



CFS User Interface Updates

Carmen Arreguin

Fluid User Interface Updates

- Homepage
 - Branding
 - Controls in the Fluid Banner
 - Search Page Enhancements
 - Borderless Page Tabs
 - Process Monitor Page Updates
 - User Profile Page
 - Supplier Set Control

Current Branding – PeopleTools 8.59.07 PUM 40 (MP 5.0)

The screenshot displays the CSU Common Financial System user interface. The top navigation bar includes the CSU logo and name, a search bar labeled "Search in Menu", and a "Menu" dropdown. Below the navigation bar, a "CFS 9.2" version selector is visible. The main content area features a grid of nine tiles representing different financial modules: Accounts Payable, Accounts Receivable, Asset Management, Billing, General Ledger, Purchasing, CFS End User, Finance Data Warehouse (PRD), and CFS 9.2 Application Documents. A "Quick Action Bar" is located on the left side, and a "Navigation Collections & Direct Link Tiles" area is on the right. A "Global Search" bar is positioned above the main grid. The interface also includes a "Custom Banner" and a "Homepage Selector".

CSU The California State University
COMMON FINANCIAL SYSTEM

FCFSPRD

Menu Search in Menu

CFS 9.2 Custom Banner

Global Search

Icons, Action, NavBar, Homepage Navigator

Navigation Collections & Direct Link Tiles

Quick Action Bar

Accounts Payable

Accounts Receivable

Asset Management

Billing

General Ledger

Purchasing

CFS End User

Finance Data Warehouse (PRD)

CFS 9.2 Application Documents

New Branding – PeopleTools 8.60.11 PUM 50 (MP 6.0)

- Redwood Color Scheme and Banner Layout Changes

The screenshot displays the CSU Common Financial System (CFS) 9.2 user interface. The top navigation bar includes the CSU logo, the text "The California State University COMMON FINANCIAL SYSTEM", a "Menu" dropdown, a search bar labeled "Search in Menu", and navigation icons for home, notifications, and refresh. Below the navigation bar, the main content area is titled "CFS 9.2" and contains a grid of nine application tiles, each with an icon and a title:

