



The California State University
COMMON FINANCIAL SYSTEM

Fluid User Interface

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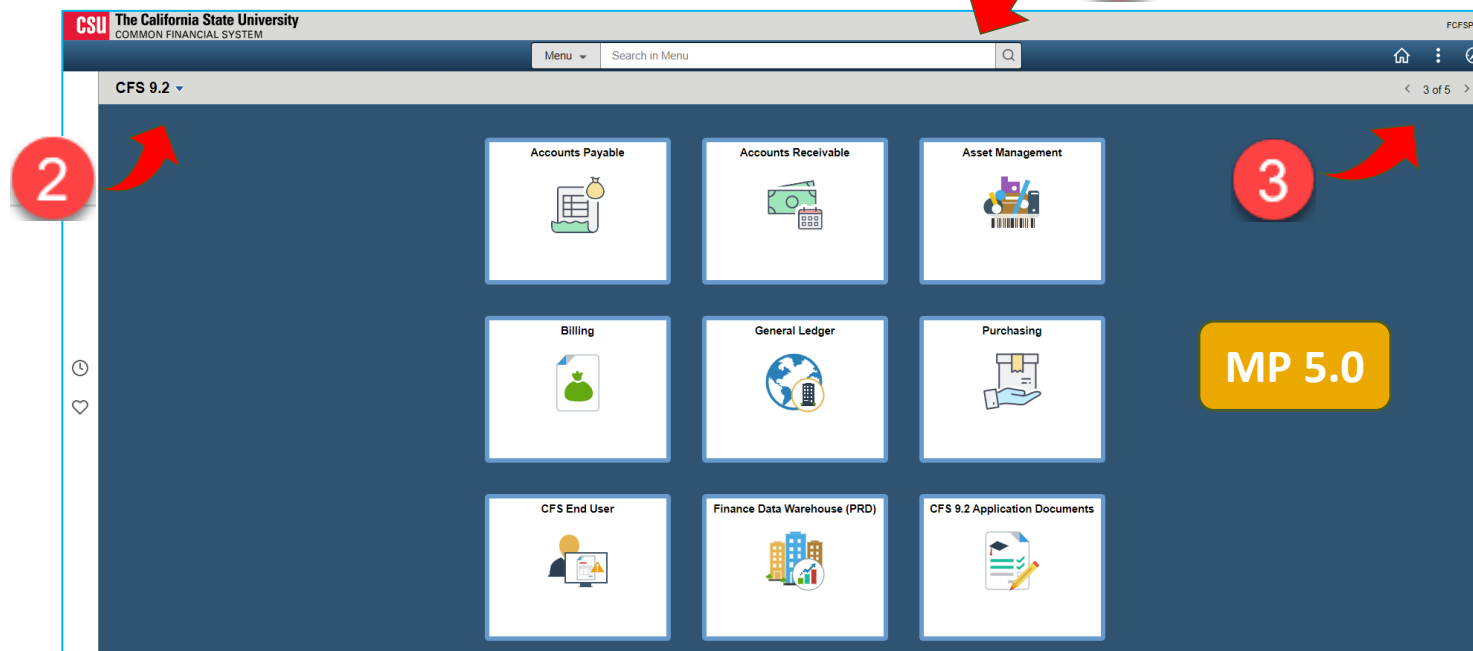
Fluid User Interface Updates

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- NavBar (Navigation Bar)
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 - Personalize NavBar
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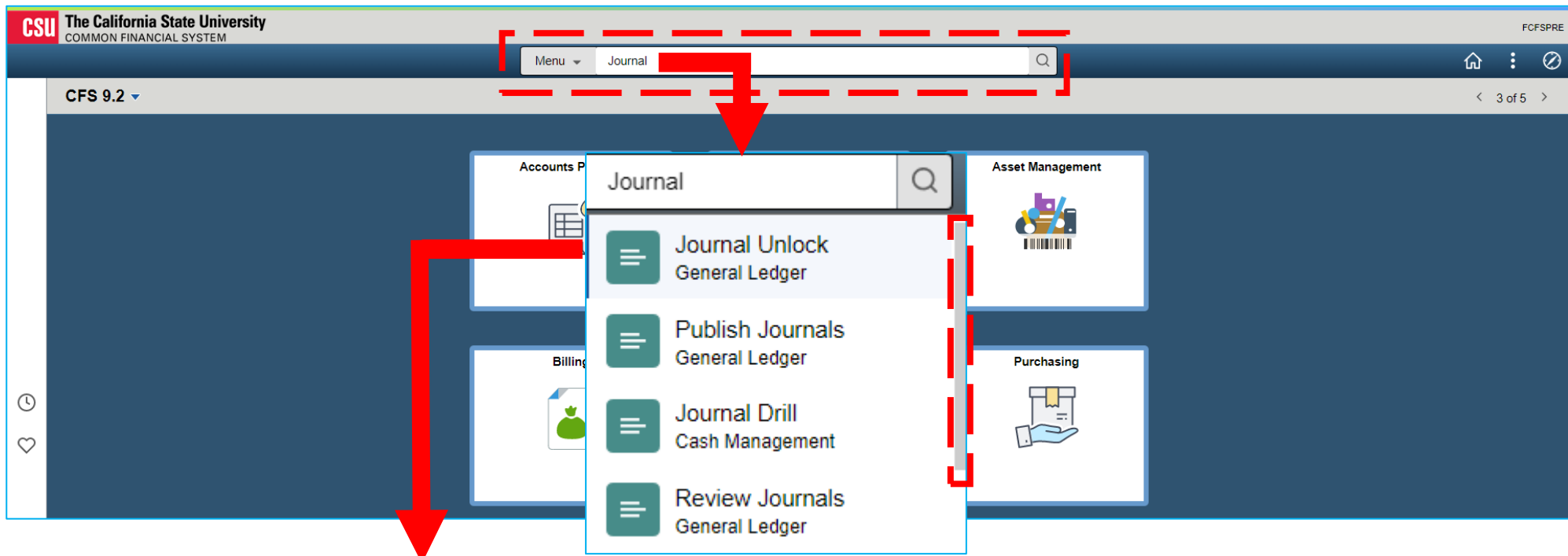
Homepage - Enhancements



