IFAS 7.9 Navigation Guide
IFAS 7.9 Navigation Training

IFAS 7.9 Dashboard Login

The IFAS software will work on IE 7 or IE 8 with full functionality. Running IFAS on any other platform will provide the user with limited functionality. See attachment A for details.

For the purpose of training, open an Internet Explorer (IE) window and type (or copy and paste) the following URL:

https://ifas79test.fanda.ucar.edu/ifas7/home/Default.aspx

Type your IFAS User ID and IFAS Password. Your IFAS User ID is your email address without the “ucar.edu”.

If you receive this error message, verify that your User ID has been typed correctly and that your CAPS lock is off, then retype your password.

The Production URL is as follows:

- Be sure to copy this link and paste into Internet Explorer for full functionality
- Your login and password will be the same one you use for the timecard application
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Log Off

To log out from the main dashboard application, always select Logoff in the upper right corner of your window. To log out from any other application, select Close in the upper right corner.

Dashboard Overview

The basic Dashboard configuration contains two tabs, Home and All. The Dashboard also provides user customization capabilities as well as single-click access to Web-enabled applications within IFAS. This functionality will be presented throughout this document.

NOTE: The Dashboard display is dependent upon configuration options and can be modified to meet user needs. This document will demonstrate some of those custom designs. The examples in this guide were taken from the 7.9 test system.
SecureCRT vs. Dashboard Matrix

<table>
<thead>
<tr>
<th></th>
<th>SecureCRT</th>
<th>IFAS 7.9 – Dashboard</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>AD HOCS</strong></td>
<td>• Date must be entered, no longer defaults</td>
<td>• Must be run using the rdf.admin suffix</td>
</tr>
<tr>
<td></td>
<td>• Format Override options 05,07 and 09 are now separate questions</td>
<td></td>
</tr>
<tr>
<td><strong>No IQ</strong></td>
<td></td>
<td><strong>IQ</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Run as a CDD in IQ reports folder</td>
</tr>
<tr>
<td><strong>USE FILES</strong></td>
<td></td>
<td>No USE FILES</td>
</tr>
<tr>
<td></td>
<td>• Must send to DocsOnline to print</td>
<td></td>
</tr>
<tr>
<td><strong>UC - Custom</strong></td>
<td></td>
<td>No UC - Custom</td>
</tr>
<tr>
<td></td>
<td>• New printing option when selecting “Queue” (e.g., report viewer)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• pdf version now exports to ftp/reports</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• UCRERV- to view month end reports that were run prior to implementation</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• DocsOnline to view month end reports post implementation</td>
<td></td>
</tr>
<tr>
<td><strong>CMM – Contract Management Module</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• must be run in CRT Nova - UCCT</td>
<td></td>
</tr>
<tr>
<td><strong>Printing</strong></td>
<td><strong>Cannot print to Terminal or Attached Printers. Must use</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>DOTEMP or DOPR</td>
<td></td>
</tr>
</tbody>
</table>

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The Dashboard Home Page

From the Dashboard home page, you may choose from a variety of Public reports and applications. Following is a view of the current ‘test’ home page configuration. **Note: Your Production login may contain additional tasks based on your access.**
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Change Content Tab

This page enables end users to customize their home page on the IFAS Dashboard. These Public Favorites have been made available to users during the initial setup.

Click **Change Content** to edit the home page content.

All the folders you can display on your dashboard are listed here.
The ✓ indicates that the folder is currently being displayed.
To add or delete a folder, click the ✓ and then click **Save**.

Click **Home** on the bar to return to the dashboard.
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Change Layout Tab

This page enables end users to change where the folders are displayed on the Dashboard.

There are three columns available on the dashboard. To move a folder to a different column, highlight the folder and click. **Note:** the first time you move a folder to *Column 3*, click.

You can also change the order of the folders in a column by highlighting a folder and clicking or .

Clicking when a folder is highlighted will display the following message.

Click **OK** to delete the folder or **Cancel** to keep it.

Click **Save** to keep the change(s). Click **Home** on the bar to return to the dashboard.
Running Reports from the Home Page

IFAS 7.9 allows for new reporting capabilities using Click-Drag-Drill (CDD) functionality. The “Use Files” previously available in Secure CRT are no longer available through the Dashboard, therefore we have re-written many of these reports in CDD.

