



## Ceres 5 Quick Access Guide

### Purpose of this document

This document provides an overview of how to set up and use many of the new user interface tools in Ceres 5. The information in this document is not tied to a particular role center or security role. You may find that your pages may look slightly different. Many of the components defined here are only enabled with the Ceres 5 Windows client. If you are using the Web client, then user specific page customization is restricted.

**Note:** the word “customizing” in this document refers to using the base Ceres capabilities to tailor the end user experience and does not involve creating custom code.

*Ceres Object release 5.00.00 is required for the functionality described in this document.*

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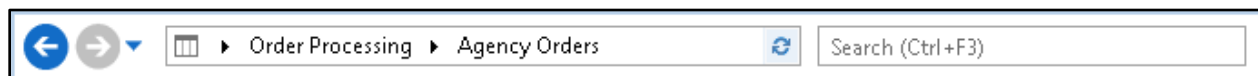
## Shortcut Keys Cross Reference

The Shortcut Keys have changed between earlier versions of Ceres and Ceres 4.0, Ceres 4.5, and Ceres 5.0. Below are some of the most commonly used shortcut keys. Shortcut keys are displayed on each menu, next to the application menu item.

RTC Shortcut Key	Description	Classic Shortcut Key
F1	Online NAV Help	F1
Ctrl +N	New or (insert)	F3
Ctrl + DEL	Delete	F4
Alt + Down Arrow	Open drop-down on fields	F6
F5	Refresh the Page	Escape
F7	Open Statistics on Card Pages	F9
F8	Copies values from the line above	F8
F9	Post	F11
Shift + F9	Post and Print	Shift + F11

## Page Elements

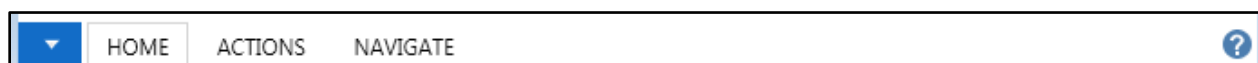
### Address Bar



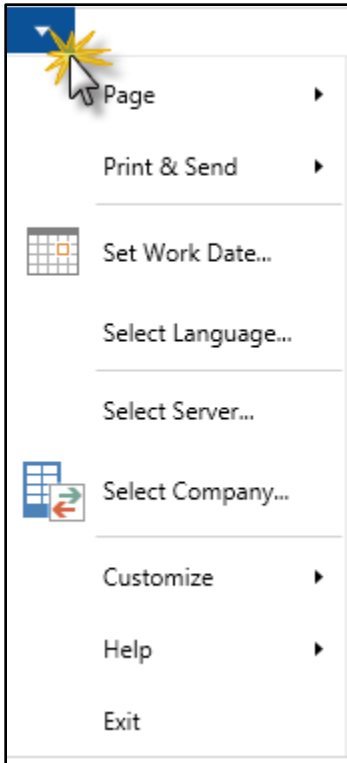
The Address Bar includes:

- Back/Forward button – Moves you sequentially from Page to Page
- Travel History (blue drop-down arrow) - Lists all Pages visited recently
- Navigation path (hierarchical context) – You can move up or down the path using the arrows or by clicking an entry in the path
- Refresh (F5) – To update/refresh the Page you are on
- Search field – System will look for matches to the Page Name as you type. Use the icons and navigation path displayed in the search results to help you choose which Page to select.

### Command Bar



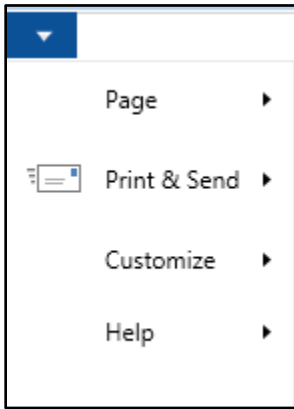
The Dynamics NAV button (blue drop-down arrow) lets you selected the Work Date, Language, Server, or Company. You can also Exit the database from this button.



Other Command Bar features are:



- Ribbon Bar Tabs – Some tabs are not display on a Page if they do not apply.
  - Home – Contains the most often used functions for this page. Through page customization you may promote or demote actions to/from the Home tab.
  - Actions – Action type options associated with the Page, such as View, Edit, or New functions.
  - Navigate – All other information associated with Page, such as Dimensions, etc.
  - Report – Any report associated with the Page.



