Education Solutions Development, Inc.

APECS Navigation:

Business Systems

Getting Started

Reference Guide

March 2013

Education Solutions Development, Inc.

What's Inside

The information in this reference guide explains everything you need to know about how data is organized on Business System screens and how you can display and navigate screens. Also included are instructions for performing basic system tasks, such as changing the fiscal year and printing reports.

# Understanding Screen Layout, Functions, and Elements

Screen Header

The top area of the screen is called the screen header. Here you can see basic information that lets you know which record is displayed and which year you are signed on. Many screens also include a search box field in the screen header so you can easily search for and display a different record on the current screen without having to redisplay the Search screen. In the example below, information for the vendor Discovery Books is displayed.The header information varies according to which Business System you are using and the type of information you are displaying.
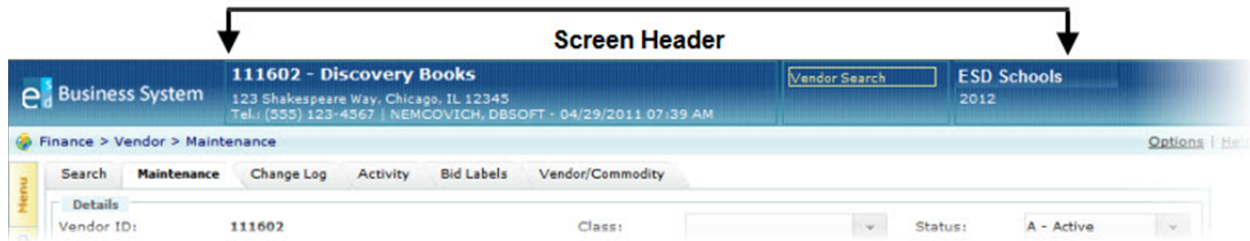
Breadcrumb Trail

The Business System lets you know "where you are" in the menu structure by displaying a breadcrumb trail that appears horizontally below the header. The breadcrumb trail displays the name of the current screen and shows where you are in the menu structure. In the example below, the breadcrumb trail is **Finance > Vendor > Maintenance**.
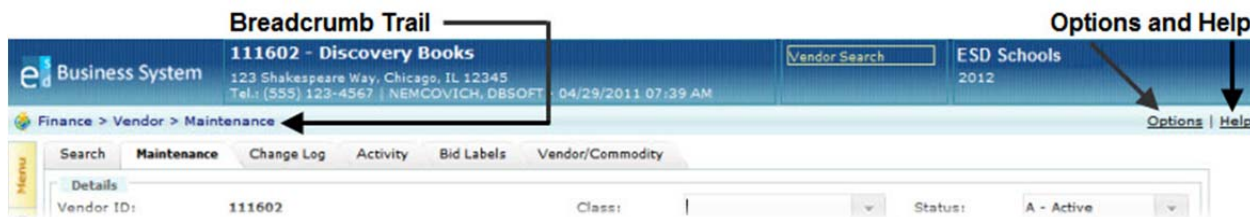
The greater than sign (>) separates each level of the menu structure, so that you can see the path you have taken to arrive at the screen. For example, the following breadcrumb trail indicates that you are currently viewing the Additional Information screen, which belongs to the Employees Profile category of Human Resources screens:

HR / Payroll> Employees > Profile > Additional Info

Two functions are provided to the right of the breadcrumb trail:

- Click **Options** to display the basic user information for the person who is currently signed on to the system, such as name, ID, and the last time this user signed on. The Options window also provides the capability to set the currently displayed screen as the default and to change your password. Refer to "Displaying Information About the Current User," "Setting the Default Sign-On Screen," and "Changing Your Password."

- Click **Help** to display the help information for the current screen. The help information includes a table that lists and describes all the screen fields. Refer to "Displaying Help."

Menu and Function Icons

Use the **Menu and function icons** that are displayed vertically on the left side of the screen to select the systems, screens, and functions you need to use.
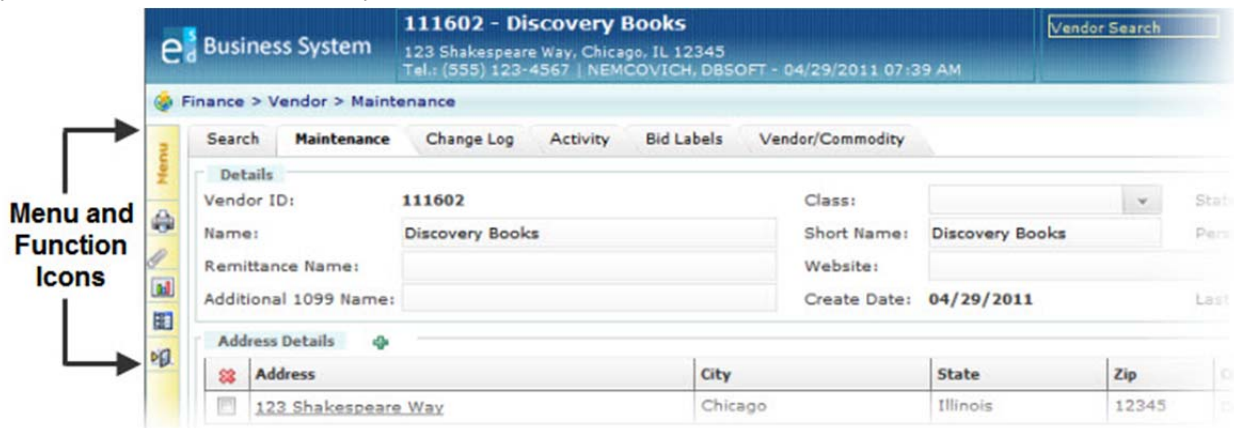
Slide the cursor over each icon to display its function. The following table describes the function of each icon.

