

Customizing PeopleSoft eProcurement

PeopleSoft can be customized in multiple ways. The following are options for MUHC eProcurement Requesters.

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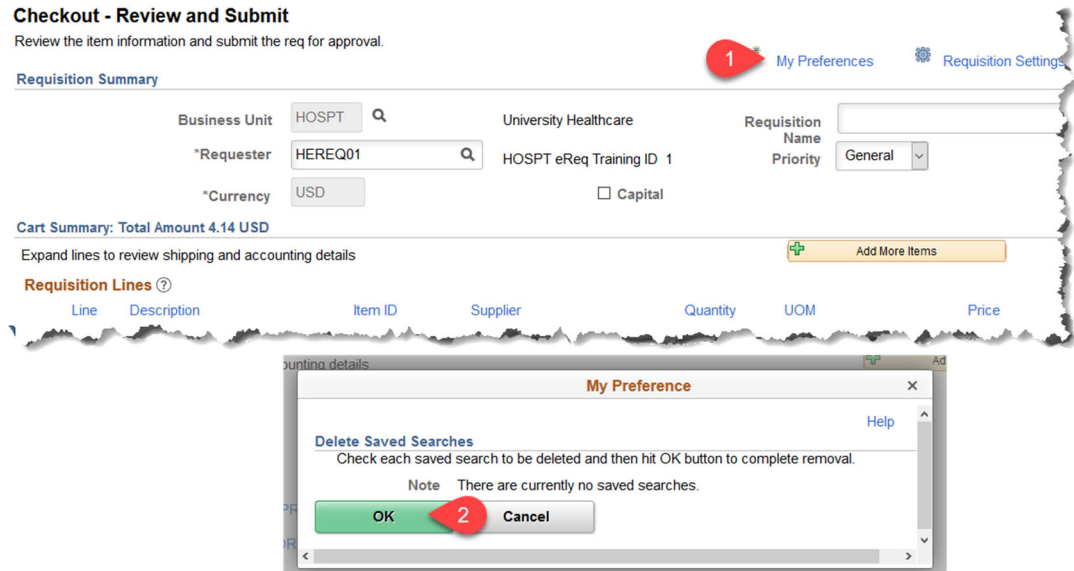
Expanded Accounting Lines – by Default

When updating requisition shipping/funding, users will need to click the expand triangle on each line to reveal the Accounting Lines (to change MoCodes, Accounts, find/copy default Location code).



If desired, this can be set to expand that section by default, eliminating the need to click the above arrow.

- 1) Select My Preferences at top of the Checkout page.
- 2) Click OK.

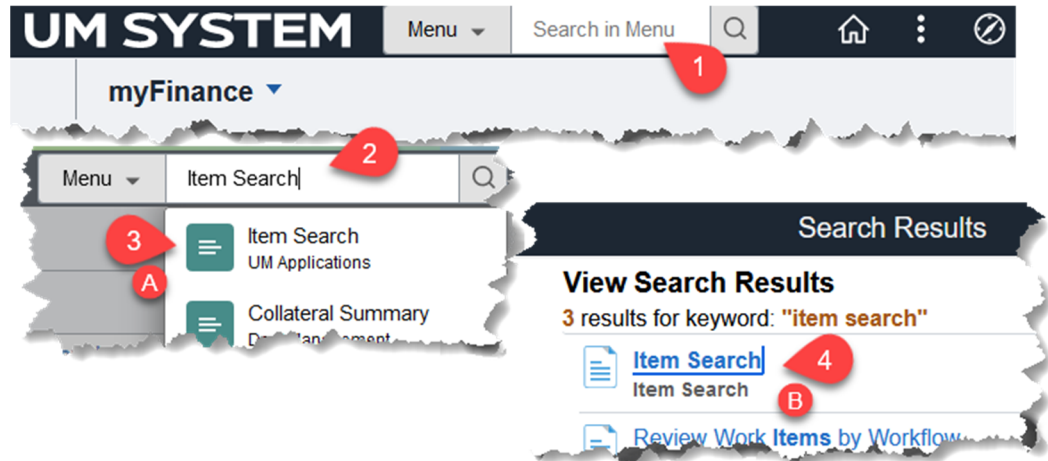


This only needs to be done ONCE. PeopleSoft will apply the setting to all future requisitions.