- 1. Global Search
- 2. Homepage Selector
- 3. Homepage Scroll



Homepage Enhancements – Global Search



The screenshot shows the 'Journal Unlock' page. The page title is 'Journal Unlock' and it includes a search form with a 'Find an Existing Value' button. Below the button, there is a section for 'Search Criteria' with a dropdown arrow. The search criteria include 'User ID' with a 'begins with' dropdown and an input field, and a 'Case Sensitive' checkbox. At the bottom, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

Homepage Enhancements – Global Search – Cont.

The screenshot shows the CSU Common Financial System homepage. At the top, there is a navigation bar with the CSU logo, the text "The California State University COMMON FINANCIAL SYSTEM", and a search bar containing the word "Journal". A red dashed box highlights the search bar and the "Journal" text. Below the navigation bar, there is a sidebar with "CFS 9.2" and a main content area with six tiles: "Accounts Payable", "Accounts Receivable", "Asset Management", "Billing", "General Ledger", and "Purchasing". A large red arrow points from the search bar area down to the search results page below.

The screenshot shows the search results page for the keyword "Journal". The page title is "Search Results" and it displays "149 results for keyword: 'Journal'". On the left, there is a "New Search" section with a "Folder" list including "General Ledger (52)", "Set Up Financials/Supply Chain (27)", "Statutory Reports (16)", "Commitment Control (13)", "Fluid Structure Content (8)", "Accounts Receivable (7)", "Purchasing (5)", "Accounts Payable (4)", "Customer Contracts (4)", and "Asset Management (2)". The main content area lists several search results:

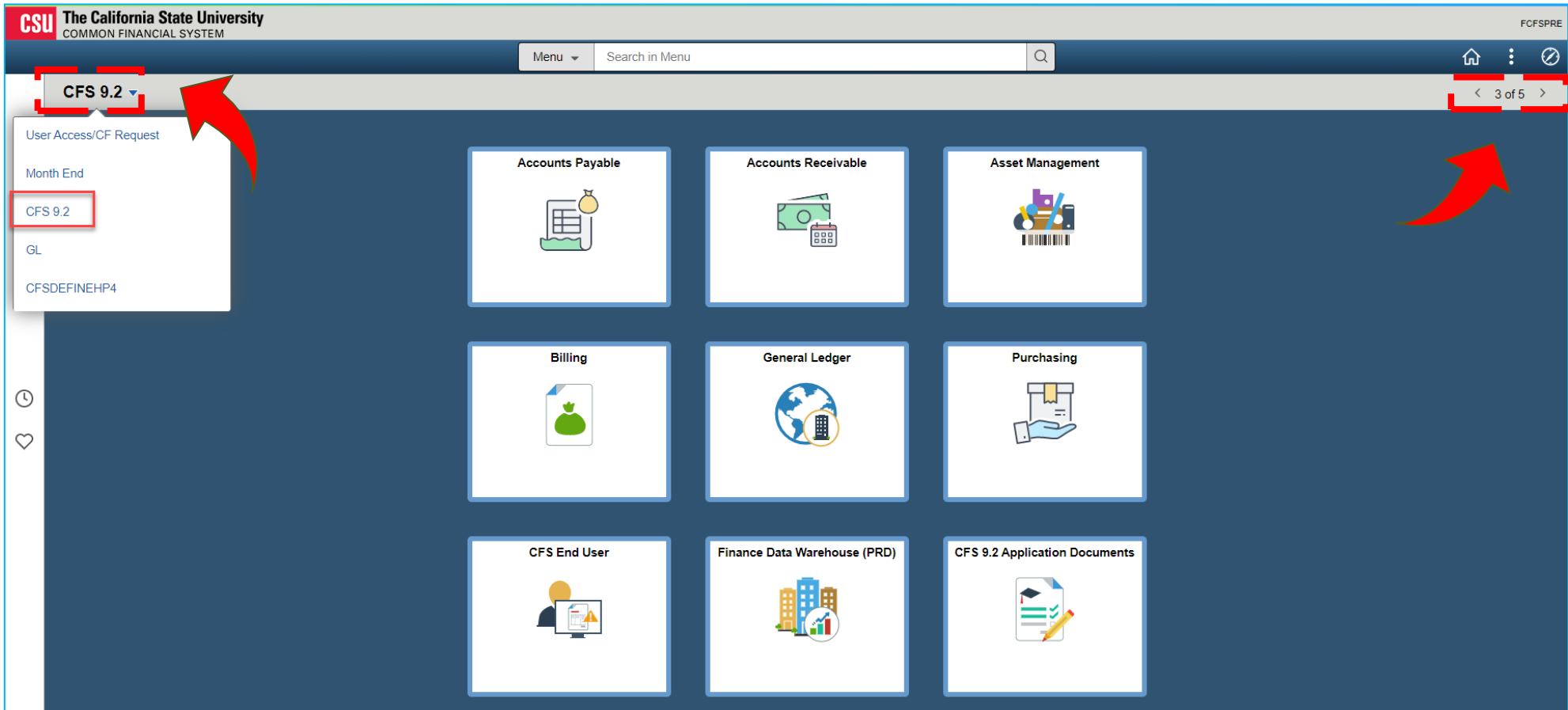
- Publish Journals**: Publish Journals To PSCR
- Import Spreadsheet Journals**: Import the journal files General Ledger spreadsheet journal interface creates.
- Entry Event Journals**: Request a process to create actual journals from budget adjustment journals.
- Define Standard Journals**: Specify journal entries to use for creating a recurring journal.
- Manage Journal Approval**: Manage Journal Approval
- CSU Journal Entry Upload**: Upload your journal entries from a csv file

A red arrow points from the "CSU Journal Entry Upload" result to the search criteria page on the right.

