



Navigation

Oracle Navigation Step-by-Step Guide

Home Page Navigation

February 4, 2021 FINAL

©2020 UC Merced. All Rights Reserved.

Table of Contents

Home Page (aka Welcome Springboard) Navigation	3
Home Page (aka Welcome Springboard)	3
Settings and Actions icon	5
Notifications icon	5
Watchlist icon	6
Favorites and Recent Items icon	6
Recent Items tab hyperlink	7
Navigator icon	8
Home Page/ Welcome Springboard	9
Personalize Springboard icon	10
Page Navigation icon	11



Home Page (aka Welcome Springboard) Navigation

UC Merced's employees will use these steps to learn how to navigate in and around the Oracle Cloud Home Page (aka Welcome Springboard).

To log in to Oracle Cloud, you will use Single Sign On and enter your network user ID and password when prompted in the UC Merced SSO window. You will then need to complete the two-factor authentication to complete your log in. Access provisioning will be controlled and evaluated for segregation of duties (SOD) compliance control. Each user has their own unique access based on their user role.

To perform this task, log into Oracle

Note: you can click the **Home** icon at any point to return the **Home Page/ Welcome Springboard** if needed

Home Page (aka Welcome Springboard)

- 1. After logging in, you will see your Home Page (aka Welcome Springboard). This is your starting point for navigating to different modules, work areas, forms, tasks, and managing your preferences and notifications.
- 2. Different user roles have different system access. Depending on your specific user role and therefore what modules you would need to work in, your home page may look different from someone else's and the one on the screen.





3. At the top of the screen, you will see a row of icons. The first one, all the way to the right, is your **Settings and Actions** icon.





Settings and Actions icon

- 1. Click the Settings and Actions icon
- 2. This menu allows you to **Set Preferences** and access **Applications Help**.

	• • • •	• • •	Settings and Actions sign Out
FI	Collections		Personalization Access Accessibility Settings Set Preferences Administration Edit Pages Edit Global Page Template
Share thoughts with your colleagues		Managemer	Manage Configurations
1 0 0		E	Setup and Maintenance Highlight Flexfields
Conversations Following Followers	Payables	Projects	Troubleshooting Record Issue
Employee NewsMy Flags	2	∠• ∡	Print Me Hide Help Icons Applications Help
	Intercompany Accounting	Budgetary Cor	About This Application

Notifications icon

- 1. The next icon to the left is the **Notifications**, click the **Notifications** icon.
- 2. Your Notifications menu can be filtered by All Notifications or by Pending Notifications. You will see your notifications listed here and when the notification occurred. New notifications will present as a red number on the notification icon. If you have many notifications and need to expand the list, you can click **More Details** hyperlink to view your complete list of notifications and tasks.





Watchlist icon

- 1. The next icon to the left is the **Watchlist**, click the **Watchlist** icon
- 2. Watchlist provides a quick glance at open or pending items within the different Oracle Cloud modules to which you have access. You can click the blue links to directly access those work areas to review or resolve an item listed.

RSITY OF CALIFORNIA	QA Support						â	\$ P	FI ~
		•		••(2	Watchlist			
						No data to display.			۰

Favorites and Recent Items icon

- 1. The next icon is the **Favorites and Recent Items**, click the **Favorites and Recent Items** icon.
- 2. The **Favorites** tab hyperlink is highlighted. You can create folders and save information to these folders to quickly access them. Favorites are static and will remain as bookmarks until you edit or delete them, however not all pages can be added to your Favorites.





Recent Items tab hyperlink

- 1. Click the **Recent Items** tab hyperlink.
- 2. The list of **Recent Items** lists all pages, work areas, and tasks that you recently visited or accessed. This list is dynamic, so the list will change as you perform more transactions in the system.





Navigator icon

- 1. The next icon is the **Navigator** on the top far left of the page, click the **Navigator** icon.
- 2. The Navigator provides a list of all work areas in the system to which you have access. The work areas are organized by business function and features that you may need to access. You can click any of the links to access that work area.
- 3. Click the **Navigator** icon again to close the Navigator window and view the **Home Page/Welcome Springboard**.

1, 3 CALIFORNIA Q	A		â	\$ P D	FI ~
Avigator Navigator Me Directory Noboarding Checklist Tasks Pay Time and Absences Career and Performance Personal Information Career and Performance Me to Learn Benefits Current Jobs	Receivables Billing Accounts Receivable Revenue Payables Payables Dashboard Invoices Payments Projects If Project Financial Management Assets	Procurement Purchase Requisitions Purchase Agreements Purchase Orders My Receipts Catalogs Suppliers Resource Directory Social Cetting Started My Rashboard	Tools Set Preferences Announcements Deep Links Worklist Spaces Reports and Analytics Scheduled Processes Import Management Export Management File Import and Export Download Desktop Integration	★ P D eceivables ral Accounting	€ ~
Current Jobs Wellness Personal Brand Volunteering Web Clock Roles and Delegations My Team Users and Roles My Client Groups Workforce Structures Sales F* Analytics Collections Contract Management Contracts	Costs Costs Grants Management Awards General Accounting General Accounting Dashboard Journals Period Close Intercompany Accounting Transactions Reconciliation Budgetary Control Cash Management Cash Balances Bank Statements and Reconcili	 My Dashboard Marketplace Cloud Customer Connect My Enterprise Offerings New Features Feature Updates Enterprise Setup and Maintenance 	 Download Desktop Integration Collaboration Messaging Configuration Sandboxes Appearance Structure Business Objects Application Composer 	ral Accounting xed Assets tting Started	>
Revenue Supply Chain Execution Receipt Accounting	Fixed Assets C Assets Asset Inquiry Intrastat Reporting Financial Reporting Center			Setup and aintenance	



Home Page/ Welcome Springboard

- 1. You can also navigate to work areas from the Home Page/ Welcome Springboard.
- 2. The tiles on the screen make up the **Home Page/ Welcome Springboard**. These navigation tiles are a visual way to access the same work areas listed in your **Navigator**.