- From the Command Bar Drop Down you can access the following features:
  - Page
    - Open in New Window
    - Copy Link to Page
  - Print & Send
    - Email as Attachment
    - Send to Microsoft Word
    - Send to Microsoft Excel
    - Print Page
  - Customize
    - Filter Pane
    - FactBox Pane
    - Choose Columns...
    - Choose FactBoxes...
    - Customize Ribbon...
    - Customize Chart...
    - Customize This Page...
    - Customize Navigation Pane...
  - Help
    - Microsoft Dynamics NAV Help (F1) – Provide access to the base NAV Online Help, information about the current Page, and the Help About screen. Please refer to the procedure documents for Ceres specific Help.
    - About This Page
    - About Microsoft Dynamics NAV

## Ribbon Bar



A Ribbon Bar:

- Can include New, Manage, Process, Report, Show Attached and Page sections.
- Tasks can be promoted to the Home Ribbon to allow you quick access to what you frequently use.
- Most options shown are available from the Command bar menus; however you will find some instances where links have been added to tasks elsewhere in Ceres.

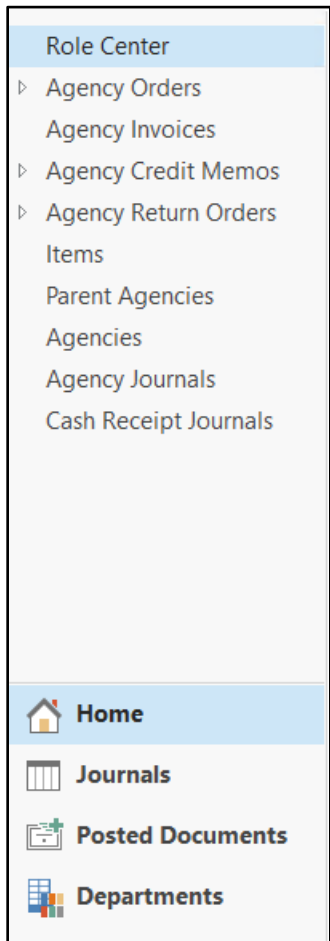
## Status Bar



The Status Bar includes:

- Company button – Displays the Company you are currently working in. You can change the Company by clicking on the Company Name.
- Work Date button – Displays the current work date. You can change the work date by clicking on the date field.
- User – Display the Id of the user who is logged on.

## Navigation Pane



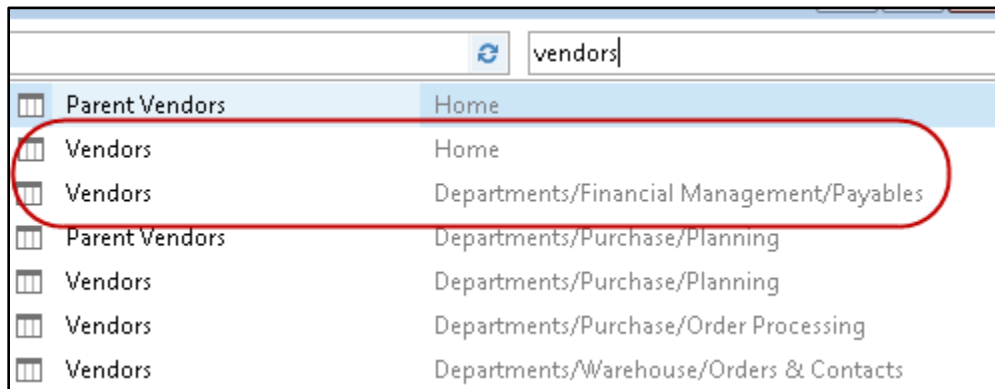
The Navigation Pane includes:

- Activity buttons – Home and Departments. You can also add your own Activity buttons (see Customization section).
- Menu Items
  - Home – Defined as part of the Role Center you are assigned
  - Posted Documents – Defined as part of the Role Center you are assigned.
  - Departments – Displays the options or sub menus under each Department
- Vertical and horizontal resizing controls – Dotted bard, both within with Navigation Pane and Content Area.

