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Customizing Screens in MaineStreet

Concept

Many of the screens in MaineStreet can be customized to suit your individual viewing preference. Custom screens allow you to keep or hide fields and pages and determine the order in which the fields and pages appear on your screen. For example: When entering Requisitions, the University does not use the ITEM field; customizing allows you to remove this field so it will not appear on your screen.

Customizations can be private or shared. Shared ones can be used by other MaineStreet users where private ones cannot. We have created two customized Requisition screens that you may use if desired; the **UMS Default Requisition** and the **UMS Change Default Requisition.**

The **UMS Default Requisition** screen has everything, except the Distribution fields, on one page. If you normally do not make changes to the Requisition/Header Default page(s) and have only one or two lines you may find this screen helpful.

The **UMS Change Default Requisition** screen is useful if you normally make changes to the Requisition/Header Default page(s) or you have several lines and want to enter the distribution only once. It is necessary to go to the Requisition/Header Defaults page when using this customized screen. <u>In most cases users will find this customization the easiest one to use.</u>

To Access the Customized Requisitions Screens: click the 

link, scroll down and click ***Copy Settings***, then click the lookup icon to select the one you want. Each custom requisition screen is explained below.

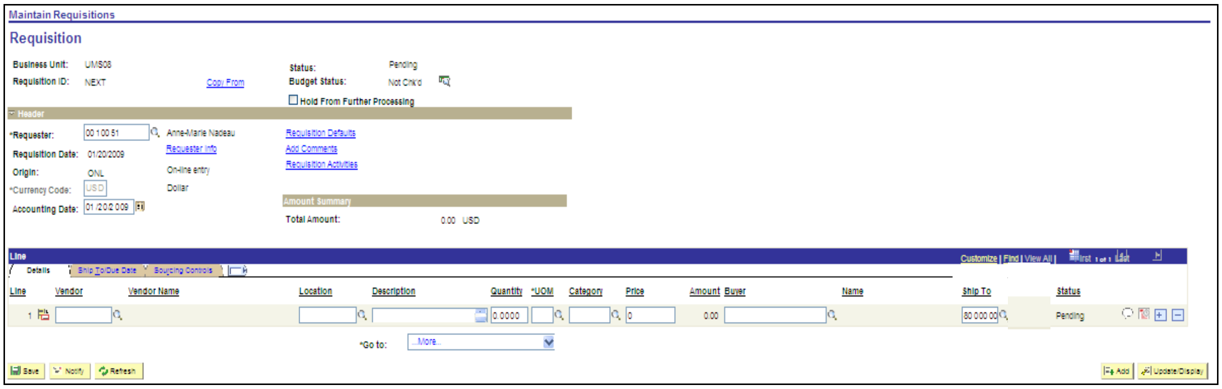
Additional Information

Once a screen is customized it becomes the default for the user. It may be changed by selecting a different customization, using the MaineStreet Default, or creating your own custom screen.

This document serves two purposes: First, it explains the two Custom Requisition Screens mentioned above, and second, it explains how you can create your own custom screens. Customizations can be applied to any screen in MaineStreet where you find the Customize link.

The Two Customized Requisition Screens:

UMS Default Requisition:



All required fields, except Distribution, are on one page. Enter the **Vendor ID#, Vendor Location, Item Description, Quantity, UOM, Category, Unit Price, and Buyer.** You can use the look-up icons to search available options if needed.

If desired, click the **Line Comment** link to add a comment to this line.

Click the **Schedule** link, then the **Distribution** link to enter the distribution (chartfields). Click **OK.** If no additional Lines need to be entered, Click **SAVE**. If additional Lines are needed click **Return to Main Page**.

