

UD Financials Job Aid

Research Admin: Homepage Navigation and Custom Tiles

Overview

This job aid will:

- provide an introduction to a Homepage in UD Financials;
- describe how to navigate to the Research Ofc Homepage;
- give instructions for making the Research Ofc Homepage the default and
- describe how to add a “custom” tile to any homepage

The screenshot below outlines many of the features and links found on the UD Financials Homepage



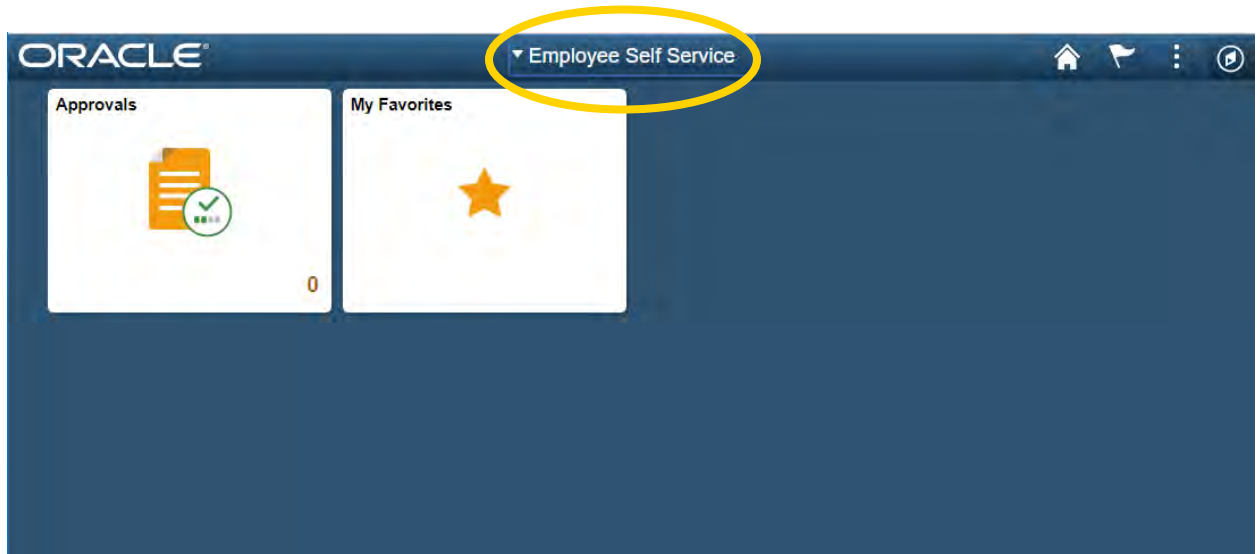
Navigation Icons

- Clockwise from top center:
 - 1) Homepage drop-down selection. Use to switch between any homepages to which you have access.
 - 2) Home button. Click this from any screen to return to your homepage.
 - 3) Notifications. UD is not implementing any Notifications functionality at go-live.
 - 4) The Actions List or “hamburger.” Press the Actions List button to reveal actions you can make based on your location in the application, and to Sign Out.
 - 5) NavBar (looks like a compass). Click this to access the Navigator which will take you to the menu you already know from PeopleSoft version 9.1.
 - 6) Refresh button. Refreshes all tiles on homepage.
 - 7) Homepage indicator. just shows the total number of available homepages, represented by a small circle.
 - 8) Tiles. Icons to navigate to specific, frequently-used menu items.