## Pages – Home vs. Departments

Pages listed in the Home Navigation Pane can also be found under the applicable Department. These represent two separate instances of the same Page.

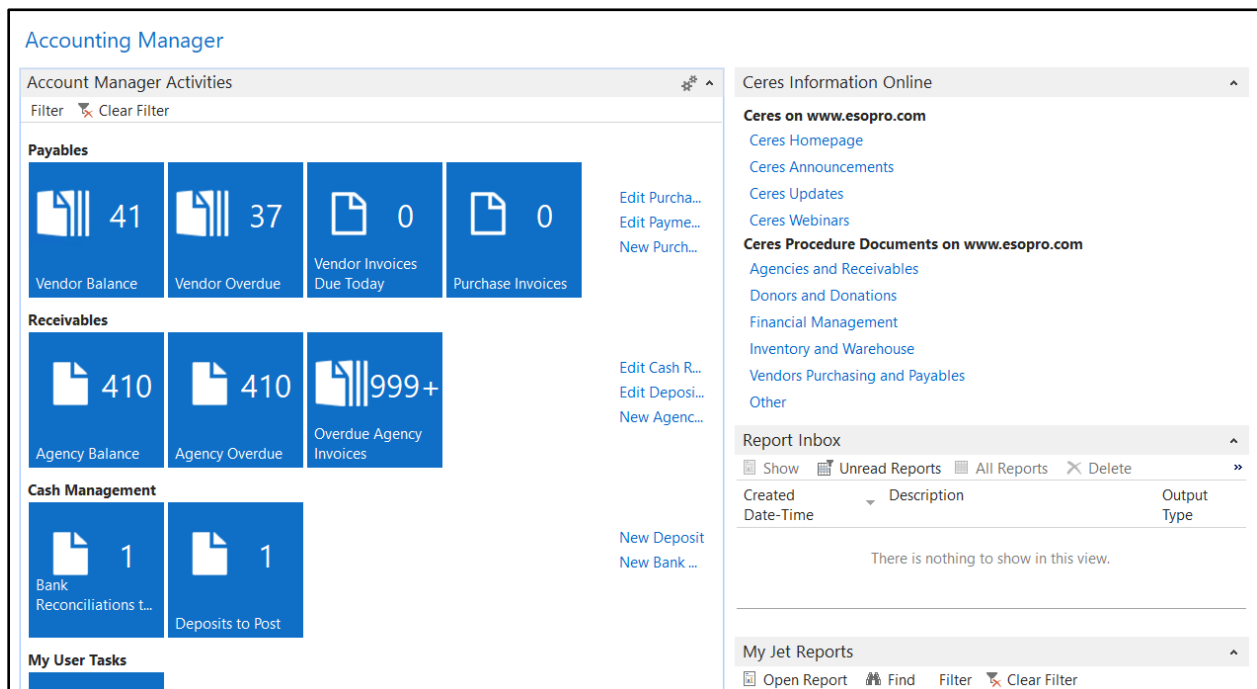
For example, if you type Vendors in the Search field, two or more items display. Vendors can be accessed from the Home Page or from Departments. The system maintains separate settings for customizations.



If you click on the Vendors menu item, the system will display the Vendor List Page with the content area. Not all Pages are displayed with the content area; some are modal in that the Page displays as an additional item in your Windows Task Bar.

## Content Area

This area displays content based on the selected menu item. If you click on Role Center, any content that is linked to your Role Center displays. The content changes based on which Role Center is assigned and any personalization i.e. customizations have been made.





## Page Types

### Departments Page

**Departments**

Choose by department

**Financial Management**

- General Ledger
- Cash Management
- Cost Accounting
- Cash Flow
- Receivables

**Agencies & Receivables**

- Agency Relations
- Order Processing
- Marketing
- Inventory & Fees

**Purchasing**

- Planning
- Order Processing

**Donation**

- Planning

**Warehouse**

- Orders & Contacts
- Planning & Execution
- Goods Handling Order by...

