

# CFS

## Common Financial System Fluid Interface User Guide



CALIFORNIA STATE UNIVERSITY, CHICO



## Table of Contents

### Overviews

FLUID BANNER .....	2
Page Title .....	2
Homepage Title .....	2
Down arrow to left of Homepage Title .....	2
Home button .....	2
Search .....	2
Actions List .....	2
NavBar .....	2
NAVBAR .....	3
Navigator (Menu) .....	3
Recent Places .....	3
My Favorites .....	3
NavBar Settings .....	3
NAVIGATION COLLECTION TILES .....	4
Application Tiles .....	4
CFS End User Tile .....	4
EXTERNAL LINK TILES .....	5
Finance Data Warehouse (PRD) .....	5
CFS 9.2 Application Documents .....	5

### Quick Guides

ESTABLISH DEFAULT HOMEPAGE .....	6
Default homepage .....	6
RENAME HOMEPAGE .....	7
NAVIGATE BETWEEN HOMEPAGES .....	8
COPY TILE FROM “CFS 9.2” HOMEPAGE TO “Chico User CFS 9.2” HOMEPAGE .....	9
MOVE TILE BETWEEN HOMEPAGES .....	10
ADD TILE TO HOMEPAGE, FAVORITES, OR DIRECTLY TO NAVBAR .....	11
REARRANGE ORDER OF TILES ON A HOMEPAGE .....	12



## FLUID BANNER

The CFS Fluid Banner is located at the top of each page in CFS. The CSU logo is now located on the left side of the fluid banner.



**Page Title:** The middle section of the fluid banner identifies either the current homepage title, navigation collection, or CFS page location.

**Homepage Title** - the fluid banner Page Title displays the current homepage title when you are at a homepage in CFS.

**Down arrow to left of Homepage Title** - contains a drop-down menu of available homepages. If you use more than one homepage, this drop-down menu allows navigation between homepages.

**Right side:** Contains four icons used for navigation through CFS, sign out and other actions available



**Home button** - upon selection will return to your defined default homepage



**Search** - navigation to search for pages within CFS by keyword. Type "Requisition" or "Process"



**Actions List** - will display a list of available actions for that page, including Sign Out



**NavBar** - Provides other navigation options, including Navigator Menu, Favorites, and Recent Page list

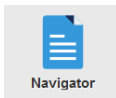


## NAVBAR

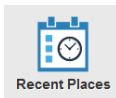


The NavBar, located on the Fluid Banner, provides additional navigation options, including Navigator (menu), My Favorites, and Recent Places list. The NavBar icon is available on every page within CFS.

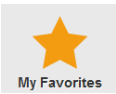
**Efficiency tip:** User defined tiles can be added directly to the NavBar (see ADD TILE TO HOMEPAGE, FAVORITES, OR DIRECTLY TO NAVBAR). For greatest efficiency, add tiles to the NavBar for your most frequented 2 pages, then using NavBar Settings, reorder the NavBar tiles to place those 2 user created tiles above the “Navigator” tile on the NavBar.



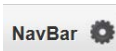
**Navigator (Menu)** – Is the Fluid “Main Menu” – most similar navigation to classic menu but does not show bread crumbs as you advance through hierarchy.



**Recent Places** - Lists the most recent 5 pages visited



**My Favorites** – Displays list of user-specified favorite pages



**NavBar Settings:**



Remove tiles from the NavBar by selecting delete icon



NavBar tiles can be reordered based on user preference by selecting the action icon and dragging the tile name to the order preferred.

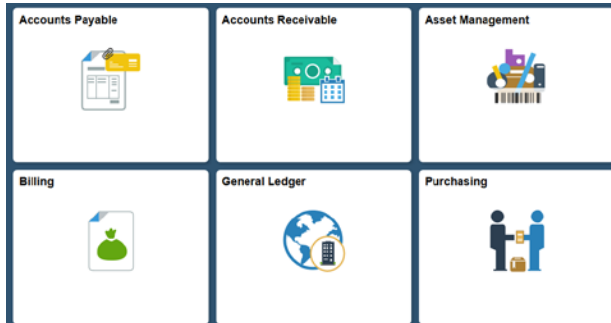


# Common Financial System Fluid Interface User Guide

## NAVIGATION COLLECTION TILES

Navigation Collection Tiles are an alternative to the NavBar and Navigator Menu. These tiles were defined by systemwide, not the campus. Users, especially within Financial Services, may frequent pages that are not included in these tiles. Other navigation options are needed to access those pages.

