Life In the FAST Lane
Navigation in FAST
Fast Financials of the University of South Florida

- Fast uses Oracle/PeopleSoft Financials
- PeopleSoft is a multi-purpose product
  - Designed to serve education and manufacturing
  - Has features in addition to those USF needs
  - Has features we haven’t explored yet
- View FAST through Internet Explorer
- All you need is the web site
  - https://fast.fastmail.usf.edu/psp/fastpro/?cmd=login
Screen Sizing

- FAST is menu driven
- Navigate with mouse clicks
- To hide the tool bar and make the screen bigger
  - Tap F11
- To return the screen to normal size
  - Tap F11 again
Our Modules

• FAST has many “Modules”

- Asset Management
- Accounts Payable
- Accounts Receivable
- Billing
- Budget
- General Ledger
- Grants
- Project Costing
- Purchasing
- P-card
- Travel (soon to be added)
More on Modules

- These modules are designed for specific business processes
- Each module has at least one “SME” or subject matter expert
- Some of these modules feed data to other modules
- All data eventually ends up in the General Ledger and Commitment Control
• Navigate with the left side menu
  – Click the desired function and follow the menu path
Navigation

- Navigate with the icons
  - Click the icon for the desired function and follow the path

<table>
<thead>
<tr>
<th>General Ledger Center</th>
<th>Journals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access General Ledger</td>
<td>Create, import, review, correct, and process journal entries.</td>
</tr>
<tr>
<td></td>
<td>- Journal Entry</td>
</tr>
<tr>
<td></td>
<td>- Standard Journals</td>
</tr>
<tr>
<td></td>
<td>- Import Journals</td>
</tr>
<tr>
<td></td>
<td>- 3 More...</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Summary Ledgers</th>
<th>Close Ledgers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access summary ledgers</td>
<td>Configure ledger closing rules and request a process for closing.</td>
</tr>
<tr>
<td></td>
<td>- Closing Rules</td>
</tr>
<tr>
<td></td>
<td>- Closing Rule Report</td>
</tr>
<tr>
<td></td>
<td>- Request Ledger Close</td>
</tr>
<tr>
<td></td>
<td>- 2 More...</td>
</tr>
<tr>
<td>Ledger Set for Summary Ledger</td>
<td></td>
</tr>
<tr>
<td>Define Summary Ledger</td>
<td></td>
</tr>
<tr>
<td>Build Summary Ledger</td>
<td></td>
</tr>
<tr>
<td>3 More...</td>
<td>3 More...</td>
</tr>
</tbody>
</table>
Hiding The Menu

• Notice the menu collapses
• It will appear as a small button in the upper left corner looking like this
• The menu is just hidden and may be expanded
• Just click the menu symbol to make it appear
• To hide the menu, click the minus button
Using Favorites

• Give your fingers a rest
• Use Favorites
• After you navigate to the desired page
  – Click
  – Name it whatever you like
  – Click
• One click moves you to the specific page
Opening Multiple Windows

• You don’t have to log in multiple times
• Just open multiple windows
  – Just click
• A new window will open
  – It will display the same page as the original window
  – Then click the menu button
  – And navigate to whatever page you like
The BACK Button and The Mouse Roller

• Be careful to NOT use the BACK button
• Sometimes it works
• Sometimes it locks up your screen
• Watch out for the roller bar on your mouse
• You might think you are scrolling down a page but are really changing a field value
Sending Messages With Notify

- FAST has a quick way to send a message
- Use the Notify button
- Click “Lookup Recipient”
- Type in the name; then click “Search”
- Check the “To”, “CC”, or “BCC” boxes
- Click “Add To Recipient List”
- Click “OK”
- Type your message in the text box
- Click “OK” to send the message
Finding Information

• There are many ways to find information in FAST
• Two general methods of search are
  – Inquiry pages
  – Reports
Inquiry Pages

• Be careful how you search on inquiry pages
• Sometimes the fewer search criteria, the better the results
• Search pages often require an Inquiry Name
  – This is just a name
  – It belongs to you and you only
  – It is a way to save the search criteria that you build
  – Next time you search, less typing
  – Give it a name that you will recognize
  – It should be just one word
  – If multiple words, they must be connected with an underscore
Inquiry Names

• As an example to search the general ledger, create an inquiry name

Ledger
Enter any information you have and click Search. Leave fields blank.

