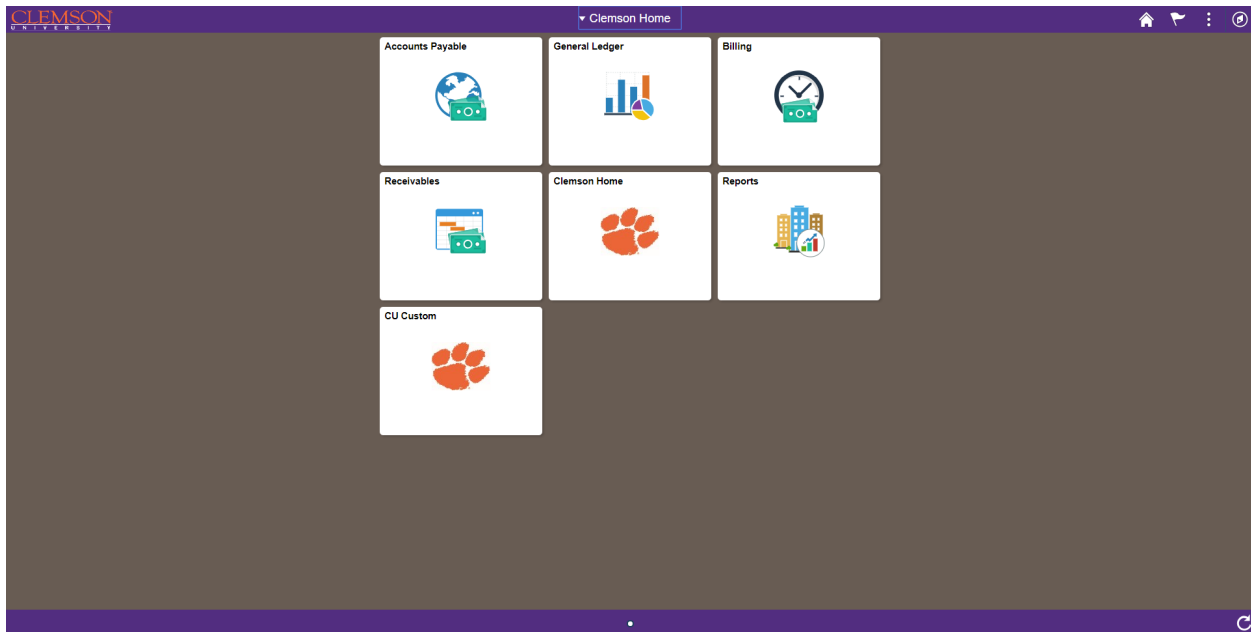


PeopleSoft Upgrade Quick Reference Guide

Fluid Homepage – Clemson Home













Clemson University has upgraded our CUBS/PeopleSoft Financials system with the latest technology released by Oracle. When you log in, you will see the **Clemson Homepage** with tiles. Each of the tiles is interactive, making it easy for you to access and navigate the system. Instructions in this document are based on accessing the system via a laptop or desktop computer. Accessing applications through a mobile device may change the layout of the tiles and pages.








Below is the list of tiles with the navigation collections shown in the Clemson Home page.

Accounts Payable	General Ledger	Billing	Receivables
My Payables Design	General Ledger Design	My Billing Design	My Receivables Design
Payables Options	Business Unit Definition	Billing Definition	Receivables Business Unit
Payables Business Unit	Ledgers For A Unit	Billing Options	Bank Accounts
Bank Accounts	ChartField Design	My Customers	View AR Open Periods
View Payables Open Periods	ChartField Values	General Information	Payment Predictor Rules
SpeedChart	Define ChartField Attributes	Contact Information	My Customers & Contacts
Accounting Entry Template	ChartField Request	My Billing Invoices	Maintain Customer Information
Procurement Control	Tree Manager	Review Pending Transactions	Quick Add/View Customers
Voucher Origin	Combo Edit Rules	Express Billing	Add/View Contacts
My Suppliers	Multi-Currency	Bill Summary	My Receivables Items
My Vouchers	Commitment Control	My Accounting	My Payment Processing
My Reporting & Analysis	Journal Transactions	My Reporting and Analysis	My Accounting
	Allocations	Billing WorkCenter	My Collections
	Consolidations		My Reporting & Analysis
	Reconciliations		
	Close		
	Reports and Analysis		
	Additional Setup		












Clemson Home

 Budget Journal
 CU Print Data
 Deposits
 Billing Invoices
 Journals
 Payroll Corrections
 P-Card Submission
 Process Monitor
 Project Information
 Vouchers
 Purchase Orders
 Voucher Bud. Errors

Reports

 Query Manager
 Query Viewer
 Define Report Request
 Report Manager
 Process Monitor

CU Custom

 P-Card ^
P-Card Submission
P-Card Activity Report
P-Card Submission Report
P-Card Travel Acct Exceptions
 Restrictions v
 CU-Business/Security Processes v
 Self-Serve v
 General Ledger v
 CU Web Invoice
 Project Information
 Payroll Correction
 CURF Web Invoice
 Load Postal Transactions
 CULR Web Invoices

Here is a legend for the tools you see on the top right side of the screen:



Home Click to return to the main Clemson Homepage



Search Click to search



Notifications Click to view actions and alerts in a notification window



Actions List Click to see a list of available actions for the current window. The Sign Out command is always available under this menu, as are context-**appropriate personalization** options.



