



Introduction to Spectrum+ Financials

User Manual

PeopleSoft Financials

Version 9.2

OCT 2015

Overview

The Board of Regents purchased the PeopleSoft Financials software in July 1997 as the new information system for the entire University System of Georgia. Georgia State University implemented the PeopleSoft Financials (version 7.0) software on July 1, 1999, and upgraded to version 7.5 on December 4, 2000. More recently, we upgraded to the web-based version 8.9 on July 1, 2009. GSU has now upgraded to the new and improved version 9.2 effective October 12, 2015. Many benefits were realized with the new upgrade of the Spectrum Plus System which include:

Tangible –

- The new financials application is WEB accessible
- Leveraged the development and training resources from BOR
- Improved Security
- Improved Workflow Model
- Better functionality and enhanced features
- New module: Grants Management
- Cost savings from decommissioned hardware
- Electronic Proposal submission and Award tracking

Intangible –

- More reliable software and hardware environment
- Realignment of GSU account and budgets with BOR
- Auto-archive process

The Office of Spectrum Systems supports and maintains the PeopleSoft Financials application (Spectrum Plus). Our office is a unit of the Finance and Administration Division of Georgia State University.

Course Objectives

- Understand Basic Spectrum Terms and Definitions
- Request Security Access
- Logon to the Spectrum System
- Navigate using the menu and navigation pages
- Search and find records
- Navigate through pages
- Enter and view data
- Clear Cache & Update Trusted Sites

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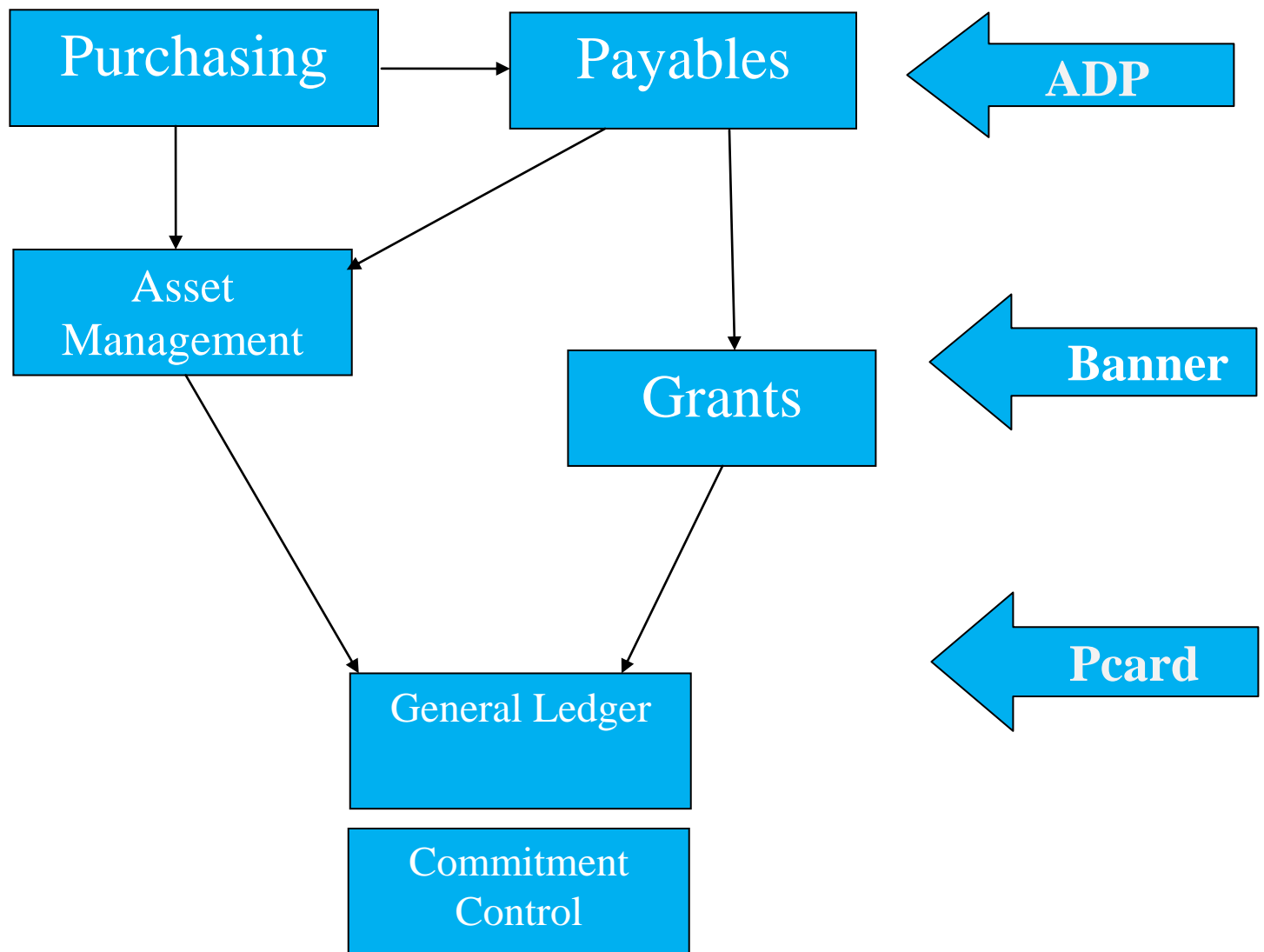
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Chapter 1 Financial Modules

The Spectrum System is comprised of 5 financial modules: General Ledger, Purchasing, Asset Management, Accounts Payable and Commitment Control.

Financial Modules

Interfaces



General Ledger

The General Ledger module is the control center of the Spectrum Financials System as it integrates and reports on information from all modules. The University's chart of accounts, budgets, journals, and actuals are all maintained through General Ledger module activities. The Spectrum System consolidated numerous business processes, as well as centralized many of the University's reporting needs. For example, the monthly and annual financial reports are based on information that is available through General Ledger reporting capabilities, which helped to eliminate shadow systems.

Purchasing

The Purchasing module is used to process purchase orders for the procurement of goods and services from suppliers external to the University, excluding purchases acquired using the PCard or Petty Cash. The Purchasing module in the Spectrum System is totally integrated with the General Ledger and Accounts Payable modules. This makes it possible for the end user to have up-to-date information at their desktop on budgets, purchase orders, and receiving and payment activities.

Asset Management

The Asset Management module was designed to help institutions maintain physical control over their organization's assets, perform complex financial accounting, enable them to plan for future asset needs, and provide a central repository for complex asset information. This module can reduce the associated maintenance, reconciliation, and data integrity problems by incorporating these functions into a single database. Assets are those items valued at or above \$5,000, and must be tracked in the AM module. Small Value Property (SVP) items are those items valued between \$3,000 and \$4,999.99. SVP items must also be tracked, but with a SVP profile.

Accounts Payable

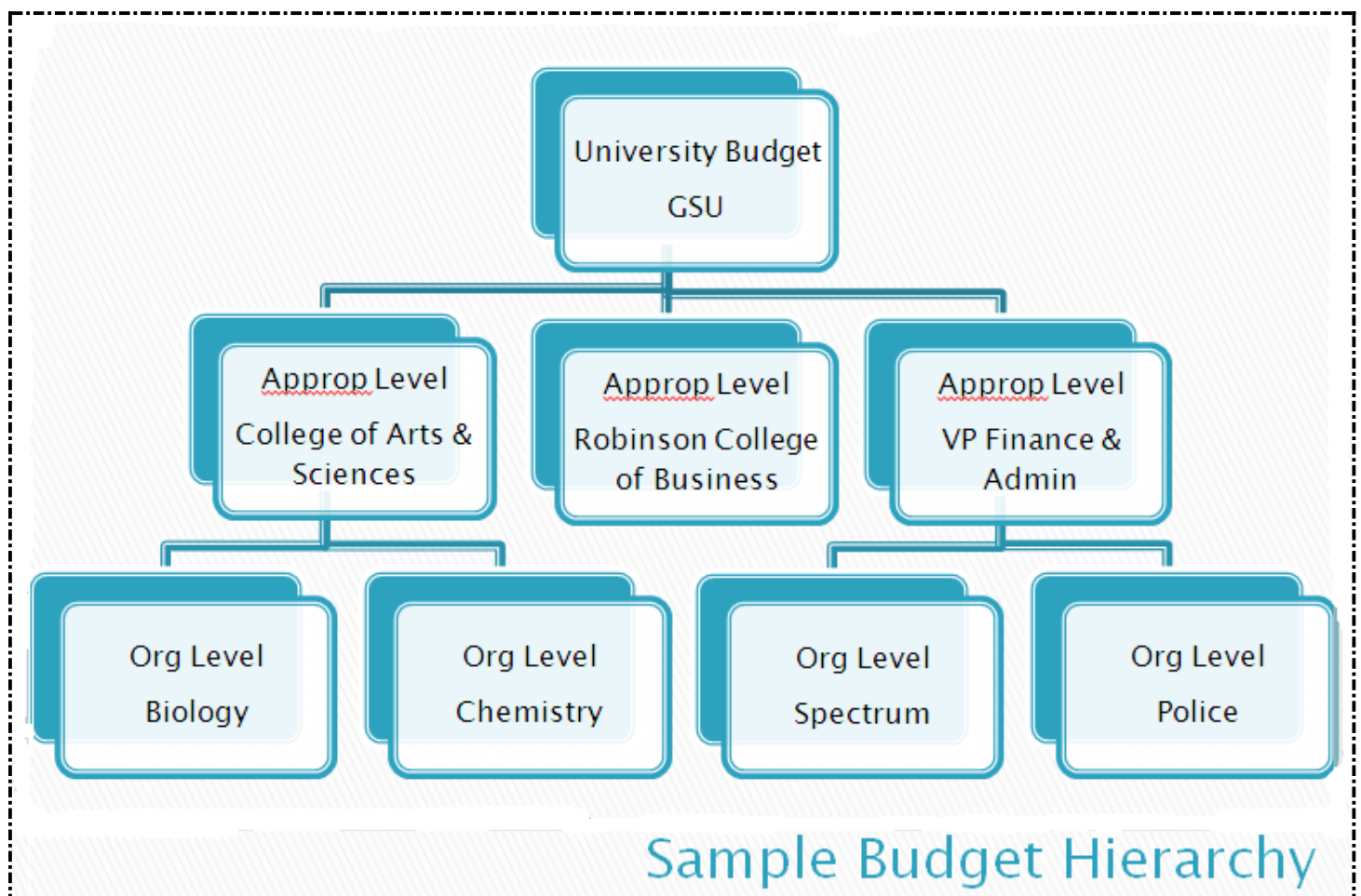
The Accounts Payable module includes processing and managing vouchers and processing payments. This module interfaces with the Asset Management and General Ledger modules. Disbursements is responsible for the printing and disbursement of checks to tender payment to vendors for goods and services purchased by the various departments. The department also tenders refund/loan checks for the Student Accounts department. These responsibilities are performed using the Accounts Payable module.