Personalize Springboard icon

- 1. You can personalize which tiles are available using the **Personalize Springboard** icon located on the right of the screen below the **Settings and Actions** icon.
- 2. Click the **Personalize Springboard** icon.
- 3. To personalize your springboard, check or uncheck the boxed for which work area tiles you want to appear on your home page and click the **OK** button to apply them.

Note: Remember that depending on your access, you will only see the tiles and sub-tiles relevant to your specific role.

Personalize Springboard Imeet openal Imeet openal <th></th> <th>QA Support</th> <th></th> <th>â</th> <th>☆ P D ®~</th>		QA Support		â	☆ P D ®~
Image: market index market		Personalize Springboard		Reset to Default OK Cancel	
Image: Construction of the second	Share t 1 Conversat 0 1 1 1 1 1 1 1 1 1 1 1 1 1	Personalize Springboard Me Directory Onboarding Checklist Tasks Pay Time and Absences Career and Performance Personal Information Learning What to Learn Benefits Current Jobs Weilness Personal Brand Voluntering Web Clock Roles and Delegations Users and Roles Workforce Structures Analytics Collections Contract Management Contracts Nervenue Receipt Accounting Receivables Billing Accounts Receivable Revenue Payables	 Awards General Accounting General Accounting Dashboard Journals Period Close Intercompany Accounting Transactions Reconciliation Budgetary Control Cash Management Cash Balances Bank Statements and Reconcili Fixed Assets Assets Assets Asset Inquiry Intrastat Reporting Center Procurement Prochase Requisitions Purchase Agreements Purchase Orders My Receipts Catalogs Suppliers Resource Directory 	Reset to Default OK Cancel Social 3 Getting Started 3 My Dashboard 4 Marketplace 6 Cloud Customer Connect 4 My Dashboard 5 Marketplace 6 Cloud Customer Connect 7 My Enterprise 6 Offerings 7 New Features 7 Feature Updates 6 Enterprise 7 Setup and Maintenance 7 Tools 7 Setup and Maintenance 7 Tools 9 Set Preferences 1 Announcements 1 Deep Links 9 Worklist 1 Spaces 9 Scheduled Processes 1 Import Management 1 Export Management 1 Export Management 1 Outload Desktop Integration 1 Collaboration Messaging 1 Collaboxes Appearance 1	2 eivables Accounting Accounting g Started up and tionance
Payables Dashboard Invoices		Payables Dashboard Invoices			



Page Navigation icon

- 1. From your home page, you can scroll to view other pages with information using the **Page Navigation** circle icons in the top area of the **Home Page/ Welcome Springboard**.
- 2. Hover your mouse over the **Page Navigation** circle icons on the **Home Page/Welcome Springboard** page to see what is on each page.

≡	UNIVERSITY	of california RCED	QA Sup	port					â ☆ ₽ î	> FI ~ T
			I		1	Genera	Accounting Infolets	2		۰
				FI			<u>ا</u>			
				FININST1		Collections	Contract Management	Receipt Accounting	Receivables	
		Share t	hought	ts with your col	leagues 📭		management			
		1 Conversat	ions	0 Following	0 Followers		E	1		
						Payables	Projects	Awards	General Accounting	>
		0 I 0 I	Emplo Vly Fl	oyee News ags		2	∠ • <u>∧</u>	<u>ش</u>	\mathbf{Q}	
						Intercompany Accounting	Budgetary Control	Cash Management	Fixed Assets	



- 3. Click the **Page Navigation** circle icon for the page you desire to go to.
- 4. On this page, you will see **Infolets**, which are interactive boxes that provide activity summaries.
- 5. Clicking into each **Infolet** will open a more detailed report of that information.
- 6. To scroll between pages, you can also click the **Previous** or **Next** icons on the left and right of the screen.

	QA Support	3	.	۵	0 4 4 0	FI ~
Close Calendar UCM Primary Ledger Day +3 Wed Feb 3 Jan-2021	Open Subledgers GL AR AP	IC Transactions	Journals \$45.7M 7	IC Reconciliation	AP Reconciliation	
AR Reconciliation	Revenues	¢:	Expenses	Allocations	Budget Consumed	6
Budget Consumed	Set up Rever	nue Accounts	Budget Consumed	Budget Consumed	Budget Consumed	
Funds Available	Funds Available	Funds Available	Funds Available	Funds Available	4	



7. Similar to personalizing your springboard, you can personalize your infolets by clicking the **Infolet Repository** icon to the right of the screen.



