



ben balances

Navigation User Guide












Document Last Updated March 1, 2012

Table of Contents

Objectives	3
Overview of BEN	4
Glossary of Terms	6
BEN Financials Login Window	8
BEN Financials Homepage	9
BEN Financials Responsibilities & Navigation Paths	Error! Bookmark not defined.
BEN Navigation – Typical Application Window	11
Switching Responsibilities	12
Taskbar	12
Using the Applications Navigator Functions Region	13
Using the Top Ten List (Optional)	14
User Preferences (Optional)	15
Menu Paths.....	16
Right Mouse Button Menus	16
Pull Down Menus	16
Toolbar.....	20
Keyboard Shortcuts	21
Navigation Tips	22
Additional Tips	23
Canceling a Long Running Query	23
Canceling a Query with Many Records	23
Server Not Available	23
Exporting BEN Financials Data to a Microsoft Excel Spreadsheet	24
Desktop Configuration	24
Using the Navigator's Documents Region.....	25
Logging Off of BEN Financials	26
Appendix A	27
Viewing and Creating Folders.....	27
Viewing Existing Folders	28
Creating a Folder and Changing Your Default	28
Creating a Folder Without Changing Your Default	29
Deleting a Folder	30
Revision History	31

Objectives

Upon completion of this section, you will:

-  have an overview of navigating in BEN Financials' applications
-  learn how to logon to BEN Financials
-  know how to navigate in BEN Financials
-  understand how to use the Toolbar
-  understand how to use the drop down menus
-  know how to 'Switch Responsibilities'
-  know how to use a '**Top Ten**' list
-  understand where to find your message line
-  learn how to customize your '**Homepage**'
-  understand the security rules in BEN Financials
-  learn how to logoff from BEN Financials

Overview of BEN

Business Enterprise Network (BEN)

Penn's business and financial management systems which includes

- Web-enabled applications and tools
- Support structure

Desktop Configuration

Consistent with current University standards

http://www.finance.upenn.edu/ben/benfin/desktop_req/

Local Support Providers (LSP's)

<http://www.upenn.edu/computing/view/support/staff.html>

- List of primary computer support assigned by Center and by Department

Access/Security

Penn eForms

<http://www.upenn.edu/computing/da/eforms/>

Important Web Addresses

U@Penn Portal

http://medley.isc-seo.upenn.edu/penn_portal/u@penn.php

- Access to a wide variety of University web sites and information including those listed below

BEN Financials Homepage

<http://benapps.isc-seo.upenn.edu>

- Access to BEN Financials, BEN Deposits, and BEN Reports

Business Enterprise Network

<http://www.finance.upenn.edu/ben>

- News, Calendar, BEN Reps, BEN Knows, Frequently Asked Questions, Support Information, etc.

Financial Training Department Web Page

<http://www.finance.upenn.edu/ftd/>

- Information regarding courses offered, register for training, view the Bottom Line Newsletter, etc.

Audit and Compliance Web Page

<http://www.upenn.edu/audit/>

- Information on controls, compliance mechanisms, and technologies to manage risk as well as providing guidance on the stewardship of University resources

Responsibility Center Management (RCM)

<http://www.finance.upenn.edu/comptroller/rcm/index.shtml>

- Information about BEN Financials Reports, Fund Aggregations & Object Code Aggregations, etc.

Overview of BEN (continued)

Need Help?

Dial 6-HELP (6-4357 or 215/746-4357)

- Enter your two-digit School or Center code
- BEN Helps is available 9:00 a.m. to 5 p.m. Monday through Friday

BEN Knows

<http://www.finance.upenn.edu/benknows/>

- Browse and search for possible solutions to your BEN Financials and BEN Reports questions

Penn eForms

Penn eForms are required for entry to most University financial systems. These eForms should be processed promptly to ensure system access following training. If an eForm has not been processed within **two months or more of attending a training course**, you will be required to repeat the course to obtain access.

☞ If you need your BEN Financials password reset call 8-1099.

Glossary of Terms

Before using BEN Financials, you should familiarize yourself with the specifics of the GUI (Graphical User Interface) or web environment and how to perform basic tasks, such as using a menu or selecting an item. In doing so, you should come across and become familiar with the following generic terms:

Block

Each window consists of one or more blocks. All required fields in a block must be completed before you can move to the next block.

Click

Quickly press and release a mouse button while the mouse pointer is on a particular item.

Desktop

The part of the computer monitor that displays where your work takes place, a.k.a. your screen.

Double-click

Rapidly click a mouse button twice while the mouse pointer is on a particular item.

Folders

Refers to the custom preferences which allow you to determine what columns (fields) appear in your view of the data.

Homepage

The BEN Financials Homepage provides a point of entry into BEN Financials.

Menu

A list that appears in a bar across the top of a window that consists of commands or actions you can perform.

Plug-Ins

Plug-ins are software programs that extend the capabilities of the Netscape Browser in a specific way. J-Initiator and MarkView are software plug-ins that work with the web browser to run graphical BEN applications on a Windows PC or a Macintosh running Virtual PC. J-Initiator must be installed before the MarkView plug-in is installed.

Record

A record is one occurrence of data stored in all the fields of a block. Also referred to as a row.

Region

A collection of related fields set apart from other fields within a block. Regions help to organize a block so that it is easier to understand.

Scroll Bar

A vertical or horizontal bar that appears on a window whose contents are not entirely visible. Click on the arrows, or drag on the box of a scroll bar to scroll through the hidden contents, or click in the bar itself to move to either the previous or next page.

Toolbar

The toolbar is a collection of function buttons. Each toolbar button replicates a commonly-used menu item. Depending on the context of the current field or window, a toolbar button will be either enabled or disabled.

Window/Form

Replaces the word 'screen' and used interchangeably throughout BEN Financials.

Logging on to BEN Financials

From the U@Penn Portal Business Tab (http://medley.isc-seo.upenn.edu/penn_portal/u@penn.php)

- Click on BEN Financials>BEN Financials Homepage or type <http://benapps.isc-seo.upenn.edu/>



These are websites you may want to create a "bookmark" or "favorite" in your web browser

Included on this page is the following information:

Across the Top

- **Contacts** – takes you to information regarding BEN Helps and links to the Local Support Providers, Frequently Asked Questions, and the Financial Training Department
- **News** – takes you to all the published communications regarding BEN
- **Related Links** – takes you to the links for BEN Helps, Desktop Requirements and Setup, Hardware and Software Requirements, BEN Applications, Documentation, Training Information, Purchasing Services, Information Systems and Computing, Office of the Comptroller, and Office of the Vice President for Finance