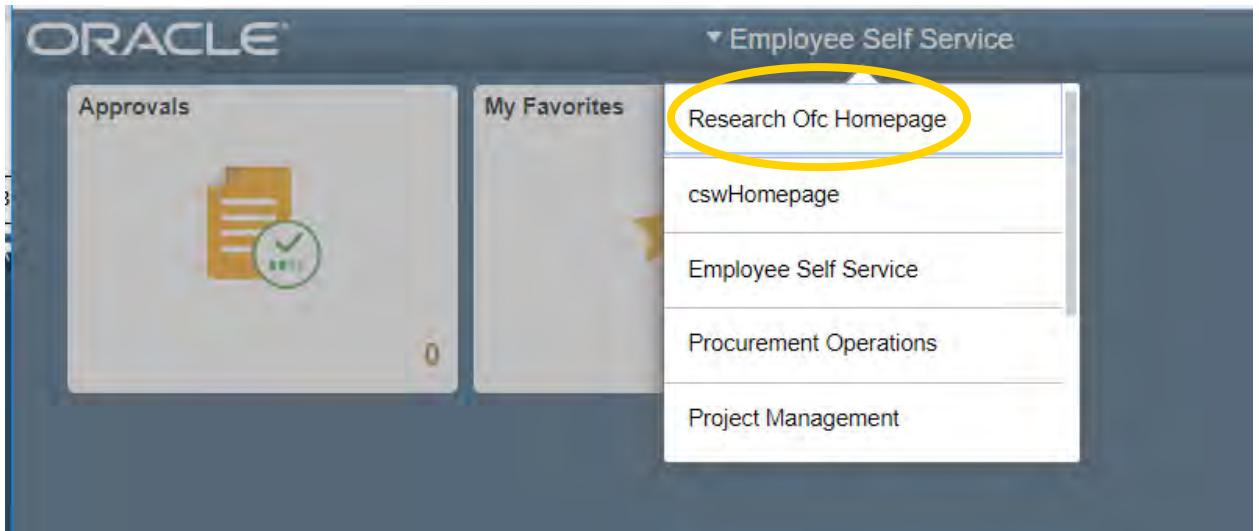
Navigating to the Research Office Homepage

Step One

- From the landing page, click on the Homepage drop-down selection item



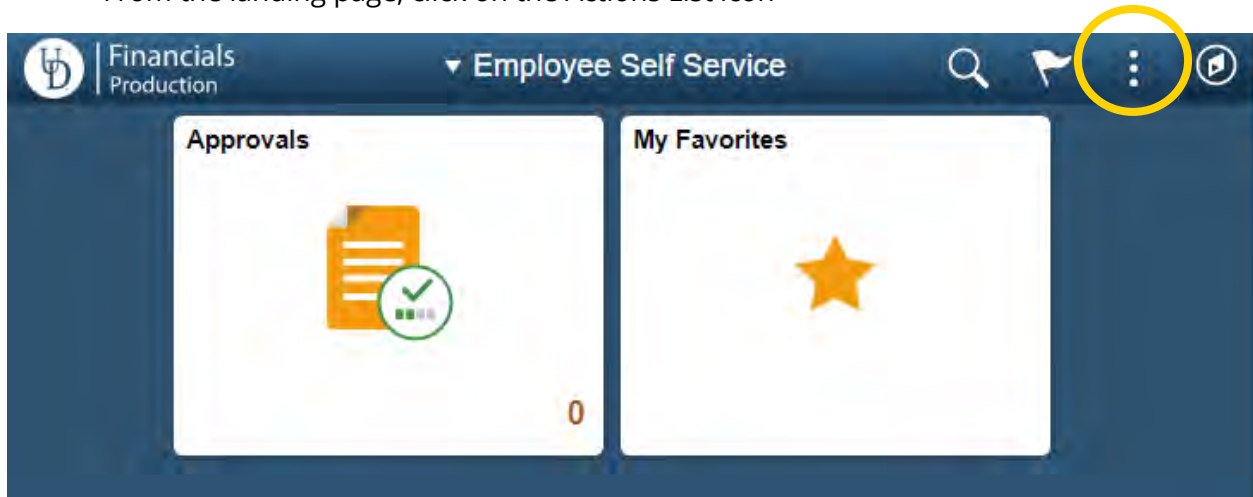
- Select Research Ofc Homepage from the list