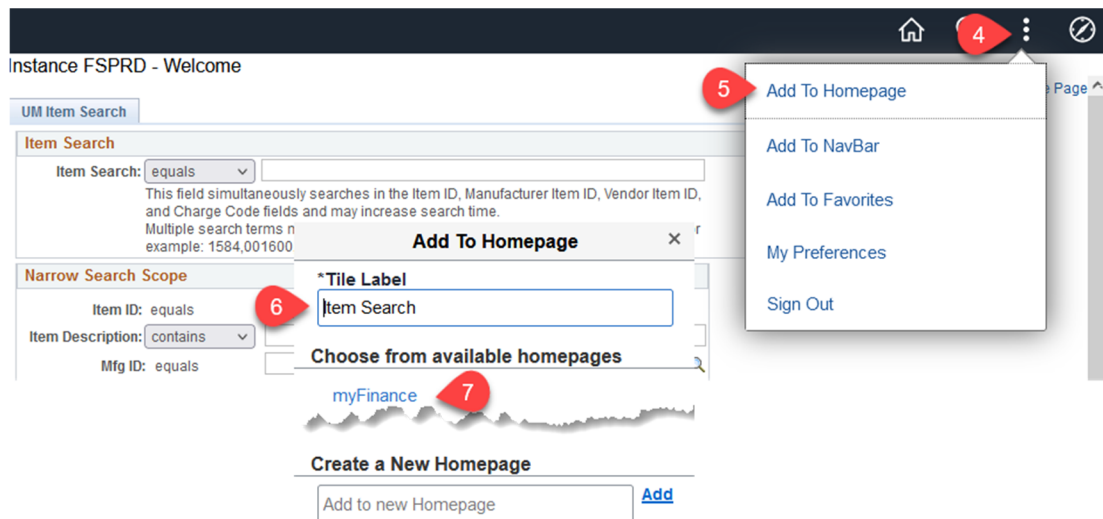
Adding a Tile – Item Search

To create a custom tile for easier navigation in the future

1. Click the Menu Search at top of the PeopleSoft page.
2. Type "Item Search" and matching entries will populate
3. Navigate to the Item Search page either by
 - a. Clicking on the Item Search menu item – OR –
 - b. Clicking <Enter> from the menu field (2) and selecting from the Search Results



4. While the UM Item Search page is displayed, click the Actions List icon in the upper right.
5. Select Add to Homepage.
6. In the pop-up window, confirm or edit the title for the tile.
7. Click the desired homepage where the new tile should be added (our default **myFinance** page in this example).



Find more customization options (Adding to Favorites, NavBar Navigation), in the eProcurement Requester Training Guide.
https://www.umsystem.edu/ums/fa/finance-support-center/muhc_eprocurement_requester

Requester Procedures

» Requester Tasks

» Navigating eProcurement Requester

» Requisition Process Overview

Disabling the Autocomplete Feature

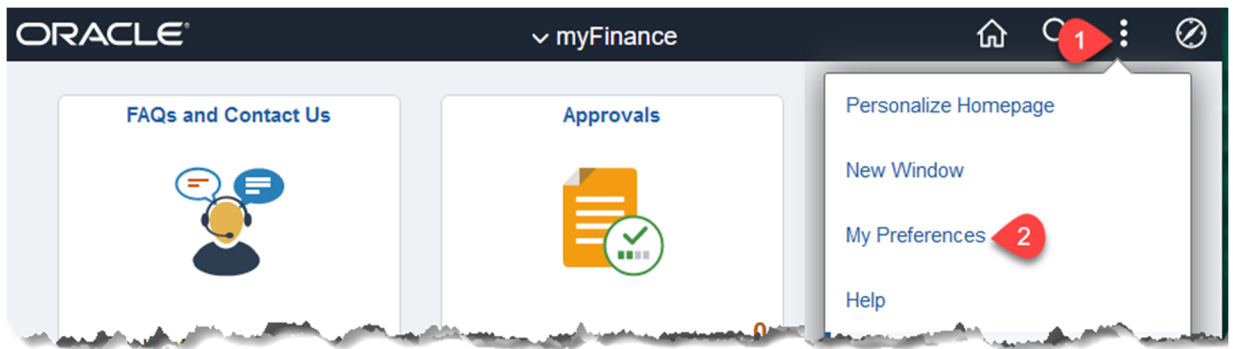
In certain fields, such as MoCode, PS Account, Ship To Code, PeopleSoft will attempt to anticipate the value the User is trying to load and allow a selection to be made from a grid.

The feature is turned ON by default, but Users may choose to disable it at the User Level (all pages within PeopleSoft).

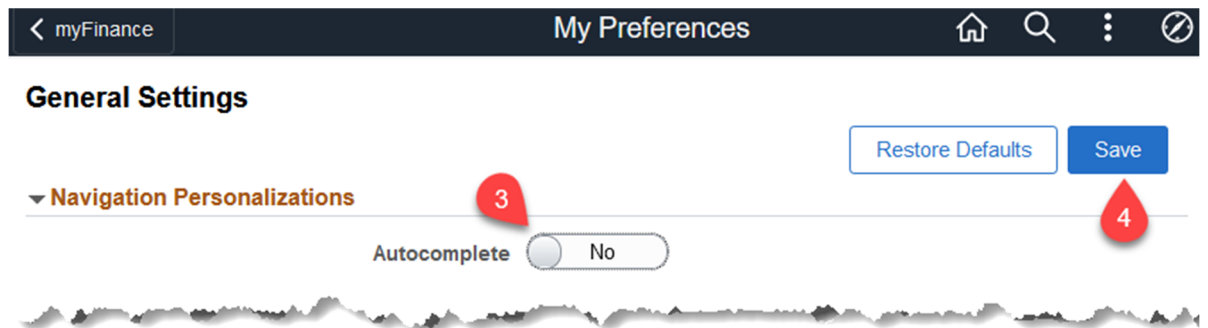
Autocomplete – Disable at the User Level

From the myFinance homepage:

1. Click Actions from the upper right hand corner
2. Select My Preferences



3. Move the slider next to Autocomplete from Yes to No
4. Click Save.



This feature may be re-enabled at any time by selecting Restore Defaults.