

Financial
System
Upgrade
Changes

WHAT'S NEW

NAVIGATION





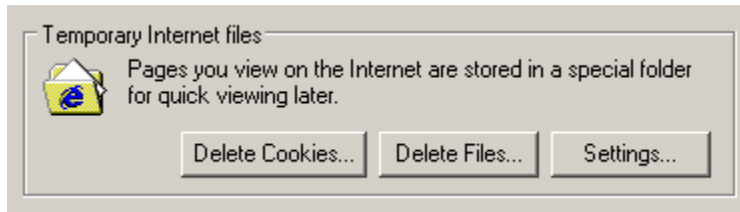
Last Updated – 6/30/2008

Internet Cache

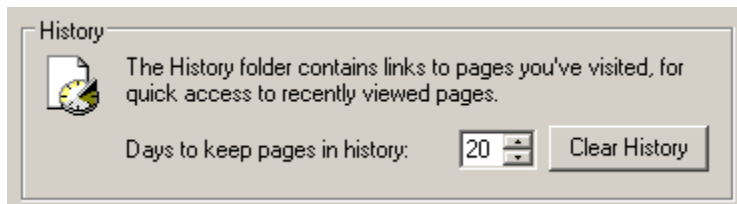
Internet Options found, within your internet browser, can be used when your internet connection is acting unusual. The following actions clear Internet information stored on your computer and allows fresh data to take its place.

➤ Navigation: Tools – Internet Options (navigation for Internet Explorer 6.0)

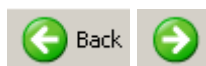
1. Delete temporary internet files



2. Clear History



Internet Navigation Tools



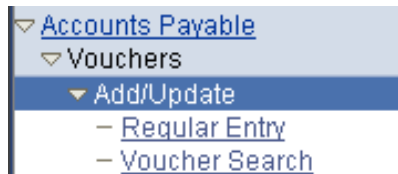
Avoid using the internet navigation tools to navigate within the financial system. These tools can cause problems with work performed within the application. Instead use the menu, hyperlinks and buttons within the financial system to navigate to desired pages.



When working with multiple FinSys9 windows simultaneously open, the tools to minimize, maximize or close extra windows may be used. Do not use the close feature to close out of the only active FinSys9 window – use the PS Sign Out option -- [Sign out](#).

FinSys9 Navigation Tools

➤ Menu Navigation and Dashboard Navigation



Menu Navigation

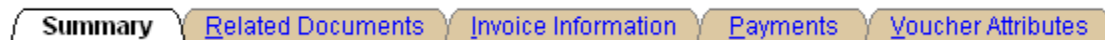
Users can navigate via the menu or in combination with the dashboard pictures. The triangle next to the menu option indicates there are additional features to navigate. The final selection options appear underlined like a hyperlink.



Dashboard navigation (using the pictures)

Users can navigate via the dashboard pictures or in combination with the menu. When using the dashboard to navigate, the menu will not expand along with the actions taken on the dashboard.

➤ Navigate within a transaction – Tabs and Hyperlinks



Tabs at the top of the window identify pages in a group. The tab for the open window will appear as black text on white background. Other tabs in the page group will appear as blue text on taupe background.

[Summary](#) | [Related Documents](#) | [Invoice Information](#) | [Payments](#) | [Voucher Attributes](#)

Hyperlinks at the bottom of the page mimic the tabs at the top of the page. The active page is the one not underlined.

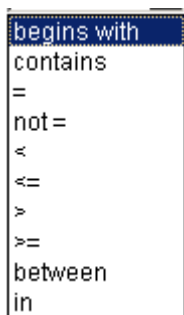
Searches

➤ Advanced Search

When you select a page, the system often displays a Find an Existing Value tab (or something similar) that enables you to do a basic search and also provides an Advanced Search link.

On the advanced search page, you can narrow your search, both by searching based on more than one field at a time and by using a variety of search operators.

By default, the search function can retrieve up to 300 entries from the database, displaying a number of results at one time in the Search Results grid. If your search retrieves more than the maximum 300 listings, attempt to narrow your search in another way if you cannot retrieve the data that you need on the first attempt.



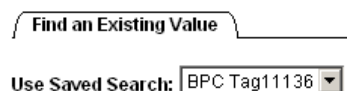
Common Operators used in searches

➤ Save Search Criteria



If you are conducting an advanced search, you can click the Save Search Criteria link to name and save the specifics of your search. If you have saved one or more searches, you can use the Use Saved Search drop-down list box to select a saved search. Once you save a search, you can use that specific search record in other search pages that use the same search record. You can remove any saved searches by clicking the Delete Saved Search link.