Icon	Function
Menu	Click Menu to display the Menu Pane, which lists all the Business screens and provides quick access to each screen. Refer to "Displaying and Navigating Screens."
Print	Click the Print icon to print a copy of the current screen and its data. Refer to "Printing Screens."
Attachments	Click the Attachments icon to attach a file to a record or to view one or more files that have already been attached to the record. Refer to "Attaching Supplemental Files to a Record. "
Reports	Click the Reports icon to generate reports that are specific to the screen that is displayed. Refer to "Printing Reports."
Job Queue	Click the Job Queue icon to display a list of jobs that have been executed. Refer to "Displaying Active Jobs"
Import	Click the Import icon to import data from a Microsoft Office Excel spreadsheet file into a Business System screen. Refer to "Importing Data from a Spreadsheet."
Export	Click the Export icon to export the search results that are displayed on a Search screen to a Microsoft Office Excel spreadsheet file. Refer to "Exporting Search Result Data to a Spreadsheet."
Logout	Click the Logout to end your session. The Logout icon is the bottom-most icon in the list. Refer to "Logging Off the Business System."

Screen Tabs

When you display a screen that belongs to a category of several screens, such as Vendor or Employees, the Business System displays **tabs** across the top of the screen so you can easily move from screen to screen within the same category by simply clicking each tab.
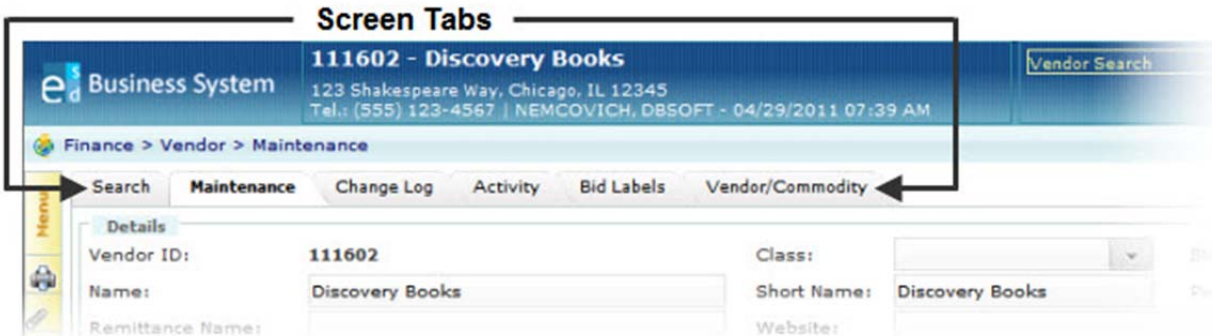
In the example above, the Finance >Vendor >Maintenance screen is displayed. To display other types of information about the vendor named Discovery Books (such as the change log or activity),click the appropriate tab (Change Log, Activity, Bid Labels, or Vendor/Commodity). Click the Activity tab to display the Activity screen, for example. Refer to "Displaying and Navigating Screens" for instructions on using tabs and the menu pane to navigate screens.

Data Fields

The **data fields** (such as Class, Status, Name, and Short Name, as seen in the below example) make up the bulk of every screen. To move from field to field on any screen, use the mouse or press the Tab key. You can press Shift-Tab to move backwards.

To enter, change, or delete information, move the cursor to the appropriate field and type the information. To change existing information, you can type over the existing data. And to delete information, use the Delete key. To delete the entire record, click the Delete button that appears at the bottom of the screen. Refer to "Entering and Updating Information."

Action Buttons

Action buttons appear at the very bottom of each screen and enable you to perform a certain type of action.