Several of the commonly used reports have been written in CDD and placed on the Dashboard for quick reference. To run any report listed, click on the link, e.g., Use Budro, and a pop up dialog box will appear.
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Report Dialog Box:

Play with the links and experiment with printing reports. Not all reports appear as the above example. There are different selection criteria for each.

To run these, and many other CDD reports using other selection criteria, refer to the Reporting with CDD section of this document.

### Drill Down

Some reports are equipped with “Drill Down” capability which will display more detail about an entry. Drill down is activated when a drill icon appears after moving your cursor over a specific column of numbers. Double clicking a total will open another screen where you may view the details of that number. Run the Budget to Actual by Account and Object report to view this feature.

To close the drill down and/or return to the main report, click the ☒ in the upper right hand corner of your screen.
General Standards for Selection Criteria and Keyboard Commands:

- All prompts are case sensitive and should be entered in capital letters.
  - e.g., when using the search function in PEUPPE, “IBM” is not the same as “ibm”
  - All names should be entered Last, First or Last*, but must be typed exactly as entered in the system.

- The “%” or “*” is used as the wildcard symbol. “ABC%” will return all records in which the specified field entry begins with ABC. An asterisk (*) can mean different things depending on the context in which you are entering selection criteria. In many CDD reports an asterisk may be auto filled, therefore, you must be aware of the selection you intend to return.

- You may select a single item (160001), multiple items separated by commas (160001,160002,160003) or a range of items using a colon (instead of a dash) (160001:160017).

- Dates must include slashes (/).

- Click to display a calendar for the current month. (in applicable reports)

- All prompts must have a valid response in order for the report to run.

- If your report does not display any data, you either entered your selection criteria incorrectly or you don’t have access to the information you requested.

- Use ‘>’ for greater than
- Use ‘<’ for less than
- Use ‘>=’ for greater than or equal to
- Use ‘<=’ for less than or equal to
- Use ‘<>,’ for not equal to (EXCLUDE)

<table>
<thead>
<tr>
<th>Key</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>CTRL+F</td>
<td>Find/Search</td>
</tr>
<tr>
<td>CTRL+L</td>
<td>Perform Look-up (for Combo boxes, PEID fields, etc.)</td>
</tr>
<tr>
<td>CTRL+P</td>
<td>Move to the Previous record</td>
</tr>
<tr>
<td>F1</td>
<td>Displays the help file for the screen/field you are viewing</td>
</tr>
<tr>
<td>CTRL+G</td>
<td>Toggle to and from Grid/Single View Modes</td>
</tr>
<tr>
<td>CTRL+N</td>
<td>Move to the Next record</td>
</tr>
<tr>
<td>TAB</td>
<td>Press the Tab key to move through the fields</td>
</tr>
<tr>
<td>F5</td>
<td>Refreshes the screen</td>
</tr>
</tbody>
</table>
Printing and Exporting Reports

If you chose the Excel option, your report will appear in a separate dialog box. In order to initiate the Excel spreadsheet in another window, click on the yellow paper clip in the upper left corner of the window. Then select the report name to open in Excel.
Navigating a Report

- Designates an attachment (such as an Excel report)
- Go to the first page of the report
- Go the previous page
- Go to the next page
- Go to the last page of the report
- Display in Adobe Acrobat
- Print/export options (may be sent to Excel, a pdf or archive (Docs Online))
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Searches/Lookups

There are links to Account Key Information (Chart of Accounts) and Person/Vendor Information (PEID) on this tab. Click on a link to activate a separate window and search for data.

Side Bar

When viewing data in these read-only windows, the side bar provides various options for information based on the selection criteria.

Account Key Information (aka GLUPKY)
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Side Bar Menu Options

**Favorites:** This will allow you to click on other favorites listed on the home page. e.g., Person/Vendor Information.

**Links:** Links to other related screens. Object Code Definition is the only link available to read-only users.

**Workflow:** Allows access to Workflow data. (Disabled for read-only users)

**Attachments:** Disabled for read-only users

**Tools:** Disabled for read-only users

**Reports:** Disabled for read-only users

**Entity List:** Lists all items for the application being viewed.

Accessing Help

Help may be accessed by clicking on Help on the upper right hand corner of the window, or pressing F1 from within any field on any screen.

Choosing Help will show a submenu with three options. **Help** (F1) will bring up the help file for the specific screen or tab you are currently in. **Navigation Help** will bring up the IFAS Navigation help document. **About** will bring up a screen showing the Release and Build you are running along with some connection information.
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**Navigation Bar (Within a Data Screen)**

Whenever you are in an IFAS screen that allows lookup or search capabilities, such as GLUPKY or PEID, you will see a navigation bar at the top of the window. Each option is described below.