Along the Side

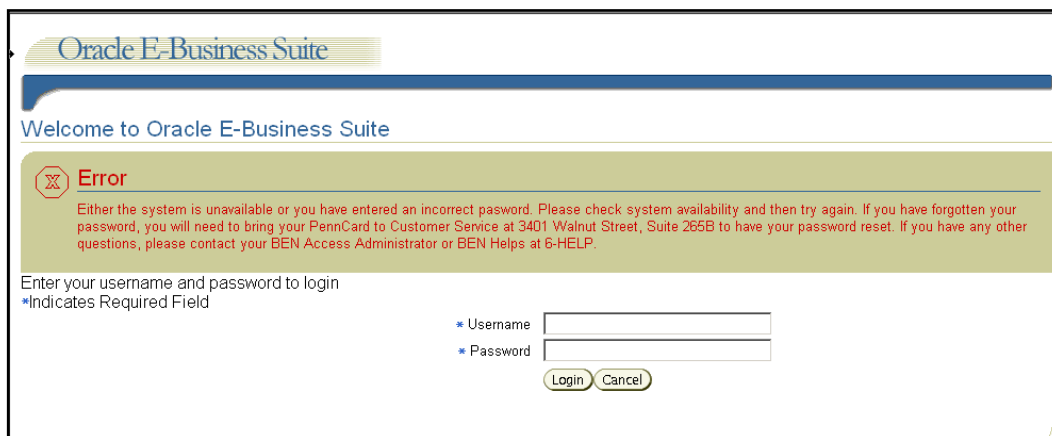
- **Access and Forms** – takes you to the Document Forms Library which includes forms for BEN Reports, BEN Financials Printers, and Logon Request Forms
- **BEN Helps** – takes you to the procedures for BEN Helps and includes a list of the 2 digit code for each School and Center
- **Desktop Requirements** – takes you to the Hardware and Software requirements, installation of the J-Initiator plug-ins for Internet Explorer and installation of MarkView Web Client
- **Documentation** – takes you to the documentation for BEN Balances, BEN Buys and BEN Reports
- **FAQ** – takes you to the 'Frequently Asked Questions' for all the BEN activities including BEN Helps, BEN Teaches, and General Usage
- **Training** – takes you to the Financial Training Department homepage
- Click on the **BEN Financials** link to login to BEN Financials

BEN Financials Login Window



- Enter your application **User Name** and **Password**
- Click on [**Connect**] or press [**Enter**]

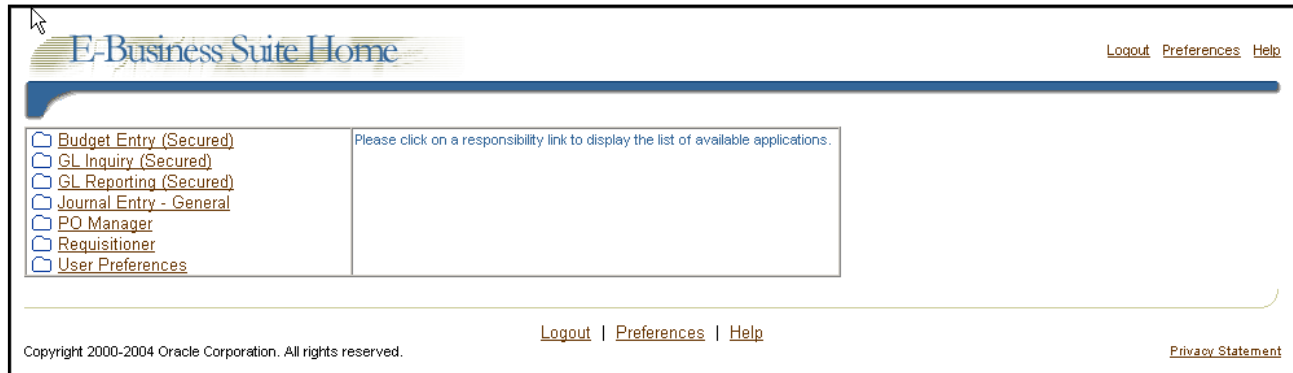
☞ *You will see the message below if you enter an incorrect password or if you attempt to login when the system is unavailable (e.g. after 8:00 p.m. EST on weekdays).*



- If you forget your password, go to:
Customer Service
3401 Walnut Street, Suite 265B
215-898-1099

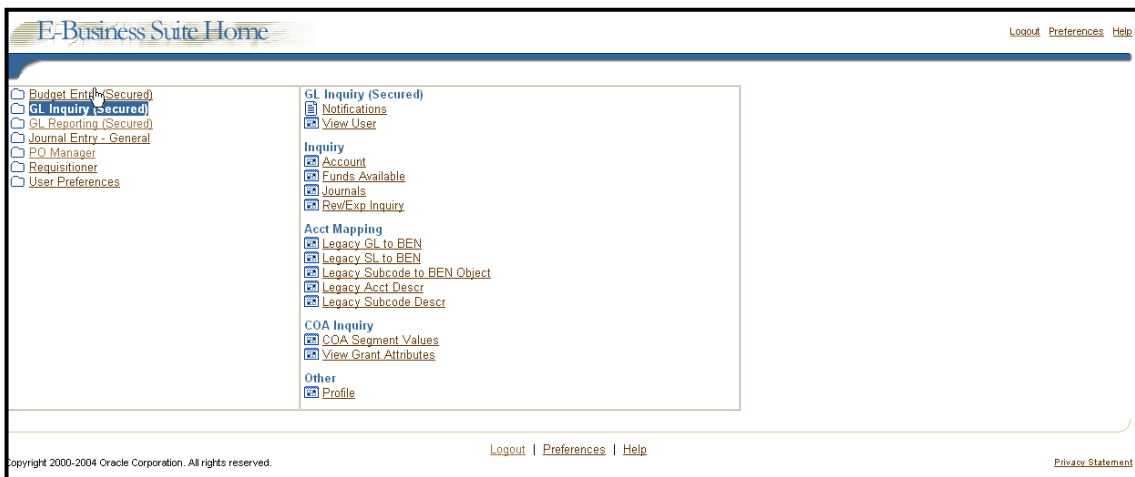
☞ *Requires Penn ID*

BEN Financials Homepage



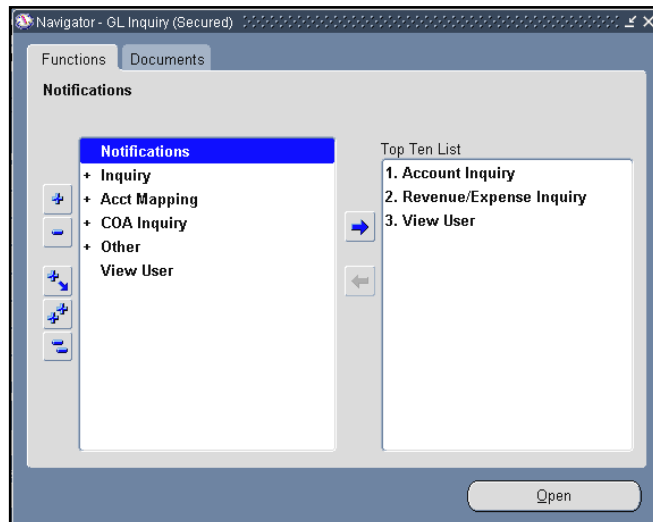
- When you click any one of the Responsibilities the system displays the navigation paths in the right panel for the selected responsibility.

☞ Click on any of the responsibilities listed in the left panel and the navigation path for the responsibility automatically changes in the right panel.



