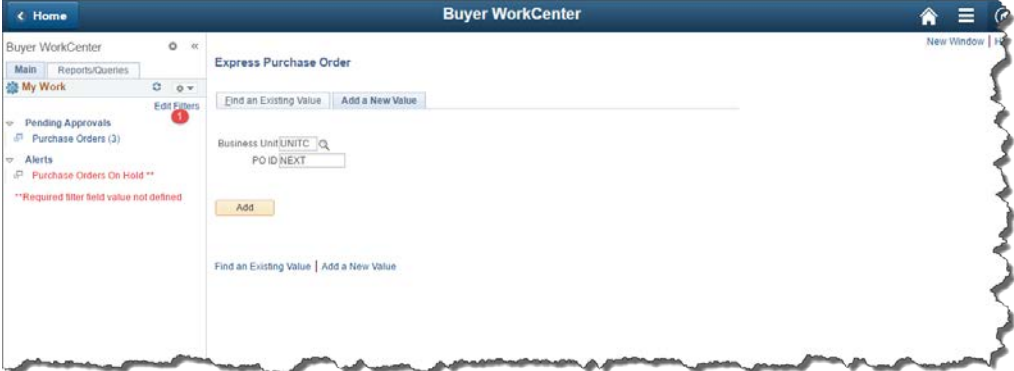
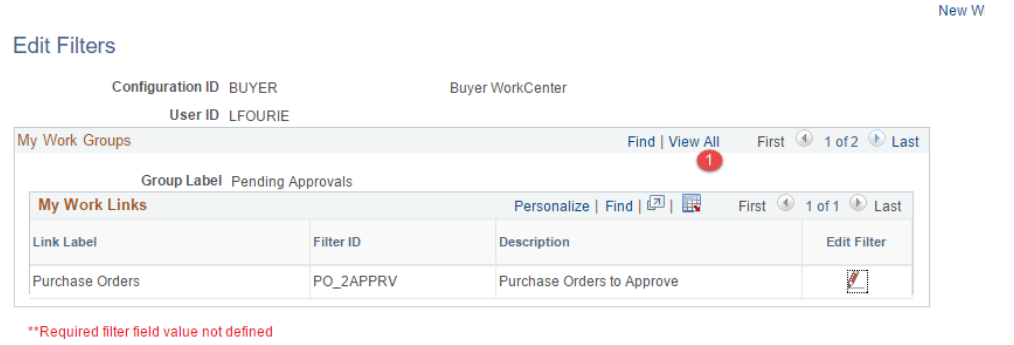
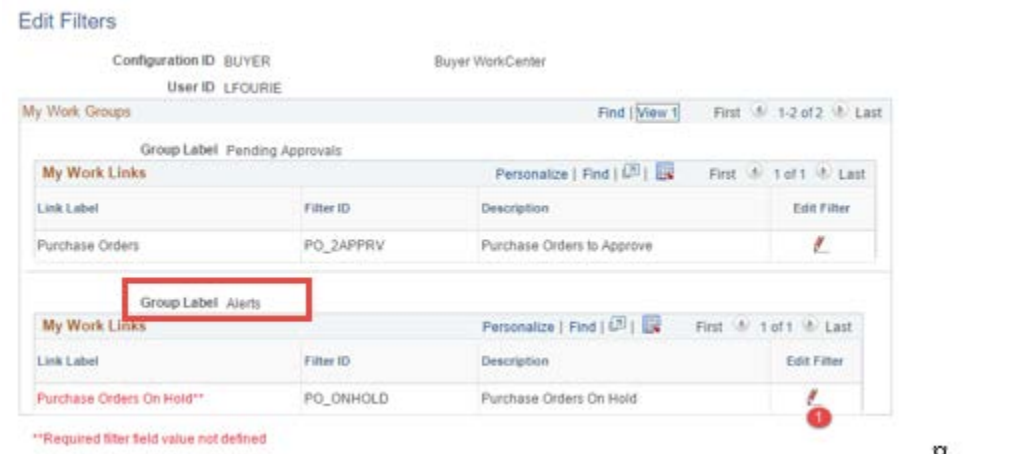
| STEP | LOG INTO PEOPLESOFT FMS |
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| <p>You will be taken to a screen listing different WorkCenters</p> <p>1. Click on the link for the Purchasing WorkCenter</p> |  |