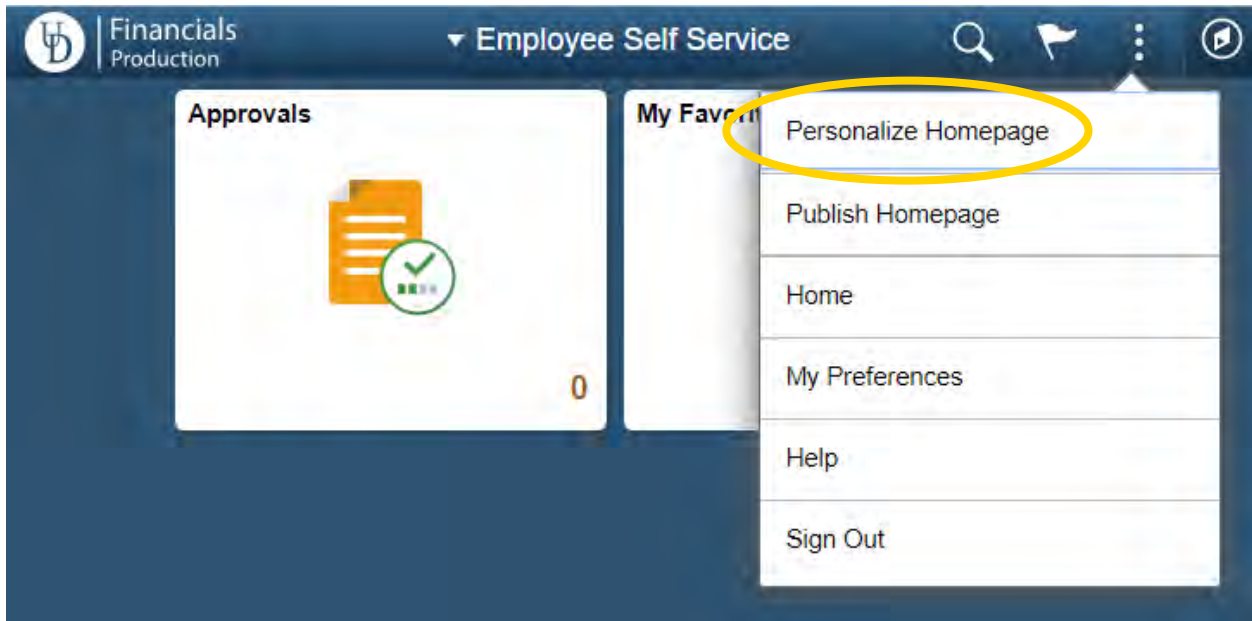
Make the Research Office Homepage My Default

Step One

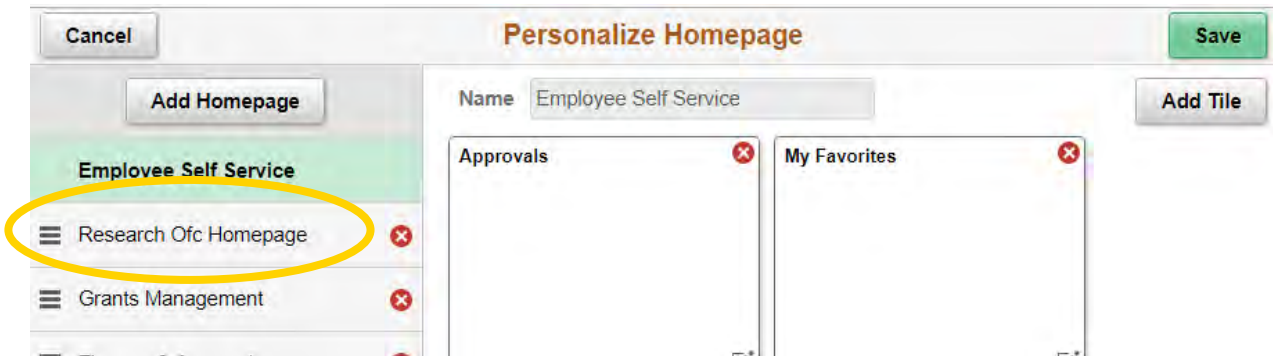
- From the landing page, click on the Actions List icon