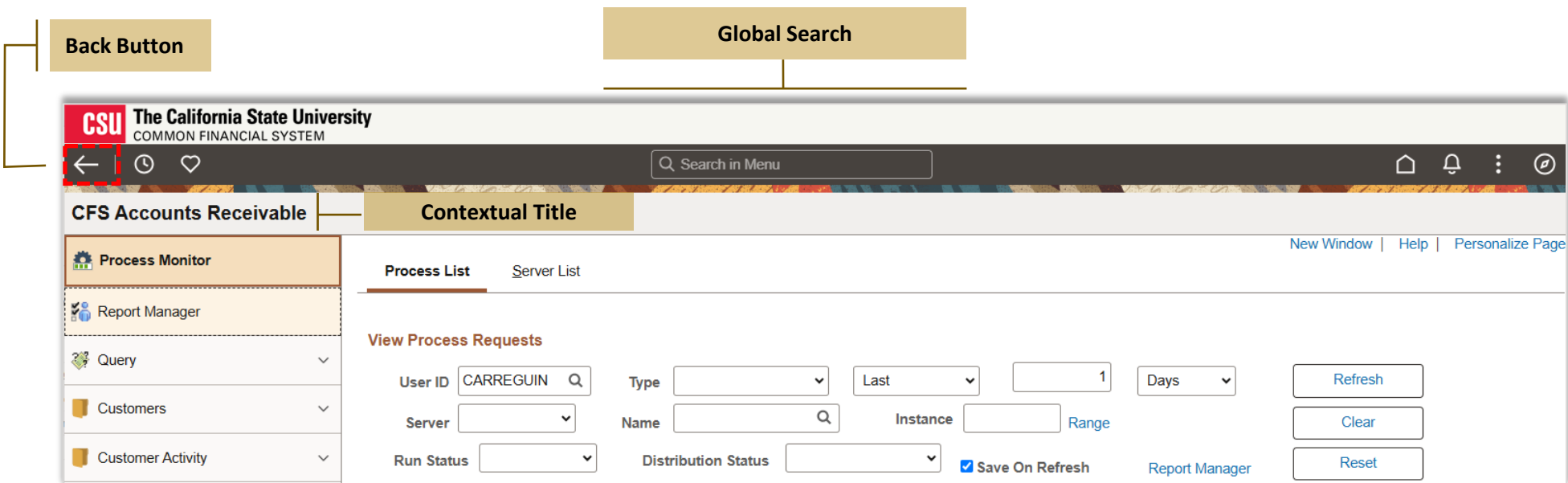
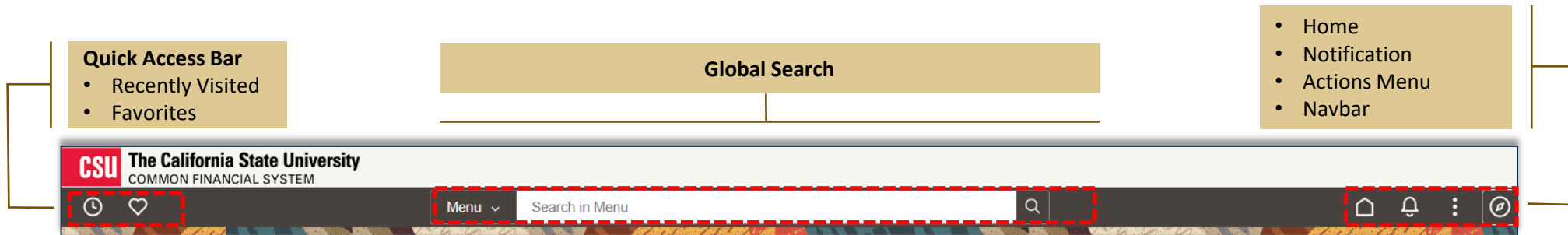
- Accounts Payable (Icon: calendar with coin)
- Accounts Receivable (Icon: money and calendar)
- Asset Management (Icon: shelves with boxes)
- Billing (Icon: document with coin)
- General Ledger (Icon: globe with chart)
- Purchasing (Icon: hand holding document)
- CFS End User (Icon: person at computer)
- Finance Data Warehouse (PRD) (Icon: buildings with chart)
- CFS 9.2 Application Documents (Icon: document with checklist)

