

Table of Contents

Overview 2

Log into CFS..... 2

CFS 9.2 Landing Page..... 4

Additional Homepages 5

Customize a Homepage..... 6

 a. Rename a Homepage..... 6

 b. Add a Tile to Customizable Homepage 8

 c: Move or Copy Tile to New Homepage 11

 d. Delete a Tile 13

 e: Rename an Existing Tile in Homepage 14

 f: Change Default Landing Page 14

Overview

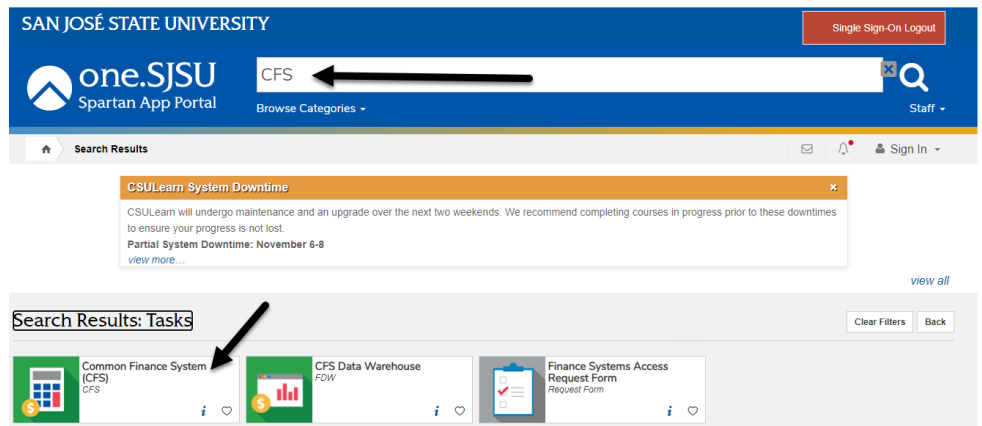
This guide will demonstrate how to use and setup the Fluid Interface Homepage feature for navigating to modules and panels within CFS.

CFS access is granted to employees who have completed the required Finance training and completed the Finance Systems Access Request form. Please refer to [Finance Training and Tutorials](#) for more information.

If there are any questions, please contact Finance Support at financeconnect@sjsu.edu or at 408-924-1558.

Log into CFS

1. Go to [One.SJSU](https://one.sjsu.edu/) (<https://one.sjsu.edu/>)
2. Enter **CFS** in the search field and click the magnifying glass.
3. Results display. Click on the **Common Finance System (CFS)** tile.



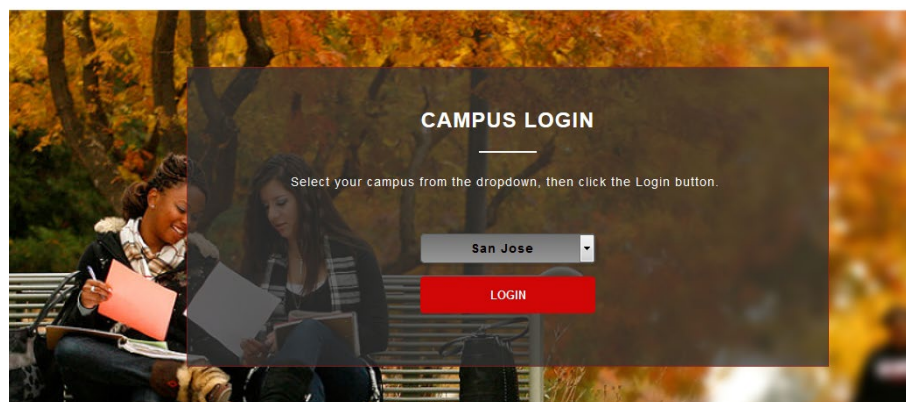
The **CSU The California State University** page displays.



4. In the **Campus** field, select San Jose State University from the drop down menu.

Tip: Hit the **S** key five times to get to San Jose State.

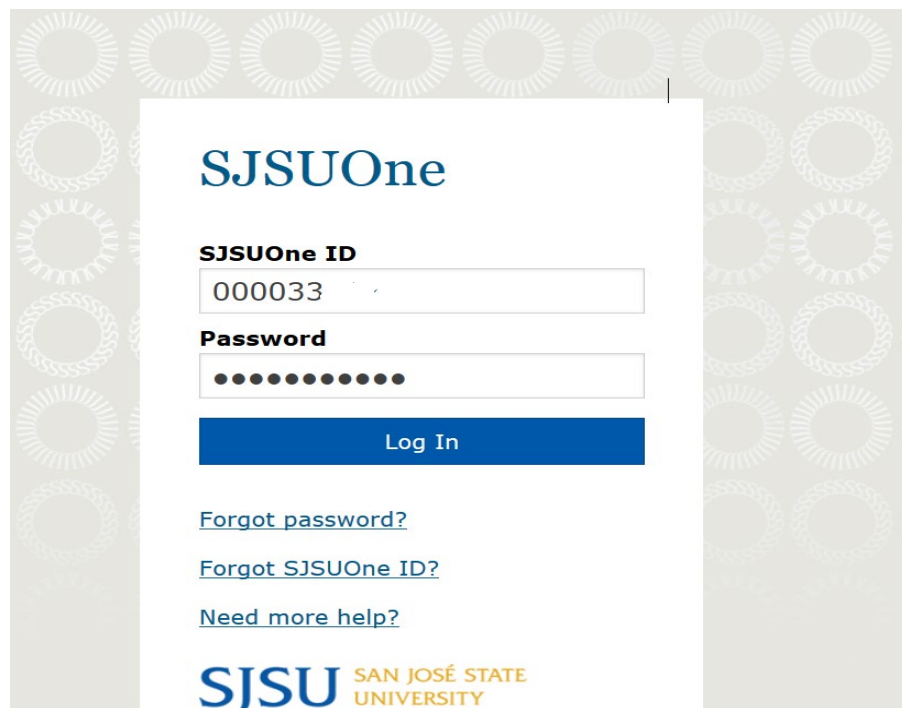
5. Click **Login** button.



