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PeopleSoft Tips Tricks ...

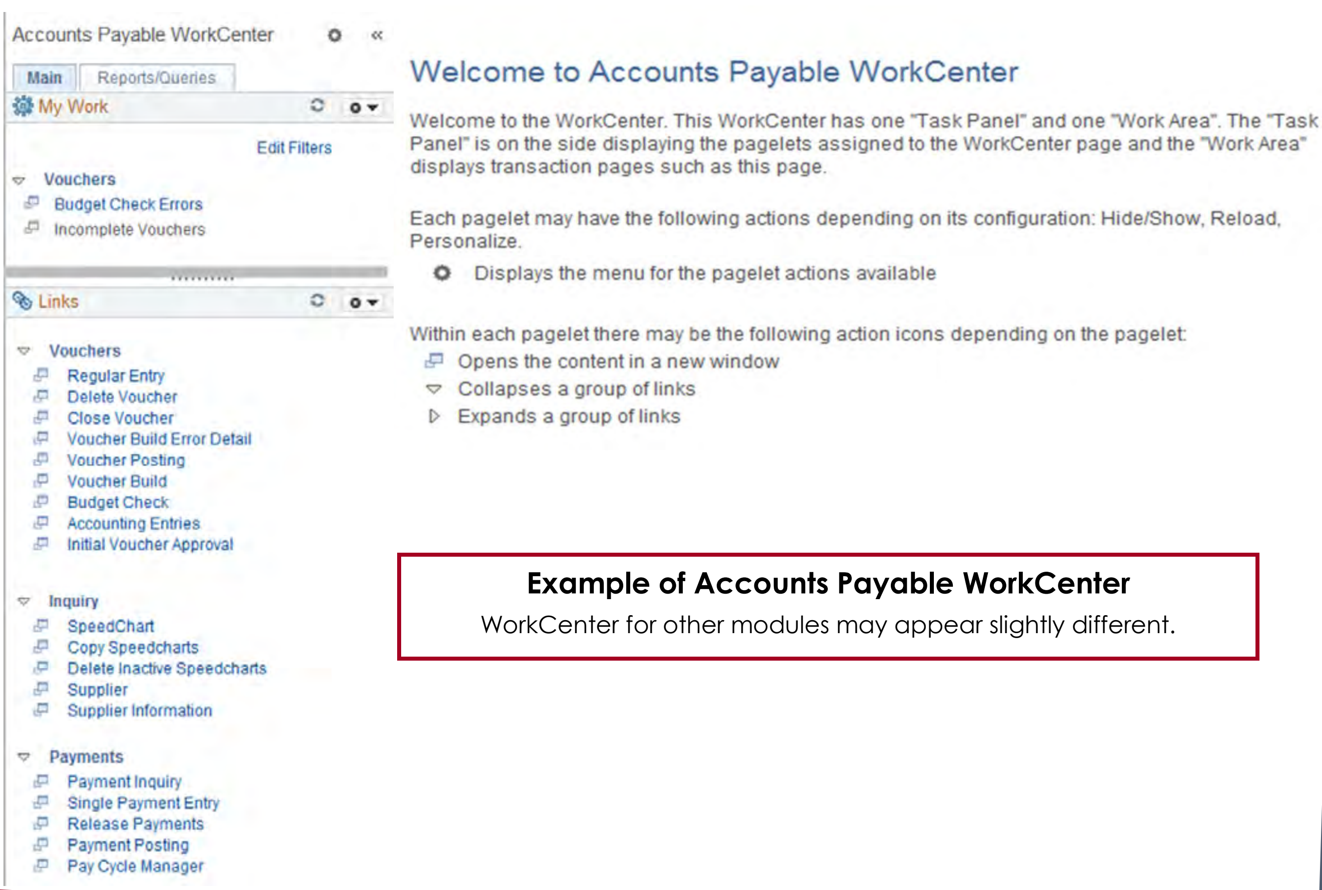
Additional PeopleSoft 9.2 Functionality—WorkCenter

One of the new features of Financial 9.2 is the WorkCenter functionality. This feature allows you to consolidate and centralize access to various modules within PeopleSoft all on one page.

PeopleSoft users will see two tabs at the top of the WorkCenter page. The Main tab has two sections. The first pagelet is the "My Work" section which includes user-specific work items that the user may need to review and complete. The second pagelet "Links" includes the most important components of that module that a user may need to use and have access to. The Reports/Queries tab will include common queries, reports and processes that end users will run in that module.

The WorkCenter can be saved to your favorites. User access and content for these pages will depend on the roles they have for that particular module. The following modules have WorkCenters—Accounts Payable, General Ledger, Purchasing, Accounts Receivable, Billing, Projects, Asset Management and Inventory.

To navigate to the WorkCenters, select the module and you should see the link to your WorkCenter (e.g., Accounts Payable > Accounts Payable WorkCenter).



Example of Accounts Payable WorkCenter

WorkCenter for other modules may appear slightly different.

Attachment

Users may notice an attachment link within some PeopleSoft modules. This link, where available, will enable you to attach supporting documentation for your transaction. When selecting the attachment link, you will be able to add a file from your computer as an attachment.

Once you have uploaded an attachment, anyone that has access to that transaction will be able to select the link and view the attached file.

Modules that have this features are Accounts Payable, General Ledger, Receivables and Asset Management.

Biennium End Deadlines

As we get closer to the end of the biennium, we will finalize our biennium deadline date. Our tentative last day to accept June business will be July 28th. Additional information will be available in early June.

PeopleSoft Training

If agencies would like any individual training on any PeopleSoft Financial module, please contact the following individuals to setup training. This training is available for both new and existing employees.

- Accounts Payable
  - Larry Martin—328-4931
  - Doreen Schumacher—328-2682
- General Ledger
  - Toby Mertz—328-4885
  - Larry Martin—328-4931
- AR/Billing
  - Lynn Shannon-Gall—328-1485
  - Larry Martin—328-4931
- Purchasing/Suppliers (Vendors)
  - Tosha Werner—328-1729
  - Robyn Helgeson—328-2773
  - Kelly Binder—328-2683
- Asset Management
  - Tasha Gerding—328-1024
  - Crystal Hoggarth—328-1666
- Project Costing
  - Rachel Kmetz—328-1530
  - Tasha Gerding—328-1024
- Inventory
  - Dustin Krueger—328-2530
  - Doreen Schumacher—328-2682
- Purchasing Card
  - Renae Heller—328-4936
  - Doreen Schumacher—328-2682
- Cognos Reporting
  - Dustin Krueger—328-2530
  - Toby Mertz—328-4885
- UPK
  - Lynn Shannon-Gall—328-1485 (Financial)
  - Vonnie Grinsteiner—328-2885 (Payroll)
- Questions regarding OMB Policies/Agency Appropriations
  - Jeff Larshus—328-4902
  - Larry Martin—328-4931