Nav Bar Click to use the Navigation Bar (Nav Bar). The Nav Bar provides handy navigation options such as Recent Places, My Favorites, and Navigator (which expands to show the classic

menu hierarchy). Users can also add and remove fluid tiles from the Nav Bar using personalization options found here.

Elastic Search

Search button in the fluid banner at the top of your screen, use the drop-down list to select a search group if needed, and enter your search item in the Search field. Tap the Search button to run the search.

This example illustrates selecting the Global Search icon in the fluid banner, selecting a search group (Navigator), and entering a free text search (Options). In this case, running a search against Navigator returns navigational results related to the keyword "Options." Select a search result to be taken to that application page directly.

The screenshot displays a web interface for search results. At the top, a purple banner contains navigation icons and a search field with the text 'Navigator' and 'Journal'. Below the banner, the main content area is titled 'View Search Results' and shows '132 results for keyword: "Journal"'. A list of search results is displayed, each with a checkbox and a title where the search term 'Journal' is bolded. The results include:

- Journal Categories**
Journal Categories
Application: PT_LOCAL
- Amortization Journal**
Amortization Journal
Application: PT_LOCAL
- Journals vs. Ledger**
Journals vs. Ledger
Application: PT_LOCAL
- Mass Delete Journals**
Mass Delete Journals
Application: PT_LOCAL
- GL WorkCenter Journals**
GL WorkCenter Journals
Application: PT_LOCAL
- Allocation Journal Line Amts**
Allocation Journal Line Amts
Application: PT_LOCAL
- Payroll Journal Compare**
Payroll Journal Compare
Application: PT_LOCAL
- Journal Restrictions**
Application: PT_LOCAL
- Direct Journal Review**
Direct Journal Review
Application: PT_LOCAL
- Direct Journal Review**
Direct Journal Review
Application: PT_LOCAL
- EE Journal Entries**
EE Journal Entries
Application: PT_LOCAL
- Budget Journal**
Review Budget Journal Exceptions
Application: PT_LOCAL

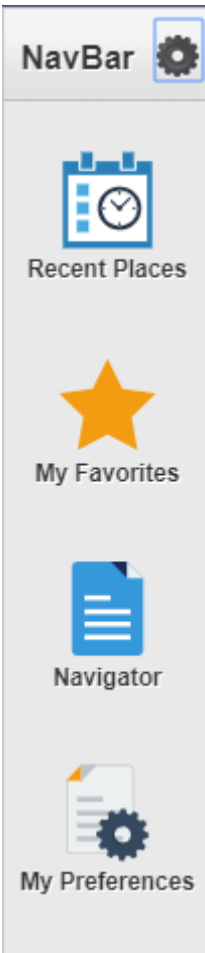
A left sidebar shows a 'New Search' section with a 'Folder' dropdown and a list of folders with item counts: General Ledger (50), Statutory Reports (16), Set Up Financials/Supply Chain (15), Commitment Control (11), Accounts Receivable (7), CU_CUSTOM (7), Purchasing (5), Accounts Payable (4), Customer Contracts (4), and Cash Management (2). A 'More' link is visible below the list.

Use the New Search box to run additional searches and use the facet boxes below the New Search box, to filter search results to help narrow your search.

Your search item will appear in bold within the text of the search result.

Using the Navigation Bar

After pressing the Navigation Bar button, the NavBar side page appears. Use this page to access additional navigational options.



Recent Places When you click this icon you will see the most recent places you have navigated.

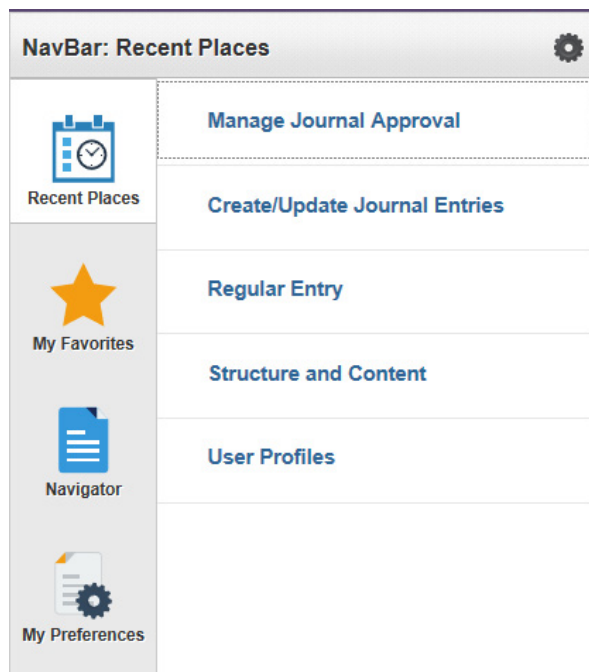
My Favorites This configurable icon allows you to determine your favorites to display here. Favorites that you have save prior to this upgrade will be accessible here.

