

New Enhancements to the Berkeley Financial System

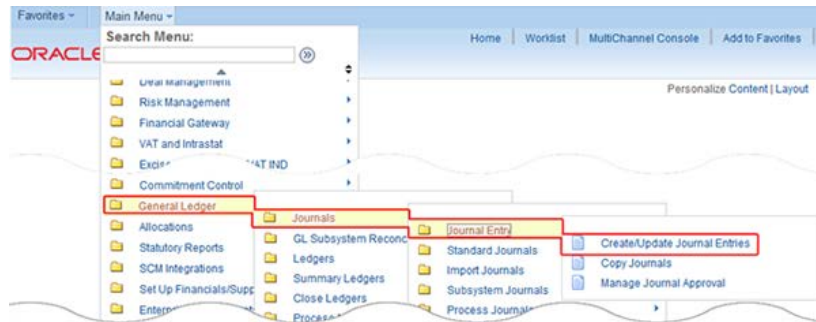
Overview

In spring 2014, the Berkeley Financial System will upgrade to version 9.2 introducing many improvements to the system. This guide reviews the new “internet-like” look and navigation.

Navigation

Main Menu: Navigate to a Specific Page

Expand the folder(s) and subfolder(s) that fall within the page’s hierarchy until you reach the desired page link. For example, to get to the **Create/Update Journal Entries** page, select - **General Ledger ▶ Journals ▶ Journal Entry ▶ Create/Update Journal Entries**.

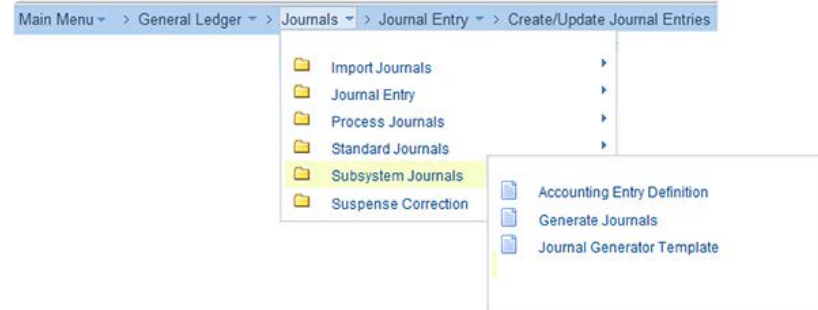


Breadcrumbs

A menu string appears at the top of every page displaying the current location of the page within the navigation structure.

Main Menu > General Ledger > Journals > Journal Entry > Create/Update Journal Entries

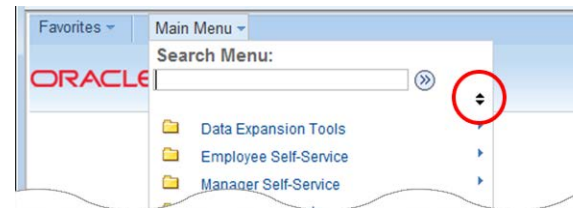
We call this menu string “breadcrumbs” because it shows a trail of each folder, subfolder, or component you passed through to get to the current page. You can backtrack to any of the previous menus by selecting one of the breadcrumb links. This unveils “clickable” subfolders and pages that fall under that link.



Customizing the Main Menu

By default, the **Main Menu** lists pages in the same order as prior versions of BFS, but now you can customize this order if you choose.

Click the arrow icon found at the top-right of the **Main Menu** to sort the menu in ascending order (A to Z) or descending order (Z to A). Each mouse click toggles to a different sort order.

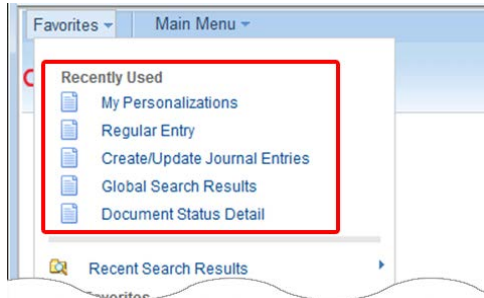


You can even edit your user profile and make one of these new sort orders the system default. See the **Appendix** at the end of this guide for instructions on how to do this.

Favorites Menu

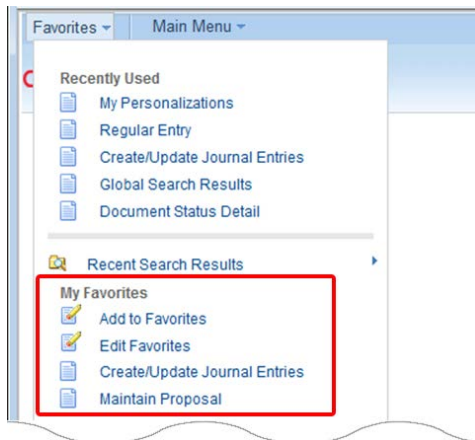
Recently Used

Much like a web browser's history function, BFS 9.2 tracks recently visited pages. This feature is found at the top of the **Favorites** menu. The pages are listed in the order last visited with the most recently visited page at the very top.



Favorites

The process of adding, editing, and removing favorites is unchanged from previous versions of BFS. The links are located at the bottom of the **Favorites** menu under **My Favorites**.

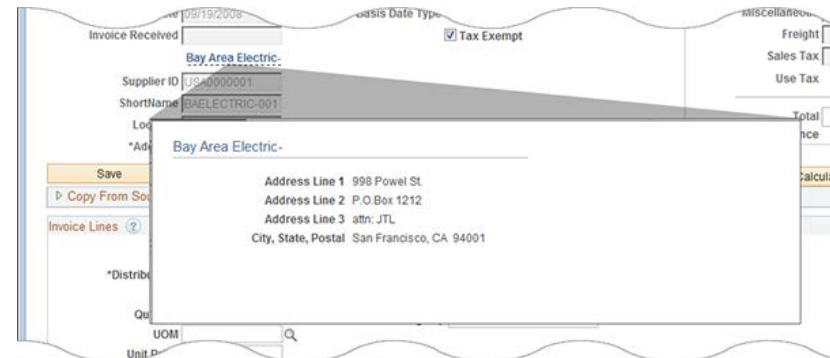


Mouse-Over

The mouse-over function displays additional information about vendors, contacts, customers, or sponsors without cluttering the page or requiring navigation to another page. A dotted-line underneath the text earmarks mouse-over enabled fields.



Hover your mouse over the text. After several seconds, additional information (such as names, addresses, email, and telephone numbers) will automatically pop up.



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Inner Scroll

The nested inner scroll is perfect for viewing a long row of content such as a chartfield. This feature helps simplify the process of reviewing a long row of data with many fields.



3 Once you have made your selection, go to the bottom of the page and click the **OK** button. This takes you to the **Save Confirm** page where you click the **Return** button to save your selection.

Appendix

Change the Default Sort Order

If you want to set one of the new menu sort orders as the default, follow these steps:

- 1 Go to the **Main Menu** and select - **My Personalizations** ► **Personalize Navigation Personalizations**.
- 2 Find the **Drop down Menu Sort Order** menu and choose the sort order you prefer. Select either **Ascending** order (A to Z sort), **Descending** order (Z to A sort), or **None** (to restore the original order of the menu).