Action Buttons
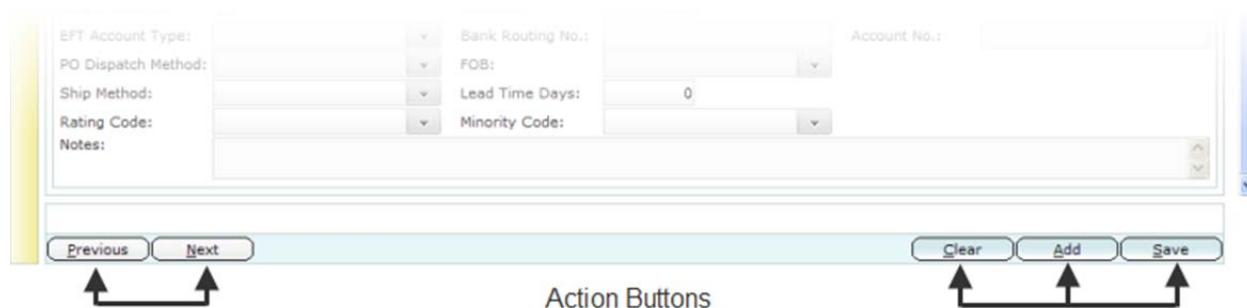
Although the buttons vary by screen, the following appear on most Business System screens:

- Click **Back** to return to the previous screen. ***You cannot use your web browser's Back button to return to the previously displayed screen.*** For example, if you display the Job and Payment Details screen from the Job and Payment Summary screen, then you can click the Back button to redisplay the Summary screen.

- Click **Clear** to undo any changes you have made on the current screen. The system displays a message asking if you want to save changes first. Be sure to click No if you do not want the system to maintain the changes entered.

- Click **Save** to save the information you have entered or to save any changes you have made. When you click Save, the system validates what you entered or changed. The system displays a message at the bottom of the screen if you do not enter all the required fields and if you enter anything in the wrong format so that you can correct your entries.

- Click **Delete** to remove a record from the database.

When you display a screen for which more than one record exists, the system includes the Previous and Next buttons on the bottom left of the screen:

- Click **Next** to display the following record on the same screen.For example, if you are looking at the Job and Payment Details screen for an employee who works more than one job position, then you can click Next to display the next Job and Payment record for that same employee.

- Click **Previous** to display the preceding record on the same screen.

Paging Arrows

When you perform a search and more records meet the search criteria than can fit on the screen, the system provides paging arrows and page numbers in the bottom right of the screen:

- Click to display the first page.
- Click to display the very last page.
- Click to display the previous page.
- Click to display the next page.
- Click an underlined page number to display a particular page.

Fields, Elements, and Icons

The following table lists and describes the different types of data fields, screen elements, and icons:

Screen Fields and Elements	Descriptions
Data Fields	Data fields are shaded light gray or light green: • Light gray fields require that you type the exact value of the field, such as a name. • Light green fields contain a drop-down list of options. **Hint:** To see all the available options, you can type one or more numbers or letters to see a list of values that contain them. For example, if you know only the first number of an account number, you can type it in an account number field, and the system will automatically display a list of account numbers that begin with that number.
Action Links and Hyperlinks	Underlined field titles indicate that you can perform an action, such as conduct a search, see if a duplicate record exists, narrow a display using a filter, or display the details for a particular record. Click on the field to display a drop-down box of additional options, a new window, or a different screen.
Magnifying Glass Icon	The magnifying glass icon indicates you can perform a search to find a particular value or record. Click this icon to display a Search window so that you can enter the information you know to direct the search.
Plus [+] and Minus Signs [-]	A plus sign [+] indicates that additional information is available. Click the plus sign to expand the list so you can see the additional fields. A minus sign [-] enables you to close the additional fields.
Add Icon	The Add icon appears on the left of the screen, usually below a group of Search fields. The Add icon enables you to add a new record. Click the Add icon to display additional fields so you can enter the information to complete a new record.
Delete Icon	The Delete icon appears at the top of a column of records to indicate you can delete one or more of them. First, click the checkbox that appears to the left of the records you need to delete. Then click the Delete icon.The system removes them from the screen. You must click the Save button to remove them from the database.
Actions Icon	The Actions icon appears at the left of columns of data to indicate that you can perform different actions. Click the Actions icon to display a window that lists your options, then click the option you need to select. For example, when you display an account on the Activity screen, the system includes the Actions icon to the left of each account type. When you click the Actions icon, you can then choose to display either the Journal Entry or Transaction Details screen for a particular account.

continued

Fields, Elements, and Icons (continued)