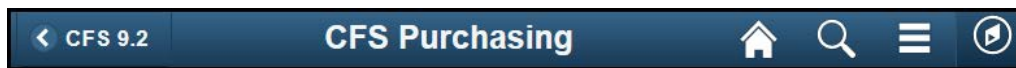
**Application Tiles:** These six tiles contain a collection of links to the CSU’s most-frequently-accessed components and/pages within the main applications. The main applications include Accounts Payable, Accounts Receivable, Asset Management, Billing, General Ledger, and Purchasing.



**CFS End User Tile:** This tile contains the CSU’s most-frequently-accessed components/pages for campus end users. Campus end users will find it most efficient to copy the “CFS End User” navigation collection tile to the Chico User CFS 9.2 homepage (see COPY TILE FROM “CFS 9.2” HOMEPAGE TO “Chico User CFS 9.2” HOMEPAGE)



Once a navigation collection tile is selected, the Fluid Banner will display in the center, as the page title, the name of the navigation collection selected (e.g. CFS Purchasing). Located at left of Fluid Banner, selecting the [Back to Homepage](#) will navigate to the last visited homepage, displayed on the button itself.



The left side of page will display the available links for the application selected. The top two links within each navigation collection will always be Process Monitor and Report Manager.



If user has Query access, the third item within every navigation collection will be Query.



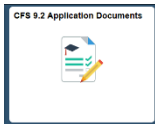
# Common Financial System Fluid Interface User Guide

## EXTERNAL LINK TILES

The CFS 9.2 homepage contains two tiles that each link to website pages external to CFS. To return to your homepage after selecting one of these external link tiles, select the “My Homepage” tab in your browser.



**Finance Data Warehouse (PRD):** selecting this tile will open a new window tab in your browser to the webpage for the CSU Data Warehouse production home dashboard.





**CFS 9.2 Application Documents:** selecting this tile will open a new window tab in your browser to the webpage for the CFS 9.2 Application Documents. This is useful to users within Financial Services to access various application process user guides and upgrade documents.





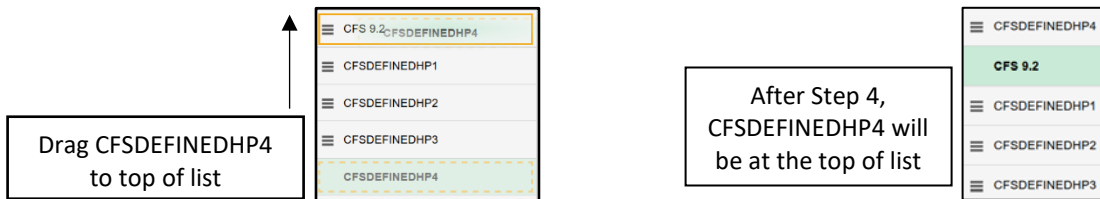
## ESTABLISH DEFAULT HOMEPAGE


**Default homepage:** The landing page that first appears when you login to CFS; also the homepage that appears when a user hits the Home icon.  For users who have the need for multiple homepages, the most frequented homepage can be established as the default.

1. From the “CFS 9.2” homepage, click on the Actions List icon 
2. Select Personalize Homepage from the Action List menu
3. From the **Personalize Homepage** screen, select the homepage to set as your new default from the list of homepages at left of page. (In the example below, CFS 9.2 is the current default and CFSDEFINEDHP4 will be the new default).



4. While holding left mouse button, drag the homepage titled “CFSDEFINEDHP4” to the top until “CFS 9.2” is outlined in gold, then release mouse button. Confirm that CFSDEFINEDHP4 is now listed first. The top homepage listed will designate the landing page when you login into CFS.