☞ The Navigator window appears on the screen. To change a navigation path within a responsibility, invoke the Navigator by

- Closing all forms or
- Clicking on the 'Show Navigator' icon on the toolbar



BEN Financials Responsibilities & Navigation Paths

The BEN Financials Homepage lists the BEN Responsibilities for which you have access. Listed below each responsibility are the corresponding navigation paths.

BEN Assets

Senior Asset Administrator & Asset Administrator

- Inquiry
 - Financial Transaction
 - Transaction History
- Asset
 - Asset Workbench
 - Mass Changes
- Other
 - Requests
 - Run
- Invoice Inquiry

BEN Balances

Budget Entry (Secured)

- Budget Journal

Freeze Grant (Secured)

- Freeze Grant
- View Grant Attributes
- View User

Freeze/Unfreeze Grant (Secured)

- Freeze Grant
- View Grant Attributes
- View User

GL Inquiry (Secured)

- Notifications
- Inquiry
 - Account
 - Funds Available
 - Journal
 - Rev/Exp Inquiry
- Acct Mapping
 - Legacy GL to BEN
 - Legacy SL to BEN
 - Legacy Subcode to BEN Object
- Legacy Account Desc
- Legacy Subcode Desc
- COA Inquiry
 - COA Segment Values
 - View Grant Attributes
- Other
 - Profile
 - View User

GL Reporting (Secured)

- Reporting
 - Run Report
 - Create Report Set
- Other
 - Profile

Journal Entry – General

- Notifications
- Journals
 - Enter
 - Encumbrance
- COA Inquiry
 - COA Segment Values
 - View Grant Attributes
- Other
 - Profile
 - View User

BEN Buys

- PO Manager
- Notifications
- Purchase Orders
 - View/Control PO
- Enter Receipts
- Inquiry
 - Invoices
 - Locations
 - Receipts
 - Requisitions
 - Shipping Info
 - Suppliers
- COA Inquiry
 - COA Segment Values
 - View Grant Attributes
- Reporting
 - Run Report
 - Create Report Set
- Other
 - Profile
 - View User

Requisitioner

- Requisitions Homepage
- Suppliers
- PO Action History
- Shipment Information

User Preferences

- General Preferences

BEN Navigation – Typical Application Window

Top of Window

Bottom of Window

Message Block
 Record # Block
 Available Features Block

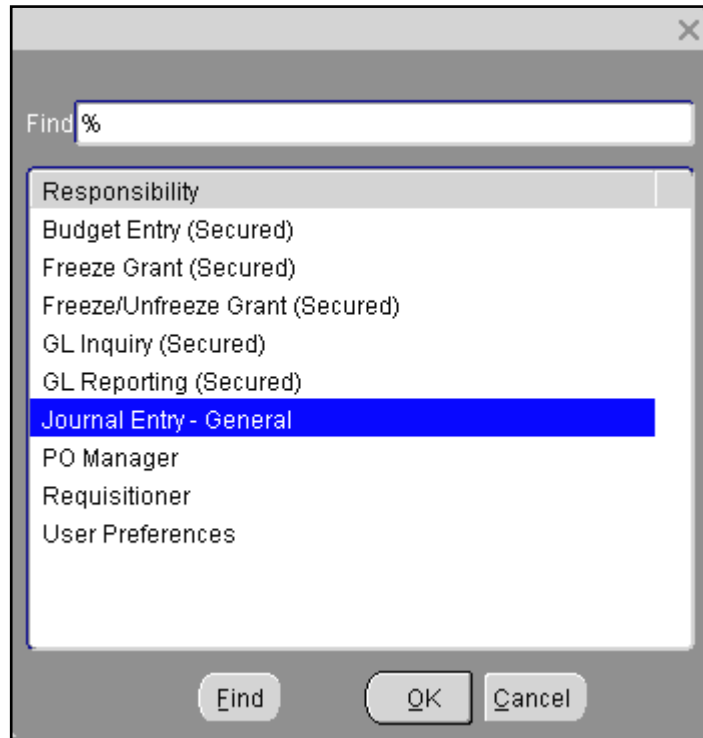
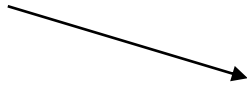
Other Window Features

- Yellow - shaded fields indicate required data field(s)
- Gray - shaded fields indicate currently unavailable data field(s)
- White – updatable but not required data field(s)
- Blue – shaded fields indicate query mode

Switching Responsibilities

To switch Responsibilities

- Close the current form by either
 - Clicking on the 'x' in the upper right hand corner of the form or
 - Clicking on File>Close Form on the menu path or
 - Clicking on the 'Close Form' icon on the Toolbar
- Once the forms are closed
 - Click on File>Switch Responsibility or
 - Click on the 'Top Hat' icon on the tool bar
 - This pop-up box will appear



Taskbar

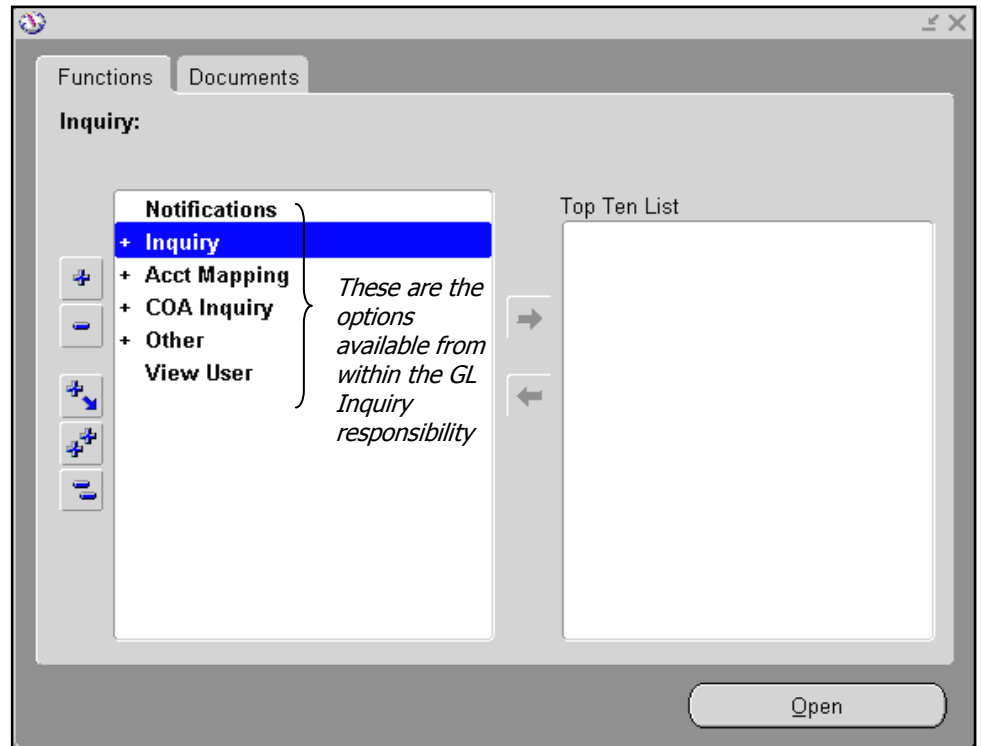
- You can also go back and forth between Responsibilities by using the 'Task Bar' on your desktop



Using the Applications Navigator Functions Region

The forms that you can navigate to are displayed in a navigation list on the left-hand side of the Navigator window. The navigation list is organized much like the hierarchy of a file system, where you can expand items that begin with a plus sign (+) to further sub-levels until you find your form of interest. Sub-levels appear indented below the items from which they are expanded. Items that are expanded are preceded by a minus sign (-). You can expand no further when an item displays neither a plus or minus sign.