Commitment Control

Commitment Control is an integrated feature in PeopleSoft 8.9 that performs budgetary control and/or tracking of financial transactions against pre-defined budgets. By establishing and tracking commitments to spend and receive amounts, Georgia State University can readily report on and control future spending and revenue.

Chapter 2 Budget Structure

University Budgets are finalized in May of each year and submitted to the Board of Regents for review and approval. These budgets become the spending plan for the next fiscal year (July 1 – June 30). Revenues and expenditures are monitored throughout the year and the budget is amended accordingly. Department Budgets can usually be amended 4 times in a fiscal year. Budget adjustments can usually be made by your College Financial Officer (Campus Rollout Team Member). Budgets can be set to control or track with budget. The control option will not allow you to spend over what has been allocated for each budget line (Salaries, Supplies, Equipment, Travel, etc.). Appropriation Budgets are always set to control, so that college/vp units do not overspend their allocation. Track with Budget allows a department or project to overspend their budget as long as a zero dollar budget has been set up for the budget line (Salaries, Supplies, Equipment, Travel, etc.).



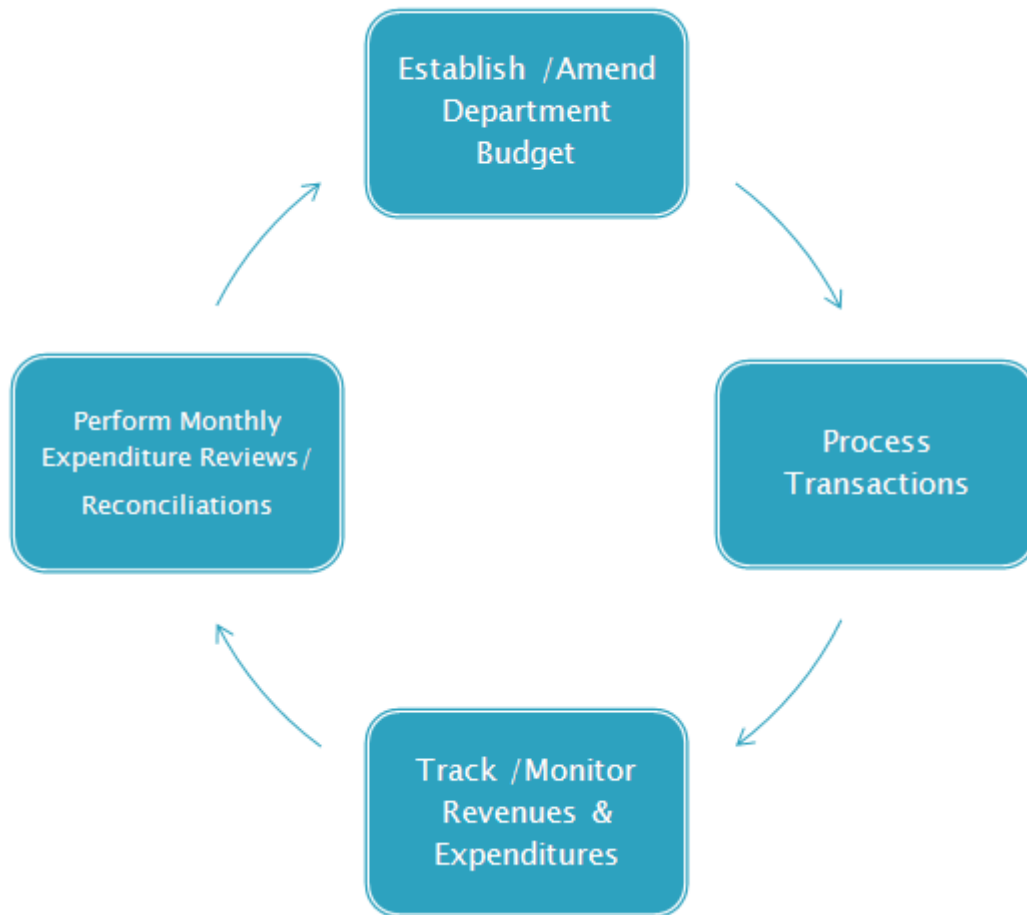


Figure 1: Department Processes

There are **5 budget ledger groups** in PeopleSoft Financials: **Appropriation, Organization, Revenue Estimate Budget, and Project/Grant.**

Appropriation Budget

An appropriation is the highest level of budgeting in PeopleSoft. An appropriation establishes a budget authorized for expenditures for a specific purpose during a specific period of time. The appropriation budget allocates monies at 2 levels; Personal Services and Non-Personal Services. Georgia State University's appropriation budget is composed of all the Colleges and VP Units. Examples of appropriation budgets are the College of Arts and Sciences, J Mack Robinson College of Business, School of Policy Studies, Vice-President for Finance and Administration, and Vice-President for Development.

Organization Budget

Each organization budget is linked to an appropriation budget. An organization budget tracks or controls spending of a budget at a lower level of detail than an appropriation. The organization budget allocates monies at detail levels such as Faculty Salaries, Staff Salaries, Graduate Assistants, Part-Time Instructors, Travel, Supplies, and/or Equipment. Departments at GSU comprise the organization budgets. Some examples include Biology, Marketing, Kinesiology and Health, Accounting Services, Registrar, Student Center, Purchasing, and Facilities Planning.

Revenue Estimate

A revenue estimate budget tracks revenues recognized and cash collected against estimated revenues. Some examples include departmental sales & services or sponsored research.

Project/Grant Budget

A project/grant budget is independent in that it is not linked to an existing appropriation or organization budget. It tracks or controls spending of a budget at a detail level. Funds are budgeted in different categories such as Faculty, Staff, Miscellaneous, Travel, Supplies, and/or Equipment. Examples of Project/Grant Budgets include Capital, Sponsored Research, and Continuing Education.

Project /Grant Overall Budget

The project header budget is the parent budget to the Project/Grant Budget. It gives high level summarized project information. (Budget – Expense – Encumbrance = Available Budget)

Detail Ledger Group

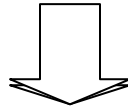
Provides the lowest level of detail information. It is used for a specific control budget and is very useful for audit tracking purposes.

Sample Budgets

University

Sample University Operating Budget

University Personal Services	\$240,874,061.00
University Non Personal Services	<u>\$179,926,194.00</u>
Total University Budget	\$420,800,255.00



College/VP Units

Sample Appropriation Budget

Fund – College/VP Unit – Class – Personal Services

Fund – College/VP Unit – Class – Non Personal Services

Example: College of Arts and Sciences

10000 11A000000 11000 P00000 \$55,930,746.00

10000 11A000000 11000 N00000 \$ 5,572,521.00

Total Appropriation \$61,503,267.00

Departments

Sample Organization Budget

Fund – Program – Department – Class – Personal Services

Fund – Program – Department – Class – Travel

Fund – Program – Department – Class – Supplies

Fund – Program – Department – Class – Equipment

Example: Biology Department

10000 1110 110600000 11000 PSS000 \$ 812,326.00

10000 1110 110600000 11000 PSF000 \$3,044,579.00

10000 1110 110600000 11000 TR0000 \$ 47,198.00

10000 1110 110600000 11000 SP0000 \$ 88,859.00

10000 1110 110600000 11000 EQ0000 \$ 20,000.00

Total Organization \$4,012,962.00

Chapter 3 Spectrum Terms and Definitions

Georgia State University operates primarily on funds appropriated by governmental bodies or donated by private entities and uses a method of accounting called fund accounting. Fund accounting is designed to separate revenues and expenses by fund to enable an institution to track and report activity for a particular purpose.

The Spectrum System chart of accounts consists of the Fund, Program, Department, Class, Project, Account, and Budget Reference. These chartfields categorize and track all financial transactions.

Fund	<p>This chartfield is the highest level of University accounting. A fund is an entity with a self-balancing set of accounts for recording assets, liabilities, fund balance, and changes in the fund balance.</p> <p>Examples of Funds:</p> <ul style="list-style-type: none">◦ 10000 State Appropriation◦ 12XXX Auxiliary◦ 13000 Student Activities◦ 14000 Continuing Education◦ 14100 Departmental Sales & Service◦ 20000 Sponsored – Restricted◦ 50000 Unexpended Plant - Lapsing																												
Department	<p>A cost center which tracks academic and administrative units within GSU’s organizational hierarchy. It is a 9-digit field. Departments begin with a prefix which identifies which College or VP unit it belongs.</p> <table><tr><th>Prefix</th><th>College/VP Unit</th><th>Department #</th><th>Department Name</th></tr><tr><td>11XXXXXXXX</td><td>Arts & Sciences</td><td>110600000</td><td>Biology</td></tr><tr><td>12XXXXXXXX</td><td>Business</td><td>120000000</td><td>RCB-Deans Office</td></tr><tr><td>16XXXXXXXX</td><td>Policy Studies</td><td>162000000</td><td>Economics</td></tr><tr><td>4XXXXXXXX</td><td>Provost</td><td>410270000</td><td>Univ Honors Program</td></tr><tr><td>900XXXXXXXX</td><td>Auxiliary Svcs</td><td>900111000</td><td>Auxiliary & Support Svcs</td></tr><tr><td>612XXXXXXXX</td><td>Finance and Admin</td><td>6122500000</td><td>Spectrum Systems</td></tr></table>	Prefix	College/VP Unit	Department #	Department Name	11XXXXXXXX	Arts & Sciences	110600000	Biology	12XXXXXXXX	Business	120000000	RCB-Deans Office	16XXXXXXXX	Policy Studies	162000000	Economics	4XXXXXXXX	Provost	410270000	Univ Honors Program	900XXXXXXXX	Auxiliary Svcs	900111000	Auxiliary & Support Svcs	612XXXXXXXX	Finance and Admin	6122500000	Spectrum Systems
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Program	<p>The program is a five-digit chartfield which classifies expenses and revenues as defined by the purpose of your unit or grant.</p> <p>Examples of Programs:</p> <ul style="list-style-type: none">◦ 11300 Instruction-Community◦ 14600 Acad Supp-Acad Admin◦ 15100 Std Svcs-Administration◦ 16200 Inst Supp-Fiscal Operations◦ 17300 OMP-Custodial Services																
Class	<p>The class is a five-digit chartfield that identifies the type of funding.</p> <p>Examples of Classes:</p> <ul style="list-style-type: none">▶ 11200 State Appropriations▶ 13000 Special Funding Initiatives▶ 14105 Lottery – ETACT▶ 41100 Depart Sales & Service-General▶ 61000 Sponsored – Federal Government▶ 61511 Federal Stimulus Funds FY2011▶ 64000 Sponsored-Private																
Project	<p>The project is a ten-digit chartfield used to identify expenditures related to a specific project or activity. GSU uses an alpha-numeric naming convention to categorize projects.</p> <table><tr><th>Project Prefix</th><th>Project Category</th><th>Project #</th><th>Project Name</th></tr><tr><td>SPXXXXXXXX</td><td>GSU Sponsored Research</td><td>SP00010008</td><td>Safe & Drug Free Schools</td></tr><tr><td>CEXXXXXXXX</td><td>Continuing Education</td><td>CE00010008</td><td>GRE Prep Course</td></tr><tr><td>FNXXXXXXXX</td><td>Capital Non-Lapsing</td><td>FN00003604</td><td>Decatur St. Pedestrian Improvement</td></tr></table>	Project Prefix	Project Category	Project #	Project Name	SPXXXXXXXX	GSU Sponsored Research	SP00010008	Safe & Drug Free Schools	CEXXXXXXXX	Continuing Education	CE00010008	GRE Prep Course	FNXXXXXXXX	Capital Non-Lapsing	FN00003604	Decatur St. Pedestrian Improvement
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FNXXXXXXXX	Capital Non-Lapsing	FN00003604	Decatur St. Pedestrian Improvement														