5. Click Save button (top right of screen). Save
6. Once the blue “CFS 9.2” homepage returns, click the home icon 
7. Your new default homepage (CFSDEFINEDHP4) will appear.

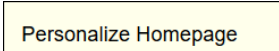




## RENAME HOMEPAGE

There are four homepages delivered in the CFS Fluid Interface Phase II Upgrade (CFSDEFINEDHP1 – CFSDEFINEDHP4) that may be renamed according to user preference. CFSDEFINEDHP4 will be renamed to “Chico User CFS 9.2” per instructions to campus end users as part of the upgrade. To rename one of these homepages follow the steps below. Note that CFS 9.2 cannot be renamed as this homepage is defined and maintained by CSU Systemwide.

1. From the “CFS 9.2” homepage, click on the Actions List icon 

2. Select  from the Action List menu

3. From the **Personalize Homepage** screen, select homepage to be renamed (for example CFSDEFINEDHP4) from the list of homepages at left of page.

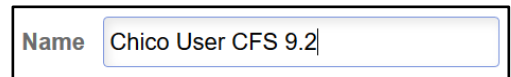
4. Rename CFSDEFINEDHP4 homepage to “Chico User CFS 9.2”:

a. Double-click on CFSDEFINEDHP4 in the Name Field.




A screenshot of a text input field. The label "Name" is on the left. The text "CFSDEFINEDHP4" is entered in the field and is highlighted with a blue selection box.

b. Type “Chico User CFS 9.2” to rename the homepage.



A screenshot of a text input field. The label "Name" is on the left. The text "Chico User CFS 9.2" is entered in the field.


5. Click Save button (top right of screen). 





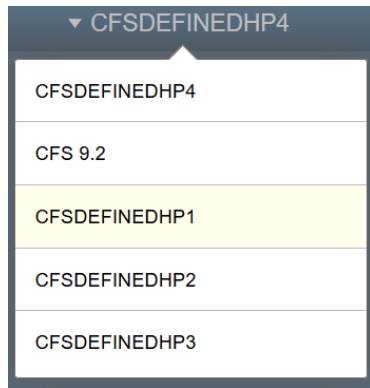
## NAVIGATE BETWEEN HOMEPAGES

Users can maintain multiple homepages. To navigate from one homepage to another:

1. Select the home icon 
2. From the homepage, select the dropdown arrow to the left of the Homepage Title on the Fluid Banner:



3. From the drop down menu of homepages, click on the homepage to which you would like to navigate:



4. The CSU Homepage Fluid Banner will now reflect the new homepage you selected as the Homepage Title (in the example you have navigated from CFSDEFINEDHP4 to CFSDEFINEDHP1).



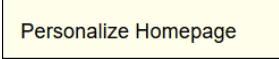


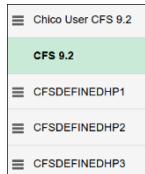




# Common Financial System Fluid Interface User Guide

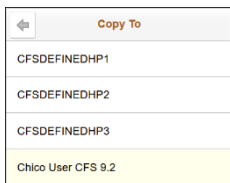
## COPY TILE FROM “CFS 9.2” HOMEPAGE TO “Chico User CFS 9.2” HOMEPAGE


Tiles can be copied from one homepage to another homepage. The Collection Navigation Tiles from the CFS 9.2 homepage can also be copied to user defined homepages. You cannot, however, copy a tile onto the “CFS 9.2” homepage as that is maintained by CSU Systemwide.

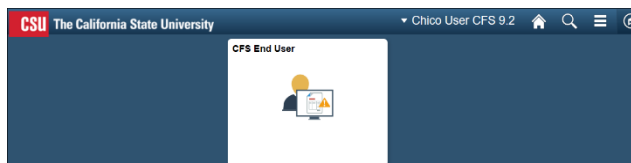
1. Select the home icon 
2. From the homepage, click on the Actions List icon 
3. Select  from the Action List menu
4. From the **Personalize Homepage** screen, select the homepage listed on the left that contains the tiles to copy (in the example below the CFS 9.2 homepage is selected). The homepage will turn “green” on the list, once selected.