Above the navigation list, you should see two fields that span the width of the window. These two fields help you identify your selection. The top field displays the name of the item currently selected, while the bottom field displays the choice highlighted.



To expand or collapse the navigation list:

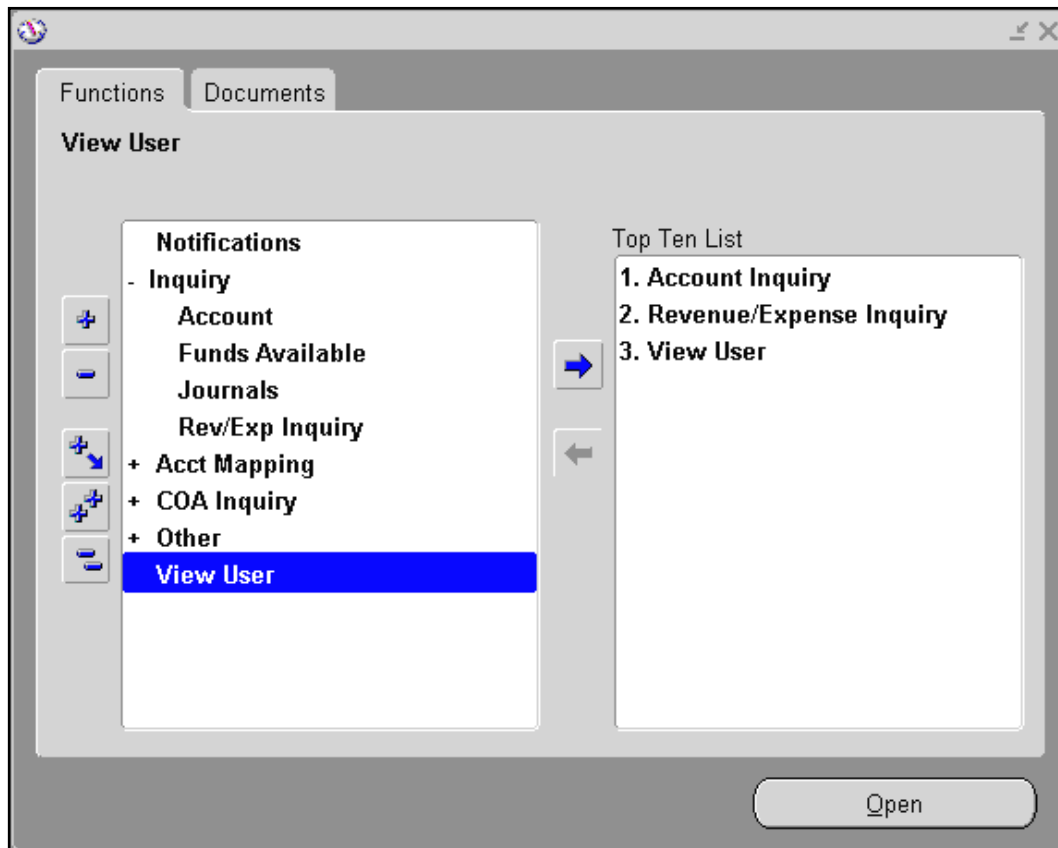
- Choose one of the following methods to expand an expandable item to its next sub-level:
 - Double-click on the item
 - Select the item and choose Open
 - Select the item and choose the Expand [+] button
- Choose one of the following methods to collapse an expanded item:
 - Double-click on the item
 - Select the item and choose the Collapse [-] button
- To expand or collapse several items at once, choose one of the following buttons:
 - Expand All Children--expand all the sub-levels of the currently selected item
 - Expand All--expand all the sub-levels of all expandable items in the navigation list
 - Collapse All--collapses all currently expanded items in the navigation list
- To open a form from the navigation list:
 - Select your form of interest
 - Choose Open
- Alternatively, you can double-click directly on the form of interest to open it.



Do not double-click on the Open button. All buttons require only a single click to activate.


Using the Top Ten List (Optional)

If there are forms that you use frequently, you can copy them over to a navigation top ten list located on the right-hand side of the Application Functions Navigator. The top ten list displays your forms numerically so you can choose them instantly without having to drill down for them in the navigation list. You can add a maximum of ten forms to the top ten list and you can create a different top ten list for each responsibility you have access to.



To create a navigational top ten list:

- Highlight a frequently used form from the navigation list
- Click on the **arrow going right**
- The form name now appears in the navigation top ten list preceded by a top ten list number

 *If you wish to remove a form name from the top ten list, highlight the form name in the top ten list and click on the **arrow going left***

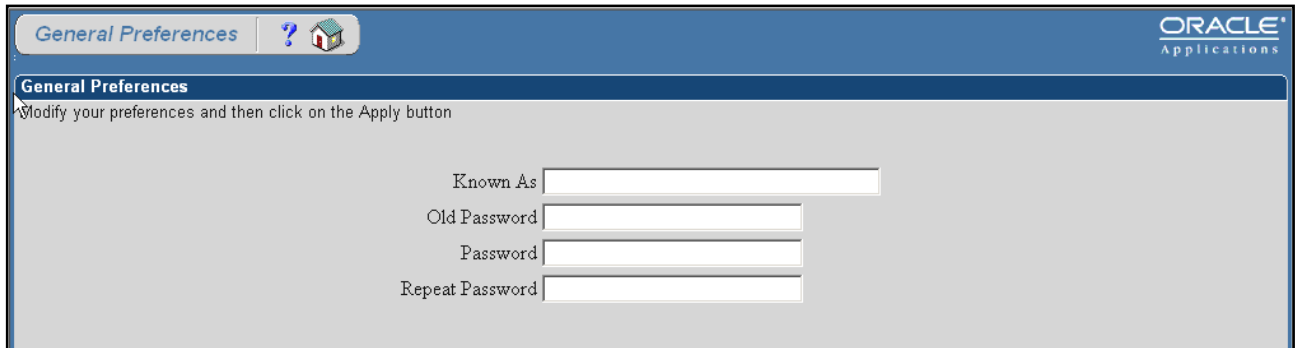
To open a form from the navigation top ten list:

- Type the top ten list number that precedes the form name you want to open
 - You can also highlight the form name you want and click on [Open], or double-click on the form name

 *The name and description of the form selected also appear in the current selection fields above the navigation list.*

User Preferences (Optional)

- From the BEN Financials Homepage, click on [User Preferences](#) to change your password



General Preferences

Modify your preferences and then click on the Apply button


Known As

Old Password

Password

Repeat Password

Users will be prompted to change their password every 30 days. User Preference is used to change your password when desired.