These arrow buttons allow you to move through existing records. (Previous/Next)

This button is used to create a new page (new record)  Disabled for read-only users

Search/Find

Options

This **Search/Find** drop-down menu allows you to perform certain search functions. There are different menu selections, depending on which mode you are in. Not all options are available to read only users. The options highlighted in yellow are not available.
There is an indicator on the navigation bar to show which mode you are in.

**Find/Search** – The Find/Search option allows you to search for a record based on selected criteria. Selecting the Find/Search option again clears all fields on the screen.

**Apply Find Criteria** - If Apply Find Criteria is selected (or enter is pressed), the current selection criteria will be applied and the screen will come up in view mode (if records are found). If no matching records are found, a “No Records Found” warning will be displayed and the screen will remain in Find mode.

**Find Extended** - When selecting this option, a dialog box will appear which allows you to search threaded notes related to the record.

**Count Records** – Reports the number of records currently selected.

**Save** – Allows the user to save a record to a QBE (Query by Example) (not available to read only users)

**Save Named List** – Allows user to create a named list to retrieve at a later time (not available to read only users)

**Reselect** - Takes you back to the first record in the entity list.

**Select All** - When you have loaded a Find/Search, you can return to the unfiltered database by choosing Select All from the Find menu.

The **Escape [Esc] key** is a quick way out of find mode. If your query returned no data, Escape will put you into ADD mode. If want to cancel a Find before doing a query, Escape will put you back into search mode to the last record you were on.

**Cancel Find (View Mode)** Cancels the current Find and returns the screen to the search mode.
Selecting Sets of Criteria

Each Find definition can be made up of one or more sets of criteria used to determine which records in the database you want presented to you in the inquiry. You may use any field or combination of fields for inquiry by moving the cursor to the desired field and keying in the selections you want to see.

Example: When using the Account Key Information (GLUPKY) screen to select by Status, Entity/Fund and Funding Source position the cursor in the Status field and enter the desired code (or select from drop down). Then position the cursor in the Entity/Fund field and enter the desired code (or click on the ellipsis to lookup a code), and do the same for Funding Source.

After entering the criteria for the search, select Apply Selected Criteria on the Find menu (or press CTRL + F) to finalize the definition and launch the inquiry. You have now instructed the system to find all records where the Status, Entity/Fund and Funding Source match the selections given. The record(s) that match the criteria selected will now be shown. Browse the records by clicking Next and Previous or in the Entity List on the side bar.
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Options

The Options drop-down menu allows you to perform special search functions. There are different menu selections, depending on which mode you are in. The options highlighted in yellow are not available.

Search Mode

Find Mode

Show Grid (Ctrl+G) or Hide Grid (Ctrl+G) – Toggle to and from grid mode and single record view mode. If you make changes to the grid settings, by re-sizing or moving a field, the Restore Default Grid Settings option will be displayed.

Sort Order - Allows you to select different sort options as shown below
Record Info - Shows log history

Undo Changes – Applies to data entry, disabled for read-only users

Undo All - Applies to data entry, disabled for read-only users

Copy Record – Applies to data entry, disabled for read-only users

Paste Record - Applies to data entry, disabled for read-only users

Delete Record - Applies to data entry, disabled for read-only users

View Last Changes - Applies to data entry, disabled for read-only users

Repeat Last Changes on Selected Records - Applies to data entry, disabled for read-only users
Preferences - Settings

The Settings option within Preferences allows you to make changes to the Account Key and Person/Vendor Information screens. There are four tabs under the Settings option: Ledgers, Preferences, Advanced, and Screen Specific.

Ledgers Tab

The options in the Ledgers tab are set and cannot be changed.

After changes to the settings are made, click **Apply Changes** (this must be done in the tab you are changing).
Preferences Tab

From this tab you can make changes to your preferences.

Enable Auto Tab: Applies to data entry. When auto tab is enabled the cursor will automatically go to next field when that field has reached its character limit without the user having to use the tab key.

Shut Down Method: Applies to data entry. This setting applies to the entire system and can be set from any screen.

Show Attachments: Used to set whether attachments (workflow documents) are always shown, shown upon request, or never shown.

Automatic Save Method: Applies to data entry.

Child Shut Down Method: Allows you to control the shut down of Explorer windows. The default is “do not close children.”