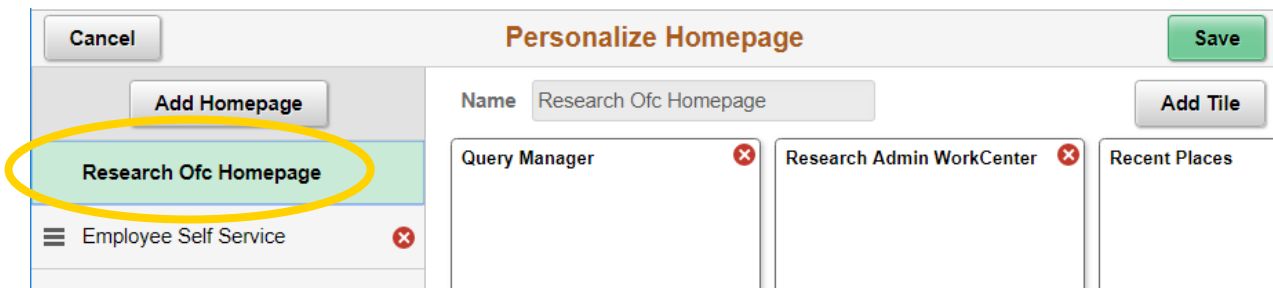
- Select Personalize Homepage



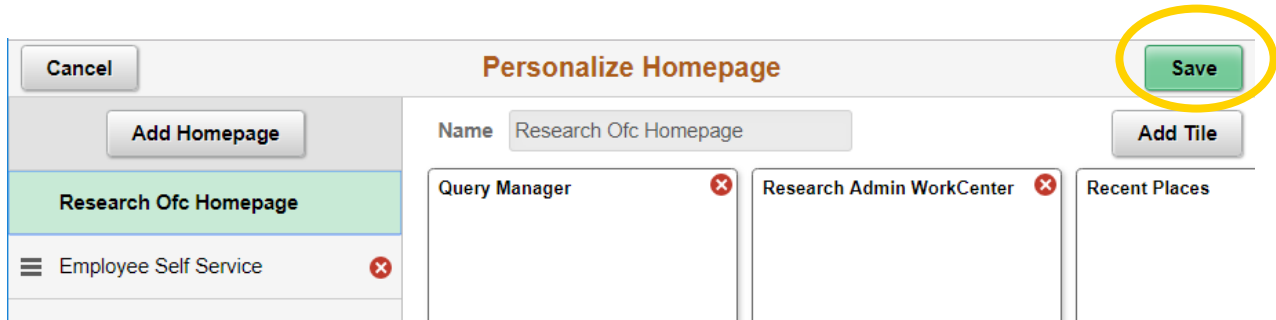
- From the Personalize Homepage page, click on the "Research Ofc Homepage" icon and drag it to the top of the list.



- Release the icon when it is at the top of the list.



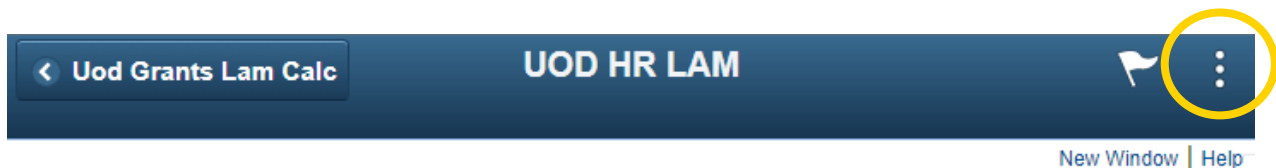
- Click the Save button



Adding a “Custom” Tile

All users can add a “custom” tile to a homepage (as an alternative to adding a page to “My Favorites”).

- Navigate to any page in UD Financials (for example, the LAM page)
- Click the Actions List icon