The **SJSUOne** login page displays.

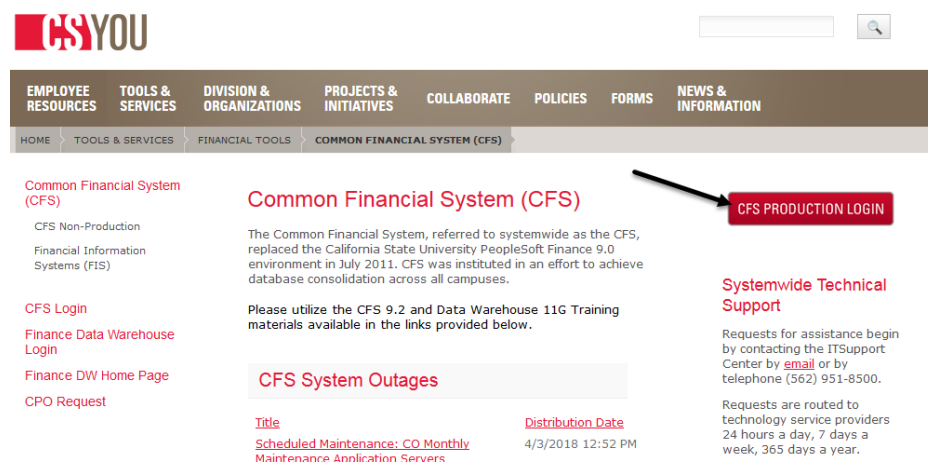
6. Enter your **SJSUOne ID** and **Password**.

7. Click **Log In** button.

The image shows the SJSUOne login page. It features a white central box on a grey background with a repeating circular pattern. The box contains the SJSUOne logo at the top, followed by input fields for 'SJSUOne ID' (containing '000033') and 'Password' (masked with dots). Below these is a blue 'Log In' button. At the bottom of the box are three links: 'Forgot password?', 'Forgot SJSUOne ID?', and 'Need more help?'. The SJSU San José State University logo is at the very bottom.

CSYou page displays.

8. Click the **CFS Production Login** button.

The image shows the CSYOU CFS Production Login page. It has a dark brown header with navigation links: EMPLOYEE RESOURCES, TOOLS & SERVICES, DIVISION & ORGANIZATIONS, PROJECTS & INITIATIVES, COLLABORATE, POLICIES, FORMS, and NEWS & INFORMATION. Below the header is a sub-header with 'HOME', 'TOOLS & SERVICES', 'FINANCIAL TOOLS', and 'COMMON FINANCIAL SYSTEM (CFS)'. The main content area is titled 'Common Financial System (CFS)' and includes a description of the system, a 'CFS Login' link, and a 'CFS System Outages' section with a table of scheduled maintenance. A red button labeled 'CFS PRODUCTION LOGIN' is highlighted with an arrow. To the right, there is a 'Systemwide Technical Support' section with contact information for the ITS Support Center.

The **CFS 9.2 Oracle** home landing page displays

The image shows the CFS 9.2 Oracle home landing page. It features a dark blue header with the CSU logo and 'The California State University COMMON FINANCIAL SYSTEM'. Below the header is a grid of application tiles: Accounts Payable, Accounts Receivable, Asset Management, Billing, General Ledger, Purchasing, CFS End User, Finance Data Warehouse (PBO), and CFS 9.2 Application Documents.

CFS 9.2 Landing Page

The default CFS 9.2 landing page is standardized with navigation collection tiles. The default landing page and tiles cannot be modified by the user.

Figure 1: The CFS 9.2 landing (home) page displays tiles to the six CFS core modules: Accounts Payable, Accounts Receivables, Asset Management, Billing, General Ledger, and Purchasing. In addition, new direct link tiles have been added for CFS End User, Finance Data Warehouse, and CFS 9.2 Application Documents.