- Click on **[Apply]**
- Click on the  to return to the BEN Financials Homepage

Menu Paths

Right Mouse Button Menu

Depending on your desktop settings, using the right (or left) mouse button may allow you to access the following menu items:

- Cut
- Copy
- Paste
- Folder Menu
- Help



Pull Down Menus

File Edit View Folder Tools Window Help

Use the Pull Down menu bar to navigate through a form, to edit or retrieve data, or to perform various other actions.



Available functions show in black, while unavailable functions show as "grayed out".

File Menu

The File menu lets you perform several actions in BEN Financials:

<ul style="list-style-type: none"> New Open Save Save and Proceed Next Step Export Place on Navigator Log on as a Different User Switch Responsibility Print Close Form Exit Oracle Applications 	<ul style="list-style-type: none"> Opens a new record in the active form. Opens the detail screen for the current selection. Saves any pending changes in the active form. Saves any pending changes in the active form and advances to the next record. Updates the Process workflow in the Navigator by advancing to the next step in the process. Exports data retrieved. Creates an Icon in the Documents tab of the Navigator which can be used to recall the active form and its current record. Exits the application and displays the BEN Financials Logon window. Displays the Applications Responsibility window. Prints your current window. An application may override this action to instead allow printing of one or more specific reports. Closes all windows of the current form. Quits BEN Financials Applications.
--	---

Menu Paths (continued)

Pull Down Menus (continued)

File	Edit	View	Folder	Tools	Window	Help
------	------	------	--------	-------	--------	------



Available functions show in black, while unavailable functions show as "grayed out".

Edit Menu

Use the Edit menu to edit your data in BEN Financials:

Undo Typing	Undo any typing done in a field before the field is exited and returns the field to the most recent value.
Cut	Cut the current selection to the clipboard.
Copy	Copy the current selection to the clipboard.
Paste	Paste the contents of the clipboard into the current field.
Duplicate Record Above	Copies all values from the prior record to the current record.
Duplicate Field Above	Copies the value of the current field from the prior row.
Clear Record	Erases the current record from the window.
Clear Field	Clears the data from the current field.
Clear Block	Erases all records from the current block.
Clear Form	Erases any pending changes from the current form.
Delete	Deletes the current record from the database.
Select All	Selects all records (for blocks with multi-select).
Deselect All	Deselects all selected records except for the current record (for blocks with multi-select).
Edit Field	Displays the Editor window for the current field.
Preferences Change Password	Displays the Change Password dialog box.
Preferences Profiles	Displays the Profiles window.

View Menu

The View menu provides you with the following options:

Show Navigator	Displays the Navigator window.
Zoom	Invokes custom defined zooms.
Find	Displays the Find window to retrieve records.
Find All	Retrieves all records.
Query by Example Enter	Invokes 'Enter Query' mode to enter search criteria for a query-by-example.
Query by Example Run	Executes the query-by-example.
Query by Example Cancel	Cancel the query-by-example by exiting from 'Enter Query' mode.
Query by Example Show Last Criteria	Recovers the search criteria used in the previous query-by-example.
Query by Example Count Matching Records	Counts the number of records that would be retrieved if you ran the current query-by-example.
Record First	Moves the cursor to the first record.
Record Last	Moves the cursor to the last record.
Translations	Displays the Translations window.
Attachments	Displays the Attachments window.
Summary/Detail	Switch between the summary and detail views of a combination block.
Requests	Displays the Request window. Requests are your reports.

Menu Paths (continued)

Pull Down Menus (continued)

File	Edit	View	Folder	Tools	Window	Help
------	------	------	--------	-------	--------	------



Available functions show in black, while unavailable functions show as "grayed out".

Folder Menu

The Folder menu lets you customize the presentation of data in a folder:

New	Creates a new folder definition.
Open	Opens an existing folder definition.
Save (Do Not Use – Saves Query)	Saves changes to the current folder definition.
Save As (Use – Doesn't Save Query)	Saves current folder definition to a new name.
Delete	Deletes an existing folder definition.
Show Field	Displays a field that is currently hidden.
Hide Field	Hides the current field.
Move Right	Moves the current field to the right.
Move Left	Moves the current field to the left.
Move Up	Moves the current field up.
Move Down	Moves the current field down.
Widen Field	Increases the width of the current field.
Shrink Field	Decreases the width of the current field.
Change Prompt	Changes the prompt for the current field.
Autosize All	Adjusts all field widths to completely show their data.
Sort Data	Specifies sort order for the first three fields by ascending, descending and no ordering.
View Query	Displays the query criteria for the current folder definition.
Reset Query	Erase the current query criteria.
Folder Tools	Display the folder tool palette.

Tools Menu

The functions in the Tools menu differ based on the area of Responsibility in which you are currently working. Available functions show in black, while unavailable functions show as "grayed out".

Window Menu

The Window menu displays the names of all open application windows and window placement options.

Cascade	Displays any open windows in a "cascaded" or stair-stepped fashion.
Tile Horizontally	Displays any open windows in a horizontally "tiled" (non-overlapping) fashion.
Tile Vertically	Displays any open windows in a vertically "tiled" (non-overlapping) fashion.
Open Window List	Displays a list of open window titles in the order in which they are stacked.

Menu Paths (continued)

Pull Down Menus (continued)

File	Edit	View	Folder	Tools	Window	Help
------	------	------	--------	-------	--------	------



Available functions show in black, while unavailable functions show as "grayed out".

Help Menu




















Use the Help menu to get additional information about BEN Financials:

Window Help	Displays help for the current window.
Oracle Applications Library	Displays a window that lists all available Oracle Applications help text.
Keyboard Help	Displays the current key mappings of specific functions and menu options.
Diagnostics	Used for technical diagnostics.
Record History	Displays information about the current record.
About Oracle Applications	Displays information about the current window and application, including version information.

Toolbar



Collection of iconic buttons replicating commonly-used menu selections. Depending on the context of the current field or window, a toolbar button will be either enabled or disabled. You can display the label for an enabled toolbar button by holding your mouse over the button. The toolbar buttons and the actions they perform are as follows:

-  New - Opens a new record in the active form.
-  Find - Displays the Find window to retrieve records.
-  Show Navigator – Displays the Navigator window.
-  Save - Saves any pending changes in the active form.
-  Next Step - Disabled in BEN Financials.
-  Top Hat – Enables switching Responsibilities.
-  Print - Prints the current screen that the cursor is in, i.e. the 'print screen' function.
-  Close Form - Closes all windows of the current form.
-  Cut - Cut the current selection to the clipboard.
-  Copy - Copies current selection to the clipboard.
-  Paste - Pastes from the clipboard into the current field.
-  Clear Record - Erases the current record from the window.
-  Delete – Deletes the current record from the database.
-  Edit Field - Displays the Editor window for the current field.
-  Zoom – Get Next Invoice Image (typically used by Accounts Payable)
-  Translations - Invokes the Translations window.
-  Attachments - Invokes the Attachments window. If one or more attachments already exist, the icon changes to a paper clip on a piece of paper.
-  Folder Tools - Displays the folder tool palette.
-  Window Help - Displays help for the current window.

Keyboard Shortcuts

Although these functions can be accessed either by the toolbar or pull down menus, Keyboard Shortcuts are yet another option for navigating through BEN.