Screen Fields and Elements	Descriptions
Calendar	A calendar button displays a monthly calendar page that enables you to select a specific date. Click the date you need to specify. If you need to find a date in a previous or following month, click the left arrow or right arrow to display it. You can also choose to type the date in MMDDYYYY format. The system will automatically insert slashes to separate the month, day, and year.
File Attachment Icon	The File Attachment icon enables you to attach one or more files to a specific item on a record to provide additional information for that item. You can also click this icon to display a window that lists existing file names and typed notes so that you can access each one as needed. The File Attachment icon works differently from the Attachments icon. The Attachments icon enables you to attach one or more files to the entire record, rather than a specific item on that record. Refer to "Attaching Supplemental Files to a Record" for more information. The Attachments icon is highlighted in green when files are currently attached.
Notes Icon	The Notes icon is displayed when you can type notes or comments to provide more information for a record. Click the Notes icon to display a window that enables you to view or type notes. The Notes icon is highlighted in yellow when notes are stored.
Fill Options	The Fill Options icon appears at the top of a column of data and enables you to quickly select a particular option and apply it to all the line items. For example, you can choose to override automatic system verification of all account balances on a purchase requisition by selecting the override option using the Fill Options icon. You can also use the fill option to override or void all the data items on a screen and then selectively "unselect" the line items that you do not want to override or void.
Drop-down List	A down arrow that appears to the right of a field indicates that options exist for this field. Click the down arrow to display the drop-down list, then click the correct option to complete the field.
Multiple-selection Icon	The multiple–selection icon appears to the right of a field to indicate that options exist for the field. You can select as many of the options as needed. Click the icon to display a drop-down list, then click the checkbox that appears to the left of each option you need to select.

continued

Fields, Elements, and Icons (continued)

Screen Fields and Elements	Descriptions
Checkbox	Fields that include a square box require you to "check" or "uncheck" the box by clicking on it. You can also use the space bar to check or uncheck a box.
Radio Button	A circle that appears to the left of a field indicates that an option exists. Click on the circle to specify the correct option.
Text Box	A text box field allows you to enter text freely as notes.
Scroll Bar	Some screens contain more fields than can be displayed at once. These screens include a scroll bar on the right side. Click and slide the scroll bar to view the additional information as needed.

Displaying and Navigating Screens

You display and maintain Finance, Human Resources, and Payroll records using a series of screens on which you can view, enter, change, or delete information. To navigate from screen to screen, use the Menu Pane and the screen tabs.

Using the Menu Pane

Click the **Menu button** (on left side of the screen) to display the **Menu Pane**, which lists all the Business screens. The Menu Pane serves as your primary gateway to all the Business screens. Most screens are grouped into categories. For example, the Primary Information screen is one of nine screens in the Employees Profile category in the Human Resources System.

To display a list of all the screens that belong to a particular category, click the plus sign [+] that appears to the left of the category name to expand it. For example, when you click the plus sign by Position Control, the system displays the names of the five Position Control screens (Details, Benefit Details, Budget Details, Incumbent Details, and Audit Trail) below. To close the list of screens for each category, click the minus sign [-] that appears to the left of the category name. To display a particular screen, simply click the screen name on the Menu Pane. The **breadcrumb trail** (below the screen header) displays the name of the current screen and shows the series of links you went through to get there so you know where you are in the menu structure. Here's an example:

HR / Payroll > Employees > Profile > Primary Info

The greater than sign (>) separates each level of the menu structure, so that you can see the path you have taken to arrive at this screen. In this example, the breadcrumb trail indicates that you are currently viewing the Primary Information screen, which belongs to the Employees Profile category of Human Resources System screens.

Using Screen Tabs

When you display a screen that belongs to a category of several screens, such as Employees or Position Control, the system displays tabs across the top of the screen so that you can easily move from screen to screen within the same category. Tabs appear below the breadcrumb trail and look like tabs on a file folder.

To display another screen within the same category, click the appropriate tab.

Refer to "Understanding Screen Layout, Functions, and Elements" for descriptions of screen areas and functions. Refer to "Entering and Updating Information" for instructions on how to enter and update information in data fields.

Entering and Updating Information

You maintain Finance, Human Resources, and Payroll records by entering, changing, and deleting information in the data fields of Business System screens by doing the following:

- **To move from field to field on any scr**een, use the mouse or press the Tab key. You can press Shift-Tab to move backwards.

- **To enter, change, or delete information,** move the cursor to the appropriate field and type the information. Some fields provide options that enable you to select a value from a drop-down list. To change existing information, you can type over the existing data or select another value from a drop-down list. And to delete information, use the Delete key. To delete the entire record, click the Delete button that appears at the bottom of the screen.

- **To save the information you have entered or to save any changes you have made**, click the Save button. When you click Save, the system validates what you entered or changed. The system displays a message at the bottom of the screen if you do not enter all the required fields and if you enter anything in the wrong format so that you can correct your entries.

- **To undo any changes you have made**, click the Clear button.

Starting the Business System

Use this procedure to start the Business System, including the Finance, Payroll, and Human Resources systems.

Before You Begin

Be sure you have an Internet connection on your computer.

Procedure

Do the following to start the Business System:

1. Start your internet browser.
2. Enter the web address assigned to your institution, and press Enter:

   The Welcome screen is displayed. This screen lists all the ESD systems available to your institution.
3. Click Business to start the Business System.