UOD HR LAM

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

Find an Existing Value

▼ Search Criteria

SetID = 🔍


Empl ID begins with 🔍

Fiscal Year =

Department begins with

Name begins with

Include History Case Sensitive

Search Clear Basic Search  Save Search Criteria

- Select Add to Homepage

UOD HR LAM

UOD HR LAM

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

Find an Existing Value

Search Criteria

SetID = UOD01

Empl ID begins with

Fiscal Year =

Department begins with

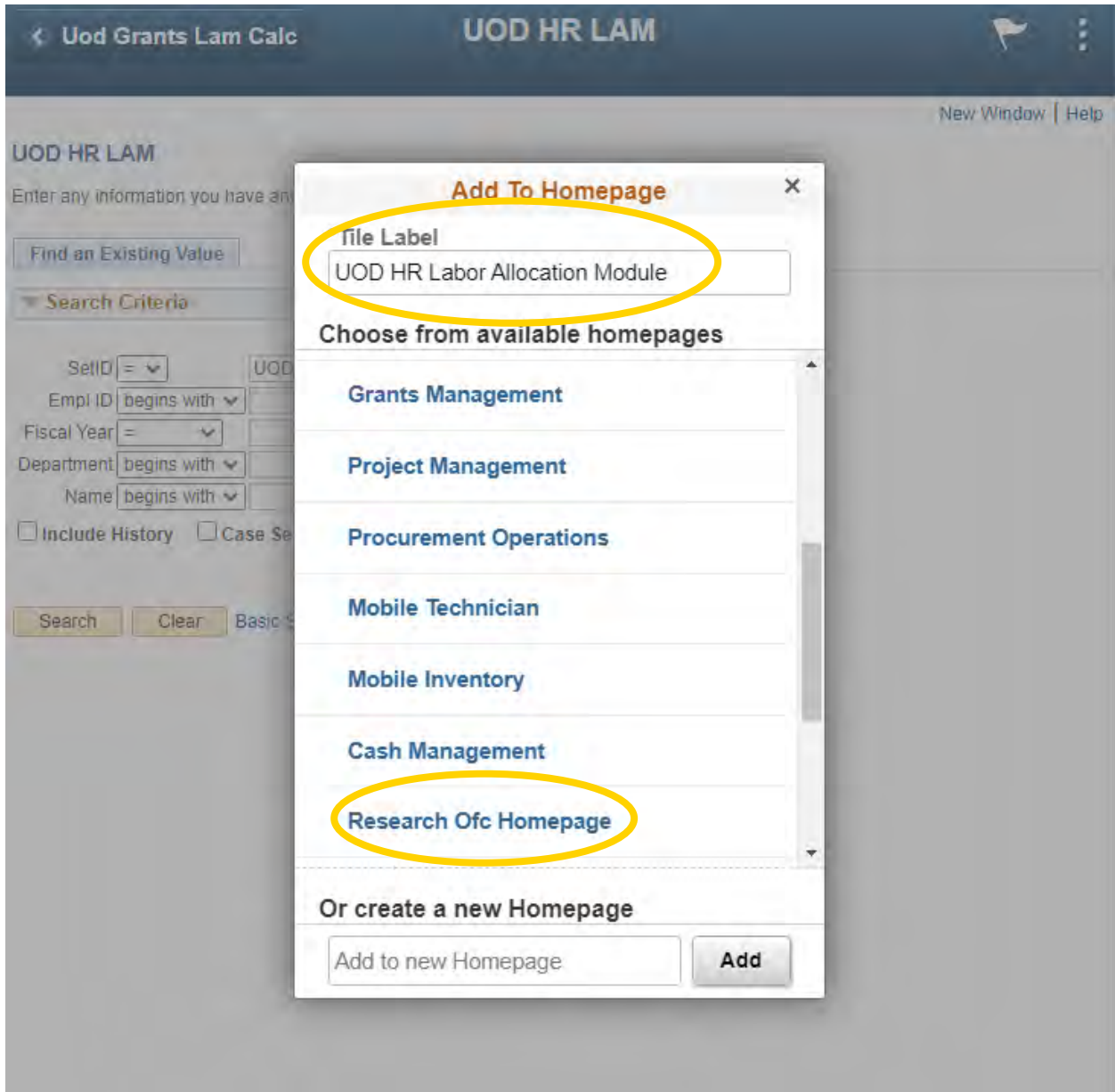
Name begins with

Include History Case Sensitive

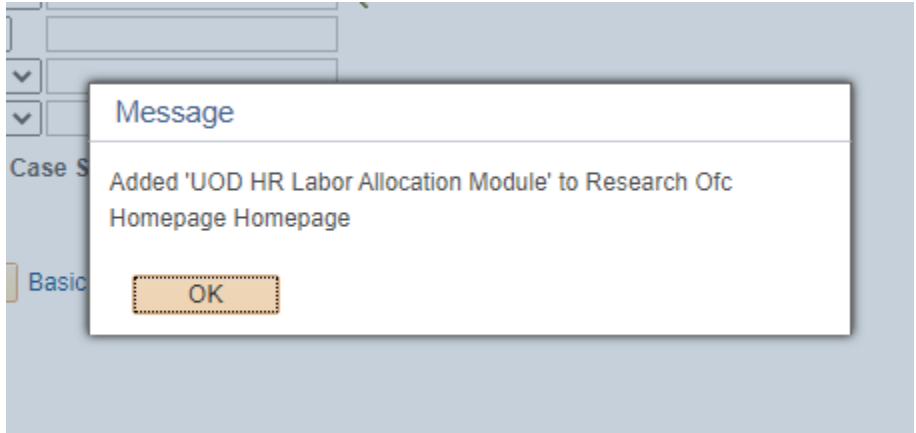
Search Clear Basic Search Save Search Criteria

- Home
- Search
- Add To Homepage
- Add To NavBar
- Add To Favorites
- NavBar
- My Preferences
- Sign Out

- Type in a label for this tile (or accept the system suggestion)
- Select the homepage where this tile should appear



- A confirmation message will appear. Click OK.



- Navigate to the selected homepage to view/use the new tile