Global
Section

Contextual
Section

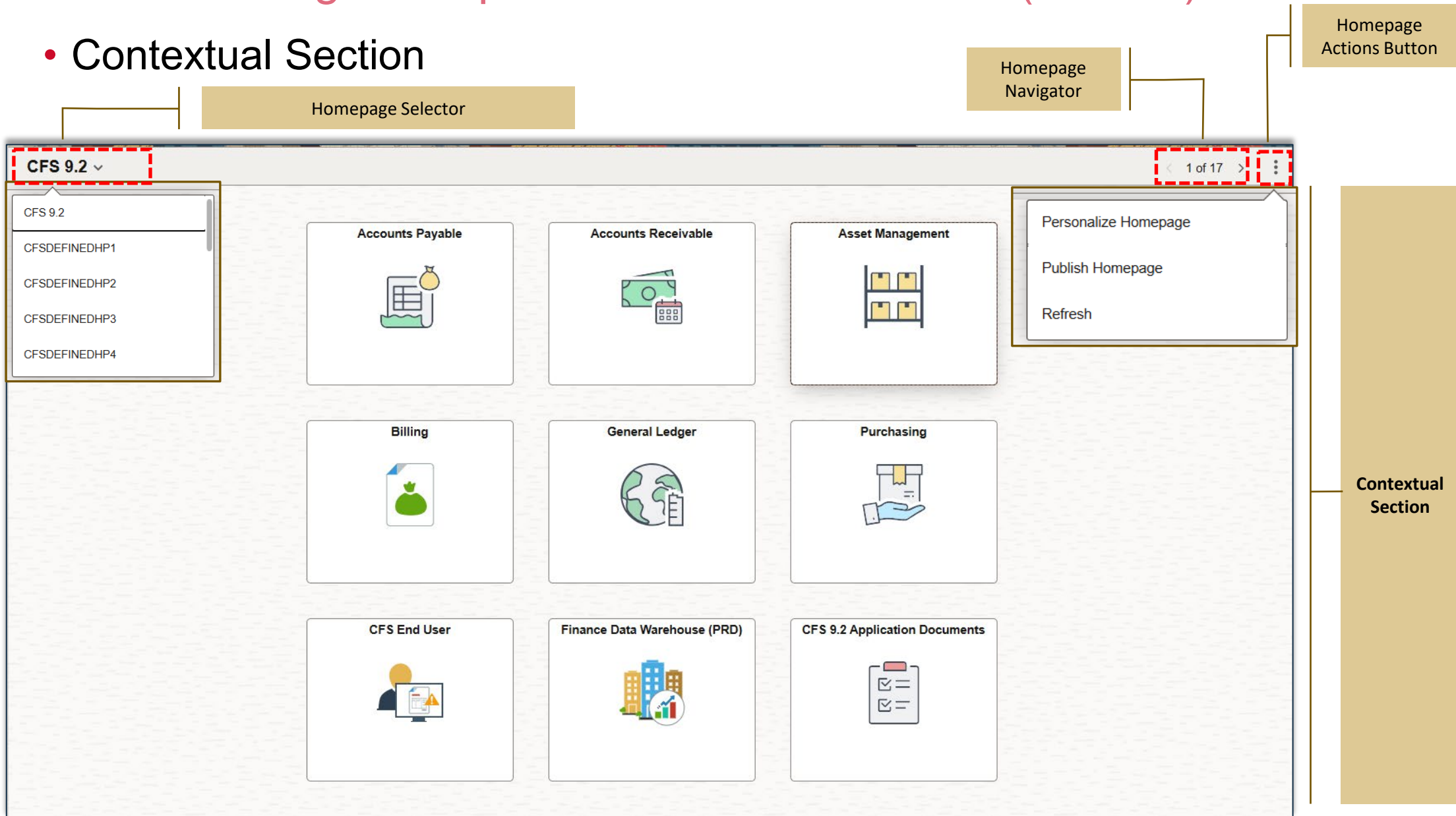
New Branding – PeopleTools 8.60.11 PUM 50 (MP 6.0)

- Global Section











New Branding – PeopleTools 8.60.11 PUM 50 (MP 6.0)

- Contextual Section



Controls in the Fluid Banner

Button	Description	Action
	Back	Use the Back button to navigate back to the previously visited component, homepage, navigation collection.
	Recently Visited	Use the Recently Visited button to display your recently visited items.
	Favorites	Use the Favorites button to display your favorite items.
	Home	
	Global Search Bar	Use the Global Search bar to perform global searches.
	Actions	Use the Actions button to display the Actions menu. From the Homepage , the Action Menu will display: New window, My Preferences, Help, and Sign Out. From a transaction page , the Action Menu will display: New window, Add To Homepage, Add to NavBar, Add to Favorites, My Preferences, Help, Sign Out.
	Homepage Actions	Use the Homepage Actions button to display the Action menu. From the Homepage , the Action Menu will display: Personalize Homepage, Publish Homepage, and Refresh.
	NavBar	Use the NavBar button to display the NavBar side page. Use this page to access additional Navigational options.