The screenshot shows the search criteria page for "CSU Journal Entry Upload". The page title is "Search Results" and it displays "CSU Journal Entry Upload". Below the title, there is a search form with the following fields and options:

- Search by: Run Control ID begins with [input field]
- Case Sensitive
- Buttons: Search, Advanced Search

Homepage Enhancements – Homepage Selector/Scroll



Homepage - Quick Access Bar

The screenshot displays the CSU Fluid User Interface homepage. The top navigation bar includes the CSU logo, the text "The California State University COMMON FINANCIAL SYSTEM", a "Menu" dropdown, a search bar labeled "Search in Menu", and user information "FCFSPRE". Below the navigation bar, the main content area is titled "CFS 9.2" and contains a grid of nine application tiles:

- Accounts Payable (highlighted with a red border)
- Accounts Receivable
- Asset Management
- Billing
- General Ledger
- Purchasing
- CFS End User
- Finance Data Warehouse (PRD)
- CFS 9.2 Application Documents

On the left side of the main content area, there is a vertical Quick Access Bar. This bar contains two icons: a clock icon and a heart icon. A red dashed box highlights these icons, and a red arrow points from the text "Quick Access Bar" in the section header to this bar.

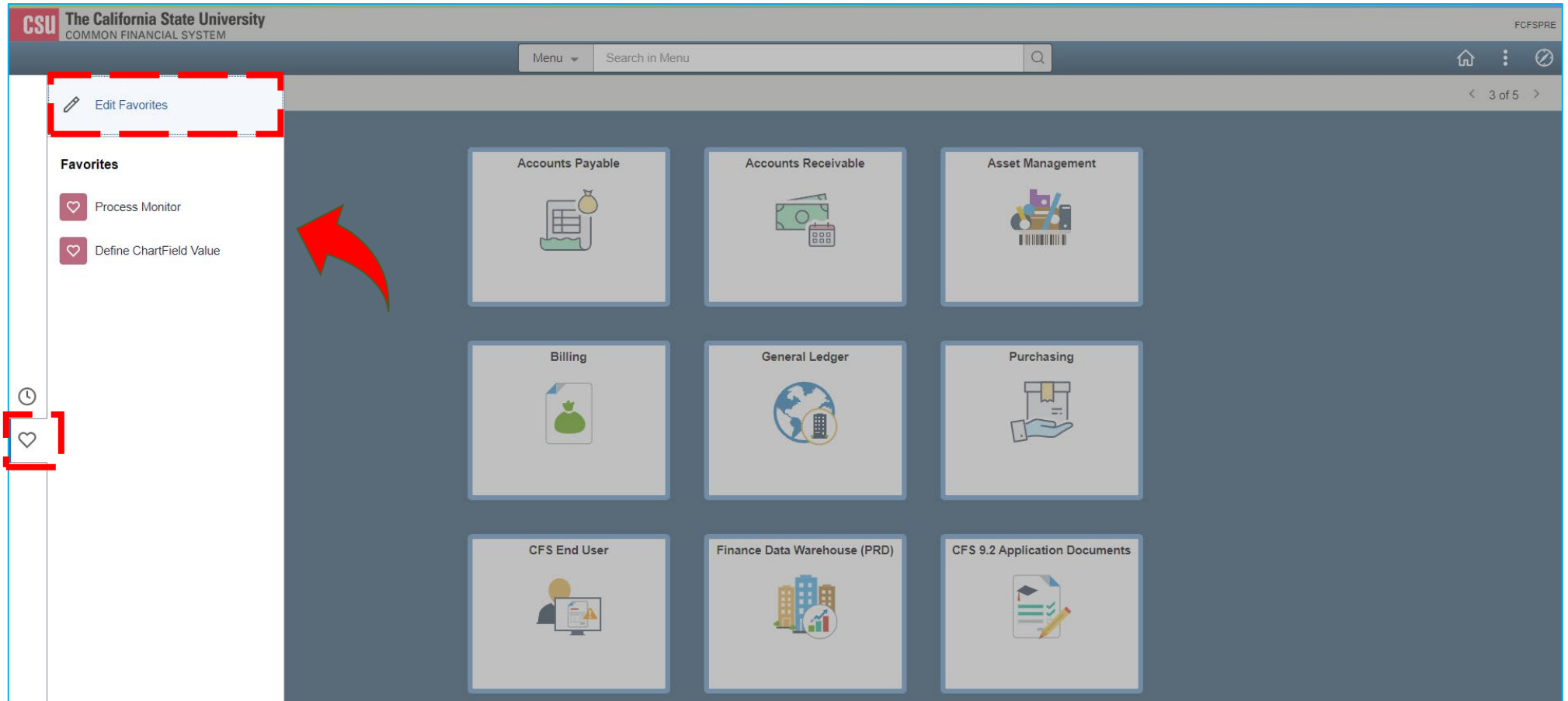
Homepage - Quick Access Bar – Recently Visited

The screenshot displays the CSU Common Financial System homepage. The top navigation bar includes the CSU logo, the text 'The California State University COMMON FINANCIAL SYSTEM', a 'Menu' dropdown, a search bar labeled 'Search in Menu', and utility icons for home, user profile, and refresh. The main content area is divided into two sections:

- Recently Visited:** A vertical sidebar on the left containing a list of frequently accessed functions, each with a clock icon. The items are: Fiscal Year-End Lock, Create/Update Journal Entries, Define ChartField Value, Regular Entry, Copy Journals, DOA Inquiry, My Preferences, User Profiles, DOA Functional Approvers, and DOA Approver Batch Upload. A red box highlights the 'My Preferences' item, and a red arrow points from it towards the main grid.
- Main Grid:** A 3x3 grid of application tiles, each with an icon and a title: Accounts Payable, Accounts Receivable, Asset Management, Billing, General Ledger, Purchasing, CFS End User, Finance Data Warehouse (PRD), and CFS 9.2 Application Documents.