   The Sign-In dialog box is displayed.
4. Enter your User ID and Password, then click Sign-in.

   The system displays a screen designated for you. You will automatically be signed onto the current year.
5. Use the Menu button to select the function or screen you need to display.

Logging Off the Business System

Use this procedure to end your session and log off the system.

Before You Begin

Be sure you have saved any new information or changes.

Procedure

To end your session, click the Logout icon . The Logout icon is the bottom-most icon on the left of the screen.

The system ends your session and redisplays the Sign-in dialog box.

Changing the Fiscal Year

Use this procedure to change to a different fiscal year than the one you are currently signed onto.

Before You Begin

When you first start the Business System, you will be signed on to the current year. Be sure your security level enables you to sign on to a different fiscal year.

Procedure

Do the following to sign on to a different fiscal year:

1. Click the underlined fiscal year that appears in the top-right corner of the screen.

   The system displays a drop-down box that lists all the valid years.

2. Click the appropriate year to sign on to that fiscal year.

   The system displays the year that you selected as the current fiscal year.

Printing Screens

Use this procedure to print a copy of any displayed screen.

Before You Begin

Display the screen and record you need to print.

Procedure

Do the following to print a copy of a displayed screen:

1. Click the Print icon , which appears on the left side of the screen under the Menu button.

   The system displays the Print dialog box, which allows you to select a printer and print preferences.

2. You will need to print the screen in landscape mode instead of portrait to ensure the entire screen is printed. Click the Preferences button, then select the Printing Shortcuts tab. In the Orientation field, select Landscape and click OK.

3. Click Print to print the screen.

Attaching Supplemental Files to a Record

Use this procedure to attach supplemental files **to a particular record** using the Attachments icon 🖉.
You may need to attach word processing files, spreadsheets, or images to provide additional information
for a particular record. You can also use this procedure to open and review a file that is attached to a
record or to delete an attachment.

Some screens also enable you to attach one or more files **to a specific item on a record.** The File
Attachment icon 📎 appears on screens that provide this feature. Click the File Attachment icon 📎 to attach
a file and to review an existing attachment that is linked to a particular item on the record.

The Attachments icon is highlighted in green 🖍 when files are currently attached to the record.

Before You Begin

Display the record to which you need to attach a file or review an attached file.

Procedure

Do the following to attach a file or review an attachment:

1. Click the Attachments icon 🖉, which appears on the left side of the screen under the Menu button.

   The system displays the Attachments dialog box.

2. What do you need to do?

If You Need to...	Then...

Attach a file	Do the following:
	1. Click the <u>Select</u> field.
	   The system displays the Select File dialog box.
	2. Click the Browse button.
	   The system displays the Choose File dialog box.
	3. Locate the file you need to attach, click it to highlight its name, then click the Open button.
	   The system displays the file name in the Select File dialog box.
	4. Click the <u>Upload</u> field to attach the file to the record.
	   The system displays the message "Upload Successful."
	5. Click the <u>Close</u> field.
	   Type information about the file contents in the Notes field as needed, then click the Close button to close the Attachments dialog box.

continued

If You Need to...	Then...

Open an attached file	Do the following:
	1. Click the underlined name of the file you need to see.
	    The system displays the message "Do you want to open or save this file?"
	2. What do you need to do?
	   • **To open the file**, click the Open button.
	    The system opens the file in the appropriate application, such as Microsoft Word or Excel.
	   • **To save the file** to a new directory or file name, click the Save button.
	    The system displays the Save As dialog box.
	    Select the correct directory, type the file name, and click the Save button.
	    The system displays the message "Download Complete."
	3. Click the Close button to close the Attachments dialog box.

Delete an attachment	Do the following: 1. Select the files you need to delete by clicking the checkbox that appears to the left of the Filename field. 2. To delete these files, click the Delete icon ✖. 3. Click the Close button to close the Attachments dialog box.

3. If you attached or deleted a file from this record, click the Save button.

Printing Reports

Use this procedure to print a variety of reports that relay the data maintained by a specific screen.

For information about each of the available reports, refer to "Finance System Reports and Processes," "HR/Payroll System Reports and Processes," and "System Administration Reports and Processes" on the documentation wiki. Refer to "Displaying Help" if needed.

Before You Begin

Display the screen for which you need to generate a report.

Procedure

Do the following to generate a screen-specific report:

1. Click the Reports icon ![icon], which appears on the left side of the screen under the Menu button.

    The system displays the Reports & Processes screen, which lists the reports and processes you can generate.

    - **Reports** are listed in **blue**.
    - **Processes** are listed in **red**.
    - **User-defined reports** are listed in green.

    Hint: Click <u>By Module</u> to list the reports and processes by module. Click <u>All</u> to list all reports and processes.