5. The right part of the screen will reflect the tiles contained on the homepage selected. Select the Edit icon  of the tile to be copied. For example select the “CFS End User” to copy that tile.
6. From the  menu, select “Copy To”.
7. Then select the homepage onto which you would like the tile copied. In the example, the tile will be copied to the “Chico User CFS 9.2” homepage.





8. Click Save button (top right of screen). 
9. Once the homepage returns, from the drop down arrow to left of Homepage Title, select the homepage to where tile was copied. (In the example select “Chico User CFS 9.2). You can now see the tile on the page where it was copied to (in the example “Chico User CFS 9.2”).

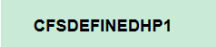





## MOVE TILE BETWEEN HOMEPAGES

Tiles can be moved from one homepage to another homepage. However, a tile cannot move from or to the “CFS 9.2” homepage as that homepage is maintained by CSU Systemwide and cannot be modified.

1. Select the home icon 
2. From the homepage, click on the Actions List icon 
3. Select Personalize Homepage from the Action List menu
4. From the **Personalize Homepage** screen, select the homepage listed on the left that contains the tile that needs to be moved (in the example below CFSDEFINEDHP1). The homepage will turn “green” on the list, once selected.



5. The right part of the screen will reflect the tiles contained on the homepage selected. Select the Edit icon  of the tile to move. For example, select “Add/Update Requisitions” tile.

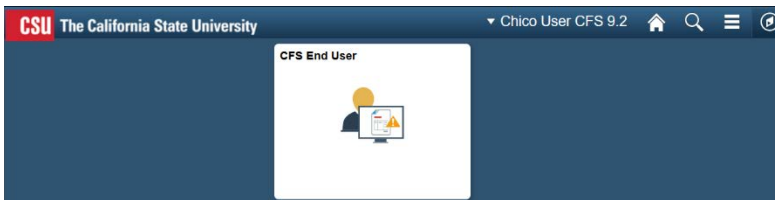


6. From the Select Action menu, select “Move To”.
7. Then select the homepage onto which you would like the tile moved. In the example, the tile will be moved from CFSDEFINEDHP1 to the “Chico User CFS 9.2” homepage.



8. Click Save button (top right of screen). Save

9. Once the homepage returns, from the drop down arrow to left of Homepage Title, select the homepage to where tile moved. (In the example select “Chico User CFS 9.2). You can now see the tile on its new homepage, to where it moved.