At the bottom right of the main content area, there is a pagination indicator showing '< 3 of 5 >'.

Homepage - Quick Access Bar – Favorites



Quick Access Bar – Favorites - Edit Favorites

The screenshot displays the 'Edit Favorites' interface. At the top, a dark blue header contains the text 'Edit Favorites'. Below the header, a message reads: 'Select the Save button after editing or deleting favorites to apply your changes.' A red circle with the number '4' highlights the 'Save' button.

The main content area is titled 'Favorites' and shows '2 rows'. A red circle with the number '2' highlights the 'Delete Selected' button. Below this, a table lists the favorites:

<input type="checkbox"/> *Favorite		Sequence number
<input checked="" type="checkbox"/>	Process Monitor	1
<input type="checkbox"/>	Define ChartField Value	2

A red circle with the number '1' highlights the checked checkbox for 'Process Monitor'. A red arrow points from the 'Save' button to the 'Edit Favorites' button in the right-hand sidebar.

Below the table, a confirmation dialog box is shown with the text: 'You have selected 1 favorite(s) to be deleted. Do you wish to continue?'. A red circle with the number '3' highlights the 'Yes' button.

The right-hand sidebar shows the 'Edit Favorites' button and the 'Favorites' section, which contains the 'Define ChartField Value' favorite.

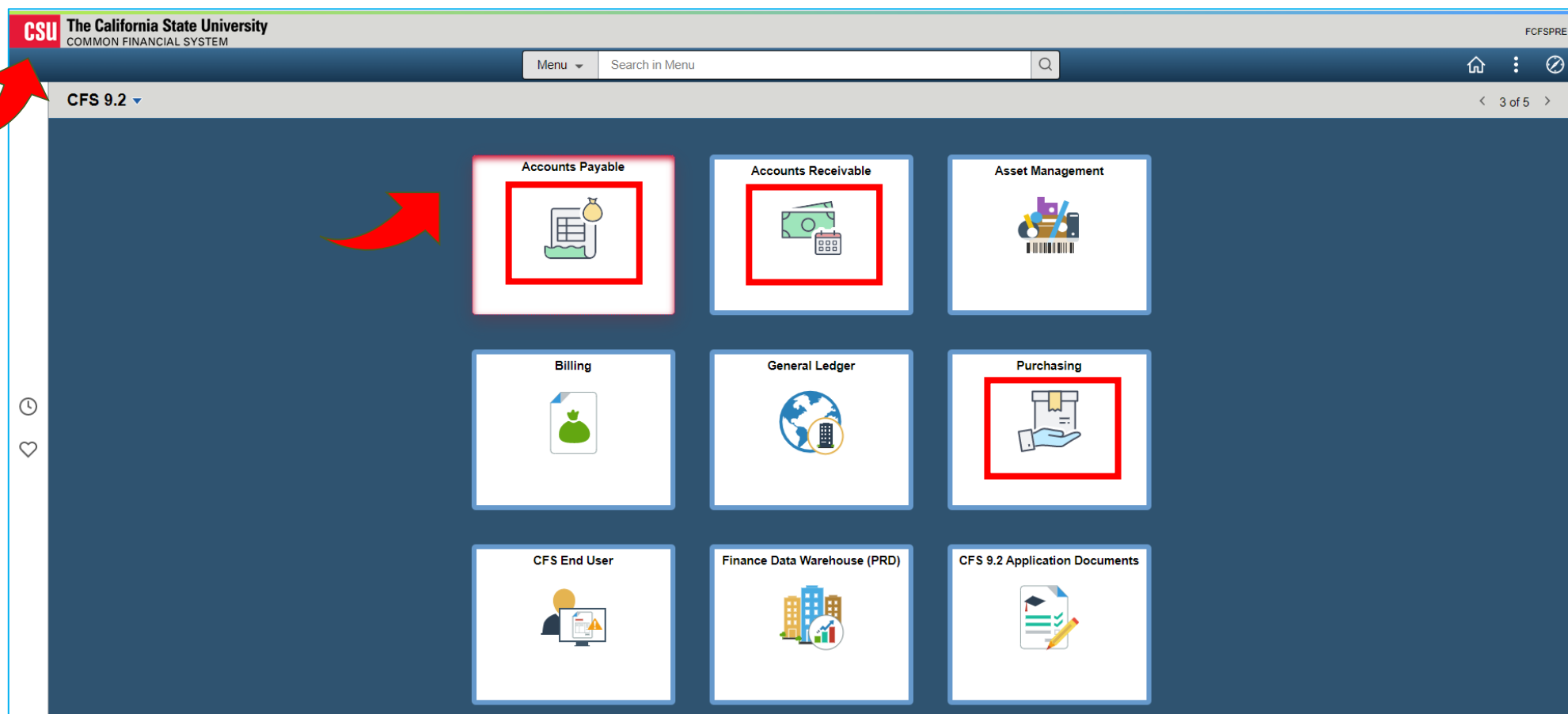
Homepage - Actions List

- Refresh
- New Window

The screenshot displays the CSU Common Financial System homepage. The header includes the CSU logo and the text "The California State University COMMON FINANCIAL SYSTEM". A navigation bar contains a "Menu" dropdown, a search box labeled "Search in Menu", and icons for home, user profile, and refresh. The main content area is titled "CFS 9.2" and features a grid of nine application tiles: Accounts Payable, Accounts Receivable, Asset Management, Billing, General Ledger, Purchasing, CFS End User, Finance Data Warehouse (PRD), and CFS 9.2 Application Documents. A user menu is open on the right, listing "Personalize Homepage", "Refresh", "New Window", "My Preferences", "Help", and "Sign Out". The "Refresh" and "New Window" options are highlighted with a red box. A red arrow points from the top right of the page to the user menu, and another red arrow points from the menu to the "Refresh" and "New Window" options.