2. Click the name of the report you would like to create.

    The system displays a description of the report and entry fields in which you can enter and select information to narrow the scope of the report.

3. Select and enter information in the report fields to create the report.

    - **To run this report using a previously saved set of parameters**, click the Magnifying icon ![icon] in the Criteria Name field to display a list of saved criteria sets and click the underlined criteria name.
    - **To create and save a new set of parameters for this report**, type a new criteria name and click the Save checkbox.

4. Click the Preview button.

    The system displays the report in a new window. Using the tools available at the top of this window, you can choose to:

    - Page through the online report.
    - Change the size of the report.
    - Search for a text item within the online report.
    - Export the report to a file format you select.
    - Print the report.

Running a Batch Process

Use this procedure to select and run a batch process (also known as "batch job"). Many batch processes not only perform data maintenance, but also generate reports. You can choose to save the parameters you use as a report criteria name so there is no need to reenter the same parameters each time you run the process. You can also choose to run the process immediately or to schedule it to run on a regular basis (such as daily, weekly, or monthly) or at a specific date and time.

For information about each of the available processes, refer to "Finance System Reports and Processes,""HR/Payroll System Reports and Processes," and "System Administration Reports and Processes" on the documentation wiki. Refer to "Displaying Help" if needed.

Before You Begin

Be sure the Business System is running.

Procedure

Do the following to run a batch process:

1. Click the Reports icon ![icon], which appears on the left side of the screen under the Menu button.

   The system displays the Reports & Processes screen, which lists the reports and processes you can generate.

   - **Reports** are listed in **blue**.
   - **Processes** are listed in **red**.
   - **User-defined reports** are listed in green.

   Hint: Click By Module to list the reports and processes by module. Click All to list all reports and processes.

2. Click the name of the process you need to run.

   The system displays a description of the process and entry fields in which you can enter and select information to customize the batch process.

3. Select and enter information in the fields to select the options for this process.

   - **To run this process using a previously saved set of parameters**, click the Magnifying icon ![icon] in the Criteria Name field to display a list of saved criteria sets and click the underlined criteria name.
   - **To create and save a new set of parameters for this process**, type a new criteria name and click the Save checkbox.
   - **To schedule the process to run on a regular basis or on a specific date and time**, click the Show icon ![icon] to reveal the scheduling fields and update them as needed.

4. Click the Submit button.

   The system displays the job queue ID for the process in the message at the bottom of the screen.

5. Make a note of the queue ID number, then click the Go to Queue button.

   The system displays the Job Queue screen. If needed, you can search for the batch process using the Search fields at the top of the screen.

6. Review the list of processes and check the Status column to see if the process is complete. You can click the underlined status code for more information if needed.

7. If the process generated a report, you can click the underlined report name by the correct queue ID number to display a list of the reports.

8. To display the report, click theunderlined output type (such as .PDF, .TXT, or .XLS).

9. Use your browser's Print function to print the report if needed.

Displaying Active Batch Processes

Use this procedure to display a list of batch processes that have been executed.

For information about each of the available processes, refer to "Finance System Reports and Processes,""HR/Payroll System Reports and Processes," and "System Administration Reports and Processes" on the documentation wiki. Refer to "Displaying Help" if needed.

Before You Begin

Be sure the Business System is running.

Procedure

Do the following to display a list of active batch processes:

1. Click the Job Queue icon 🖼, which appears on the left side of the screen under the Menu button.

    The system displays the Job Queue screen.

2. Specify the parameters to narrow the search for the process you need to display, then click the Search button.

    The system displays a list of jobs that match the criteria specified.

3. What do you need to do?

| If You Need to...	Then...
Delete a process from the queue	Click the checkbox that appears in the left-most column, then click the Delete icon ✖.

Rerun a process	Do the following:
	1. Click the Actions icon 🔁to the left of the queue ID.
	   The system displays the Actions window.
	2. Click Re-run.
	   The system redisplays the Criteria screen for that process so you can update as needed and submit it to the queue again.

Review the reports associated with a process.	Do the following: 1. Click the underlined report name. The system displays a window that lists the reports. 2. Clickthe underlined report output type (such as .PDF, .TXT, or. XLS) to display the report.
Review details about the status for a particular process	Click the underlined status code to display a window that shows the progress report for the process.
Display a list of scheduled jobs	Click View Scheduled Jobs.
Display a different list of processes	Select and enter values in the Search fields at the top of the screen, then click the Search button.

Importing Data from a Spreadsheet

Use this procedure to import data from a Microsoft Office Excel spreadsheet file that has been saved in .CSV (comma delimited) or .XML format to a Business System screen. The import feature is available on

Business System screens that include the Import icon ⊞ in the function icon list, which appears below the Menu icon. You may want to use this feature, for example, to import supply orders from teachers directly onto the Warehouse Requisition Entry screen.