Block menu	[Ctrl] [B]
Clear Block	[F7]
Clear Field	[F5]
Clear Form	[F8]
Clear Record	[F6]
Commit	[Ctrl] [S]
Count Query	[F12]
Delete Record	[Ctrl] Up Arrow
Display Error	[Shift] [Ctrl] [E]
Duplicate Field	[Shift] [F5]
Duplicate Record	[Shift] [F6]
Edit	[Ctrl] [E]
Enter Query	[F11]
Execute Query	[Ctrl] [F11]
Exit	[F4]
Help	[Ctrl] [H]
Insert Record	[Ctrl] Down Arrow
List of Values	[Ctrl] [L]
List Tab Pages	[F2]
Next Block	[Shift] [Page Down]
Next Field	[Tab]
Next Primary Key	[Shift] [F7]
Next Record	Down Arrow
Next Set of Records	[Shift] [F8]
Previous Block	[Shift] [Page Up]
Previous Field	[Shift] [Tab]
Previous Record	Up Arrow
Print	[Ctrl] [P]
Return	[Enter]
Scroll Down	[Page Down]
Scroll Up	[Page Up]
Show Keys	[Ctrl] [K]
Update Record	[Ctrl] [U]

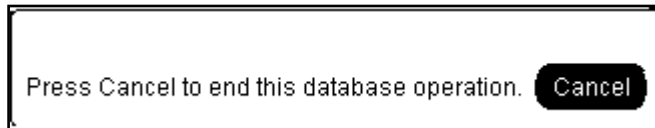
Navigation Tips

Item	BEN Financials
Navigating	Pull Down Menu Paths; Toolbar icons; Keyboard shortcuts
Quickpick	List of Value icon [***] within field or [Ctrl] L
Cancel Runaway Query	Pop-up box appears after first 100 records. Click [Continue], [Stop] or [Continue to End] or Click [Cancel] on 'Press Cancel...' message.
Change Responsibility	File>Switch Responsibility
Move From Fields and Zones	[Tab] or Move Cursor With Mouse
Finding Patterns With Wildcards	You can use the percent '%' wildcard within a field to represent any number of characters (including no characters). Example: To retrieve all records that contain the word "Central" in a specific field, you would enter %Central% in that field. Click [Find] .
Case Sensitive?	Yes
Message and Status Lines	Bottom of Window
Available Options	Toolbars & Menu Items
Record History	Help>Record History
Name in Action History	View User option listed under various Responsibilities
Enter Query	View>Query By Example>Enter or [F11] or Flashlight Icon
Execute Query	View>Query By Example>Run or [Ctrl] F11 or click [Find]
Cancel Query	View>Query By Example>Cancel or [F4]
Copy Field	Edit>Duplicate>Field Above or [Shift] [F5]
Copy Record	Edit>Duplicate>Record Above or [Shift] [F6]
Paste	Edit>Paste
Error Message	Pop-up Box
Report	Requests
Additional Record Information	Pop-up List or [**]
Insert Row	[Ctrl] Down Arrow or NEW record icon
Field Edit	Edit>Edit Field
Exiting	File>Exit Oracle Applications

Additional Tips

Canceling a Long Running Query

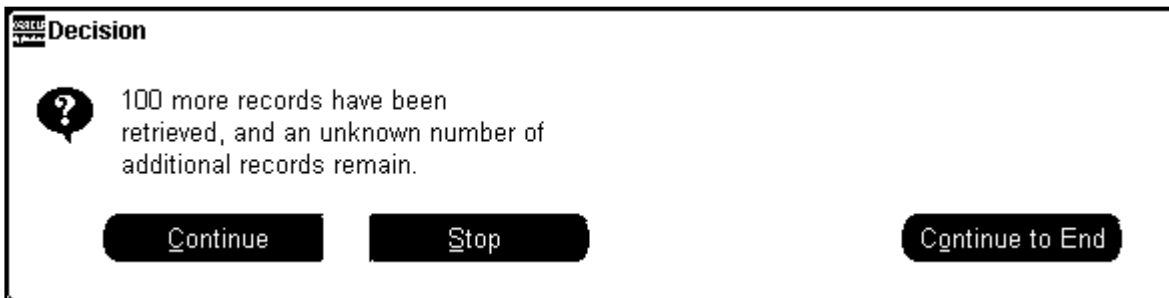
When a query may take longer than a few seconds to retrieve the selected records, this pop-up message may appear. Ignore this message if you wish to wait for the query to finish. Or click on [Cancel] to end the query and either enter data to narrow the search or re-enter any mistyped information.



Canceling a Query with Many Records

If you enter a query and the records exceed 100, you will see this message appear. Select from the following options:

- [Continue] - will continue to the next 100 records
- [Stop] - will stop the query
- [Continue to End] - will continue to the end of the entire query



Server Not Available

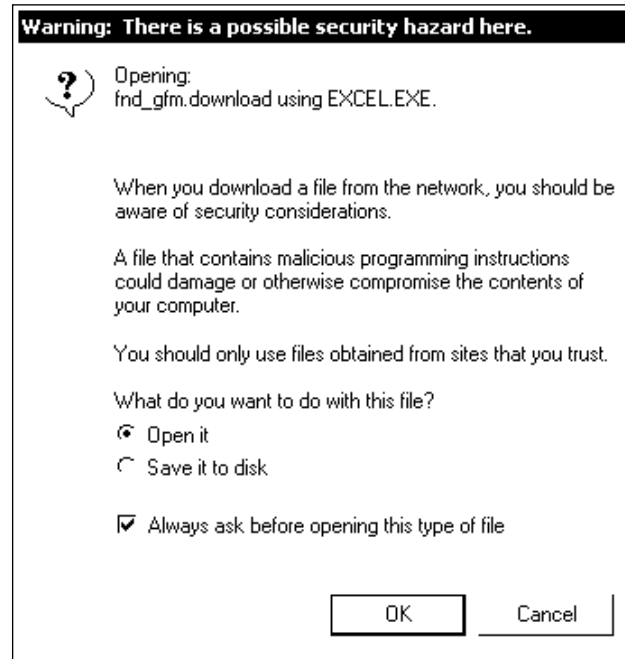
The pop-up box below will appear when a server connection is unavailable, e.g. due to hardware or network problems. Click [OK] to remove message.



Exporting BEN Financials Data to a Microsoft Excel Spreadsheet

Procedure

- From the menu, click on **File>Export**
- If your desktop is configured properly, you should either see the spreadsheet or the following box, which should say Opening: *filename* using **EXCEL.EXE**. If it does not say EXCEL.EXE, your desktop is not configured properly (see below).