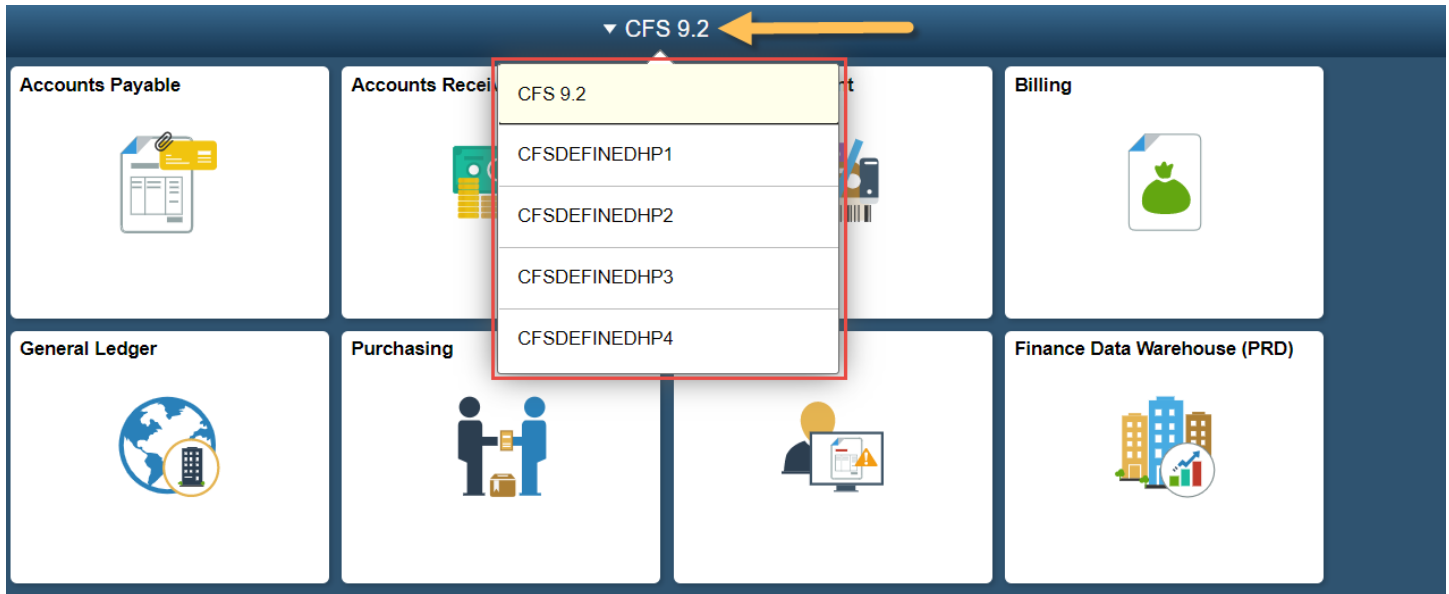
Access to the pages within the modules will be dependent on the user’s CFS security access.



Additional Homepages

Besides the default CFS 9.2 landing page, CFS have four other homepages that can be customized by users with their navigation tiles.

Figure 1: Click on the **CFS 9.2** label to display the dropdown menu for the other homepages (CFSDEFINEDHP1 to CFSDEFINHP4). Click on a homepage to navigate to it.

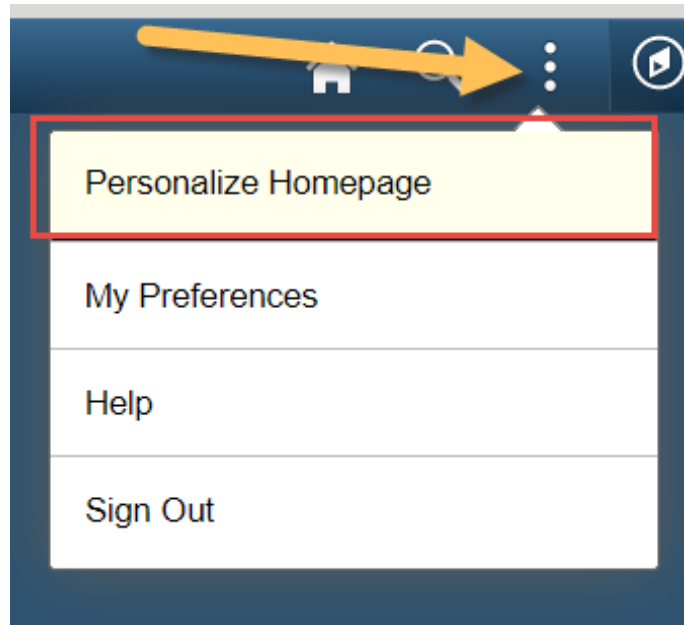


Customize a Homepage

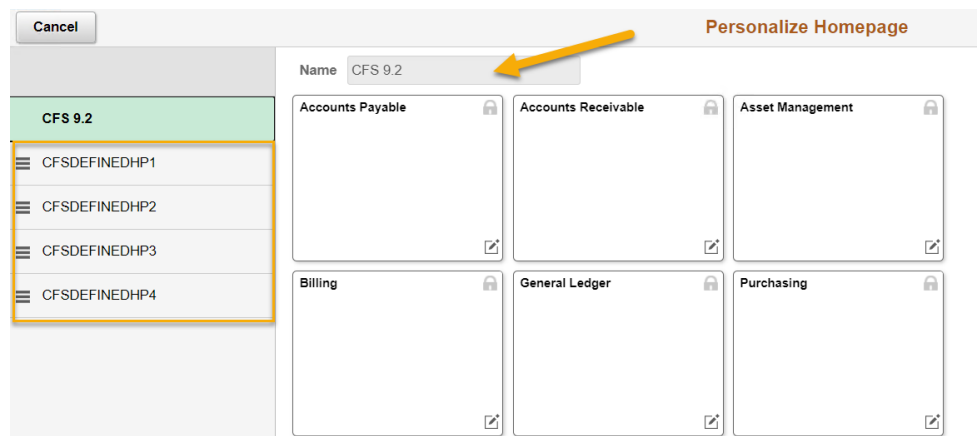
CFS 9.2 landing page cannot be customized by the user; however, users can customize the other homepages (CFSDEFINEDHP1 to CFSDEFINHP4).

a. Rename a Homepage

1. At the top right of the CFS page, click on the **3-dot** icon to display the menu. From the menu, select **Personalized Homepage**.