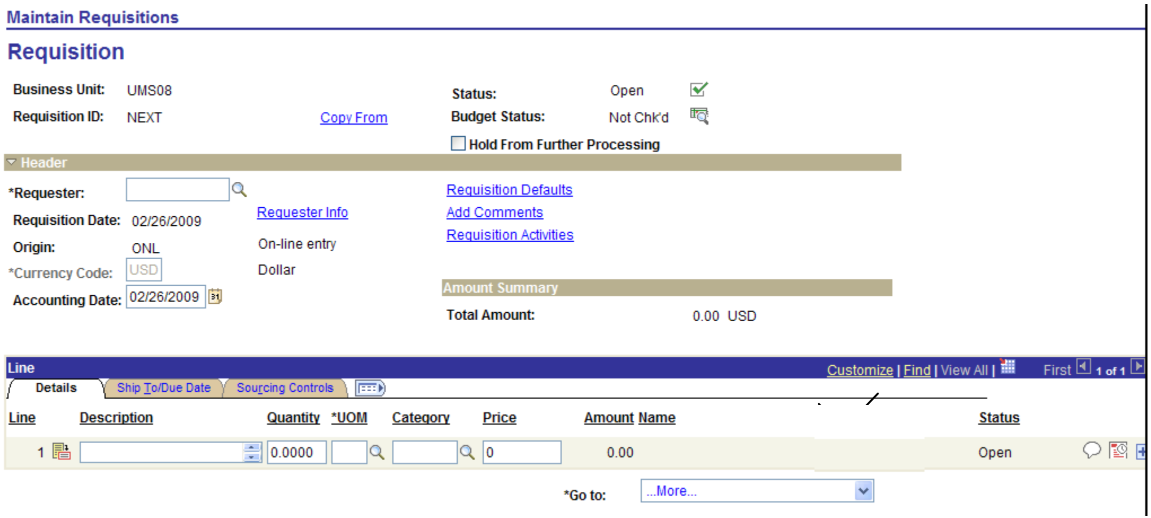
To add more Lines click the **Add a New Row** link and repeat the above steps.

When you have entered all lines Click **SAVE.**

NOTE: The Defaults for the Requisition Defaults and More PO Defaults pages apply to this requisition unless you go to those pages and change them. E.g. Regular Order, Ship To, Payment Terms, Dispatch Method, and Freight Terms.

When necessary, it is recommended that you make changes to the Requisition/Header Defaults page **before** entering Line Information in order to avoid the Retrofit page. <u>If you find you normally need to makes changes to the Requisition Defaults page you may find the **UMS Change Default Requisition** customization (below) works better for you.</u>

UMS Change Default Requisition:



This screen requires you to use the Requisition Defaults link to enter the **Vendor ID, Vendor Location,** and **Buyer**. You can also change **PO Type** and enter **UOM, Category**, and **Distribution**. If necessary click the **More PO Defaults** link to make additional changes.

Click **OK**.

Back on the **Maintain Requisitions** page enter the **Item Description, Quantity,** and **Unit Price**. If you entered UOM or Category, on the Requisition Defaults page it will default for you when you Save the requisition, however, you can still enter or update those fields here.

If desired, click the **Line Comment** link to add a comment to this line.

If you entered the Distribution on the Requisition Defaults page it will default to the Lines when you click Save. You can still update the Distribution at the Line level if needed. If you did not enter it on the requisition defaults page enter it here: Click the **Schedule** link, then the **Distribution** link to enter the distribution (chartfields).

Click **OK.** If no additional Lines need to be entered, Click **SAVE**. If additional Lines are needed click **Return to Main Page**.

To add more Lines click the **Add a New Row** link and enter the Line information for the additional lines.

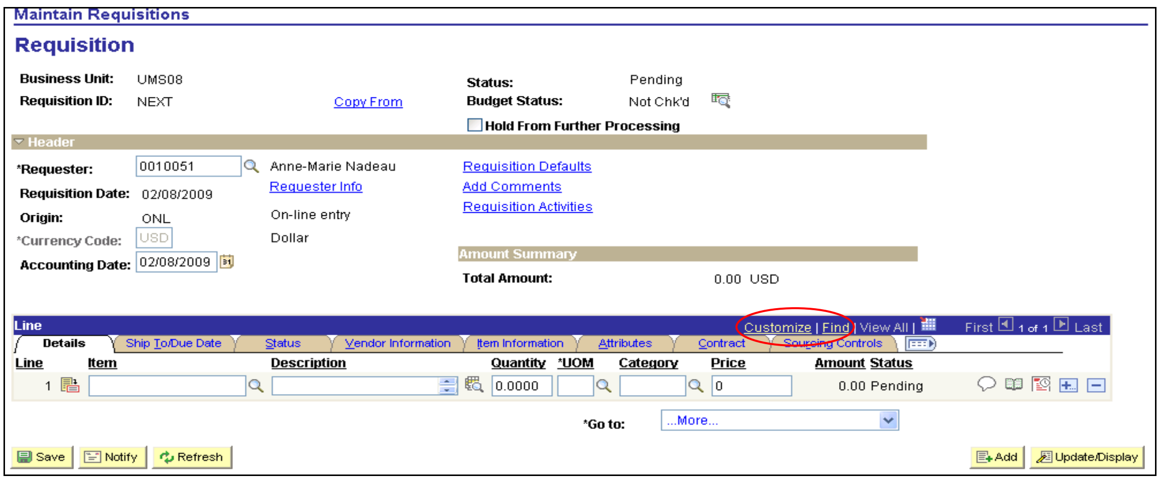
When you have entered all lines Click **SAVE.**

Customizing Screens in MaineStreet.