Display Field Help: When “Yes” is selected, the user will see additional information at the bottom of the box that relates to the coding of fields. This coding is useful to F&A IT Sys. Admins. for troubleshooting field problems. Default is “No”.

Recommended settings
Advanced Tab

From this tab you can make changes to the preferences for timeout and record limits.

**Request Timeout:** Is the amount of time the system has to retrieve information before the system enters 'timeout' mode. You may use this option to define a timeout value (in seconds) greater than the default, which is 30 seconds.

**Child record limit:** Applies to data entry. Allows you to limit the number of child records that may be opened at one time. This will help avoid system overload that may occur when opening many child records at one time.

**Rows in Entity List:** Allows you to define how many rows will appear in the side bar. Generally, 30-40 is optimal for viewing.
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**Screen Specific Tab**

The screen specific tab allows you to modify the options on selected screens.

**Initial Screen Mode:** Enables you to open the screen in browse mode by selecting "Initially Normal" or in select mode by selecting "Initially in Find Mode". Opening the screen in Find Mode will cause it to display faster as no records are displayed until you perform your query.

**Initial Filter /Always Filter** – Are set to system defaults

**Workflow Task List** – When enabled, allows the user to see workflow documents in side bar

**Local Printers:** N/A - lists the printers defined on the user’s PC

**QBE Lookups:** Applies to data entry. Default setting should be "Disable" for Administrators
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Drop-Down Arrows and Ellipsis (…)

Navigating with Drop-Downs (Combo Boxes)

The **arrow** to the right of a field indicates a list or "picklist" of options available for this field. Click on the arrow and a drop-down box of options will appear.

Navigating with the Ellipsis (…)
Whenever you see the **ellipsis** symbol, this indicates there are options for this field that will activate a Data Lookup Dialog Box.
The **Lookup** (CTRL+L) command in an ellipsis field will activate the Data Lookup Dialog Box.

**Data Lookup Dialog Box**

To create a filter to search for data in the Lookup Dialog box, you must enter information on the three fields in the box. In the first field, select the type of information by which you want to search. In the second field, select a qualifier (e.g., like, equal to, not like.). In the third field, enter the data that you would like to find. Then press the Apply button. For example, if you want to look up all the keys in division 12 (HAO), you would enter "PROG" in the first field, select “like” in the second field, and 12* in the third field (using the * wildcard).
Parts of an Account Key

In the Account Key (GLUPKY) screen there are some additional informational tabs.

Primary Part – Basic information relating to the Agreement (key), including Entity, Contract, Funding Source, etc..

Supplemental Parts – This tab identifies the 32 additional part codes available.

Contacts – N/A

Text – N/A

Select Codes – This tab identifies the 8 codes currently used in the Project Accounting office

Misc Codes – This tab identifies current and previous years OH rates, Property designation, and Award Group

Valid Object Types – N/A
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All: Menu Tree

The second tab on the Dashboard is the ALL tab. This tab contains a Menu Tree, where end users have the ability to create Personal Favorites and reports based on user specifications. This is also where you would access specific read-only screens, IQ reports, and CDD (Click Drag and Drill) Reports. Although Reporting will be presented in a separate document and training session, following are some highlights to reporting.

Command Window

If you know the mask you would like to access, you may type it into the command window for quick access e.g. typing GLUPKY will take you directly to the chart of accounts (glupky) screen.
Favorites
The Favorites option allows you to add reports, including CDD, to a folder which you can run with a single click. There are two types of Favorites in 7i, Public and Personal. Public Favorites are those that are available to all users of the system. Personal Favorites are those created by a particular user and available to that user only. The list of Favorites available to the user is a combination of the Public and Private favorites as displayed below.

Favorites Options
The Favorites drop-down includes the following options:

Personal Favorites: A list of all the personal favorite menus created by the current user

[New Personal Favorites]: Use this to create a new menu of personal favorites

Public Favorites: A list of all the public favorite menus (available to all users)

[New Public Favorites]: Use this to create a new menu of public favorites
Note that these "favorite menus" represent an entire tree of favorites (each may contain multiple favorite jobs and nested levels of folders). When you select an option within any of the favorites (in the tree), the following options will be added to the drop-down favorites menu:

**New Folder** (added within currently selected option/node)

**Rename** (applies to currently selected option/node)

**Delete** (applies to currently selected option/node)

**Quick Favorites Tips**

Clicking a name in one of the favorite menus (within the drop-down list) will load that menu under the Favorites option of the menu tree. A check mark indicates which favorite menu is loaded. Clicking a "loaded" name will unload that menu. The menus loaded will automatically reload when you launch IFAS.