By default, the **CFS 9.2 landing homepage tiles** displays. In the menu to the left, the other homepages can be found below CFS 9.2.



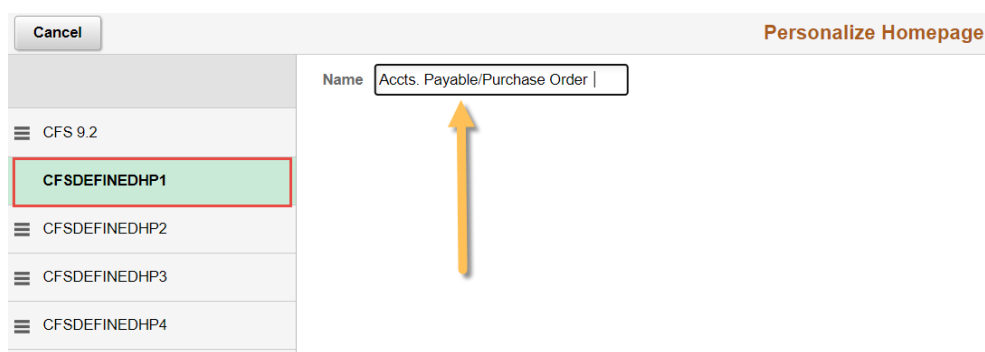
2. Select a homepage to rename.
3. Enter new label for homepage in the **Name** field.

In this example, CFSDEFINEDHP1 is being renamed to Accts. Payable/Purchase Order.

4. Click **Save** to complete edit or

Cancel (button is located to the left of page).

When user returns to the CFS 9.2 landing home page, the newly named homepage will display in the menu.



Cancel

Personalize Homepage

Name: Accts. Payable/Purchase Order

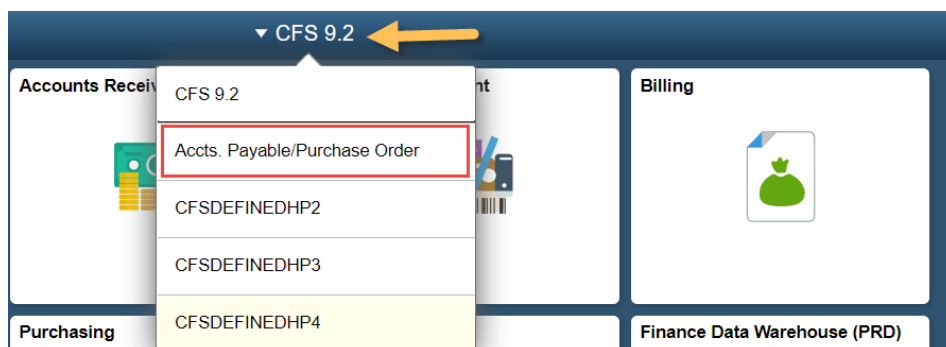
- CFS 9.2
- CFSDEFINEDHP1
- CFSDEFINEDHP2
- CFSDEFINEDHP3
- CFSDEFINEDHP4



Personalize Homepage

Save

Add Title



▼ CFS 9.2

- CFS 9.2
- Accts. Payable/Purchase Order
- CFSDEFINEDHP2
- CFSDEFINEDHP3
- CFSDEFINEDHP4

Accounts Receivable

Billing

Purchasing

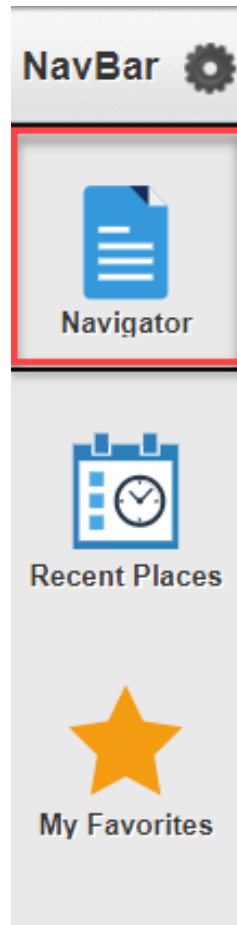
Finance Data Warehouse (PRD)

b. Add a Tile to Customizable Homepage

Users can navigate to a module or panel in CFS by using the NavBar feature. Refer to [Finance CFS tutorials](#) instructions for using NavBar and navigation to commonly used modules/panel.

In this demonstration, we are adding a tile for ProCard Adjustment to the newly named Accts. Payable/Purchasing homepage.

1. Use the NavBar feature to navigate to the module or page.



In this demonstration, we are adding a tile for CSU ProCard Adjustment to the Accts. Payable/Purchase Order homepage.

2. Click the **3-dot** icon at top right of page.

3. Select **Add to Homepage** from the menu.

The image shows a screenshot of the 'CFS Accounts Payable' system interface, specifically the 'ProCard Adjustment' page. The page has a dark blue header with the title 'ProCard Adjustment' on the right. Below the header, there's a search bar and a 'Find an Existing Value' button. The 'Search Criteria' section includes fields for Business Unit (set to 'SJ000'), Origin, Invoice Date, Last Name, First Name, and Invoice Number, each with a dropdown menu and a search icon. There's also a 'Case Sensitive' checkbox. At the bottom of the search section are 'Search' and 'Clear' buttons, along with links for 'Basic Search' and 'Save Search Criteria'.