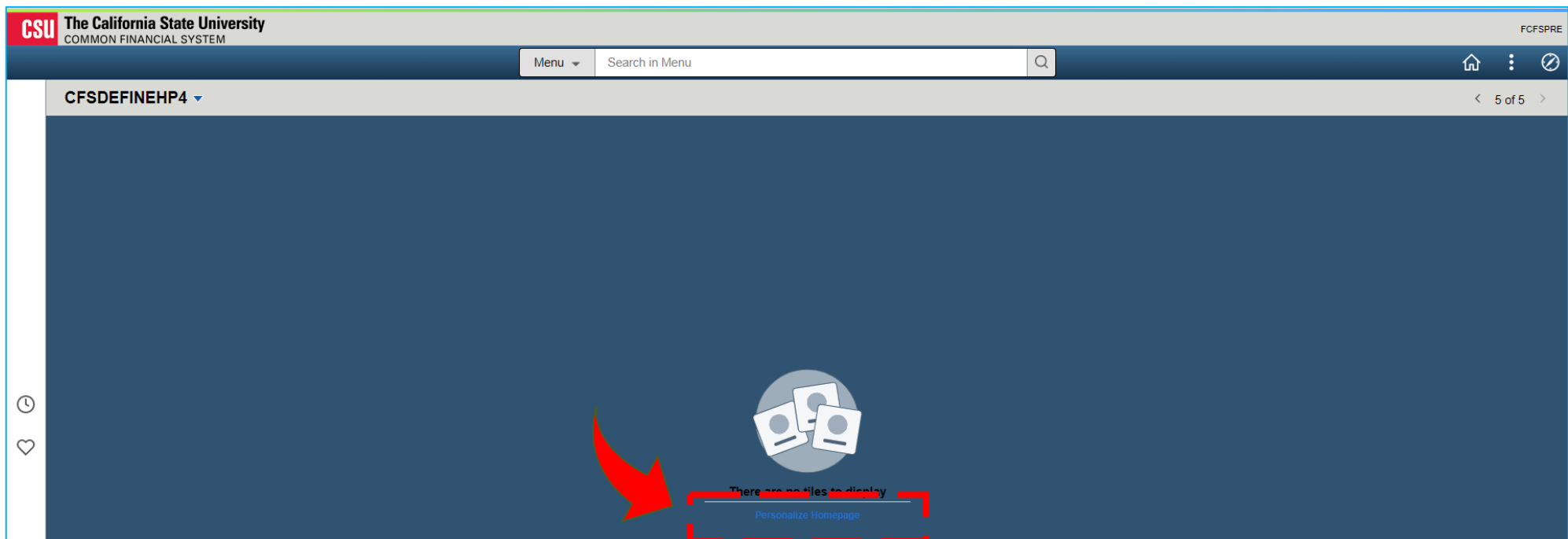
Homepage - Branding

- Color Scheme – ADA and CSU Compliant
- New Icons
- Enhanced Tile Borders
- Hover over Tile (Red)