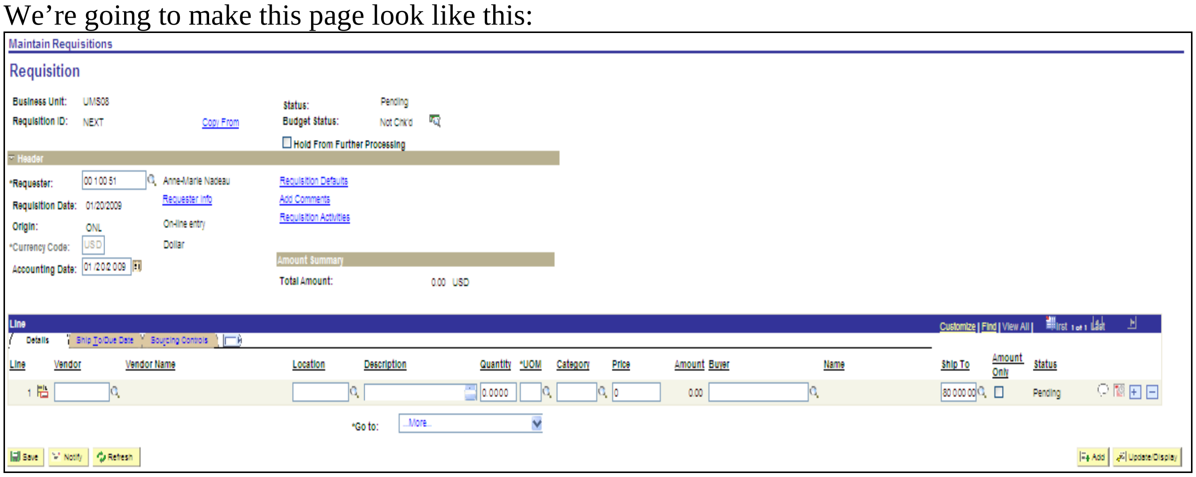
You can Cusotmize any screen in MaineStreet where you find the Customize link. 

Click the Customization link. On the Left side of the page are the names of the fields; icons are noted as “Column XX”; Pages are noted as “Tab XX”. Use the **Up/Down Arrows** to move items from one place to another on a page or from one page to another. Use the **Hidden** checkbox to hide fields or to hide pages. Use the **Frozen** checkbox if you want a field to appear on every page.

For Example: Here is the PeopleSoft delivered Requisition Page: Note there are 8 Pages/Tabs of information (Details, Ship To/Due Date, Status, Vendor Information, Item Information, Attributes, Contract, and Sourcing Controls). We are going to move the fields we need from each Page to the Details Page and then Hide the Pages we don’t want to see.



We’re going to make this page look like this:



We’ve hidden the fields we don’t use and moved the fields we do use to the Details page. We’ve also hidden the tabs/pages we don’t need.

Click the Customize link. First:

Let's see what the Customization page looked like before we made changes:
These are the PeopleSoft default settings for the Requisition page:

Here's the Customization

See next page for an explanation of changes:

Hiding entire Pages/Tabs: Pages/Tab are identified as "Tab XXX". For example, the Item Information page is "Tab Item Information". There are 7 fields on this page; none of which we need. We highlighted "Tab Item Information", then check the "Hidden" box.

Moving fields from one page to another: Highlight the field and use the Up/Down Arrows to move. For example, we wanted Vendor ID, Vendor Location, and Vendor Name to be the first field on the Detail page of the requisition. We highlighted Vendor ID, Vendor Location, and Vendor Name under "Tab Vendor Information" and, using the Arrows, moved them.

Hiding Icons: Icons are identified as Columns, for example (Column 25) is the  link. We don't use it so it's hidden on the customization.

Save, Share, Copy, or Delete Custom Settings:

To **Save** a customization simple click ***OK*** when you have completed your changes. This will save the changes to your view of that screen.

To **Share** a customization click ***Share Settings,*** then select ***Private*** or ***Public***. If you select Public you will need to Name the setting. Please Use underscores when naming. For example: UMS_Default_Requistion.

To **Copy** a customized setting click ***Copy Settings***, then click the lookup icon to select the setting. Only customized setting that have been created and saved as Public will appear. If there are none you will need to create your own.