Below the search section, there's a smaller version of the same page, which is the focus of the second step. It shows the '3-dot' menu icon in the top right corner, which is highlighted with a black arrow.

The third step shows a menu overlay that appears when the '3-dot' icon is clicked. The menu has a yellow background and a red border. It contains the following options: 'Add to Homepage', 'Add to NavBar', 'Add to Favorites', 'My Preferences', and 'Sign Out'. A yellow arrow points to the '3-dot' icon, and a red box highlights the 'Add to Homepage' option.

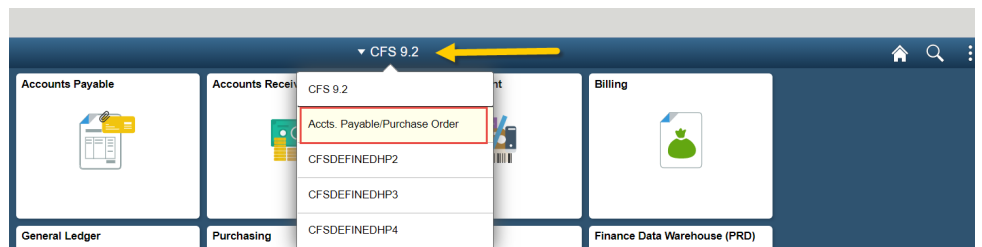
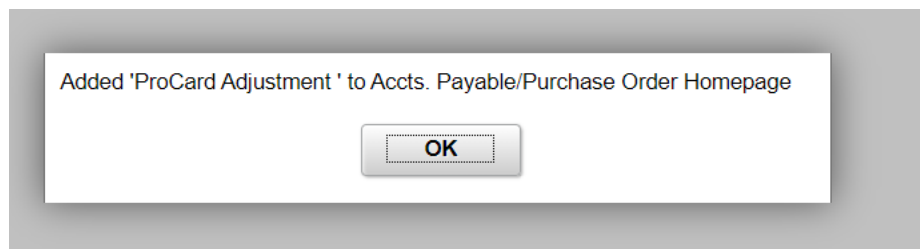
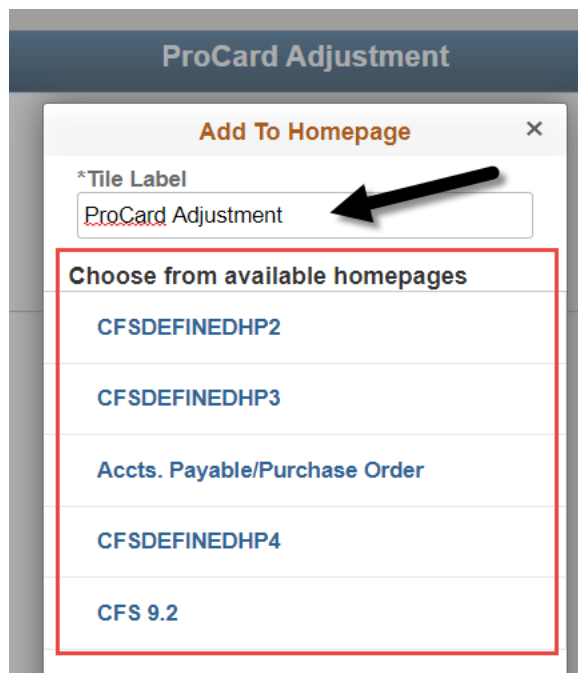
The **Add To Homepage** window displays list of homepages and the Tile Label with the system assigned named.

4. In the Tile Label field, the user has the option to keep the system assigned name or rename it.
5. Select the **homepage** to save the tile to.

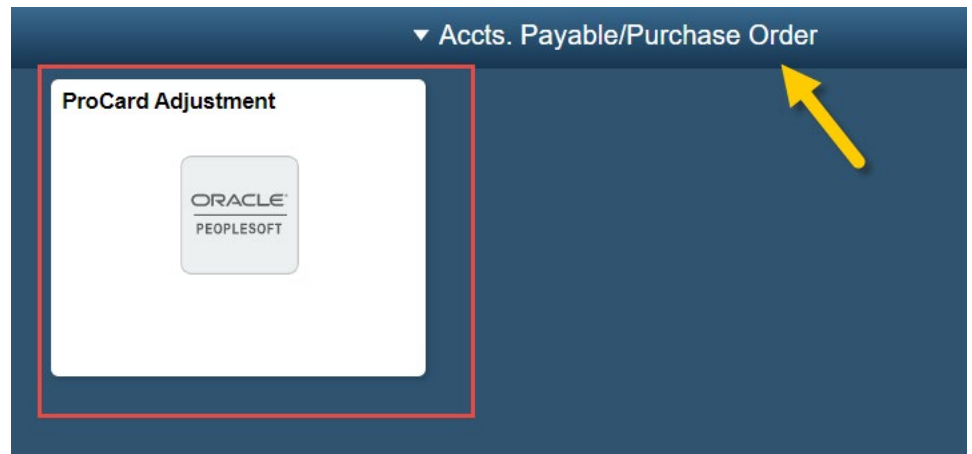
Message appears to confirm tile has been saved to selected homepage.