Account	A 6-digit chartfield which is used to capture the nature of the transaction			
	Account Prefix	Account Category	Account #	Account Description
	1XXXXXX	Asset	141000	Inventories
	2XXXXXX	Liability	211000	Accounts Payable
	3XXXXXX	Fund Equity	321100	Alloc Fund Bal-Unrestricted
	4XXXXXX	Revenue	441110	Cont Ed - Fees
	5XXXXXX	Expense-Personal Services	511100	Salaries-Regular Faculty
	6XXXXXX	Expense-Travel	640100	Travel - Employees
	7XXXXXX	Expense-Operating Supplies	714102	Books and Publications
	8XXXXXX	Expense-Equipment	843105	Equip & Furn Purch > \$4,999.99
Budget Reference	A 4-digit chartfield that represents the year from which the funds are being expended or obligated.			
Speedtype/Speedchart	<p>SpeedType/speedchart is used to represent a particular budget and is used to simplify data entry. The same values will be used for both SpeedTypes and SpeedCharts. These values, when entered into the system, will translate and automatically fill in the corresponding predefined chartfield values.</p> <p>SpeedTypes are used for journal entries, while SpeedCharts are used for vouchers, purchase orders, travel authorizations and consultant authorizations.</p>			

Examples of SpeedTypes and Pre-defined Chartfield Values:

Non-Project SpeedType – Office of Spectrum Systems		
Fund	10000	General Fund – Unrestricted
Department	612250000	Spectrum Office
Program	16200	Inst Supp-Fiscal Operations
Class	11000	Gen Opns - General
Budget Reference	2016	July 1, 2015– June 30, 2016

Project SpeedType – School-Based Bullying		
Fund	20000	GSU Sponsored - Restricted
Department	140000000	Counseling & Psychological Svc
Program	13100	Public Svc-Community Svc
Class	61400	Federal Flow Through Private
Budget Reference	2016	July 1, 2015– June 30, 2016
Project	SP00010093	School-Based Bullying
PC Bus Unit	GSUFS	GSU Financial System
Activity	PROJ	Project

Figure 2: Express Purchase Order Transaction

Distribution

SpeedChar: **SPECT**

Distributions Personalize | Find | View All | First 1 of 1 Last

Chartfields Asset Information

Dist	Percent	GL Unit	Account	Fund	Dept	Program	Class	Bud Ref	PC Bus Unit	Project
1	100.0000	GSUFS		10500	612250000	16200	11000	2016		

OK Cancel Refresh

Figure 3: Regular Voucher Entry Transaction (Project)

Invoice Lines Find | View All | First 1 of 1 Last

Line 1 ☐ Copy Down

*Distribute by: Amount

Item

Quantity

UOM

Unit Price

Line Amount: 20.00

Calculate

SpeedChar: **SP00010005**

Ship To: **CENTRAL**

Description

Packing Slip

Distribution Lines Personalize | Find | View All | First 1 of 1 Last

GL Chart Exchange Rate Statistics Assets

Copy Down	Line	Merchandise Amt	Quantity	*GL Unit	Account	Fund	Dept	Program	Class	Bud Ref	PC Bus Unit	Project	Activity
<input type="checkbox"/>	1	0.00		GSUFS		20000	110600000	12100	64000	2016	GSUF	SP00010005	PROJ

Fiscal Year

The **fiscal year** at Georgia State University begins July 1 and ends on June 30 of each year. The fiscal year spans over 2 calendar years and is named for the year it ends. For example, Fiscal Year **2016** began **July 1, 2015** and ended **June 30, 2016**. There are 12 months that make up the fiscal year. These months are called **accounting periods** and are numbered 1 through 12. July is the first month of the fiscal year and is assigned the number 1; and June is the last month of the fiscal year and is assigned the number 12.

Fiscal Year	
Month	Accounting Period
July	1
August	2
September	3
October	4
November	5
December	6
January	7
February	8
March	9
April	10
May	11
June	12

Spectrum Transactions

There are various ways that you can transact business at Georgia State University. Some of the transactions that are performed at GSU include but are not limited to the following: procurement of goods and services from vendors, payment of invoices, and reimbursement to employees, students and non-employees for travel, issuance of travel/project advances, prepayment for hotels/airfare and issuance of incentives for participations.

The methods we use to transact business are journals, regular vouchers and express purchase orders and p-cards.

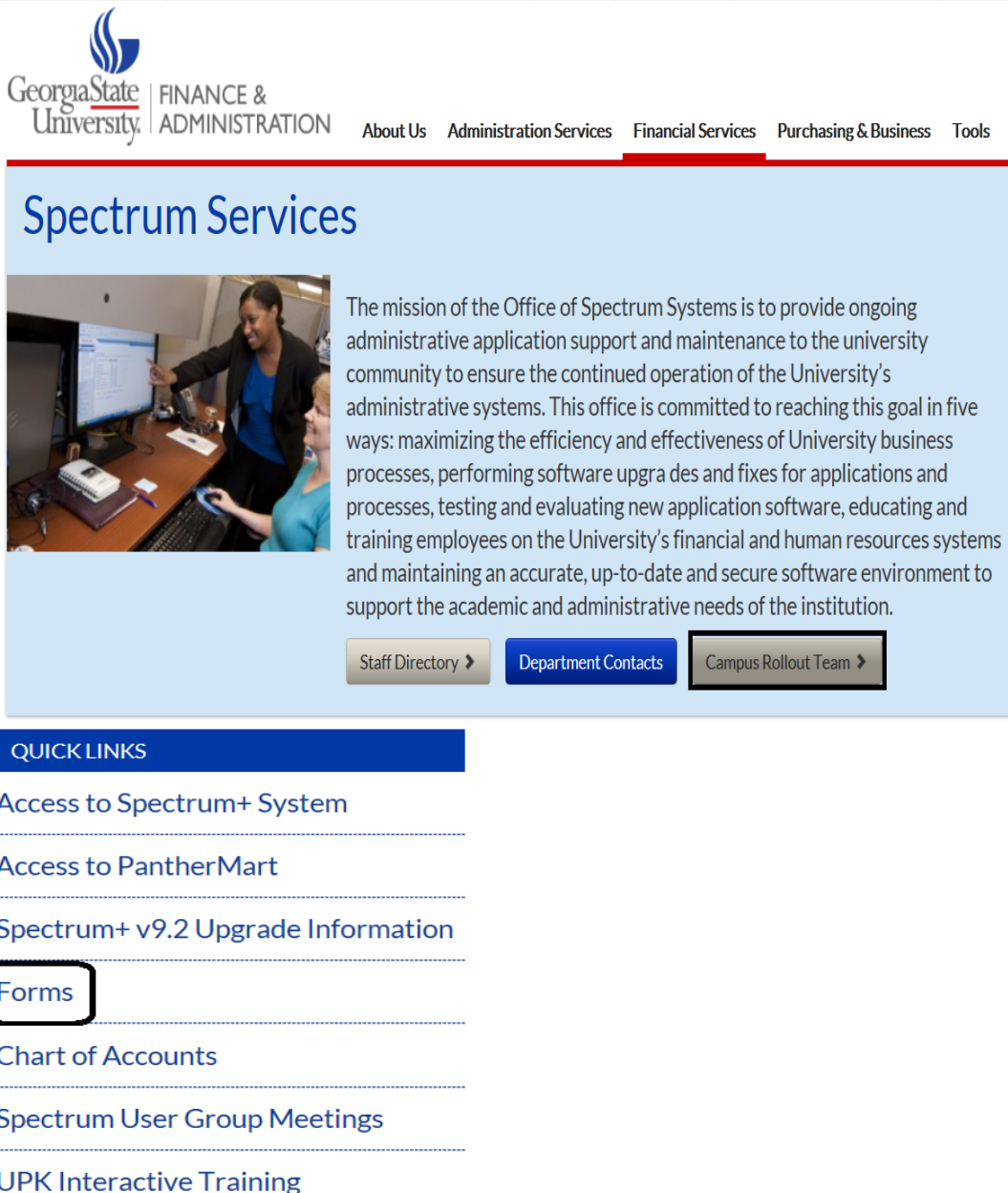
Methods Used to Process Transactions	Description
Journal	A journal is a chronological record of transactions and is the first place that transactions are recorded. Each entry records the date, the accounts affected and their reference number, and explanation of the transaction and the debit/credit effect from the accounts named. Journals are used to make corrections and adjustments to existing transactions, reallocate expenditures, transfer expenditures and record cost-transfers.
Express Purchase Order	Express Purchase Orders is used to procure goods and services that have a value greater than \$4,999.99 and in which competitive bidding is required. It is also used to purchase small value property/equipment with a value between \$3,000 and \$4,999.99.
P-Card	A p-card is a credit card issued to authorized GSU employees to purchase goods and services that have a dollar value less than \$5,000. There are exceptions that apply and employees must complete P-card training prior to being issued a P-card.
Regular Voucher	Regular Vouchers are used to pay for supplies, subscriptions, memberships, conference registrations, third party payments, consulting agreements, etc. that have a dollar value less than \$5,000. Also, it is used to generate a payment for an Express Purchase Order. Regular vouchers require supporting documentation such as an invoice, receipt, agreement or travel expense statement. Exceptions do apply to these rules.