**Human Resources**

- Payables
- Fixed Assets
- Inventory
- Periodic Activities
- Setup

**Roadnet**

- Periodic Activities
- Setup

**Appian**

- Periodic Activities
- Setup

**Adv. Leased Storage**

- Reports
- Periodic Activities
- Setup

**Administration**

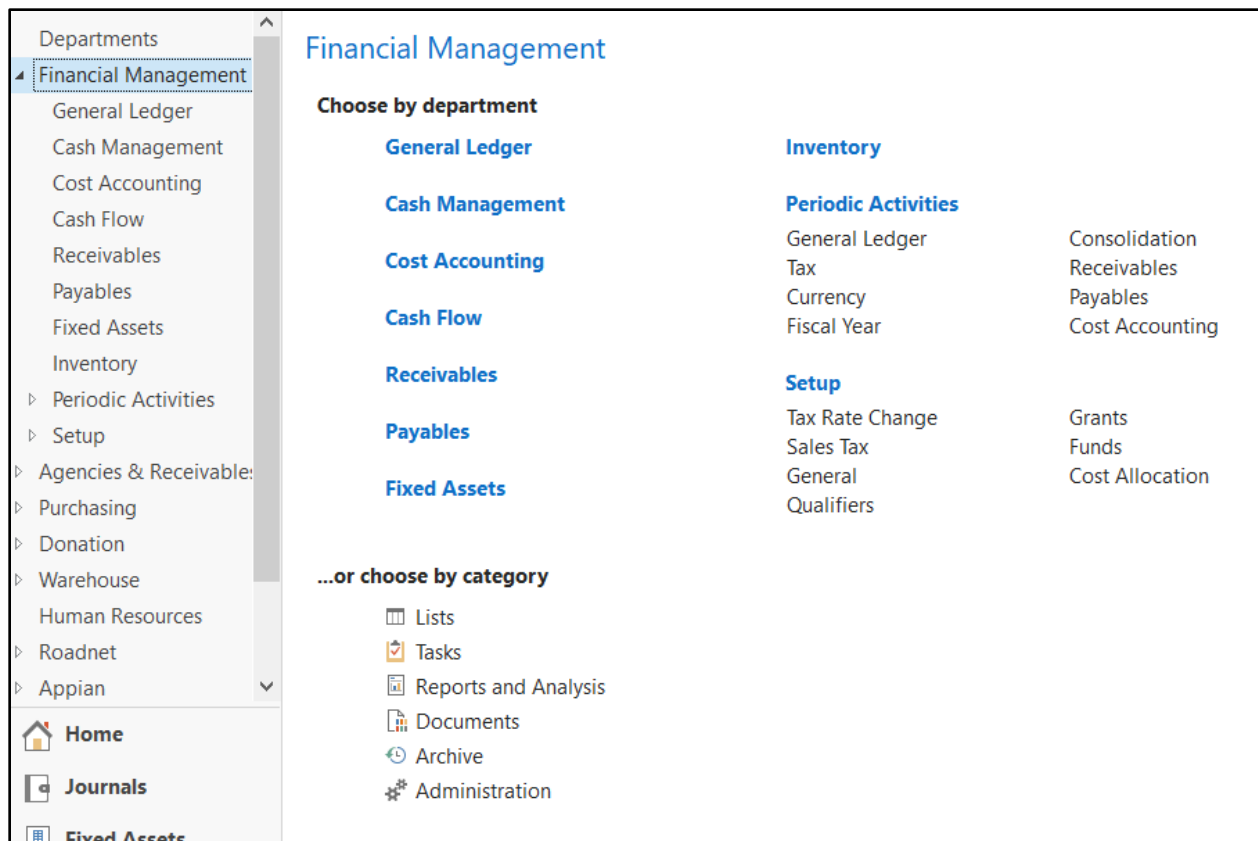
- IT Administration
- Application Setup
- Application Tools

**Web Portal**

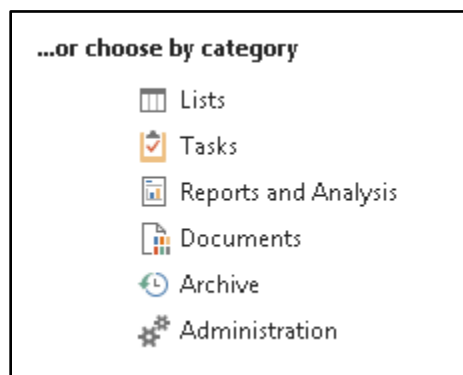
- Portal Entities
- Surveys
- Setup

On Department Pages:

- Each department (also called module) is displayed in the content area when you select Departments from the Navigation Pane.
- The Financial Management menu has departments underneath it. You can navigate to a Page using Choose by Department or choose by Category.