To view tile in homepage, return to the main **CFS 9.2** landing page.

6. Click on **CFS 9.2** to display full homepage menu.

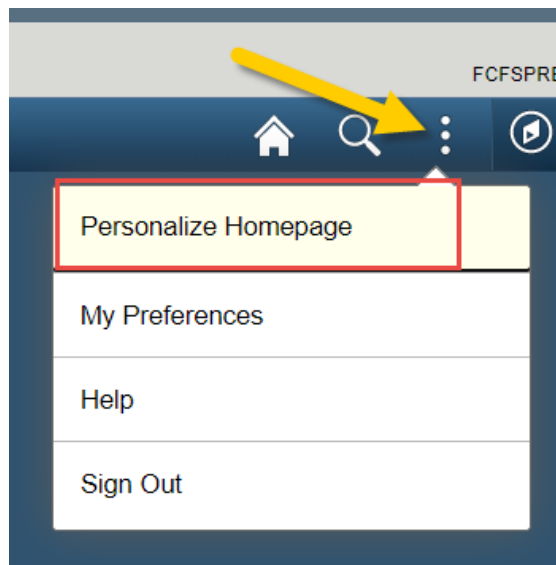


The save tile displays in selected homepage.

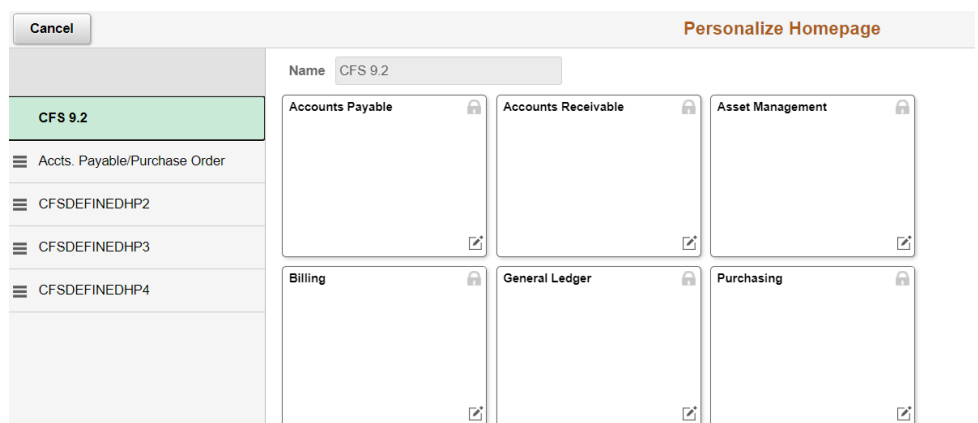



c: Move or Copy Tile to New Homepage

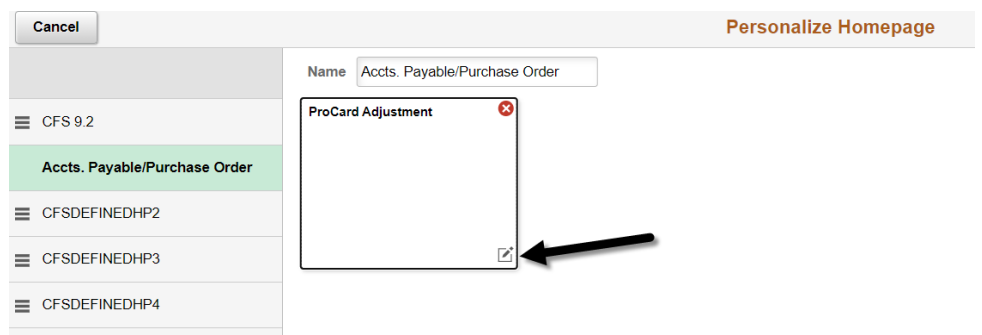
1. Click on the **3-dot** icon.
2. Select **Personalize Homepage** from the menu.



Personalize Homepage displays.

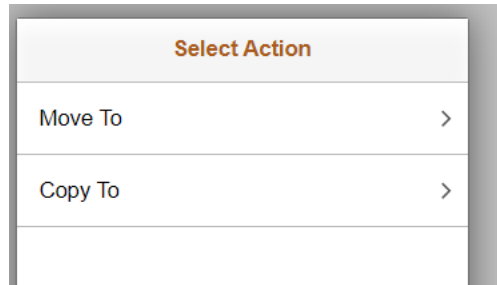


3. Select the homepage where tile is located.
4. Click on the  **Edit** icon at bottom right of the tile.



Select Action window displays.

5. Select **Move To** to move tile to new homepage
or
Copy To to copy tile to new homepage while keeping original in current page.

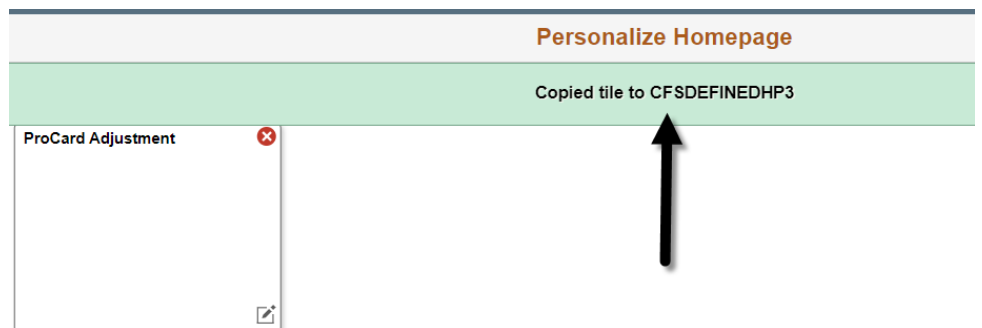


List of homepages display.