Chapter 4 Security Access

A security request form is required to gain access to the Spectrum System. Once access is created you will login to the Spectrum system using your Campus id and Campus password.

Step 1

To apply for security access to the Spectrum System, go to the Spectrum webpage http://tools.finance.gsu.edu/browse-by-function/?gf_search=spectrumf
Next Go to Quicklinks: select Forms



Georgia State University | FINANCE & ADMINISTRATION

About Us Administration Services Financial Services Purchasing & Business Tools

Spectrum Services

The mission of the Office of Spectrum Systems is to provide ongoing administrative application support and maintenance to the university community to ensure the continued operation of the University's administrative systems. This office is committed to reaching this goal in five ways: maximizing the efficiency and effectiveness of University business processes, performing software upgrades and fixes for applications and processes, testing and evaluating new application software, educating and training employees on the University's financial and human resources systems and maintaining an accurate, up-to-date and secure software environment to support the academic and administrative needs of the institution.

Staff Directory > Department Contacts Campus Rollout Team >

QUICK LINKS

- Access to Spectrum+ System
- Access to PantherMart
- Spectrum+ v9.2 Upgrade Information
- Forms**
- Chart of Accounts
- Spectrum User Group Meetings
- UPK Interactive Training

Step 2

Select: [Spectrum Plus User Access Request Form](#) link to download form.

Step 3 Complete the Financials Systems: PeopleSoft Spectrum+/Panthermart Access Request Form



FINANCIALS SYSTEMS - PEOPLESOFT SPECTRUM+ PANTHERMART

REQUEST FOR: ☐ NEW USER ACCESS
☐ CHANGE OF ACCESS
☐ TERMINATE ALL ACCESS

Employee Name: _____

Campus ID: _____ Employee ID: _____ Panthercard #: _____

Campus Email: _____ College or VP Area: _____

Campus Phone: _____ Dept. Name and Number: _____

Financial Systems Security Access:

☒ **Inquiries / Reports / Query Viewer / PantherMart Shopper** (all users will get this access by default)

Additional access for Spectrum+:		Additional access for PantherMart:	
<input type="checkbox"/> POs & Vouchers	<input type="checkbox"/> GL Journals	<input type="checkbox"/> Requestor	<input type="checkbox"/> Receiver

☐ **Other changes requested:** _____

Financial Systems Workflow Roles (optional): **

☐ Department Approver 1 ☐ Department Approver 2
☐ Project Approver 1 ☐ Project Administrator ☐ Project Approver 2

Notes: ** If any of these boxes are checked please complete the *SpectrumWorkflowRequest.doc* for adding/changing workflow routings.

Departmental Signature of Approval: ** _____ **Date:** _____
(i.e. Business Manager, Chair, or Director)

Departmental Signature of Approval is not required by the Spectrum Office; however, it may be required by some Colleges and/or VP units.

CRT Member Signature of Approval: _____ **Date:** _____

Step 4 Email all request forms to:
Spectrum_Team@gsu.edu

Step 5	<p>Campus Roll Out Team: The security form must be signed by the CRT member responsible for your college or VP area. Spectrum will not grant access without the appropriate CRT signature for the user's area http://finance.gsu.edu/financial-services/spectrum-services/campus-rollout-team/</p> <table border="1"> <tr> <td>College of Arts and Sciences Mr. Fred Mote (404) 413-5025</td><td>Research & Sponsored Programs Mr. Gary Brennaman (404) 413-3529</td></tr> <tr> <td>Robinson College of Business Mr. Ralph Kahlan (404) 413-7010</td><td>University Library Ms. Carmen Newton (404) 413-2713</td></tr> <tr> <td>Nursing and Health Professions Mr. Anthony Roberts (404) 413-1087</td><td>Vice President for Development Mr. Dale Palmer (404) 413-3434</td></tr> <tr> <td>College of Education Mr. Matthew Gillet (404) 413-8102</td><td>Public Relations & Marketing Communications Ms. Susan Toohey Hannan (404) 413-1430</td></tr> <tr> <td>Institute of Public Health Ms. Colleen Blanchard (404) 413-1131</td><td>Information Systems and Technology Mr. Kevin Lipford (404) 413-4520</td></tr> <tr> <td>Andrew Young School of Policy Studies Ms. Denise Jenkins (404) 413-3017</td><td>Vice President for Student Affairs / Housing Mr. Jeff Walker (404) 413-1521</td></tr> <tr> <td>College of Law Mr. Christopher Hill (404) 413-9060</td><td>Auxiliary & Support Services Mr. Wayne Reed (404) 413-9500</td></tr> <tr> <td>Institute of Biomedical Sciences Ms. Pamela Kindred (404) 413-3576</td><td>Facilities Management Services Mr. Patrick Dukes (404) 413-0765</td></tr> <tr> <td>Provost/Vice President for Academic Affairs Mr. Edgar Torbert (404) 413-2572</td><td>Athletics Mr. John portland (404) 413-4006</td></tr> </table>	College of Arts and Sciences Mr. Fred Mote (404) 413-5025	Research & Sponsored Programs Mr. Gary Brennaman (404) 413-3529	Robinson College of Business Mr. Ralph Kahlan (404) 413-7010	University Library Ms. Carmen Newton (404) 413-2713	Nursing and Health Professions Mr. Anthony Roberts (404) 413-1087	Vice President for Development Mr. Dale Palmer (404) 413-3434	College of Education Mr. Matthew Gillet (404) 413-8102	Public Relations & Marketing Communications Ms. Susan Toohey Hannan (404) 413-1430	Institute of Public Health Ms. Colleen Blanchard (404) 413-1131	Information Systems and Technology Mr. Kevin Lipford (404) 413-4520	Andrew Young School of Policy Studies Ms. Denise Jenkins (404) 413-3017	Vice President for Student Affairs / Housing Mr. Jeff Walker (404) 413-1521	College of Law Mr. Christopher Hill (404) 413-9060	Auxiliary & Support Services Mr. Wayne Reed (404) 413-9500	Institute of Biomedical Sciences Ms. Pamela Kindred (404) 413-3576	Facilities Management Services Mr. Patrick Dukes (404) 413-0765	Provost/Vice President for Academic Affairs Mr. Edgar Torbert (404) 413-2572	Athletics Mr. John portland (404) 413-4006
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Step 6	Once the form is completed and all signatures are on the form, A member of the Spectrum team will complete the security setup. The security administrator will send the users an email upon completion of setup.																		
Email	<p>Employee X,</p> <p>You have been granted security access as requested in PeopleSoft Financials Spectrum+ and Panther Mart (PMREQUESTOR, PO & Voucher)</p> <p>Your User ID: CAMPUSID</p> <p>For password please use your CampusID password.</p> <p>You can access the PeopleSoft Financials Spectrum+ signin page using the following URL: https://www.spectrum.gsu.edu</p> <p>You can access the Panthermart signin page using the following URL: www.panthermart.gsu.edu</p> <p>If you have problems with the CampusID password, please contact the Help Desk at 404-413-4357. https://campusid.gsu.edu/faq.cfm</p>																		

Training and Quick Reference Guides can be found here:
<http://finance.gsu.edu/financial-services/spectrum-services/>

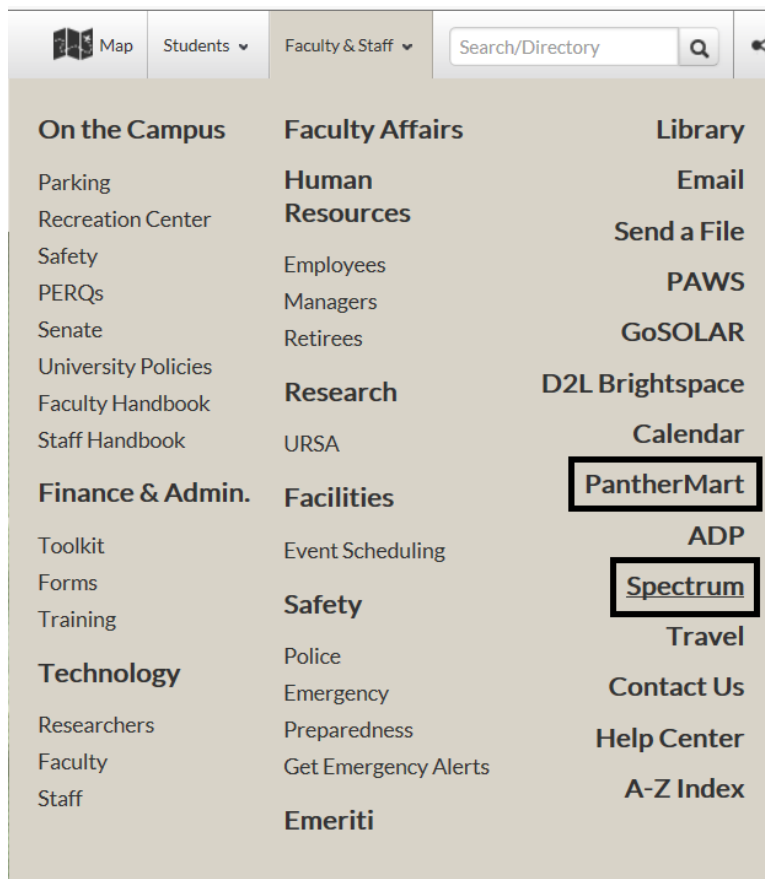
Please make sure that you update your browser settings as described in documents named "Disabling Pop-up Blockers" and "Updating your Trusted Sites".

Chapter 5 Logging into the Spectrum+ System

Step 1

Log into PeopleSoft Financials using your Campus ID/Campus password. You can use Profile Manager, <http://profilemanager.gsu.edu>, to look up your Campus ID and change your Campus ID password. You can also contact help@gsu.edu.