Be sure to name your new Favorites folder before adding to it. When you create a Favorites menu, it will automatically enter "rename mode" so that you can provide a name for it. After entering the name, press Enter (or click elsewhere on the tree) to save it. Once your favorite menu exists, you can drag any screen or report (including CDD’s) to it by holding down the control key, clicking on a "terminal node", and dragging it to the desired location (Cntrl, Click, & Drag). Similarly, you can drag jobs around within the favorites menu to reorganize it. Changes are automatically saved to the database.

- Dropping an item on a folder will add it to the end of that folder.
- Dropping an item in another favorites menu entirely will make a copy instead of a move.
- When a job is moved into a Favorites menu, the user responses will go with it. For example, if you have already filled out selection criteria, it will become the default value within the favorite.
- Within the job, there is a Save Changes button that can be used to alter the default values for that job (this option is only available on jobs within a favorites menu). The defaults are stored within the favorite and will remain unchanged unless you use that button.
- After dragging jobs into a favorite menu, you may want to rename the jobs so that they make more sense or so they will better describe the default options that were selected.
- Rename is only available within Favorites menu, not in the standard IFAS options.
Creating Favorites

When creating Favorites, one option is to place the individual favorites in folders. The following explains how the folders are presented to the user in various configurations.

Create a New Personal Favorite

1. Open the Favorites folder. Click on Favorites in the toolbar, then click on [New Personal Favorites]

2. When the new folder appears, type a name for the folder (e.g., Budgeting), press Enter.
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Create a Subfolder within a Favorites Folder

1. Open the ‘Budgeting’ folder created in the previous step.
2. Click on Favorites, and then New Folder in ‘Budgeting’
3. Type in the name for the subfolder, (e.g. Monthly Reports), and press Enter.

Note: At any point after creating a folder or subfolder, that folder may be renamed or deleted.
Adding Reports to a Favorites Folder

1. Any report in the Menu Tree (including CDD reports) may be added to any personal favorite’s folder. To add a report to your folder, locate the report, hold down the Ctrl key, click on the item and drag the mask into the desired folder. In this example, adding a report to the “budgeting” folder.

**Note:** Reports may be filled in with the end users selection criteria prior to dragging to a folder. The selection criteria will remain intact and may also be edited with each use.
Create a Single Web link in Favorites

1. Click on a folder so you can see that it is open
   (in this example, we use General Ledger Info, but web links may be used in any folder)

2. Click on the Favorites menu and then click on New Web Link in ‘General Ledger Info’
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3. Type in the name you would like associated with the Web Link, press tab and enter the URL in the field provided.

Web links may also be edited or deleted
**Favorites on the Dashboard**

1. Favorites may also be added to the dashboard toolbar. Click on the Options tab (white paper icon) in the upper right corner of the Dashboard. Select ‘Preferences’

2. Any of the favorites listed in the dialog box may be added to your Dashboard toolbar for easy access. This includes Personal and Public Favorites. They may also be removed from the toolbar by un-checking the appropriate box.
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Jobs

If the user clicks on the Jobs link, a pop-up window will appear. When the window opens, the user will initially view only their jobs actively running. If the option is selected, recently completed jobs will also be shown. If the option is selected, jobs submitted by all users will also be shown.

Users have the option of cancelling their own jobs by clicking on the link while the job is running.

Note: Data entry job postings should NEVER be cancelled using this option!
Clicking on a IFAS job number will display the reports and associated tail sheet. Clicking on these links will display the report in PDF.
Workflow
The Workflow tab is where users will find any tasks waiting to be approved.

IFAS
The IFAS tab contains links to various financial system folders where the end user may run reports and/or processes. Instruction on running reports will be covered in a separate document and class.

Reports
This is where the end user will go to access IQ reports and custom UCAR CDD reports
Reporting with CDD

In addition to the CDD reports that have been written and conveniently placed on the Dashboard, users may also access the more extensive list of reports located on the “ALL” tab within the “Reports” folder.

From the menu tree, click Reports, UCAR Reports

This will provide you with a menu of the different sub systems in which reports reside. Open your desired folder and select a report by double-clicking on the report name.

Upon making your selection, you will be prompted with a dialog box which will allow you to enter a variety of selection criteria.
Your report will open in a separate window to facilitate printing and viewing. Refer to the Printing and Exporting Reports section of this document for additional information.