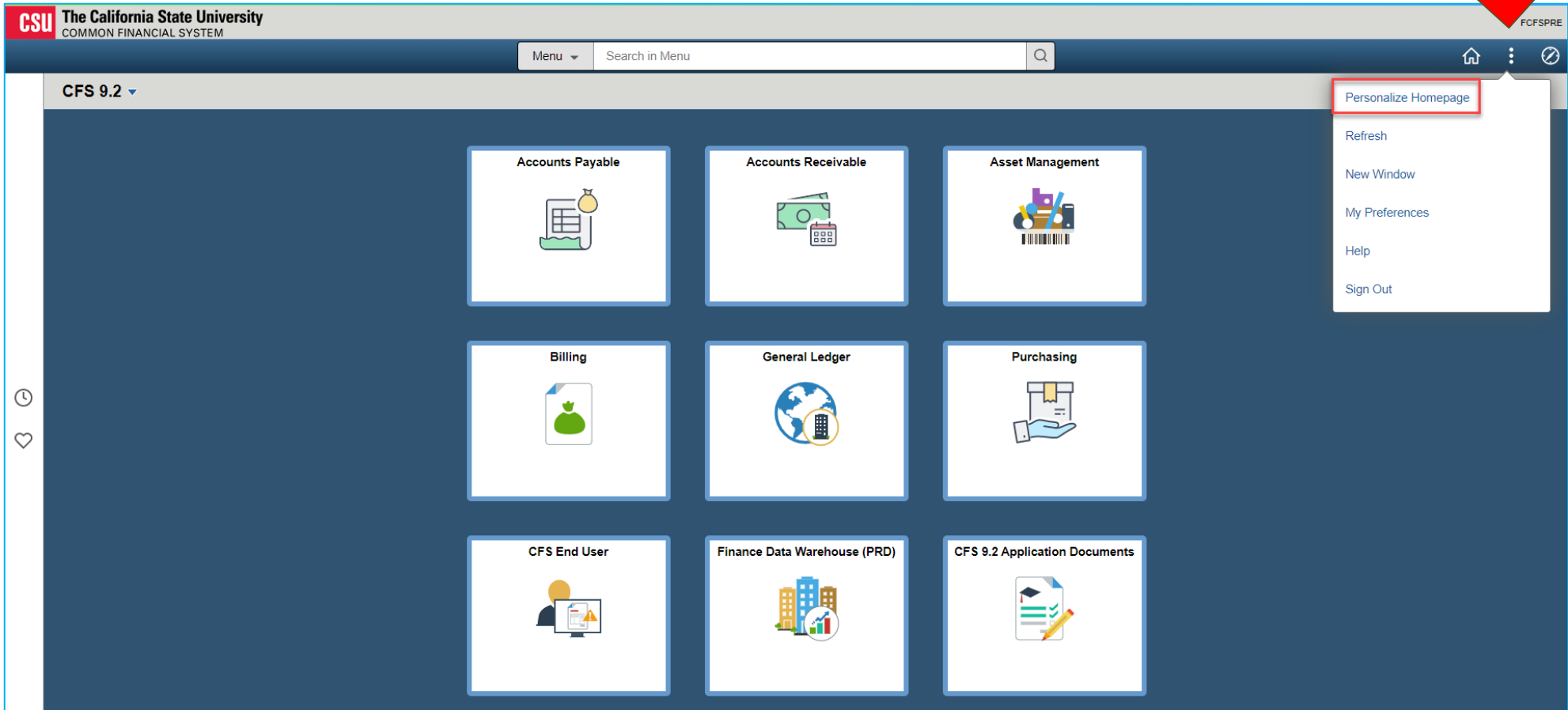


Homepage - Personalize Homepage

- Hyperlink displayed on a non-customized homepage



Homepage - Personalize Homepage – Cont.



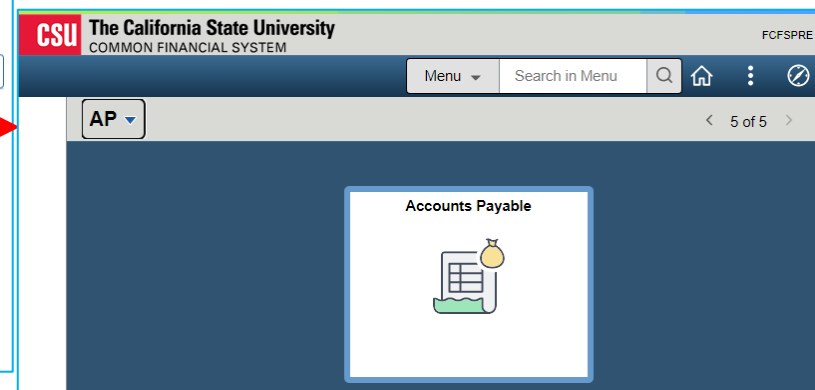
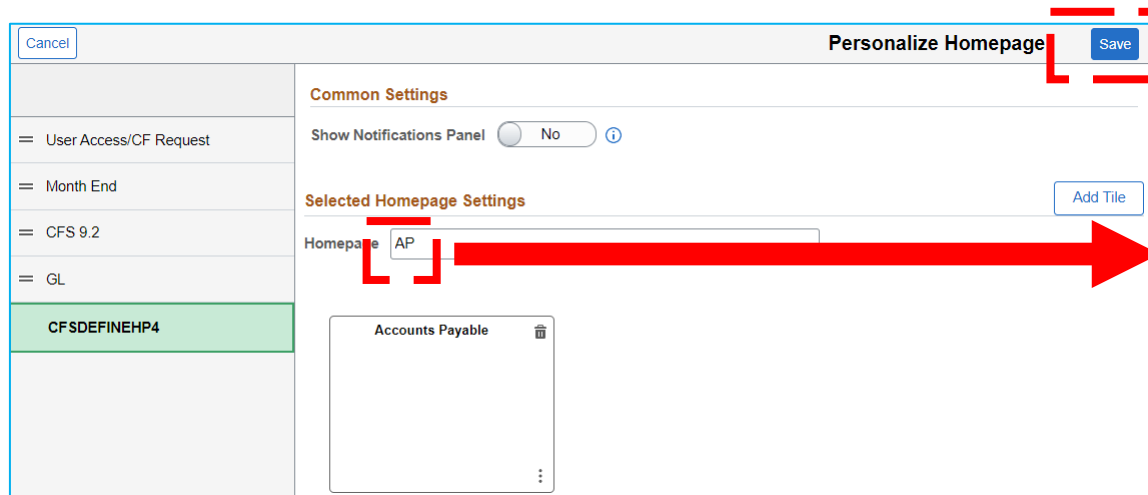
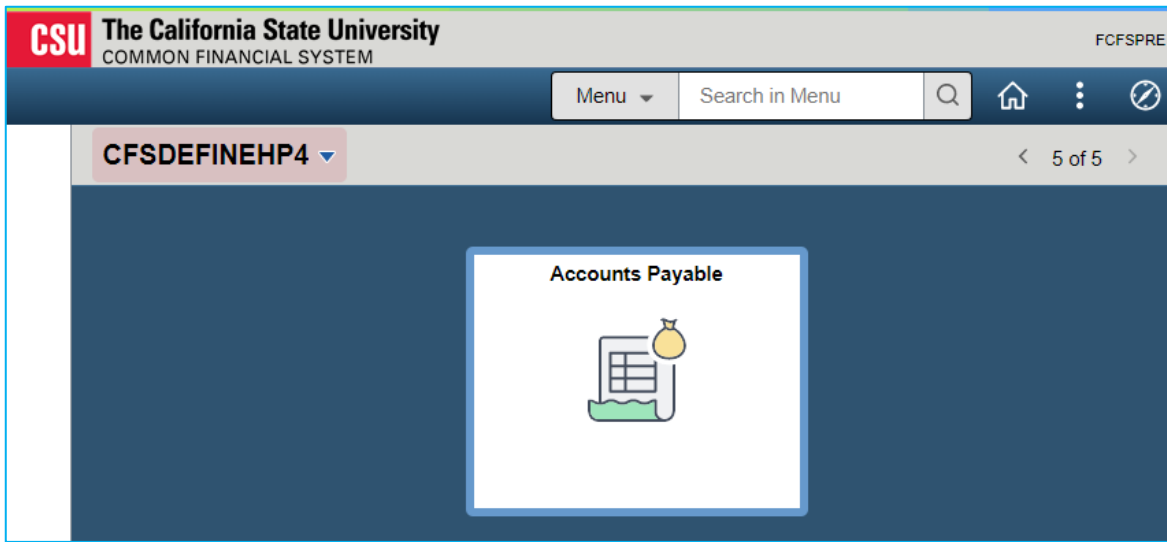
Homepage - Personalize Homepage – Cont.