You may access the system by way of the GSU homepage: <http://www.gsu.edu/>



The following are additional links to access spectrum:
<http://finance.gsu.edu/financial-services/spectrum-services/>
<https://www.f92prod.spectrum.gsu.edu/psp/FPROD/?cmd=login>

Step 2

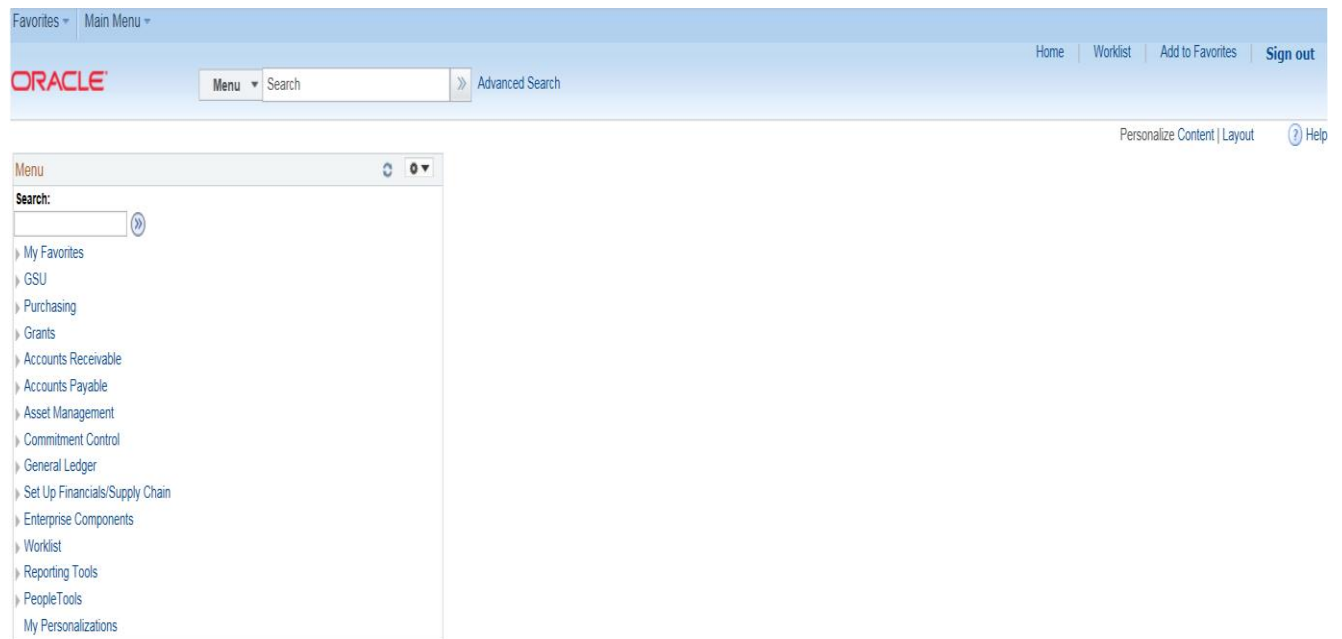
Once you access the system the following screen will appear. Type your Campus ID and Campus Password and press the Sign In button.



The screenshot shows the login interface for the Georgia State University Spectrum+ Financial System. At the top, there is a blue header with the Georgia State University logo and the text "Spectrum+ Financial System". Below the header, the login fields are centered. The "User ID" field contains the text "CAMPUSID". The "Password" field is masked with ten dots and has a small upward arrow icon to its right. Below the password field is a dark grey "Sign In" button.

Step 3

The Home Page for PeopleSoft Financials appears, if your User ID and Password were entered correctly.



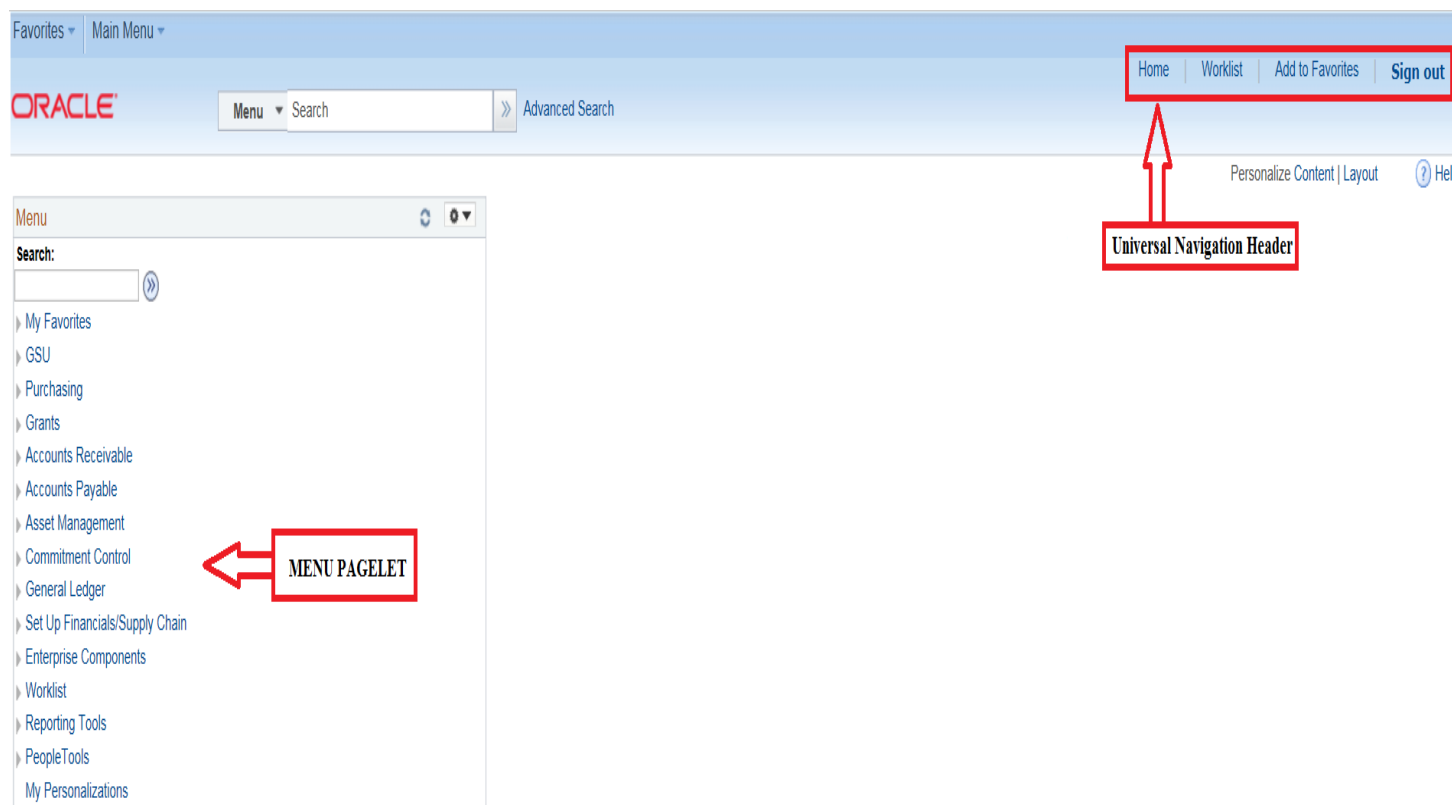
The screenshot displays the home page of the PeopleSoft Financials system. At the top, there is a navigation bar with "Favorites" and "Main Menu" dropdowns on the left, and "Home", "Worklist", "Add to Favorites", and "Sign out" links on the right. The "ORACLE" logo is on the left, and a search bar with a "Menu" dropdown and "Advanced Search" link is in the center. Below the navigation bar, there is a "Menu" panel on the left with a search field and a list of menu items: "My Favorites", "GSU", "Purchasing", "Grants", "Accounts Receivable", "Accounts Payable", "Asset Management", "Commitment Control", "General Ledger", "Set Up Financials/Supply Chain", "Enterprise Components", "Worklist", "Reporting Tools", "PeopleTools", and "My Personalizations". On the right side of the page, there are links for "Personalize Content", "Layout", and "Help".

Chapter 6 PeopleSoft Home Page

Using the Universal Navigation Header

The universal navigation header is located at the top of your PeopleSoft Internet Architecture page and remains static as you navigate through the pages. The navigation header contains the following links: Home (homepage), Worklist, Add to Favorites and Sign out.

Home	Returns you to your homepage, found on the universal navigation header.
Worklist	The worklist is an organized list of work items (journals, vouchers & purchase orders) awaiting an action to be taken (approve, recycle, reject). The worklist page provides summary information about all items in your personal worklist. This page also provides links enabling you to view additional details about the work, navigate to pages where you can perform the indicated work, and reassign work items
Add to Favorites	Favorites allow you to create your own list of bookmarks to components and transaction pages. Once you add a favorite, it is maintained under the My Favorites folder in the menu. Expand the My Favorites folder and click the hyperlink you want to view.
Sign out	Select this button to log off from the application and return to the sign on page.



Pagebar

Just below the universal navigation header sits the pagebar, which is a series of links and buttons. The availability of these options is controlled by the application developer. All options may not be available for each component. The pagebar contains the following links:

- **New Window:** Opens a new browser window identical to the current open window. The New Window link in the Pagebar opens a new browser window or child window that displays the search page for the current component. From this window, you can view or enter new data. You can open as many child windows as needed by clicking the New Window link.
- **Help:** Opens the online PeopleBooks help for the specific transaction page that is displayed.

[New Window](#) | [Help](#) |

Chapter 7 Using the Menu Pagelet and Menu Bar Breadcrumbs

The menu pagelet is located on the left side of screen and is comprised of Folders, Sub-folders and components. The menu provides a structure to find components and pages to manage your financial data. Expanding and collapsing folders on the menu pagelet are the primary means of getting around in your PeopleSoft application. Click the folder name to expand (open) the folder and display the contents. Click the folder name again to collapse (close) the folder and hide the contents.

Folders – Represents a set of functions. When you select a folder, the folder is expanded to list the menus that are a part of that group. Some common menu items are Accounts Payables, Vendors, Purchasing, Commitment Control, Grants, etc.

Sub-Folder – A group of business processes.

Component – One or more pages within the same window.

Pages – A component may contain one or more pages.