A common BPC search would include using the same VISA Name, Card Type and Buyer Complete value. A saved search can be used to eliminate the need to enter these search fields each time – just select the name associated with the saved search.



Saved searches can not be edited, but can be deleted and easily recreated as needed.

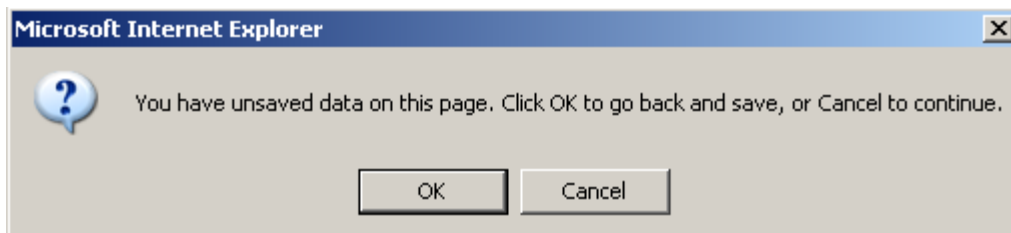
Summary Pages

A summary page is added to most transactions after the entry has been saved. The summary page will show some basic details related to the transaction.

Summary		Related Documents	Invoice Information	Payments	Voucher Attributes	Error Summary
Business Unit:	UKANS	Invoice Date:	06/30/2008			
Voucher ID:	00000176	Invoice No:	EWRQWR			
Voucher Style:	Regular	Invoice Total:	2,400.00	USD		
Contract ID:						
Vendor Name:	MIMI KITTY 9 LIVES LANE LAWRENCE, KS 66046	Pay Terms:	net30			
		Voucher Source:	Online			
Entry Status:	Postable	Origin:	ONL			
Match Status:	No Match	Created:	06/30/2008			
Approval Status:	Pending	Created By:	VCHRADDCENT			
Post Status:	Unposted	Modified:	06/30/2008			
		Modified By:	VCHRADDCENT			
		ERS Type:	Not Applicable			
Budget Status:	Not Chk'd	Close Status:	Open			
Budget Misc Status:	Valid					

Common Messages

➤ Unsaved Data

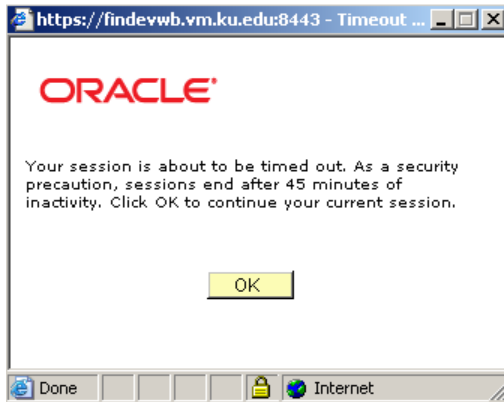


When moving out of a transaction, the user will frequently be presented with this message if the last action was not a "Save".

OK = user wants to return to the transaction to save the latest change

Cancel = user does not want the latest changes saved

➤ Time Out Warning Messages



The system allows a financial system transaction to sit idle for 45 minutes before the system will cancel the connection.

At 40 minutes of no activity, the following warning message will appear. The user is prompted to either sign out of the system or resume using the system.

At 45 minutes of no activity, the system connection will be terminated. The user is prompted to sign in to resume use of the system. If multiple system windows are open and one window session times out due to inactivity, all windows will also be timed out (no longer connected to the system).



Your PeopleSoft connection has expired.

For increased security on this site, connections are expired after 45 minutes of inactivity.

Your PeopleSoft session has expired. Close all browser windows before logging in again. If this is your only active PeopleSoft session, click the Sign In link to sign in again.

[Sign in to PeopleSoft](#)

Shortcuts for Data Entry

➤ The Percent Sign --%

% - the percent sign acts as a wildcard symbol. Use this in a search field when spelling or number is in doubt. The example below will return all out of state Account values:

Account:

➤ **Today's Date = T in a date field**

T – when the letter “T” is entered into a data field, the value will return TODAY’s date.

Invoice Date: ⓘ = Invoice Date: ⓘ

➤ **More Shortcuts, Common Tools and Buttons**

Can be found in a document titled “Common Tools & Hot Keys