Before You Begin

Do the following before you begin:

- Display the Business System screen to which you need to import data.
- Be sure the data to be imported has been saved in the correct format. If you need to review a data

  template, click the Import icon ⊞ then select <u>Download import template</u> within the File Import dialog box. You can choose to open or save the template to a different file name, then add your own data as needed.

Procedure

Do the following to import data from a spreadsheet:

1. Click the Import icon ⊞, which appears on the left side of the screen under the Menu button.
   The system displays the File Import dialog box.
2. Click the Browse button to select the file you need to import.
3. Click <u>File Upload</u>.
   The system displays the Step 2 dialog box.
4. Review the data. You can select the option to see all records or only the error records.
5. Click <u>Import</u>.
   The system imports the data from the file and displays it as line items on the current screen.
6. Review the screen to be sure the results are what you expected.
7. Enter other information on the screen as needed, then click the Save button.

Exporting Search Result Data to a Spreadsheet

Use this procedure to export the search results displayed on a Search screen to a Microsoft Office Excel spreadsheet file. The export feature is available only on Search screens that include the Export icon 🗒️ in the function icon list, which appears below the Menu icon.

Before You Begin

Display the appropriate Search screen.

Procedure

Do the following to display data using a Search screen and then export it to a spreadsheet:

1. Select and enter the information for the data you need to display, then click the Search button.

    The system displays a list of records that match the criteria specified.

2. Review the screen to be sure the search results are what you expected. Reenter the search parameters if needed.

3. Click the Export icon 🗒️, which appears on the left side of the screen under the Menu button.

    The system displays the File Download dialog box.

4. What do you need to do?

    - To **open** the file, click the Open button.

        The system opens the file in Microsoft Excel. You can format the data as needed.

    - To **save** the file to a new directory or file name, click the Save button.

        The system displays the Save As dialog box.

        Select the correct directory, type the file name, and click the Save button.

        The system displays the message "Download Complete."

5. Click the Close button to close the Attachments dialog box.

Displaying Information About the Current User

Use this procedure to determine which user is currently signed onto the system at a particular computer. You can display a list that includes the user's name, ID, time of last login, and the current date.

Before You Begin

Be sure the Business System is running.

Procedure

Do the following to display a list of information about the person who is currently signed on:

1. Click <u>Options</u>, which appears to the right of the breadcrumb trail.

    The system displays a list of information about the person who is currently signed on to the system. This information includes the user's name, ID, time of last login, and the current date.

2. Click outside the information box to close it.

Displaying Help

Use this procedure to display help information for the currently displayed screen. The system provides extensive help information for every screen, which explains the usage of each screen, describes all the fields, and lists related reports and operating procedures. This help information is stored in the documentation wiki. You can choose to print any of this information as needed.

Before You Begin

Display the screen for which you need help.

Procedure

Do the following to display help information for any screen:

1. Click Help, which appears to the right of the breadcrumb trail.

   The system opens the documentation wiki in a new window and displays the help information for the current screen.

2. Scroll through the screen to find the information you need. You can keep the documentation wiki open in the separate window and refer to it as needed.

   You can also use the menu and Search field to find and review additional information.
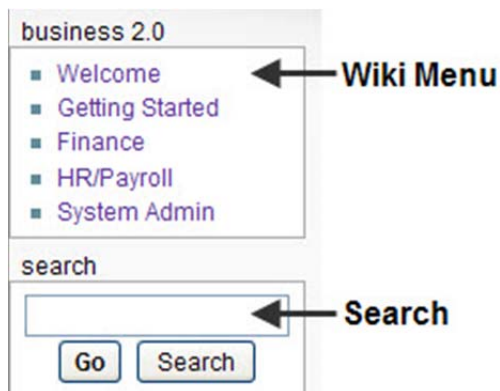
3. To print the help information, first click the Printable version link in the toolbox menu at left. Then use the print function within your browser.

Customizing System Preferences

The Business System provides several ways for you to customize the way you interact with the system and its screens. You can:

- Change your password at any time. Refer to "Changing Your Password."

- Set a specific screen to be the first one displayed every time you sign on. Refer to "Setting the Default Sign-On Screen."

- Create a list of favorite screens that you can access in one click using the Favorites icon . Refer to "Creating and Managing a List of Favorite Screens."

Changing Your Password

Use this procedure to change your current password to a new one. You can change your password as often as needed.

Before You Begin

Be sure you are signed on to the Business System using your own user ID.

Procedure

Do the following to change your password:

1. Click Options, which appears to the right of the breadcrumb trail.

   The system displays the User Info and Change Password dialog box.

2. If the User Info dialog is displayed, then click the Change Password tab.

   The Change Password dialog box is displayed.

3. Enter the new password in the Password and Confirm Password fields, then click Save.

   A message is displayed indicating the password has been saved. If you mistyped the password, a message is displayed asking you to retype the password in both fields.