6. Select location to move or copy tile to.



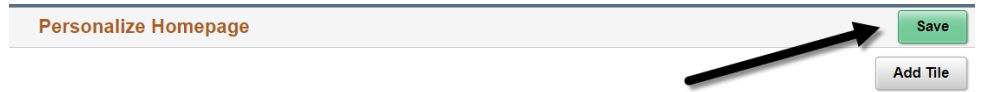
A green bar at the top will display to confirm tile has been moved or copied to new homepage.



7. Click **Save** to complete edit

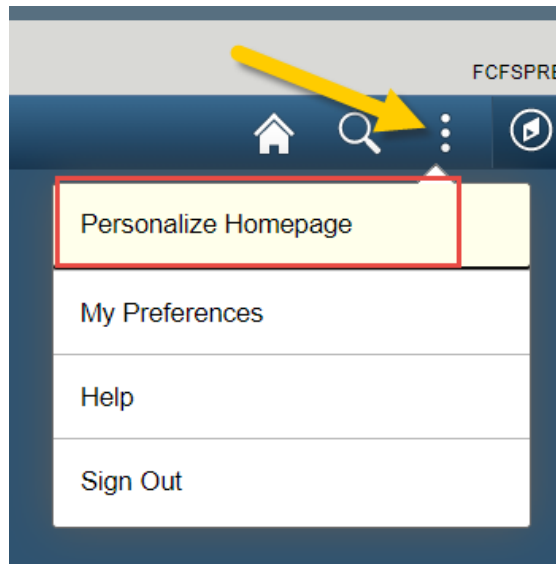
or

Cancel (button is located to the left of page).

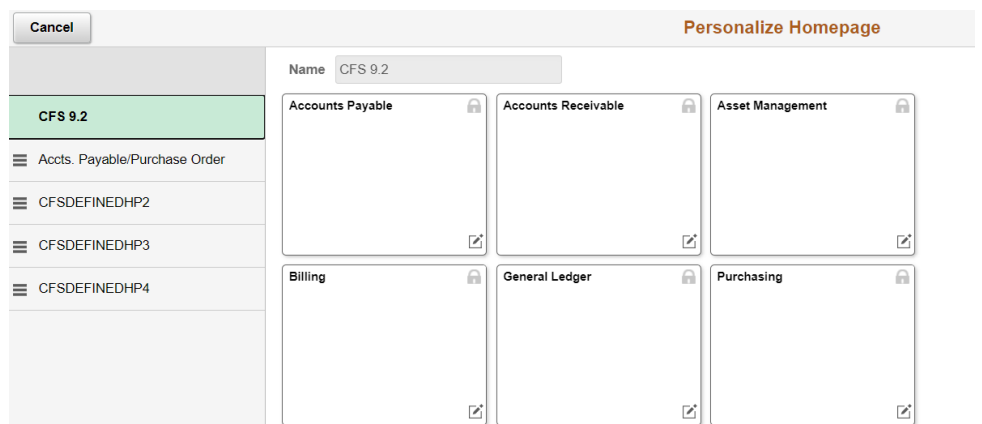



d. Delete a Tile

1. Click on the **3-dot** icon.
2. Select **Personalize Homepage** from the menu.



Personalize Homepage displays.

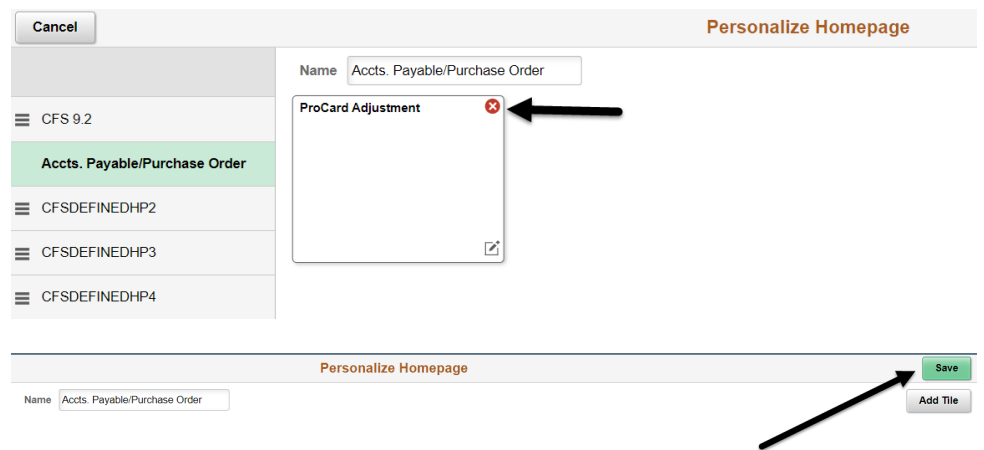


3. Select the homepage where tile is located.
4. Click on the  Delete icon at top right of the tile.

Tile is immediately deleted.