- The categories are defined by the system and every menu item in Ceres is assigned one of these categories, which has a unique icon display in the Search results.



## List Page

Agencies

Type to filter (F3)

No.

Filter: No

Limit totals: 07/01/19..06/30/20

No.	Name	Address	City	State	ZIP Code	Contact
1011A	Pantry Agency	123 Mian Street	Meridian	ID	83725	
1050-A	Uplift Organization	Post Office Box 5757	Kansas City	MO	64127	Connie
A0442	Synergy Services-2	Do Not Disclose		MO		A0442
A0592	TLC For Children and	Do Not Disclose	Kansas City	MO		Robert
A12346	JBL TEST	123 Test Ave	Kansas City	MO	64127	
A1764	Scarborough Childrens Home	Do Not Disclose		MO		Elizabeth
ADMIN	AE3 Admin Program Card					Noreen
B0129	Safehome, Inc.	2000 Main St.	Topeka	KS	76677	John S
B0310	Newhouse, Inc.	Do Not Disclose		MO		Bea Ly
B0358	Rose Brooks Center	Do Not Disclose		MO		Johnni
B0458	House of Hope, Inc.	Do Not Disclose		MO		Ann El
B0558	Hope House, Inc.	Do Not Disclose		MO		Gary A
B0686	Safe Home, Inc.	Do Not Disclose		KS		Rachael
B1007	F.A.I.T.H., Inc.	Do Not Disclose		MO		David
B1404	Synergy Services-	Do Not Disclose		MO		Robin
B3055	Willow Domestic Violence	Do Not Disclose		KS		Crystal

Agency Distribution Hi...

Agency No.: 1011A

Ongoing Orders: 4

Ongoing Invoices: 0

Ongoing Return O...: 0

Ongoing Credit M...: 0

Posted Shipments: 12

Posted Invoices: 11

Posted Return Rec...: 2

Posted Credit Me...: 2

Agency Statistics

Agency No.: 1011A

Balance (\$): 302.37

Distributions

Outstanding Ord...: 0.00

Shipped Not Invd...: 54.48

Outstanding Invoi...: 0.00

Total (\$): 356.85

Credit Limit (\$): 0.00

Overdue Amounts...: 302.37

Total Distributed (...): 0.00

Lbs. Distributed: 0.00

Within each Page there may be a:

- Ribbon Bar – Actions, Navigate, and Report menus and New, Manage, Process, and Report areas of each menu (see Page Elements for more details)
- FactBox Pane (displays to the right of the List)
  - Can include data-related facts about a specific record. Not defined for all List Pages in Ceres
  - Can include Links and/or Notes
    - Always displays below and data-related FactBoxes
    - Links and Notes are entered from the Card Page
    - Links can be opened from the List Page
    - Notes can be viewed from the List Page

Agency Distribution Hi... ^	
Agency No.:	1011A
Ongoing Orders:	4
Ongoing Invoices:	0
Ongoing Return O...	0
Ongoing Credit M...	0
Posted Shipments:	12
Posted Invoices:	11
Posted Return Rec...	2
Posted Credit Me...	2
Agency Statistics ** ^	
Agency No.:	1011A
Balance (\$):	302.37
<b>Distributions</b>	
Outstanding Ord...	0.00
Shipped Not Invd...	54.48
Outstanding Invoi...	0.00
Total (\$):	<b>356.85</b>
Credit Limit (\$):	0.00
Overdue Amounts...	302.37
Total Distributed (...)	0.00
Lbs. Distributed:	0.00
Suppl. Addresses ^	
Agency No.:	1011A

- Filter Pane
  - Basic filtering: Input a value in the Type to filter field. You can change the field you want to filter by clicking on the down arrow to the right of the No. field. The fields that display in the drop down are the same fields that display on the List Page

Agencies ▾	Type to filter (F3)   No. ▾ → ▾
Filter: • No    Limit totals: 07/01/19..06/30/20	

- Basic Sorting: Sorting is accomplished by clicking on the column you wish to sort by. Clicking that column again toggles between Ascending and Descending sort.