- Select **Open It** and click **[OK]**

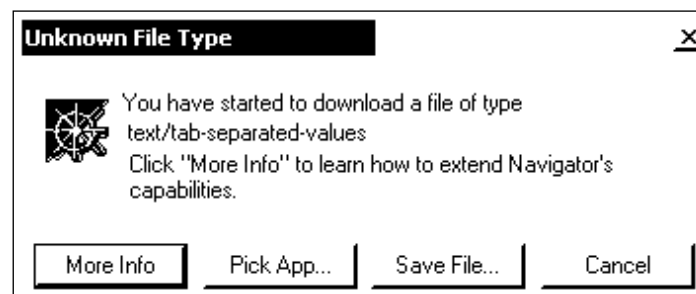
Desktop Configuration

- Should be handled by your Local Support Provider (LSP)
- Do-it-yourself instructions can be found here:

http://www.finance.upenn.edu/ben/benfin/desktop_req/config-excel.shtml



*If your desktop is not configured properly, you will receive the following box. You can either select **Pick App...** and browse to the EXCEL.EXE file on your hard drive, or select **Save File...** and open the file from within Excel later.*



Using the Navigator's Documents Region

If you have a document, such as a particular purchase order, invoice, or report that you want to access later, you can create a link to the document using the Navigator's Document feature. The Navigator's Document feature allows you to create as many links as you want and save them in the Documents region of the Navigator window. The links can be represented as icons in the window or may be viewed as a list. When you use a link to open a document, BEN Financials opens the document in the appropriate form window. You can access the Document region using the tab titled 'Documents'.

Adding New Documents to the Navigator

- Forms that support adding documents to the Navigator enable the **Place on Navigator** menu item in the File menu. Use this menu item to add your document to the Navigator.

Opening the Navigator's Document Region

- Click on the **Documents** tab in the Navigator window

To Open a Form from the Document Region

- Select the document link you want to open
- Click on **[Open]** or double-click on it

Renaming Documents in the Navigator

- Highlight the document link you want to rename.
- Click on **[Rename]** or double-click on the label
- Enter the new name, then click **[OK]**

There is a limit of 80 characters for document names

Removing Documents from the Navigator

- Highlight the document link to be discarded
- Click on **[Remove]**

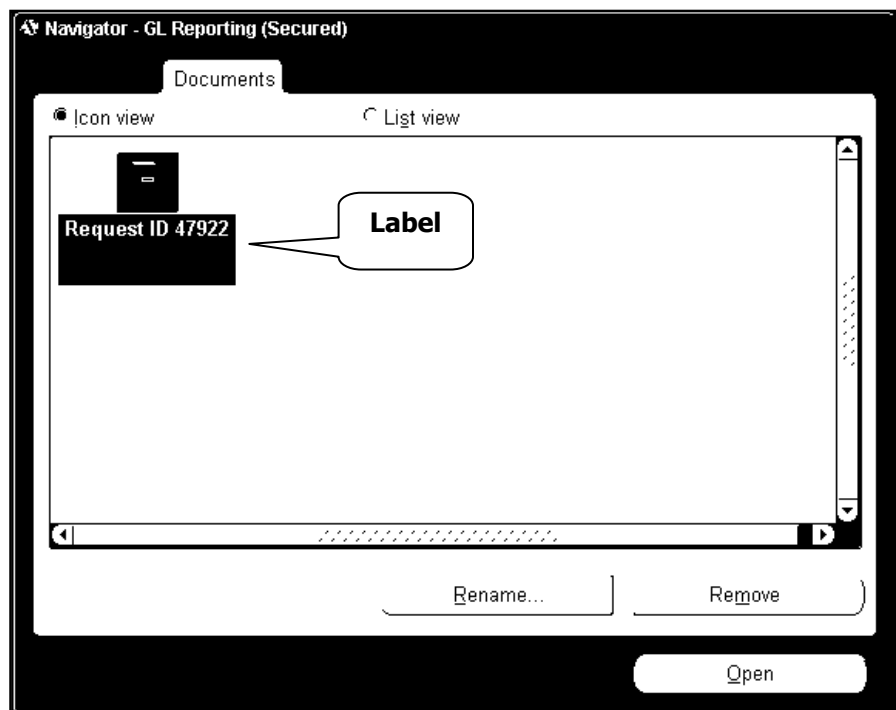
Documents placed on the Navigator will stay there until you remove them.

Removing the document link from the Navigator has

no effect on the actual document. However, if a record such as a report request is deleted, the link in your Navigator displays a message letting you know that your link is now invalid.



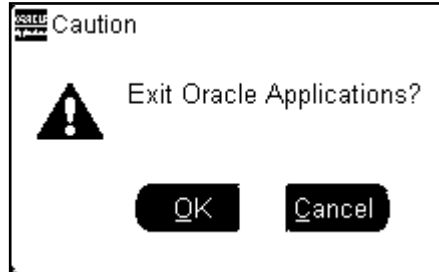
Once you create a link to a document, the Document region will open by default when you log on. **Information here is static, i.e. not updated.**



Logging Off of BEN Financials

When you are ready to logoff of BEN Financials

- Close all the open windows and forms by clicking on the 'x' in the upper right hand side
- Click on **File>Exit Oracle Applications**
- Click **[OK]**