Search Pages - Find an Existing Value / Add a New Value

- The default Find an Existing Value vs Add a New Value is component specific

Find an Existing Value

Asset Management – Asset Basic Information

Add a New Value

Accounts Payable – Voucher - Regular Entry

Asset Basic Information

Find an Existing Value

Add a New Value

Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches: Choose from recent searches

Saved Searches: Choose from saved searches

*Business Unit: = FLCMP

Asset Identification: begins with

Tag Number: begins with

Parent ID: begins with

Description: begins with

Asset Type: =

Asset Subtype: begins with

Show fewer options

Case Sensitive Include History Correct History

Search Clear

Nothing yet
Your search results will appear here

Voucher

Add a New Value

Find an Existing Value

*Business Unit: FLCMP

*Voucher ID: NEXT

*Voucher Style: Regular Voucher

Supplier Name:

Short Supplier Name:

Supplier ID:

Supplier Location:

Address Sequence Number: 0

Invoice Number:

Invoice Date:

Gross Invoice Amount: 0.00

Freight Amount: 0.00

Sales Tax Amount: 0.00

Misc Charge Amount: 0.00

PO Business Unit:

PO Number:

Tax Exempt Flag:

Estimated No. of Invoice Lines: 1

Add

Search Pages - Find an Existing Value – Basic Search

- The Find an Existing Value page enables end users to find the rows of data they need to view or modify.

Basic Searches - The example below demonstrates the fields and controls on the Voucher Regular Entry- Basic.

NEW
Recent
Searches

NEW
LOCATION
Save Searches

**Show More Option
(Advance Search)**
Expand to show additional
search field options

Search Pages - Find an Existing Value – Advance Search

- The **Find an Existing Value** page enables end users to find the rows of data they need to view or modify with additional field criteria.

Advance Search- The example below demonstrates the fields and controls on the Voucher Regular Entry- Basic.

Voucher

Find an Existing Value + Add a New Value

▼ Search Criteria
Enter any information you have and click Search. Leave fields blank for a list of all values.

🕒 Recent Searches 📌 Saved Searches

Business Unit = 🔍

Voucher ID

Invoice Number

Invoice Date = 📅

Short Supplier Name

Supplier ID 🔍

Supplier Name

Voucher Style =

Related Voucher

Entry Status =

Voucher Source =

Incomplete Voucher =

^ Show fewer options
 Case Sensitive

Show more Options

Search Pages - Find an Existing Value – Recent Search

- The Recent Search function enables end users to select from recent searches.
- Saves time and effort by providing quick access to previous searches without having to retype them.

Voucher

Find an Existing Value ⊕ Add a New Value

▼ Search Criteria
Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches Choose from recent searches ✎ **Saved Searches** Choose from saved searches ✎

Business Unit = FRXNO 🔍

Voucher ID begins with C

Invoice Number begins with

Invoice Date = 📅

Short Supplier Name begins with

Supplier ID begins with DELL 🔍

Supplier Name begins with

Voucher Style =

Related Voucher begins with

Entry Status =

Voucher Source =

Incomplete Voucher =

^ Show fewer options
 Case Sensitive

Search Clear 🔖 Save Search

Manage Recent Searches ×

[Help](#)

Recent Searches 🗑️ Delete All

Business Unit(EQ):FRXNO,Voucher ID(BGN):C, +1more	×
Business Unit(EQ):CHXCO,Voucher ID(BGN):C, +1more	×

Save Cancel

Search Pages - Find an Existing Value – Saved Searches

- The Saved Searches function enables end users to save a search.
- Provides easy access to frequently used searches.

Voucher

Find an Existing Value ⊕ Add a New Value

▼ Search Criteria
Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches Choose from recent searches Saved Searches Choose from saved searches

Business Unit = FRXNO

Voucher ID begins with C

Invoice Number begins with

Invoice Date =

Short Supplier Name begins with

Supplier ID begins with DELL

Supplier Name begins with

Voucher Style =

Related Voucher begins with

Entry Status =


Voucher Source =

Incomplete Voucher =

^ Show fewer options
 Case Sensitive

2 Search Clear Save Search **3**

1

 **Edit**
Saved Searches

Manage Saved Searches × Help

Display By Newest on top

Saved Searches ⊕ Delete All

FRXNO P2P VOUCHERS: Business Unit(EQ):FRXNO,Voucher ID(BGN):C, +1more	Rename	×
CHXCO P2P VOUCHERS: Business Unit(EQ):CHXCO,Voucher ID(CT):C	Rename	×