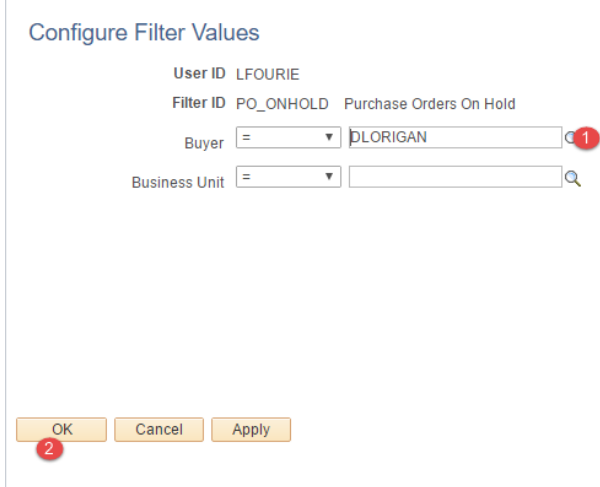

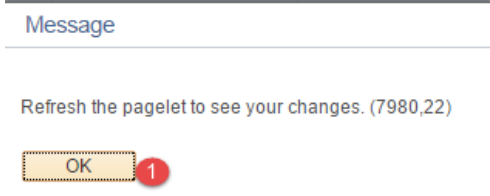

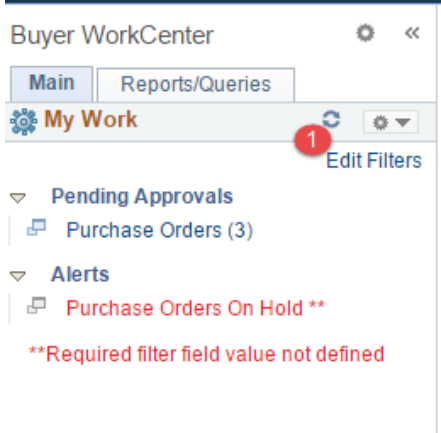
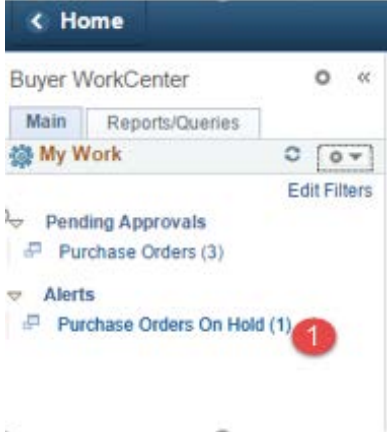
| | |
|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <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.</p> <p>Please note that Peoplesoft does not currently support the Microsoft <i>edge</i> browser.</p> <p>Chrome, Firefox and Safari are supported.</p> |
|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

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 |  |
| 1. Click View All |  |
| In the Alerts Section 1. Click Edit Filter Icon (pencil), beside the link to be filtered. |  |

| STEP | APPLY A FILTER |
|-----------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>1. Apply Filter Requirements ie Buyer Name</p> <p>2. Click</p>  |  <p>The dialog box 'Configure Filter Values' shows the following details: User ID LFOURIE, Filter ID PO_ONHOLD Purchase Orders On Hold. The Buyer field is set to DLORIGAN with a red circle '1' next to the clear button. The Business Unit field is empty. At the bottom, there are OK, Cancel, and Apply buttons, with a red circle '2' next to the OK button.</p> |
| <p>1. Click</p>  |  <p>The 'Message' dialog box contains the text: 'Refresh the pagelet to see your changes. (7980,22)'. There is an OK button with a red circle '1' next to it.</p> |
| <p>1. Click Refresh</p>  |  <p>The 'Buyer WorkCenter' screenshot shows the 'My Work' section with a red circle '1' next to the 'Edit Filters' link. Below it, under 'Alerts', there is a red message: 'Purchase Orders On Hold **' followed by '**Required filter field value not defined'.</p> |
| <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 'Buyer WorkCenter' screenshot shows the 'My Work' section. Under 'Alerts', the 'Purchase Orders On Hold (1)' is now displayed in black text, with a red circle '1' next to the count '1'.</p> |