Note: reports are usually pre-written with common selection criteria that facilitate running the report; however you may select additional criteria by clicking on the Add Prompt button.

If your intention is to run the report with specific exclusions or additional criteria, not already coded into the CDD report, see the next section – CDD Exclude/Add Features.
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**CDD Exclude/Add Features**
To be able to exclude or add criteria on a CDD report you will need to run the CDD report from the "All" tab rather than the Dashboard version of the report. The reason for this is, the selection criteria you want to exclude or add has to be inserted into the report because the report is written with specific criteria. From the Dashboard, click on the "All" tab.

From here, you will need to go to the CDD reports folder, which is Reports>UCAR Reports. All of the CDD reports are stored in a sub-folder under UCAR Reports. For this particular report you would go to Reports>UCAR Reports>General Ledger>Transaction Detail>Transaction Detail by Division, Program, & Object (RXTXNRPT). Remember clicking on the +, the folder icon, or the name of the folder will open up all of the sub-folders under that folder.
From here, you will need to click on "Add Prompt" and select a category to add your additional criteria. In this example, Vendor/Emp ID.

The syntax to exclude is as follows:
<> ,xxxxxx where xxxxxx represents the criteria that is to be excluded. In this case, the xxxxxx is the employee id, i.e., 015857. There are no spaces between the <>, and the criteria.

To add criteria, select a category from the dropdown box and type the information into the field to the right. Refer to General Standards for Selection Criteria and Keyboard Commands: for selection criteria tips.
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UCREPOST
This report may be accessed from the Dashboard Home page or the ALL tab (CDD):
Enter selection criteria and click the Submit button.

P0963784 – Good example with account splits, encumbrance, payments
M0973670 – Large maintenance agreement with multiple line items
P0948135 – A standard, fully paid PO with multiple line items

Your report will open in a separate window to facilitate printing and viewing. Refer to the Printing and Exporting Reports section of this document for additional information.
# Purchase Order Status Inquiry

<table>
<thead>
<tr>
<th>Item</th>
<th>Qty Ordered</th>
<th>Units</th>
<th>Key</th>
<th>Object</th>
<th>Unit Price</th>
<th>Extended</th>
</tr>
</thead>
<tbody>
<tr>
<td>0001</td>
<td>1</td>
<td>EA</td>
<td>GL</td>
<td>BLANK</td>
<td>$2,519.00</td>
<td>$2,519.00</td>
</tr>
</tbody>
</table>

**Split:**
- 475000 5281 2,268.00 %: 0.00 Amt: $2,268.00
- 475000 5324 251.00 %: 0.00 Amt: $251.00

**PO Total:** $2,519.00

## ENCUMBRANCE DETAIL

<table>
<thead>
<tr>
<th>Item</th>
<th>Batch ID</th>
<th>Job Number</th>
<th>Key</th>
<th>Object</th>
<th>Type</th>
<th>Post Date</th>
<th>EN Amount</th>
<th>PD Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>0001</td>
<td>PO</td>
<td>2904599</td>
<td>GL</td>
<td>475000</td>
<td>EN</td>
<td>01/12/2003</td>
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<tr>
<td>0001</td>
<td>POADU</td>
<td>2908581</td>
<td>GL</td>
<td>475000</td>
<td>EN</td>
<td>01/21/2003</td>
<td>($251.00)</td>
<td>0.00</td>
</tr>
<tr>
<td>0001</td>
<td>AP 12OTM1</td>
<td>2909457</td>
<td>GL</td>
<td>475000</td>
<td>FP</td>
<td>01/22/2003</td>
<td>0.00</td>
<td>$251.00</td>
</tr>
<tr>
<td>0001</td>
<td>AP 12OTM1</td>
<td>2909457</td>
<td>GL</td>
<td>475000</td>
<td>FP</td>
<td>01/22/2003</td>
<td>0.00</td>
<td>$2,268.00</td>
</tr>
<tr>
<td>0001</td>
<td>PO</td>
<td>2908581</td>
<td>GL</td>
<td>475000</td>
<td>EN</td>
<td>01/21/2003</td>
<td>$251.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

**Total:**
- 475000 $2,519.00
- $2,519.00

## Item: MAC COMPUTER PURCHASE

- **Address:** 12545 Riata Vista Dr<br>MS: 199-HE<br>AUSTIN, TX 78727
- **Attention:** CUMMINGS, DONNA
- **Request Date:** 01/12/2009
- **PO Deliver To:** DONNA CUMMINGS
- **Terms:** NET 30 DAY
- **Buyer:** STEPHANIE McKEEHAN-CONTRACT ADMINISTRATOR

**Date Last Printed:** 01/21/2009
**Last Date Received:** 01/20/2009

**Req. Codes:**
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]

**PO Number:** P0829764
**Vendor ID:** V01875
**Vendor Name:** APPLE COMPUTER INC

**Status:** Fully Paid
IFAS 7.9 Navigation Training

Inactive Use File Listing

In IFAS 7.9 the ability to run USE files from the IQ menus no longer exists.