Example of an expanded folder:

Set Up Financials/Supply Chain > Common Definitions > Design ChartFields > Reports > ChartField Report

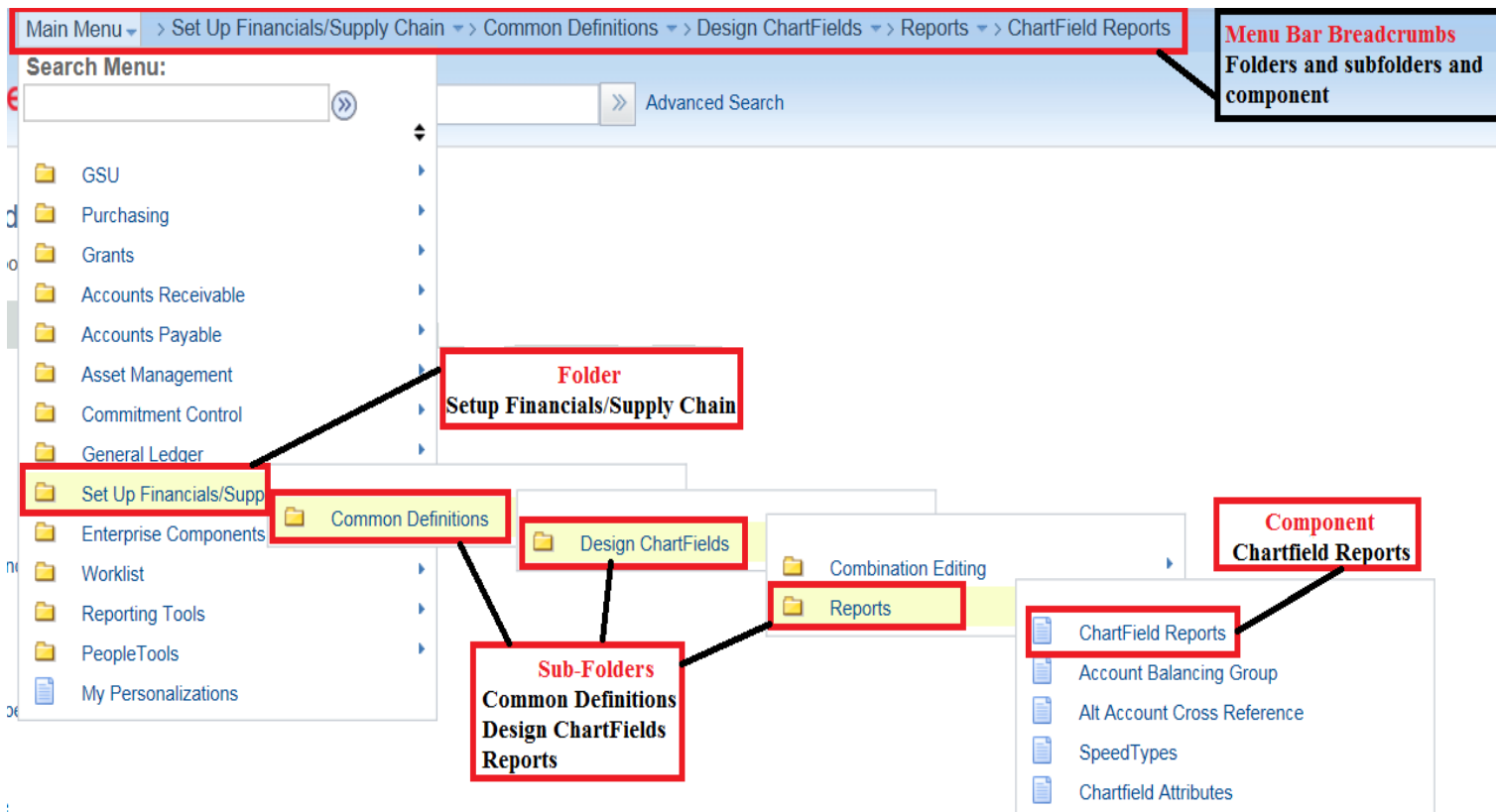


Figure 4: Menu Pagelet

Component is the lowest level in the hierarchy, is highlighted and underlined. Searches, views, and data entry occur on “pages.”

In addition to the menu pagelet, you can also navigate using the **Menu Bar Breadcrumbs**. These navigation pages provide a user-friendly navigation tool at the top of the page in the form of selection-driven pages that provide intuitive access to sub-folders and components needed to complete your business processes. The breadcrumbs will appear when you click on a folder on the menu such as Setup Financials/Supply Chain. Next, click on the sub-folders, then the component.

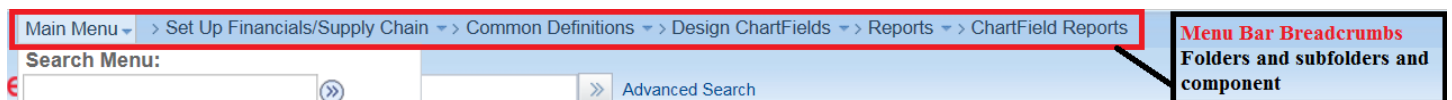


Figure 5: Menu Bar Breadcrumbs

When you access the component, a search page or corresponding page will appear to the right of the menu pagelet.

Chapter 8 Using Search

A search page is displayed before you access a component. The Business Unit will default as “GSUFS” on most search pages.

Fields that uniquely identify data are referred to as **key fields**

You access the Search page by selecting the ‘**Find an Existing Value**’ tab. search pages: **Advanced and Basic**. **Basic search** allows you to search using one field, such as business unit, voucher ID or Vendor Name. Advanced search allows you to search using multiple fields. When you select a component, the advanced search page will automatically appear. There is a Basic Search link at the bottom of page which allows you to select the Basic Search page. **Advanced Search** provides a variety of search criteria options. This page is very helpful when you are researching a problem and do not have all of the specific details to perform a basic search. Based on what you enter, the system uses the search record to present a list of possible matches or, if there is only one match, the page you requested. Often, you don’t have all the needed information. Enter a full value or partial value for any search field which includes wildcards. Click the Search button. To add a new value you will select the ‘**Add a New Value tab**’. This allows you to create a new transaction.

Voucher

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

Find an Existing Value | Keyword Search | Add a New Value

Search Criteria

Business Unit:	=	GSUFS
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:	=	

☐ Case Sensitive

Search | Clear | **Basic Search** | Save Search Criteria

Voucher

Find an Existing Value | Keyword Search | **Add a New Value**

Business Unit:	GSUFS
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
Misc Charge Amount:	0.00
PO Business Unit:	
PO Number:	
Estimated No. of Invoice Lines:	1

Add

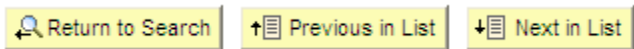
Find an Existing Value | Keyword Search | Add a New Value

Find an Existing Value | Keyword Search | Add a New Value

Figure 6: Advance Search & Add a New Value

Search List Navigation

When accessing a record using a search, typically you will have multiple responses that satisfy the search. In this case, the list buttons become active. The record selected appears in the panel, but the list buttons allow you to scroll through the full list without having to perform another search. This is an effective way to view or update a group of records that match specific or partial search criteria.

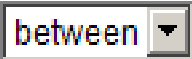

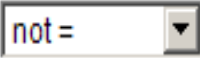




Using Operators

Operators enable you to perform searches on limited amounts of information, such as first letters for vendor, company, or requester names. The following operators are available and the examples below are from the Vendor component – Name 1 field.

Note. If you use the IN operator to search for multiple items, separated by commas, and you enter a space after the comma, the search automatically strips out that space. (For example, if you search for *1000, 1001*, the search assumes that you are searching for *1000, 1001*. If you actually do want to search for a character string that contains a space, include that string within double quotes, like this: *1000," 1001"*).

Button/Action	Definition
	This drop down button is a search wild card. Allows you to search for values that begin with the value you enter i.e. 7%
	This drop down button is a search wild card. Allows you to search for values that contain the value you enter. i.e %7%

	<p>This drop down button is a search wild card. Allows you to search between two different values that contain the value you enter. i.e all results between 712 and 714</p>
	<p>This drop down button is a search wild card. Allows you to search for values that equal to the exact value entered. i.e all results with 7</p>
	<p>This drop down button is a search wild card. Allows you to search for values that do not have the value entered. i.e results do not have a 7 in the field.</p>
	<p>This drop down button is a search wild card. Allows you to search for criteria that are “In List”. i.e. list of values available to select</p>
	<p>This drop down button is a search wild card. Allows you to search for criteria that are “Less/Greater than or equal to value.</p>

Using Wildcards

The Spectrum System uses wildcard features when searching for data in character fields. These wildcards can be helpful in finding the exact information you want to process. The following are two supported standard wildcard features.

% (percent sign) Match one or more characters.

_ (underscore) Match any single character.

Wildcards only work with the 'begins with' and 'contains' operators.

For example, if you enter *F%00*, as the course code, the system returns a list of courses whose codes begin with F and end with 00, as you can see here.

Examples of Wildcard Searches: Department number begins with 612

▼ Search Criteria

SetID: =

GSUFS

Department: begins with

612

Description: begins with

☐ Include History ☐ Correct History ☐ Case Sensitive

Search

Clear

Basic Search

Save Search Criteria

Search Results

View All First 1-12 of 12 Last

SetID	Department	Description	Manager Name
GSUFS	612000000	VP for Finance & Administratio	(blank)
GSUFS	612000001	Univ FF Admin - State Approps	(blank)
GSUFS	612000003	Univ FF Admin - SFI	(blank)
GSUFS	612100000	Allocation Management Dept	(blank)
GSUFS	612110000	Std Support Holding Acct	(blank)
GSUFS	612150000	University Treasurer	(blank)
GSUFS	612200000	Budget & Planning	(blank)
GSUFS	612250000	Spectrum Office	(blank)
GSUFS	612300000	Org Dev & Consulting Svcs	(blank)
GSUFS	612355000	Mgt & Staff Dev Svcs - DS&S	(blank)
GSUFS	612999999	VP Finance & Admin-Fringe Bene	(blank)
GSUFS	612A00000	VPFA - Appropriation Budget	(blank)

Search on Appropriation Budgets. The first 2 or 3 numbers in the department number identify the College or VP unit and the next character 'A' tells you that it is an appropriation budget.

