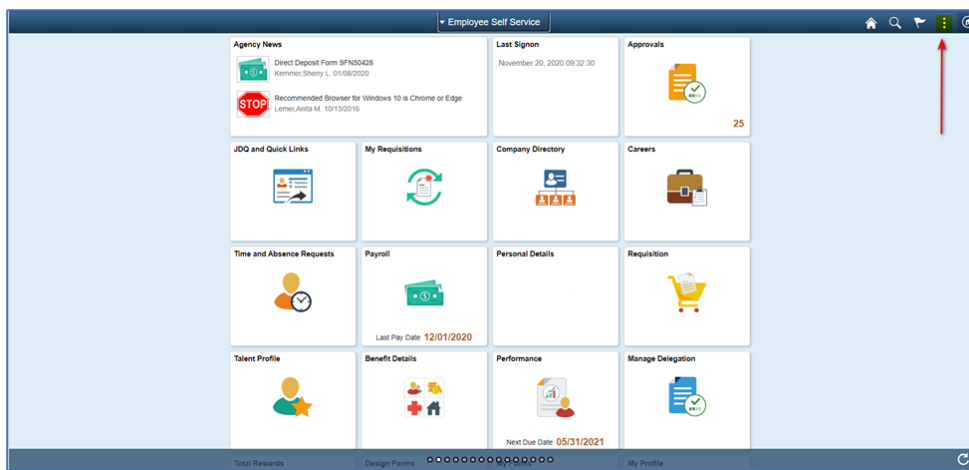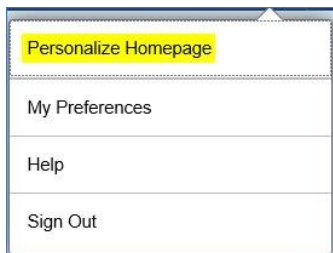# PEOPLESOFT TIPS & TRICKS

HOW TO SET THE FINANCE HUB AS YOUR HOMEPAGE

To set the Finance hub as your homepage, click on the hamburger (three dots) icon on the upper right-hand corner of the screen.

The following menu items will appear. Click on Personalize Homepage.

To set the Finance hub as your default homepage you can click and drag Finance to the top of the list. Click on Save. Finance will then become your default homepage when you click on the home button and when you log into PeopleSoft.

NEW ACCOUNTS PAYABLE QUERY

A new query has been added to the Accounts Payable tile. The query allows you to view all invoice and distribution lines associated with a single voucher. The P-Card voucher is a great example of when you might want to run this query. The query includes the merchant name, cardholder name, and description of items purchased, if entered when reallocating the P-Card transactions. The query is not limited to P-Card vouchers, it can be used for any voucher.

In the Accounts Payable tile, under the Query Section, scroll down and select Voucher Transactions.

Enter the Voucher ID and Business Unit you are inquiring about and click on View Results.

An example of the query is provided below:

JOURNAL SEARCH SORT ORDER CHANGE

Previously when searching journals, the sort order was from oldest journal date to current. This sort order has recently been changed to sort from current journal date to oldest and then by Journal ID sorting numeric to alpha in ascending order.   This change affected the order of the search criteria fields on the Create/ Update Journal Entries screen. The second search criteria is now Journal Date instead of Journal ID. An example of the search criteria order and new journal sort order is provided.

NORTH
Dakota | Fiscal Management
Be Legendary.™   MANAGEMENT AND BUDGET

600 E Boulevard Ave, Dept 110 • Bismarck ND 58505-0440
701.328.2680 • omb@nd.gov • nd.gov/omb