Following is a table of USE files that will no longer be available from Secure CRT (Bi-Tech). These are reports that were launched in Secure CRT (Bi-Tech) from an IQ menu, such as APIQ or GLIQ. IQ reports may now be run from the IFAS Menu Tree under the Reports folder.

<table>
<thead>
<tr>
<th>APOHlQ</th>
<th>GLIQ</th>
<th>POIQ</th>
<th>NUIQ</th>
<th>PYIQ</th>
<th>ENIQ</th>
<th>PEIQ</th>
</tr>
</thead>
<tbody>
<tr>
<td>APEMP</td>
<td>BA</td>
<td>NEWREQ</td>
<td>FDID</td>
<td>TIAIQ</td>
<td>ENBYPO</td>
<td>CUSTINFO</td>
</tr>
<tr>
<td>APFIND</td>
<td>BSRIQ</td>
<td>POCHK</td>
<td>PROPOSAL</td>
<td>CASPAY</td>
<td>ENBYPO2</td>
<td>FINDPE</td>
</tr>
<tr>
<td>APVEND</td>
<td>BUDGET</td>
<td>RECEIVE</td>
<td>SPFINDD</td>
<td>SPFINMO</td>
<td>ENSTATUS</td>
<td>BOSTATUS</td>
</tr>
<tr>
<td>APVISA</td>
<td>BUDCHECK</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CHECKPAY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NONENCBO</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PHONE</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>VENYTD</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Due to user access limitations, this list may include reports which you did not have access to in CRT.
IFAS 7.9 Navigation Training

Attachment A

Minimal functionality view of the Dashboard, using web platforms other than Internet Explorer (IE 7 or IE 8) e.g. Mozilla Firefox

Note: Limited functionality on Dashboard Home page – no ability to change Content or Layout
Note: Limited functionality in IFAS “ALL” page – no access to Favorites, Workflow or the basic IFAS menu tree. Only CDD reports are available.
IFAS 7.9 Navigation Training

Browser Functionality

The following table outlines the functionality of the IFAS 7.9 system using various browsers. As indicated in Attachment A the system works to its optimum capability on IE7 or IE8.

<table>
<thead>
<tr>
<th>Functionality</th>
<th>IE8</th>
<th>Firefox</th>
<th>Safari (Win)</th>
<th>Safari (MAC)</th>
<th>CRT</th>
<th>CITRIX</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dashboard Access</td>
<td>Y</td>
<td>Y*</td>
<td>Y*</td>
<td>Y*</td>
<td>N/A</td>
<td>Y</td>
</tr>
<tr>
<td>Dashboard Customization</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N/A</td>
<td>Y</td>
</tr>
<tr>
<td>IFAS Menu Tree</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Favorites (Public and Private)</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N/A</td>
<td>Y</td>
</tr>
<tr>
<td>Access to COA &amp; Person/Entity</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>Y</td>
</tr>
<tr>
<td>Reports (Click, Drag, Drill (CDD))</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>N/A</td>
<td>Y</td>
</tr>
<tr>
<td>Standard IFAS Reports from Menu</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Ad Hoc Reports</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Webforms (CSC, other TBD like Travel)</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>N/A</td>
<td>Y</td>
</tr>
<tr>
<td>Docs Online Access</td>
<td>Y</td>
<td>Y**</td>
<td>Y**</td>
<td>Y*</td>
<td>N/A</td>
<td>Y*</td>
</tr>
</tbody>
</table>