Navigator Clicking on this icon will present the main menu in a linear layout.

My Preferences

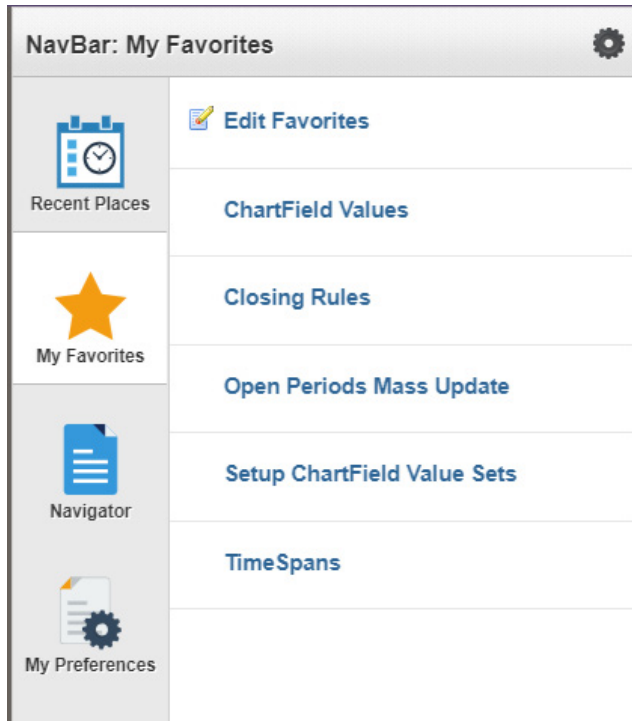
Using Recent Places

Recent Places displays links to the pages recently visited by the current user.



Using Favorites

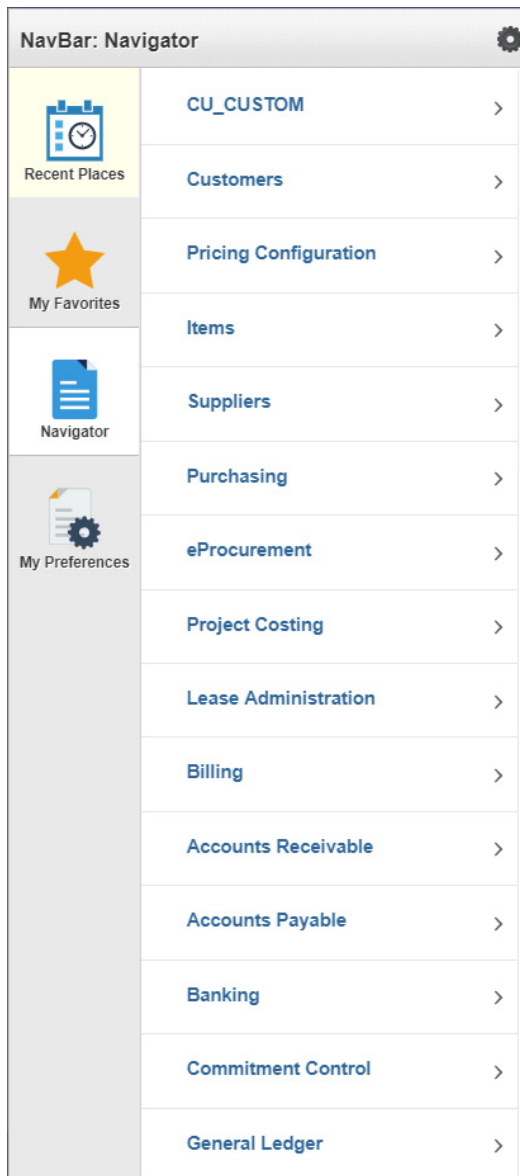
Favorites displays any specified favorite pages. Favorites can be added through the Add To Favorites link in fluid components.



Using Navigator

The Navigator displays the traditional, hierarchical menu structure, similar to what the user would see when accessing PeopleSoft in classic mode and using the Main Menu.

While the appearance of the menu is different than the classic Main Menu, the menu hierarchy is exactly the same.



My Preference

My Preference will take the users to the General Setting page.