Look Up Dept

SetID: GSUFS

Department: begins with

[Look Up](#) [Clear](#) [Cancel](#) [Basic Lookup](#)

Search Results

View All First 1-17 of 17

Department	Description	Manager Name
11A000000	COAS - Appropriation Budget	(blank)
12A000000	RCB - Appropriation Budget	(blank)
14A000000	COE - Appropriation Budget	(blank)
15A000000	CHHS - Appropriation Budget	(blank)
16A000000	SPS - Appropriation Budget	(blank)
17A000000	Honors College	(blank)
18A000000	Law - Appropriation Budget	(blank)
41A000000	Provost/VPAA - Appropriation B	(blank)
45A000000	IS&T - Appropriation Budget	(blank)
51A000000	VP&A - Appropriation Budget	(blank)
56A000000	Regents Global Ctr-Approp Bgt	(blank)
61A000000	President - Appropriation Budo	(blank)
64A000000	Univ Central Expend-Approp Bgt	(blank)
81A000000	Scholarships/Fellow-Approp Bgt	(blank)

Look Up Dept

SetID: GSUFS

Department: begins with


[Look Up](#) [Clear](#) [Cancel](#) [Basic Lookup](#)

Search Results

View All First 1-7 of 7

Department	Description	Manager Name
214A00000	VPR - Appropriation Budget	(blank)
432A00000	VPD - Appropriation Budget	(blank)
435A00000	VP for Univ Relations - Approp	(blank)
563A00000	GA Cancer Coalition-Approp Bgt	(blank)
612A00000	VPFA - Appropriation Budget	(blank)

Search Look-up Features

The magnifying glass icon  indicates a search box is available to look up the value for this field. A look-up feature is provided when the value is a combination of code/description information stored in separate tables. PeopleSoft uses a drop down box for single pre-defined values. Click on the icon to open. The type of search available depends on the number of valid values for this field. PeopleSoft displays the entire list (View All), or you can enter specific search criteria.

Vendor

Look Up Short Vendor Name

SetID: GSUFS

Short Vendor Name: begins with

Name 1: begins with

Vendor ID: begins with

[Look Up](#) [Clear](#) [Cancel](#) [Basic Lookup](#)

Search Results

Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.
[View All](#) First 1-100 of 300 Last

Short Vendor Name	Name 1	Vendor ID
001165626-001	PATELJITAN	001165626
1001MARQUE-001	1001 MARQUETTE, LLC	0000007169
100BLACKME-002	100 BLACK MEN OF MACON-MIDDLE GA	582221295
100BLACKME-003	100 BLACK MEN OF ATLANTA INCORPORATED	0000008030
100MIDTOWN-001	100 MIDTOWN	300258518
10100INTER-001	10100 INTERNATIONAL DRIVE OWNER, LLC	0000018669
1030MSLLC-001	1030MS LLC	582395512
103WEST-001	103 WEST	581800413
10KWIZARDT-001	10K WIZARD TECHNOLOGY, LLC	752809325
1105MEDIAI-001	1105 MEDIA INCORPORATED	0000013935
1157DESIGN-001	1157 DESIGN CONCEPTS, LLC	0000019520

Figure 7: View All

Look Up Short Vendor Name

SetID: GSUFS

Short Vendor Name: begins with OFFICE

Name 1: begins with

Vendor ID: begins with

[Look Up](#) [Clear](#) [Cancel](#) [Basic Lookup](#)

Search Results

[View All](#) First 1-18 of 18 Last

Short Vendor Name	Name 1	Vendor ID
OFFICECHAI-001	OFFICE CHAIRS UNLIMITED	0000026821
OFFICECOMM-001	OFFICE COMMISSIONER OF INSURANCE	0000023725
OFFICEDEPO-001	OFFICE DEPOT	592663954
OFFICEFURN-004	OFFICE FURNITURE EXPO	581474923
OFFICEFURN-005	OFFICE FURN INSTALLATION SPECIALISTS INC	582460051
OFFICEFURN-006	OFFICE FURNITURE TODAY, INC.	0000017550
OFFICEIMAG-001	OFFICE IMAGES INCORPORATEDE	043085390
OFFICEIMAG-002	OFFICE IMAGES, INC.	0000017213
OFFICEINTE-003	OFFICE INTERIORS, INC.	201177973
OFFICEMAXC-001	OFFICEMAX CONTRACT INCCORPORATED	820477390
OFFICEMAXN-001	OFFICE MAX NORTH AMERICA INCORPORATED	341573735
OFFICEMOVI-001	OFFICE MOVING SYSTEMS, INC.	581745024
OFFICEOPTH-001	OFFICE OF THE CHAPTER 13 TRUSTEE	0000005050
OFFICEQUAR-001	OFFICE QUARTERS.COM	161514834

Figure 8: Specific Search Criteria

Search Results

The search function can retrieve up to 300 entries from the database, displaying a number of results at a time in the Search Results grid. Use your browser's scroll bar to view all listings on the current page. If the list is subdivided, click the right arrow above the grid to view the next set of listings.

Vendor Information

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

Find an Existing Value Add a New Value

SetID:

=

GSUFS

Vendor ID:

begins with

Persistence:

=

Regular

Short Vendor Name:

begins with

Our Customer Number:

begins with

Name 1:

begins with

☐ Include History ☐ Correct History ☐ Case Sensitive

Search

Clear

Basic Search

Save Search Criteria

Search Results

Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.

[View All](#) First 1-100 of 300 Last

SetID	Vendor ID	Short Vendor Name	Our Customer Number	Name 1	Persistence
GSUFS	0000000001	GSUDEFAULT-001	(blank)	GSU DEFAULT - SELECT NEW VENDOR	Regular
GSUFS	0000000018	FAMILYSUPP-001	(blank)	Family Support Registry (FSR)	Regular
GSUFS	0000000038	MARYIDATO-001	(blank)	MARY IDA TOWNSON, CHAPTER 13 TRUSTEE	Regular

If your search retrieves more than the maximum 300 listings, the Search Results grid indicates this by displaying the number of results in the grid header. Attempt to narrow your search in another way if you cannot retrieve the data you need on the first attempt.

When you access a page, notice that the key fields from the search page appear as the uppermost display-only fields on the page, most often just below the tabs. The Advanced Search allows you to select different operands (directions) for your search criteria. Select an operand from the drop down box to help narrow your search.

Georgia State University |

Introduction To Spectrum+ (PeopleSoft Financials)

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Sorting Search Results

You can sort your search results to display them in **ascending or descending** order. Simply click on the white column heading in the column you wish to sort and PeopleSoft sorts the search results for you.

Example:

Before sorting, the results below are in order by Vendor ID

Search Results					
Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.					
View All			First 1-100 of 300 Last		
SetID	Vendor ID	Short Vendor Name	Our Customer Number	Name 1	Persistence
GSUFS	0000000001	GSUDEFAULT-001	(blank)	GSU DEFAULT - SELECT NEW VENDOR	Regular
GSUFS	0000000018	FAMILYSUPP-001	(blank)	Family Support Registry (FSR)	Regular
GSUFS	0000000038	MARYIDATO-001	(blank)	MARY IDA TOWNSON, CHAPTER 13 TRUSTEE	Regular
GSUFS	0000000046	ISESCORPOR-001	(blank)	ISES CORPORATION	Regular
GSUFS	0000000222	MEDCO-002	(blank)	MEDCO Company	Regular

After sorting by Name 1 field (by clicking on the Name 1 column heading), the results appear in alphabetical order of the Name 1 field.

Search Results					
Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.					
View All			First 1-100 of 300 Last		
SetID	Vendor ID	Short Vendor Name	Our Customer Number	Name 1	Persistence
GSUFS	0000005262	ACSSUPPORT-001	(blank)	ACS SUPPORT	Regular
GSUFS	0000006947	ADAMSELLA-002	(blank)	ADAMS, ELLA	Regular
GSUFS	0000007511	ADAMSJUANI-001	(blank)	ADAMS, JUANITA J	Regular
GSUFS	0000009169	ADAMSVICTO-001	(blank)	ADAMS, VICTORIA J.	Regular
GSUFS	0000008363	ADELMANJEF-002	(blank)	ADELMAN, JEFF	Regular

Saving Search Criteria

You can save the specifics of your search using **Save Search Criteria**. Click the link and you'll be able to give the search a name, review the included values, and save your search. Later on, the **Use Saved Search** dropdown list will appear so that you can select a previously saved search. Once a search is saved, that specific search record is available for use in other search pages that use the same search record. You can remove any saved searches on the **Delete Saved Searches** page.

Chapter 9 Accessing and Navigating Within Pages

Components consist of several related pages within the same window. Typically, significant pages such as those containing required fields come early in the page order. As you finish with one page, you can select the folder tab of another page to open it. You can think of this as leafing through several pages of a single form. Alternatively, you can click the links at the bottom of each page in the component to move to other pages within the component instead of clicking on the page tabs.

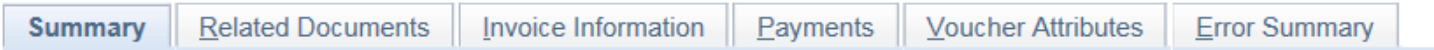


Figure 9: Pages in a Component

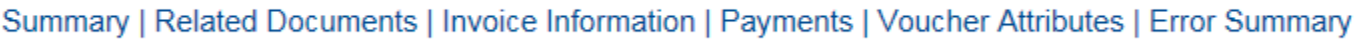
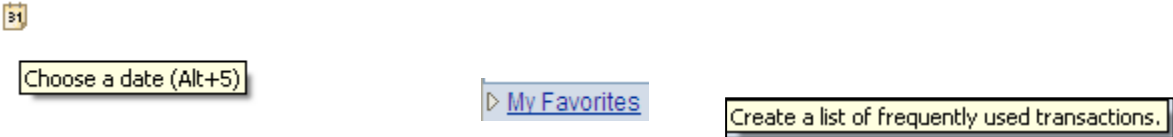


Figure 10: Page Links in a Component

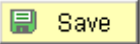
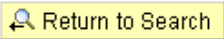
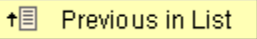
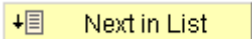
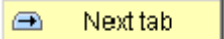
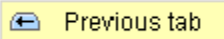
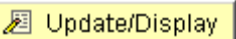
Tool Tips



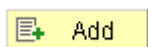
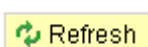
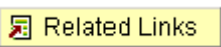
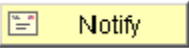
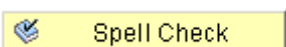
Tool tips are pop-up text messages that appear when your mouse pointer hovers over a button or link. Sometimes called hover text, tool tips display additional information about the action that the button or link performs. Typically, tool tips display what a button or link will do and may list its keyboard hot key, if applicable.