The image displays two screenshots of the 'Personalize Homepage' interface, illustrating the process of copying a tile from one user profile to another.

Top Screenshot: Shows the 'Personalize Homepage' window for user 'CFS 9.2'. The 'Selected Homepage Settings' section shows 'Homepage' set to 'CFS 9.2'. A red dashed box highlights the 'Accounts Payable' tile. A red circle with the number '1' points to the three-dot menu icon on the 'Accounts Payable' tile. A red circle with the number '2' points to the 'Copy To' button in the 'Select Action' menu.

Bottom Screenshot: Shows the 'Personalize Homepage' window for user 'CFSDEFINEHP4'. A red dashed box highlights the 'CFSDEFINEHP4' user profile in the left sidebar. A red circle with the number '3' points to this profile. A red circle with the number '4' points to the 'Save' button in the top right corner. A notification banner at the top of the window reads: 'Tile will be copied to CFSDEFINEHP4 homepage after saving changes'.

Homepage - Personalize Homepage – Cont.



Homepage - Personalize Homepage – Cont.













[CFS Fluid User Interface video](#)

Homepage - Personalize Homepage – Cont.

- For more information on Fluid User Interface, please visit:
 - Documentation: <https://csyou.calstate.edu/Projects-Initiatives/CMS/AppDevelopment/CMSCFS92/Pages/CFS92FluidUserInterface.aspx>

The screenshot shows the CSYOU website interface. At the top left is the CSYOU logo. To the right is a search box labeled "Search this site". Below the logo and search box is a dark navigation bar with the following categories: EMPLOYEE RESOURCES, TOOLS & SERVICES, DIVISION & ORGANIZATIONS, PROJECTS & INITIATIVES, COLLABORATE, POLICIES, FORMS & PROCEDURES, NEWS & INFORMATION, and BUILDING INFO. Below this is a breadcrumb trail: HOME > PROJECTS & INITIATIVES > COMMON MANAGEMENT SYSTEMS (CMS) > APPLICATIONS > CFS 9.2 > CFS 9.2 FLUID USER INTERFACE. The main content area is divided into two columns. The left column lists various system areas: CFS 9.0, CFS 9.2 (with sub-items: CFS General, Accounts Payable, Accounts Receivable/Billing, Asset Management, Enterprise Systems (CO Application), General Ledger, Purchasing), Campus Solutions 9.2, and Human Resources 9.0. The right column is titled "CFS 9.2 Fluid User Interface" and is further divided into "Phase II" and "Phase I". Under "Phase II", there are four links: "CFS 9.2 MP 3.0 Fluid User Interface Phase II FAQ (05/08/20)", "CFS 9.2 MP 3.0 Fluid User Interface Phase II Presentation", "CFS 9.2 MP 3.0 Fluid User Interface Phase II Q&A Teleconference Recording (03/26/20)", and "CFS 9.2 MP 3.0 Fluid User Interface Phase II Recording (03/12/20)". Under "Phase I", there are two links: "New User Interface - Fluid Session Material" and "New User Interface - Fluid Recording (04/26/18)".

NavBar (Navigation Bar) – Icons/Names

Item	MP4	MP5
NavBar		
Personalize NavBar		
Recent Places / Recently Visited		
My Favorites / Favorites		
Navigator / Menu		
My Preferences		



NavBar (Navigation Bar) – Personalize NavBar

The screenshot displays the CSU Common Financial System (CFS) Fluid User Interface. The top navigation bar (NavBar) is highlighted with a red dashed border. It includes the CSU logo, the text "The California State University COMMON FINANCIAL SYSTEM", a "Menu" dropdown, a "Search in Menu" field, and a "Personalize NavBar" button. The main content area shows a grid of application tiles: Accounts Payable, Accounts Receivable, Asset Management, Billing, General Ledger, Purchasing, CFS End User, Finance Data Warehouse (PRD), and CFS 9.2 Application Documents. On the right side, a vertical sidebar contains a "Personalize NavBar" button, a "Recently Visited" section, a "Favorites" section, a "Menu" section, and a "My Preferences" section. A red arrow points to the "Personalize NavBar" button in the sidebar.

NavBar (Navigation Bar) - Personalize NavBar – Cont.

- Standard

The image shows the process of personalizing the NavBar. On the left, the 'Personalize' dialog box is open, showing the 'Menu Order' section with 'Standard' selected. A red arrow points from the 'Standard' button to the 'NavBar: Menu' interface on the right. The 'NavBar Tiles' section in the dialog has 'Menu' selected, with a red arrow pointing to the 'Menu' tile in the resulting interface. The 'NavBar: Menu' interface shows a list of menu items: Recently Visited, Favorites, Menu, and My Preferences. The 'Menu' item is highlighted, and a list of menu items is displayed to its right: Accounts Payable, Accounts Receivable, Asset Management, Billing, General Ledger, Purchasing, Suppliers, Customers, Set Up Financials/Supply Chain, and Reporting Tools.

Personalize (Cancel) (Save)

Menu Order

Alphabetical **Standard**

NavBar Tiles (+)

= Recently Visited

= Favorites

= **Menu**

= My Preferences (trash icon)

NavBar: Menu (gear icon)

Recently Visited

Favorites

Menu

My Preferences

Accounts Payable >

Accounts Receivable >

Asset Management >

Billing >

General Ledger >

Purchasing >

Suppliers >

Customers >

Set Up Financials/Supply Chain >

Reporting Tools >

NavBar (Navigation Bar) - Personalize NavBar – Cont.