* Access to screen items limited due to browser

** Access to user interface via url link but no access to standard show jobs viewer
### IFAS 7.9 Navigation Training

#### Report Viewer Printing

<table>
<thead>
<tr>
<th>VIEWER:</th>
<th>Next</th>
<th>Prev</th>
<th>Right</th>
<th>Left</th>
<th>Search</th>
<th>Goto</th>
<th>Queue</th>
<th>File</th>
<th>Cmp</th>
<th>Help</th>
<th>Exit</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Send report to a specified printer:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ctrl-C to return to Main Menu.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ctrl-U for HELP on this Menu.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Printer:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Page Numbers:</td>
<td>1</td>
<td>THRU</td>
<td>35</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Old Print Option**

<table>
<thead>
<tr>
<th>Account</th>
<th>06/30/11</th>
</tr>
</thead>
<tbody>
<tr>
<td>5300</td>
<td>-17217.1</td>
</tr>
<tr>
<td>5317</td>
<td>1458.6</td>
</tr>
<tr>
<td>5550</td>
<td>15798.5</td>
</tr>
</tbody>
</table>

Total 016001: 0.0 0.0 0.0

---

**New Print Option**

<table>
<thead>
<tr>
<th>Account Key</th>
<th>Uncommitted</th>
<th>Committed</th>
<th>Program Plan</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Carryover</td>
<td>Carryover</td>
<td>&amp; New Funds</td>
<td>Tra</td>
</tr>
<tr>
<td></td>
<td>CY Funds</td>
<td>CY Funds</td>
<td>NF Funds</td>
<td>TR</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>MMM/PSC Workshops</th>
</tr>
</thead>
<tbody>
<tr>
<td>5300 Purchased Services</td>
</tr>
<tr>
<td>5317 Interest Expense</td>
</tr>
<tr>
<td>5550 Depreciation &amp; Amortization</td>
</tr>
</tbody>
</table>

Total 016001: 0.0 0.0 0.0

File: huddle_Budget_Division_16.

Has been written to the ftp/reports directory

Press Return to continue:
Access FTP, navigate to the Reports folder, export file to desired location. Report will appear as a PDF. Open and make print selection.
IFAS 7.9 Navigation Training

Print
select page(s) to print

<table>
<thead>
<tr>
<th>Account Key</th>
<th>Object Code</th>
<th>Uncommitted</th>
<th>Committed</th>
<th>Program Plan</th>
<th>Fund Transfers</th>
<th>Working Adj</th>
<th>Revenue</th>
<th>Encumbrances</th>
<th>Funds</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>UNCC</td>
<td>CC</td>
<td>PF</td>
<td>FT</td>
<td>WAP</td>
<td>RE</td>
<td>ENC</td>
<td>AV</td>
</tr>
<tr>
<td>MMM/PSU Workshops</td>
<td></td>
<td>-17217.1</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>-17217.1</td>
<td>0.0</td>
<td>0.0</td>
<td>-17217.1</td>
</tr>
<tr>
<td>5300 Purchased Services</td>
<td>5317 Interest Expense</td>
<td>1458.6</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>1458.6</td>
<td>0.0</td>
<td>0.0</td>
<td>1458.6</td>
</tr>
<tr>
<td>5300 Purchased Services</td>
<td>5317 Interest Expense</td>
<td>15726.5</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>15726.5</td>
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<td>15726.5</td>
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<tr>
<td>Total 016001</td>
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<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>MMM CSC PLED Key</td>
<td></td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>18651.8</td>
</tr>
<tr>
<td>4100 Internal Chargeback Revenue</td>
<td>5317 Interest Expense</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>-18651.8</td>
</tr>
<tr>
<td>5300 Purchased Services</td>
<td>5317 Interest Expense</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>-830.7</td>
</tr>
<tr>
<td>5300 Purchased Services</td>
<td>5317 Interest Expense</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>830.7</td>
</tr>
<tr>
<td>Total 016999</td>
<td></td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>17762.6</td>
</tr>
</tbody>
</table>

06/30/11  Page 9
IFAS 7.9 Navigation Training

Secure CRT Options

*Orion*

- Orion replaces the previous “Starburst” machine and has much faster usage capability.

*Pulsar*

- Prior Fiscal Year data, FY91-FY10

*Nova*

- Mirror of IFAS 7.9 FY11 and forward

Other

*Wiki Links*

- [https://wiki.ucar.edu/display/fintools/CDD+Report+Information#](https://wiki.ucar.edu/display/fintools/CDD+Report+Information#)
  - Link to commonly used reports and screen shots of the results of running those reports

- [https://wiki.ucar.edu/display/fintools/Financial+Management+Tools+Project](https://wiki.ucar.edu/display/fintools/Financial+Management+Tools+Project)
  - Link to FinTools Project

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