Find an Existing Value  Add a New Value

Inquiry Name: begins with [GLreview]
Building Search Criteria

• When building an inquiry or a report, you will need to select search criteria
• You may type the specific criteria
• You may search for criteria by clicking the
• This will produce a list of valid choices
• Click the appropriate/desired choice
Search Symbols

• Search buttons may also appear as the following symbols

– On some pages you may also just touch the Enter key
Use Wild Cards In Your Search

• You may not be sure of the specific result or you may want a range of results
• Wild cards help you find the right results
• The most commonly used wild cards are
  – %  The percent sign
  – _  The underscore
  – ?  The question mark
Use Wild Cards In Your Search

• % The percent sign matches one of more characters

• _ The underscore matches any single character

• ? The question mark matches any single character
Use Wild Cards In Your Search

• For instance
  
  – _ _ T %   Delivers every entry that has a T in the third space
  
  – %AMER%   Delivers all results containing the letters AMER

  – AMER%    Delivers all results that begin with letters AMER

  – %T       Delivers all results that end in the letter T

  – GAD??    Delivers all five character results beginning with GAD
Use Operators In Your Search

- Operators are also helpful in conducting searches
- Common operators are
  - Begins with
  - Contains
  - =
  - NOT=
  - Between
  - < (less than)
  - > (greater than)
  - <= (less than or equal to)
  - >= (greater than or equal to)
Examples of Searches With Operators

- Use “Begins With” when you know the first character or first few characters
- Use “Contains” when you know specific characters but don’t know where they are in the value
- Use = when you know the exact spelling of the value
- Use “Between” when you want a range of values (this is especially helpful when searching date values)
- Use <, >, <=, or >= when searching for numeric values
Managing The Data

• With inquiries, remember that
  – Some allow you to change the number of delivered rows
  – You can download results to an Excel spreadsheet; look for this symbol
  – Click the column headings to sort the data
  – Look for how many rows appear on the screen
  – Remember the “View All” button
  – Some inquiries allow you to step through the results one at a time
    • Use Next In List or Previous In List
Reports And Run Controls

• Reports normally require a Run Control
• This is just a name
• It belongs to you and you only
• It is a way to save the report criteria that you build
• Next time you run the report, less typing
• Give it a name you will recognize
• It must be one word or several words connected by an underscore
More On Run Controls

• This is an example of a Run Control
Using Process Monitor

- When you run a report, check the progress of the report on Process Monitor
- Click Process Monitor
- A list of jobs that you have run will appear
- The top line is the current job (notice the date)
- Click Refresh periodically
- Look for a Run Status of
- Look for a Distribution Status of
Report Output

- Reports are often delivered in pdf format
- You may save the pdf file to your computer
- You may also view and print the pdf file
Finding The Reports

• To view the pdf file
• Click Details
• Click View Log/Trace
• Click the pdf file
Security Roles

- Everyone has the INQUIRY role
- INQUIRY allows users to view all pages but make no changes
- Other security roles exist
  - Assigned based on your job duties
  - Define pages that are open to you for data entry
  - Roles are related to specific modules in FAST
  - Combinations of roles is a concern
Security Roles

• Examples of security roles
  – Purchasing
    • P-card actions
    • Receiving
    • Requisition initiator
    • Requisition approver
  – Accounts Payable
  – Billing
    • Creating billings
    • Processing billings
Requesting Security Roles

- How do you apply for FAST access and security roles?
- Go to the FAST web page
  - Navigate through Forms, Forms Alphabetical
  - Look for Security/FAST Access Form
- Download the Security Access Request from
  - [https://www.usf.edu/fast](https://www.usf.edu/fast)
  - Then navigate through Forms/Forms Alphabetical
- Follow instructions; complete all required information
- Send to AOC0200 Attn: Nancy Dellaporte
Getting On-line Help

• If you have questions about the page you are viewing
  – Click the Help
  – Find it in the upper right corner of the screen
  – It will open PeopleBooks to documentation describing the page you were viewing
  – It will appear as a new window
  – Close the window when you are done reading
Toss Your Cookies

• Remember to clean up your internet files
• This should be a daily chore
• It takes just a minute or so
• On your desktop
  – Right click the Internet Explorer icon
  – Click Properties
  – Click Delete Cookies
  – Click Delete Files
  – Check the box described “Delete All Offline Content”
  – Click OK
  – Click OK again
Great Resources

• Helpful Resources

  – The FAST web site (news, training link, documentation, contacts)
  – www.usf.edu/fast

  – Compass for USF business procedures
    • On the FAST web site look under “Useful Links”

  – MetaMart which contains a glossary of terms
    • On the FAST web site look under “Useful Links”
Great Resources

• Helpful Resources
  – Sign up on the FAST List Serve for important announcements and training information
  – Sign up for FAST training on the GEMS Self-Service site
    https://eusf.admin.usf.edu
Great Resources

• And if you have questions, call or email:
  
  – Mark De Vore    974.2286    mdevore@admin.usf.edu
  
  – Lisa Corley     974.3340    lcorley@admin.usf.edu
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• That’s All! Have fun with FAST!