5. Click **Save** to complete edit
or

Cancel (button is located to the left of page).



e: Rename an Existing Tile in Homepage

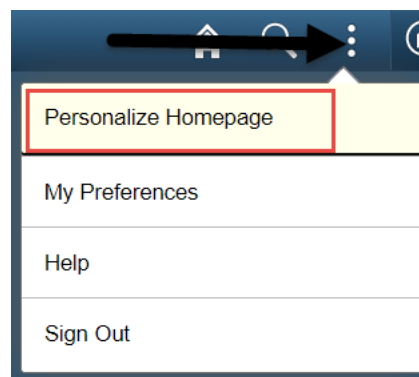
To rename an existing tile in a homepage, user will need to follow the steps to:

1. [Delete a Tile.](#)
2. [Add a Tile to Customizable Homepage](#)

f: Change Default Landing Page

Users can make a customizable homepage as their default landing page.

1. Click on the **3-dot** icon.
2. Select **Personalize Homepage** from the menu.



- Click and drag the homepage you want to make as your default. Drag it to the first position.

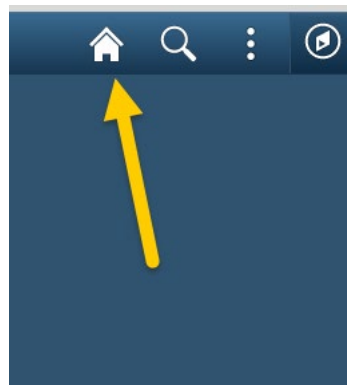
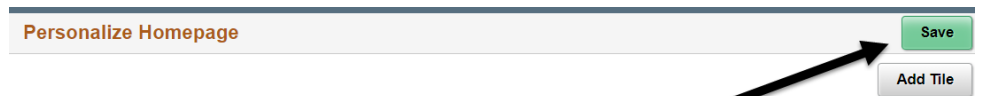
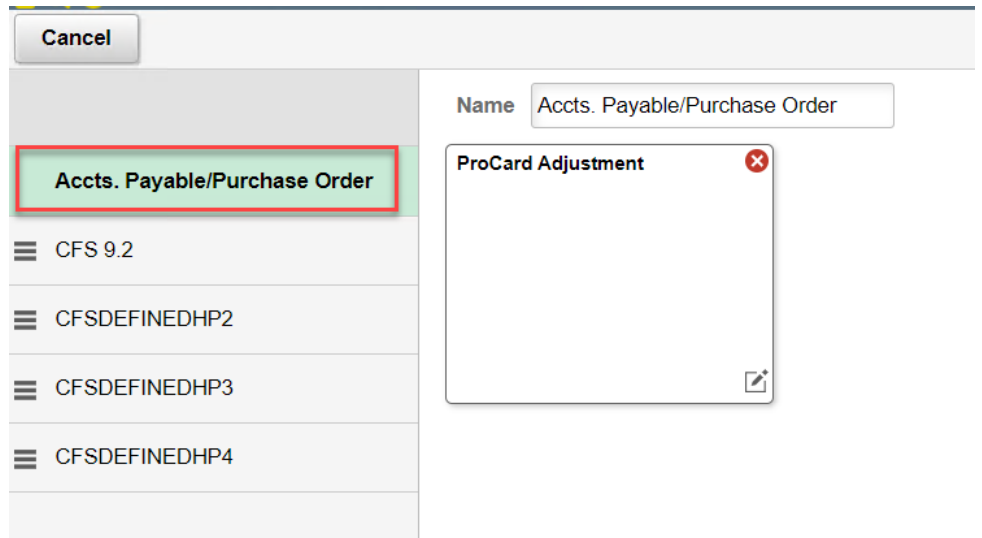
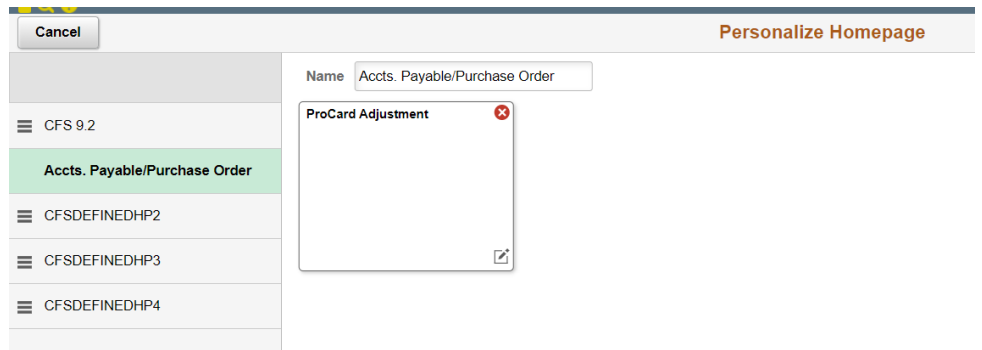
In this demonstration, we will make Accts. Payable/Purchase Order homepage the default landing page.

Accts. Payable/Purchase Order homepage is now first while the former default CFS 9.2 is in second position.

- Click **Save** to complete edit or

Cancel (button is located to the left of page).

- Click the  Home icon to return to the landing page.



Newly selected homepage is now the default landing page.

6. Click the down arrow to display the full homepage menu and select to navigate to them.