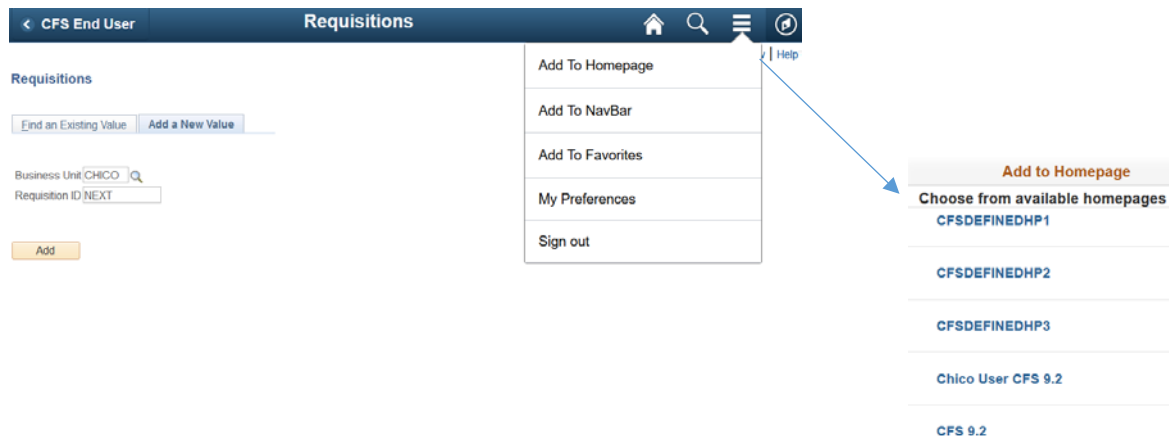


## Common Financial System Fluid Interface User Guide

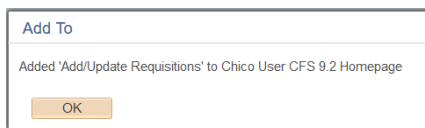
### ADD TILE TO HOMEPAGE, FAVORITES, OR DIRECTLY TO NAVBAR

With the exception of the “CFS 9.2” homepage which is locked, a user can add new tiles to a homepage, to the Favorites List on the NavBar or as a tile directly on the NavBar. Although there is menu option to “Add Tile” when you are at the Personalize Homepage and also at the NavBar Settings, the recommended method to add a tile is to navigate directly to the page where the new tile will link by proceeding as follows:

1. Click on the NavBar  located on the fluid banner.
2. Click on the Navigator icon    
Navigator
3. Select the Navigator menu of the page for which you want to create a link. In the example below, a tile for “Add/Update Requisitions” will be created. So we will navigate as follows:  
Purchasing >Requisitions>Add/Update Requisitions
4. Once the page is displayed for the tile you want to create, select the Actions List icon  from the fluid banner.
5. From the Actions List menu that pops up, select whether to add the tile you are creating to Homepage, NavBar or Favorites. If Add to Homepage is selected a submenu will appear for you to specify the homepage of where to add the tile. Select the location of where to add the new tile. User-defined tiles cannot be added to the CFS 9.2 homepage, as only CSU Systemwide can make modifications to that homepage.



6. Click ok, if an “Add To” dialog window appears








## REARRANGE ORDER OF TILES ON A HOMEPAGE

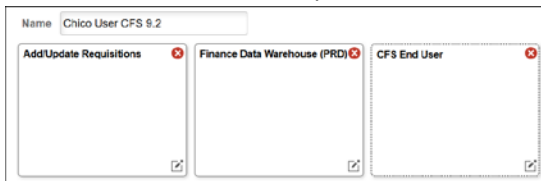
Tile order can be rearranged on user-defined homepages. The order of the tiles are locked on “CFS 9.2” and cannot be rearranged on that specific homepage only.

### Option 1: Rearrange Tiles from Homepage

1. Select the home icon 
2. From the homepage where tiles are to be arranged, hold left mouse button down while selecting a tile to move and drag it to the new location on that same homepage.

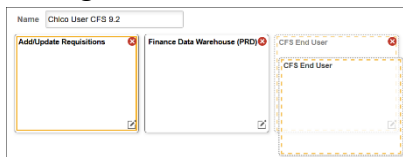
### Option 2: Rearrange Tiles from Personalize Homepage

1. Select the home icon 
2. From the homepage, click on the Actions List icon 
3. Select Personalize Homepage from the Action List menu
4. From the **Personalize Homepage** screen, select the homepage listed on the left that contains the tiles to rearrange (in the example below Chico User CFS 9.2). The homepage will turn “green” on the list, once selected. Chico User CFS 9.2
5. The right part of the screen will reflect the tiles contained on the homepage selected. While selecting the tile to be moved, hold the left mouse button down (in the example below CFS End User tile is selected).

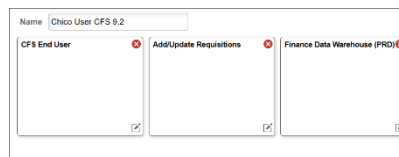


(Keep holding the left mouse button) Drag the tile to the location on the homepage where you want to place it, then let go of mouse button. The tile selected will display a gold dashed line around the perimeter, as it is moved. The location that you will place the tile displays a gold solid line. (In example below, the “CFS End User” tile is to move to the left tile placement where the “Add/Update Requisition” tile is located).

During Placement:



After Placement:



6. Click Save button (top right of screen).