Save Cancel

Search Pages - Find an Existing Value – Search Results

Voucher

Find an Existing Value ⊕ Add a New Value

Search Criteria
Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches Choose from recent searches Saved Searches Choose from saved searches

Business Unit =

Voucher ID begins with

Invoice Number begins with

Invoice Date =

Short Supplier Name begins with

Supplier ID begins with

Supplier Name begins with

Voucher Style =

Related Voucher begins with

Entry Status =

Voucher Source =

Incomplete Voucher =

Show fewer options
 Case Sensitive

Search Results
245 results Business Unit "CHXCO", Voucher ID "C" +1 more

Business Unit	Voucher ID	Invoice Number	Gross Invoice Amount	Payment Amount	Invoice Date	Short Supplier Name	Supplier ID	Supplier Name	Voucher Style	Related Voucher	Entry Status	Voucher Source	Incomplete Voucher	
CHXCO	C0025421	5933-03 RETENTION	3558.3	3558.3	07/31/2024	STAPLESCON-001	1007443560	Staples Construction Company Inc	Regular	(blank)	Postable	XML	Complete	>
CHXCO	C0025418	5933-03	67807.76	67807.76	07/31/2024	STAPLESCON-001	1007443560	Staples Construction Company Inc	Regular	(blank)	Postable	XML	Complete	>
CHXCO	C0025415	1913-02.0.01 RETENTION	1221.99	1221.99	07/31/2024	STAPLESCON-001	1007443560	Staples Construction Company Inc	Regular	(blank)	Postable	XML	Complete	>

In MP 6.0, **Search Result** rows are no longer displayed as hyperlinks

Hovering over a grid row now changes its color, providing users with improved visual feedback

Borderless Page Tabs

In MP 6.0, **Page Tabs** now appear borderless, with an underline indicating the selected tab

Regular Entry

Summary Related Documents Invoice Information Payments Voucher Attributes Error Summary

Business Unit CHXCO Invoice No 8011480648
 Voucher ID C0028637 Invoice Date 09/07/2024
 Voucher Style Regular Voucher
 Supplier ID 0004059364

Action Run

Payment Details

Actions	Details	Payment Status	Scheduled to Pay	Payment Reference	Remit SetID	Remit Supplier	Remitting Address	Payment Method	Gross Payment Amount	Paid Amount	Payment Currency
Actions	Details	Not Selected for Payment	10/07/2024		CHXCO	0004059364		3 CHK	291.76		USD

Voucher Line - PO Information

Save

Return to Search Previous in List Next in List Notify Refresh Add Update/Display

Summary | Related Documents | Invoice Information | Payments | Voucher Attributes | Error Summary

Process Monitor

In MP 6.0, the All option has been moved.

Process Monitor

Process List | Server List

View Process Requests

User ID: CARREGUIN | Type: | Last | 13 | Days | Refresh

Server: | Name: | All | Range | Clear

Run Status: | Distribution Status: | Save On Refresh | Report Manager | Reset

Click on the Range hyperlink to enter a Process Instance range

View Process Requests

User ID: | Type: | Last | 1 | Days | Refresh

Server: | Name: | Instance | Range | Clear | Instance From | Instance To

Run Status: | Distribution Status: | Save On Refresh | Report Manager | Reset

Process List

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	28735394		DEC20	Application Engine	ES_FEE_ROLL	CARREGUIN	01/29/2025 1:41:14PM PST	Success	Posted	Details	Actions
<input type="checkbox"/>	28735391		MP6_TXT_JAN24	PSJob	AM_PIJOB	CARREGUIN	01/24/2025 7:28:26PM PST	Success	Posted	Details	Actions

Run Control ID now appears in the grid