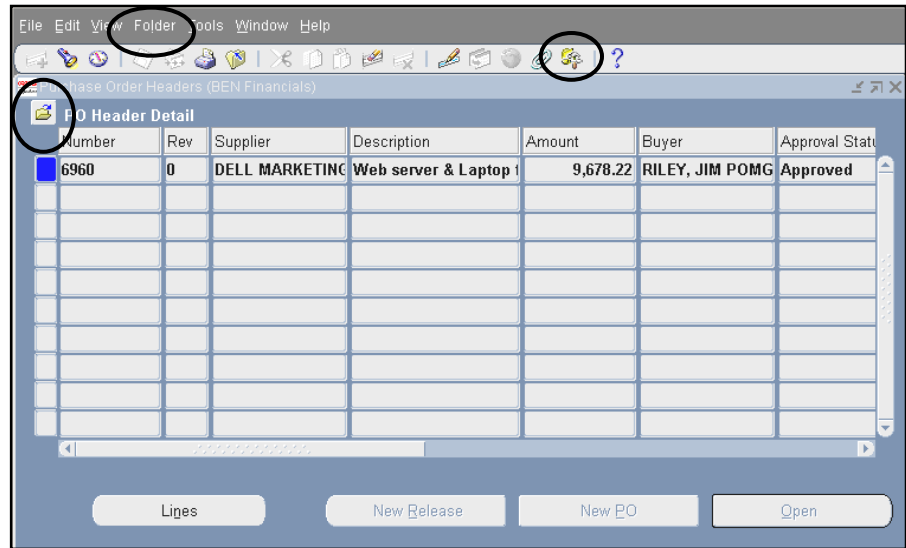


Appendix A

Viewing and Creating Folders

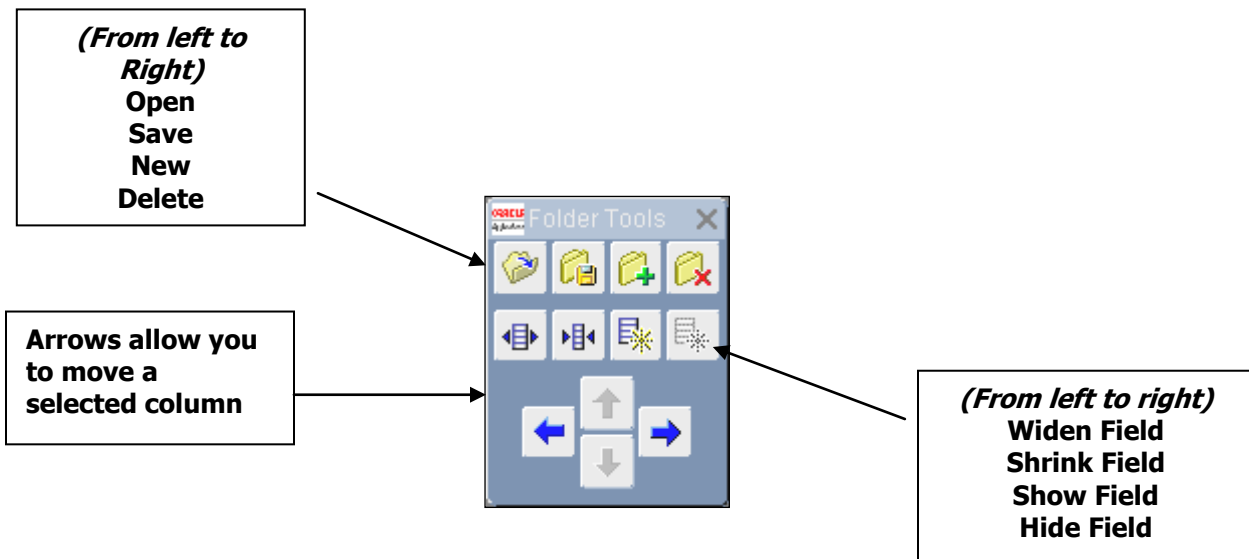
A folder block is a special block whose field and record layout you can customize. The following helps you distinguish a folder block from a regular block:

- An enabled **Folder menu** appears in the main menu bar when your cursor is in a folder block.
- An **Open Folder icon** appears in the upper left hand corner of the form.
- An enabled **Folders Tool icon** appears on the toolbar when your cursor is in a folder block.



Clicking on the **Folders Tool**  icon will open the Folders Tools box.

Your Folders Tool options are as follows:

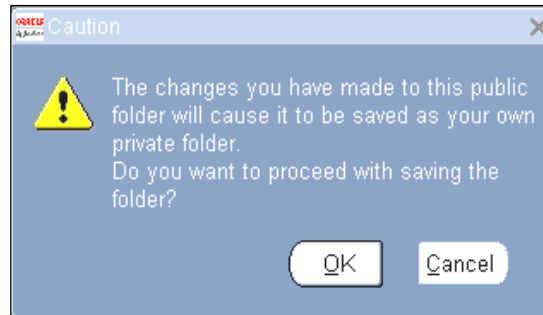


Viewing and Creating Folders (continued)

Creating a Folder and Changing Your Default (continued)

- Select **Open as Default**
- Unselect **Public**
- Click **[OK]**

BEN Financials will confirm that you want to save your private folder.



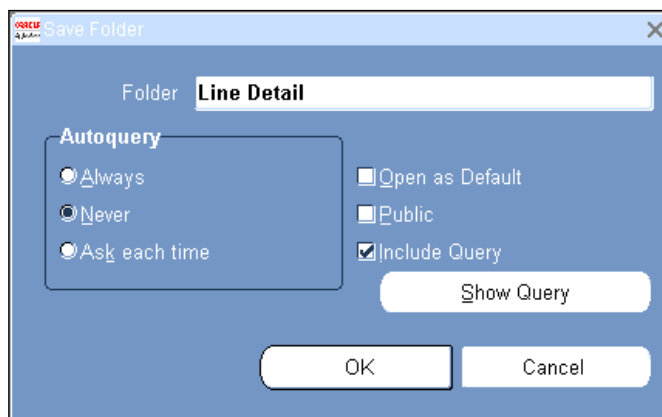
- Click **[OK]**

Creating a Folder Without Changing Your Default

Place your cursor in the column you want to adjust and select one of the options listed above.

Once you have completed all of your alterations, save your changes by using the **Folder>Save As** menu path.

The **Save Folder** form will appear.

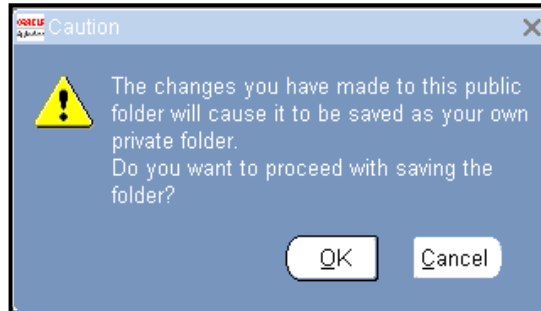


- Unselect **Public**
- Click **[OK]**

Viewing and Creating Folders (continued)

Creating a Folder Without Changing Your Defaults (Continued)

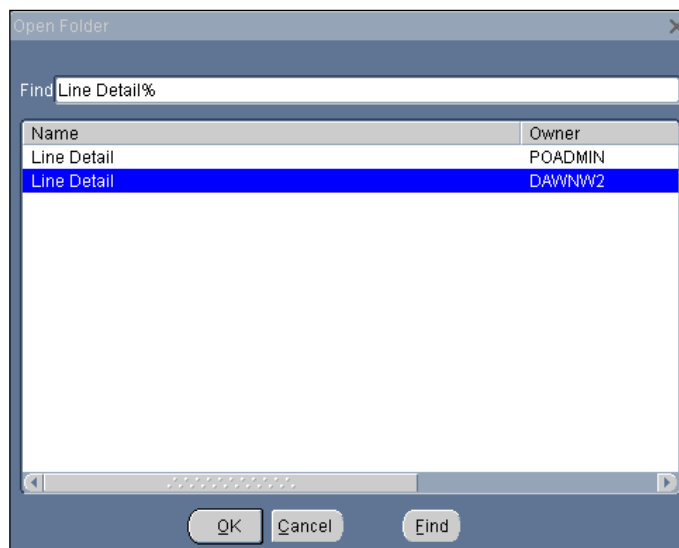
BEN Financials will confirm that you want to save your private folder.



- Click **[OK]**

Whenever you perform an inquiry on the form that you have altered you will be required to select your default folder by selecting from the menu path **Folder>Open**.

The **Open Folder** form will appear.



- Select the appropriate folder
- Click **[OK]**

Note the BEN Financial default folder has the owner name of POADMIN.

Deleting a Folder

While your cursor is resting on the form in which you created a folder select from the menu path

Folder>Delete or invoke your Folder Tools box by clicking on the Folders Tool  icon and clicking on

the Delete  icon.

Revision History

Date	Page Number(s)	Topic
May 31, 2002	1-24 – 1-27	Viewing and Creating Folders
December 5, 2003	1-4	Add BEN Knows Web Address
December 5, 2003	Various	Reconfigure document
January 20, 2005	Various	BEN 11.5.9 Upgrade – Replace entire User Guide including addition of U@Penn website
October 14, 2005	1-11 – 1-17	Navigation path changes
February 10, 2006 (BAM)	1-9 – 1-15	New navigation screens
October 24, 2008 (BAM)	1-5, 1-10 – 1-11	Logon Access Info Add BEN Assets to Responsibilities; BEN Financials Upgrade 11.5.10
March 1, 2012 (BAM)	1-4, 1-5	Penn eForm information