4. Click outside the dialog box to close it.

   The next time you start the Business System, be sure to sign on using the new password.

Setting the Default Sign-On Screen

Use this procedure to specify a particular Business System screen to be displayed every time you sign on. You may want to set the screen you use most in your work as the default screen. You can change the default screen as often as needed.

Before You Begin

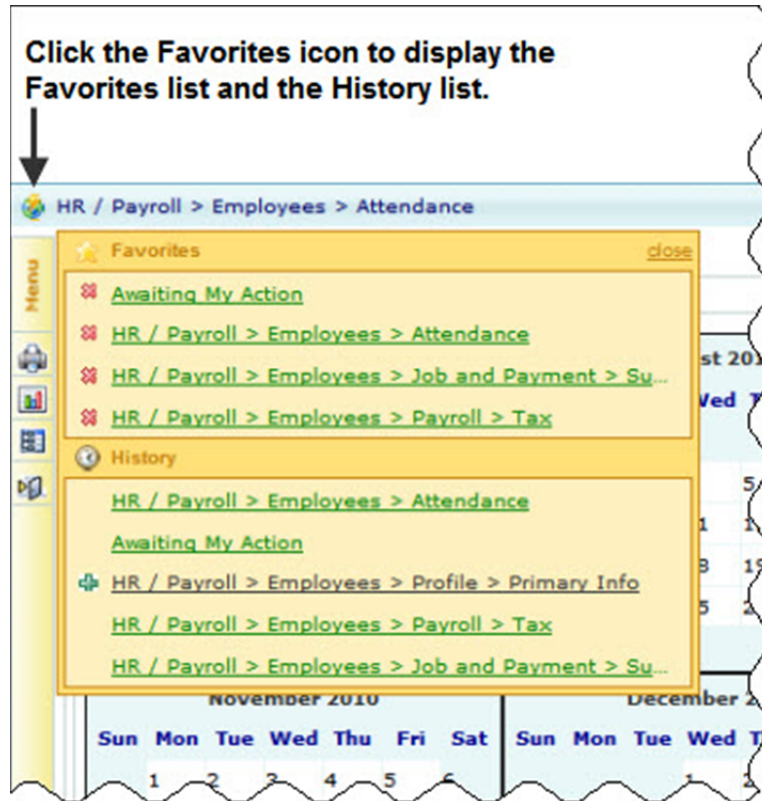Be sure you are signed on to the Business System using your own user ID.

Procedure

Do the following to specify or change the default screen:

1. Display the Business System screen you prefer to be the default screen.

2. Click Options, which appears to the right of the breadcrumb trail.

   The system displays the User Info and Change Password dialog box.

3. If the Change Password dialog is displayed, then click the User Info tab.

   The system displays the User Info dialog box, which includes a list of information about your user credentials. This information includes your user name, ID, the date and time of last login, and the current default screen (if one has been specified).

4. Click Set Current Screen as Default.

   The system displays the name of the currently displayed screen in the Current default screen field.

5. Click outside the dialog box to close it.

   The next time you start the Business System and sign on, the screen you specified will be displayed.

Creating and Managing a List of Favorite Screens

Use this procedure to create and manage a list of favorite screens so you can have direct access to the screens you use most. You can add and delete screens from your Favorites list at any time.

The Favorites list is available from any screen just by clicking the Favorites icon 🌎, which appears to the left of the breadcrumb trail. Also included in the Favorites list is a History list of the screens that have been displayed in your current session. You can click any of the screen names in the Favorites or History list to display them immediately without having to use the Menu Pane.

Before You Begin

Be sure you are signed on to the Business System using your own user ID.

Procedure

Do the following to add and remove screens from your Favorites list and to display a screen included in the Favorites or History list:

If You Need to…	Then…

Add a screen to the Favorites list	Do the following:
	1. Display the screen you want to add to the Favorites list.
	2. Click the Favorites icon .
	   The Favorites list is displayed. The currently selected favorite screens are listed in the top. A history of the screens you have viewed in your current session is displayed at the bottom.
	3. Click the Add icon to the left of the screen to be added as a favorite.
	   The screen is added to the list of Favorites.
	4. You can continue to add as many screens to the Favorites list as needed by clicking the Add icon for each.
	5. To exit the Favorites list, click <u>close</u>.

Remove a screen from the Favorites list	Do the following:
	1. Click the Favorites icon .
	   The Favorites list is displayed. The currently selected favorite screens are listed in the top.
	2. Click the Delete icon that appears to the left of the screen name.
	   The screen is removed from the list of Favorites.
	3. You can continue to delete as many screens from the Favorites list as needed by clicking the Delete icon for each.
	4. To exit the Favorites list, click <u>close</u>.

Display a screen in the Favorites or History list	Click the underlined name of any screen. The screen is displayed.