Using the Toolbar

The toolbar appears at the bottom of most pages. It can include search list navigation buttons, page navigation buttons, and page action buttons; it changes depending on the type of page that is active or the settings that the developer has put into place for a particular transaction. Not all buttons shown in the following table appear on every page. Likewise, some buttons may be unavailable for selection.

Button/Action	Definition
 Save	Click to send the information that you have entered on the page to the database. You generally save when you come to the end of a component. The Save button updates the data for all pages in a component. When activated, the system displays the saved message in the upper-right corner of the page.
 Return to Search	Click to return to the search page.
 Previous in List	Displays the data for the previous data row in your search results grid. This button is unavailable if you did not select the data row from the search results grid, if there was only one row in the grid, or if the data that appears is the first row in the grid.
 Next in List	Displays the information for the next data row in your search results grid. This button is unavailable if you did not select the data row from a search results grid, if there was only one row in the grid, or if the data that appears is the last row in the grid.
 Next tab	Displays the next page in the current component. If you are in the last page of the component, this button is unavailable.
 Previous tab	Displays the previous page in the current component. If you are in the first page of the component, this button is unavailable.
 Update/Display	Click to access existing rows of data in the database. If data is effective-dated, only current and future rows appear.

	Click to display all rows of data: current, future, and history.
	Click to access existing rows of data in the database and display all effective-dated rows. Enables you to update all rows, including history rows. Only a few people have security access to correct history.
	Click to add a row of data to the database for the current transaction.
	Click to force a trip to the server, validating any data that has been entered and processing any deferred PeopleCode changes.
	Displays when several pages are related to the current page. Click to access a new page containing a list of related page links.
	Click to open the Send Notification page, where you can specify names, email addresses, or worklists to which to send notifications.
	Click to activate the spell check for all spell check enabled fields on the page. Each field is checked individually. As each field is checked, processing continues to the next field, displaying the spell check page if there are errors. If there are no errors, the <i>No misspellings found</i> message appears.

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

Business Unit GSUFS
Voucher ID PT001452
Voucher Style Regular
Supplier Name RAININ INSTRUMENT, LLC
LOCKBOX NO. 13505
NEWARK, NJ 07188-0505
Entry Status Postable
Match Status No Match
Approval Status Approved
Post Status Posted
Budget Status Valid
Budget Misc Status Valid
*View Related Payment Inquiry Go

Invoice Date 08/18/2015
Invoice No Test081815
Invoice Total 100.06 USD
Pay Terms Due Now
Voucher Source XML Invoices
Origin
Created On 08/18/2015 4:36PM
Created By JWILLIAMS239
Last Update 08/18/2015 4:36PM
Modified By GSUBATCH
ERS Type Not Applicable
Close Status Open

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

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

Page Tabs
Navigate within a component

Page Links
Same as the page tabs in link form

Page Toolbar
Toggle between different search results

Keyboard Shortcuts

This section provides an overview of keyboard shortcuts and discusses how to:

- Use hot keys.
- Use access keys.

Understanding Keyboard Shortcuts

Working in a browser-based environment can often be mouse intensive. However, PeopleSoft offers keyboard navigation alternatives to using the mouse. These shortcuts are classified into two categories: hot keys and access keys.

Using Hot Keys

Hot keys perform immediate actions. When you press one, the designated action occurs. Note that several hot keys perform different functions depending on the page that you are on, such as a transaction page or a search page.

ALT+1	Saves a page in a transaction. Moves to the Search or Add button on a search or look up page. Moves to the OK button on a secondary page.
ALT+2	Returns to the search page from the transaction page.
ALT+3	View the next row in the list when the button is active.
ALT+4	View the previous row the in list when the button is active.
ALT+5	Accesses the Look Up page. Opens the calendar prompt.
ALT+6	Opens the pop-up window on a page.
ALT+7	Inserts a row in a grid or scroll area.
ALT+8	Deletes a row in a grid or scroll area.
ALT+0	When in Expert Entry mode, activates the Refresh button, which validates the data entered on the page.
ALT+ .	View the next set of rows in a grid or scroll area.
ALT+ ,	View a previous set of rows in a grid or scroll area.
ALT+ /	Finds data in a grid or scroll area.
ALT+ ‘	View all rows of data in a grid, scroll area, or search page results list.
ALT+ \	Toggles between Add a New Value and Find an Existing Value on a search page.
CTRL+ J	Displays the system information page.
CTRL+ K	When on a search or transaction page, accesses a page with a list of keyboard navigation

	shortcuts using hot keys and access keys.
CTRL+ Y	Toggles the menu pagelet between collapse and expand.
CTRL+TAB	Toggles the focus through the frame set.
ENTER	Activates the OK button, where appropriate. On a search page, activates the Search button. On a look up page, activates the lookup button.
ESC	Activates the Cancel button, where appropriate.

View a printable list of these shortcuts while online, press **CTRL+K** while on a search or transaction page.

Using Access Keys

Access keys move the focus of your cursor to a particular button on a page, at which point you can press ENTER to carry out the command. This is equivalent to clicking the appropriate button.

The following table outlines the shortcuts that you can use in place of clicking the equivalent action button. After pressing the desired key combination, you must press ENTER to carry out the action. For example, to save a page press ALT+1 followed by ENTER. Note that some access keys have multiple actions assigned to them, and the usage depends on the currently active page.

You can also use access keys for page tabs to help you move between pages in a component. Identify these access keys by noting the underlined letter in the page tab name. To access a page, press ALT plus the underlined letter, and then press ENTER.


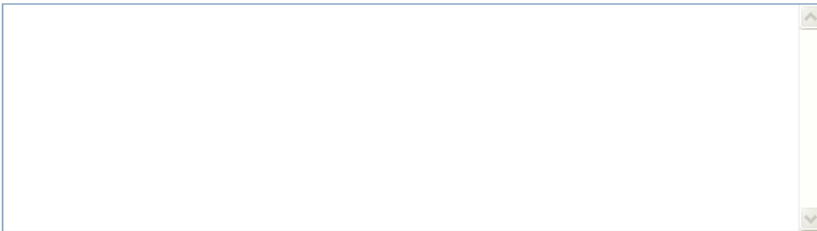
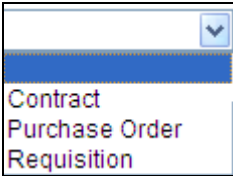
ALT+9	Accesses the Help line.
ALT+ \	Toggles between Update/Display, Include History, and Correct History action modes on the toolbar on a transaction page.
CTRL+Z	Accesses the menu search box.

Menu Pagelet Access Keys

Navigate between menus by pressing **CTRL+Z**, which moves the focus of your cursor to the menu pagelet. From the menu, press **TAB** (or **SHIFT+TAB** for reverse direction) to navigate through the menu.








Types of Page Elements

The following are all different types of data entry fields.

Name	Function
Edit Box	<p>The size of the edit box and the number of characters you can enter are determined by the length of the associated database field</p> 
Long Edit Box	<p>Long, often wide, rectangular boxes are for long text items, such as comments. Long edit boxes are used for variable-length alphanumeric fields; the length of the field is determined by its contents</p> <p>Voucher Comments</p> 
DropDown List Box	
Look up page	<p>The lookup page allows you to search for detailed information about a particular field.</p> <p>Look Up Vendor ID</p> <p>SetID: GSUFS</p> <p>Vendor ID: <input type="text" value="begins with"/></p> <p>Short Vendor Name: <input type="text" value="begins with"/></p> <p><input type="button" value="Look Up"/> <input type="button" value="Clear"/> <input type="button" value="Cancel"/> Basic Lookup</p>

Chapter 10 Using Grids

Grids are areas of a component that have rows and columns similar to an Excel spreadsheet. The following table describes the buttons and links that might appear on your grid or scroll area.

Grid Buttons & Links	Descriptions
Personalize	Changes the format of the grid. Allows you to sort by column and reorder, hide and freeze columns
Find	Click to find a row of data containing a specified search string.
View All	Displays all the rows of data on the page. It will not display all rows of data if the amount of rows exceeds 100. The grid will only display 100 rows on the page at one time.
View 100	If there are more than 100 rows of data, the 'View 100' link will be available. This will display the first 100 rows of data
	(Download) Click to display a new browser window, showing the contents of the grid in a spreadsheet-like format.
First	Displays the first row or set of rows of data (up to 100 rows)
	(Show Previous Row) Click to display the previous row or set of rows of data.
23-123 of 200	Displays what rows are currently showing on the grid
	Click to access the last row or set of rows of data.
Details Ship To/Due Date	Each folder tab links to a specific page within the Grid
	(Show All Columns) In a tabbed grid only, click to expand grid columns to the right so that tabs are no longer needed.
	(Show Tabs) In a tabbed grid only, click to return the expanded grid to its tabbed state.
	Adds a row or multiple rows
	Deletes a row
Note. The Show Next Row and Show Previous Row buttons are disabled if you are viewing all rows of data.	




Search Results									
Personalize Find View 100   First 1-100 of 14745 Last									
Voucher Details		Supplier Information							
Business Unit	Voucher ID	Invoice Number	Invoice Date	Voucher Style	Voucher Source	Entry Status	Incomplete Voucher	Gross Invoice Amount	Transaction Currency
GSUFS	01218280	6038517820771755	06/10/2009	Regular	Online	Postable	<input type="checkbox"/>	190.01 USD	
GSUFS	01220343	3120388899	06/02/2009	Regular	Online	Postable	<input type="checkbox"/>	58.26 USD	
GSUFS	01220354	3120906325	06/17/2009	Regular	Online	Postable	<input type="checkbox"/>	150.21 USD	
GSUFS	01220369	3121212347	06/27/2009	Regular	Online	Postable	<input type="checkbox"/>	81.98 USD	

Figure 11: Grid

Chapter 11 Clearing Cache/Updating Trusted Sites

The temporary internet files folder, referred to as cache, contain copies of web pages that you recently visited. The web pages are copied so that if you open these pages again, the pages will display quickly. All of those temporary internet files stored take up space, so it is a good idea to clear the cache to free up some space on your computer. This is called clearing your browser cache.

Please reference the link listed below for detailed instructions on clearing your cache and updating your trusted sites.

http://www2.gsu.edu/~wwwspc/Training/QR_UpdatingYourTrustedSites.pdf