- Alphabetical

Cancel Personalize Save

Menu Order

Alphabetical

NavBar Tiles

= Menu

= Recently Visited

= Favorites

= My Preferences

NavBar: Menu

Menu

Recently Visited

Favorites

My Preferences

A

Accounts Payable

Accounts Receivable

Allocations

Asset Management

B

Background Processes

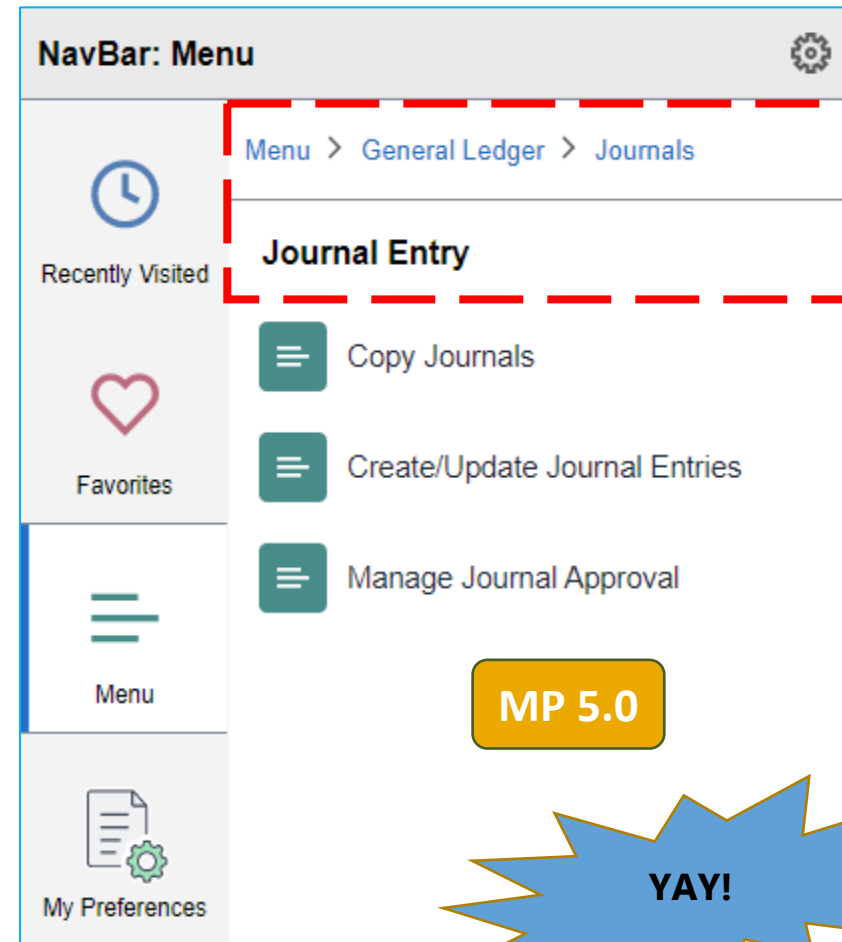
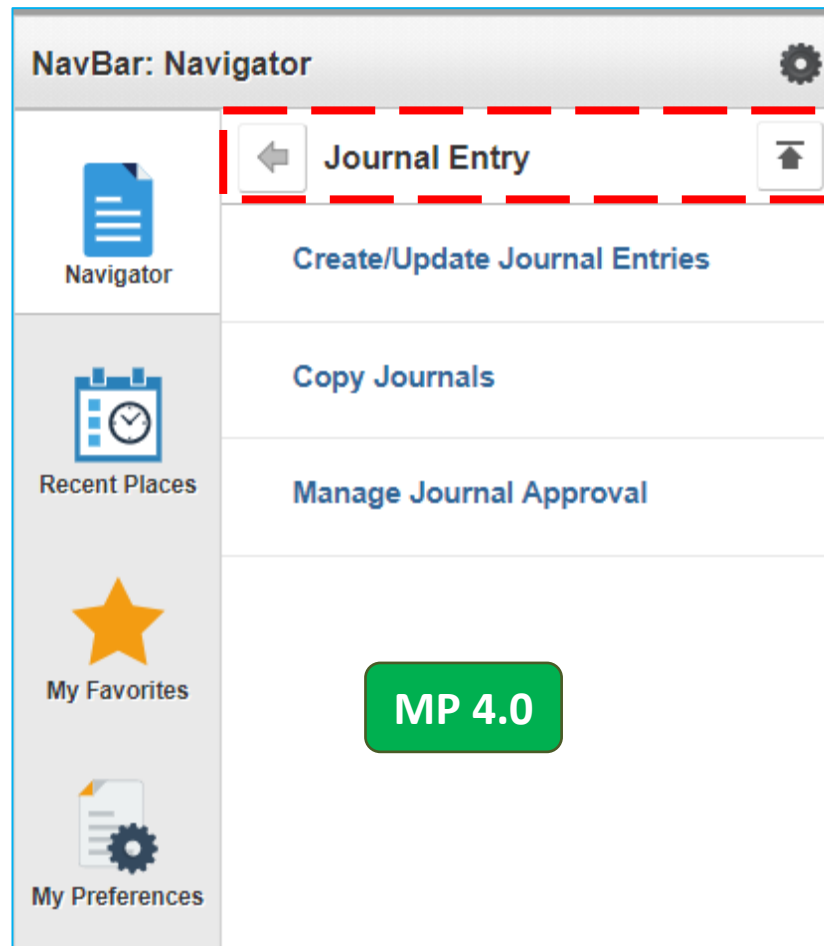
Banking

Billing

C

Cash Management

NavBar (Navigation Bar) – Breadcrumbs are back!



YAY!