Agencies ▾					Type to filter (F3)	No. ▾	Sort Ascending	Filter ▾	No
No.	Name	Address	City	State					
Y0100	Food Bank of Alaska	2121 Spar Avenue	Anchorage	AK					
Y0025	Bay Area Food Bank	5248 Mobile South Street	Theodore	AL					
Y0101	United Way Community Fo...	Post Office Box 310460	Birmingham	AL					
Y0102	Food Bank of North Alabama	Post Office Box 18607	Huntsville	AL					
Y0629	Montgomery Area Food Bank	521 Trade Center Street	Montgomery	AL					
Y0060	Food Bank of Northeast	3406 South Culberhouse Ro...	Jonesboro	AR					
Y0626	River Valley Regional FB	Post Office Box 4069	Ft. Smith	AR					
Y0631	Arkansas Food Bank	8121 Distribution Drive	Little Rock	AR					
Y0646	Northwest Arkansas FOOD...	1378 June Self Drive	Bethel Heights	AR					
Y0024	The Community Food Bank	Post Office Box 26727	Tucson	AZ					
Y0038	St Mary's/Westside FB Allia...	Post Office Box 1310	Sun City	AZ					
Y0103	United Food Bank	358 East Javelina	Mesa	AZ					
Y0104	Southeast Arizona	401 East Maley Street	Wilcox,	AZ					
Y0175	St. Mary's Food Bank	2831 North 31st Avenue	Phoenix	AZ					
Y0645	Association Of Arizona	2100 North Central Avenue	Phoenix	AZ					

- Page Title button – Includes filtering options, as well as the option to Save View as
  - Advanced filtering: Click Page Title button to the right of the Agencies field and place a check mark by the Advanced filter and Limit totals fields

Agencies ▾	
Filters	
<input type="checkbox"/>	Advanced filter      Shift+F3
<input type="checkbox"/>	Limit totals      Ctrl+Shift+F3
<input checked="" type="checkbox"/>	Clear Filter      Ctrl+Shift+A
Views	
<input checked="" type="checkbox"/>	Save View As...

- In the Show Results section select the fields and the values you want to filter by.

Agencies ▾

Show results:

✕ Where Blocked ▾ is

✕ And Dormant ▾ is No

✕ And State ▾ is KS

+ Add Filter

- Click on the down arrow to the right of any one of the filter fields and select All for a list of additional fields you can filter by. Scroll down or type the first letter of the field until you find the field you want to filter by. Please note that the fields in the drop down lists are in alphabetical order.

501(c)(3) Adv. Ruling End Date  
501(c)(3) Adv. Ruling No.  
501(c)(3) Contact  
501(c)(3) Date Received  
501(c)(3) Expiration Date  
501(c)(3) Name  
501(c)(3) No.  
501(c)(3) Phone No.  
501(c)(3) Shared  
501(c)(3) Shared No.  
Address  
Address 2  
Adv. LS Minimum Charge  
Adv. Leased Storage Customer  
AE Quest. Applicable Date  
AE Survey Online Order Status  
Affiliation Count  
Agency Approval Date  
Agency Disc. Group  
Agency Fee Group  
Agency First Order Date

- In the Limit totals to: section select the fields and values you want to filter. Limit totals to filters are the equivalent of flow filters in earlier versions of Ceres. You can use Limit totals to filters independently or in conjunction with Show results filters.

Agencies ▾

**Limit totals to:**

✗ Where Date Filter ▾ is 07/01/19..06/30/20

✗ And Department Filter ▾ is 1000

+ Add Filter

- You can use filter shortcuts:
  - \* (asterisk) works as a wild card (i.e. No. = B\* returns all numbers that start with B)
  - .. (period period) works as range (i.e. No. = B0100..B0500 returns all number within the defined number range.
  - | (pipe) works as an or (i.e. B0129|B0458 returns the two records with the defined numbers

See Filtering Criteria Procedure for a more comprehensive list.

- Once you have set your filters, you can save the view by selecting Save View as. In the Name field, input the name of your view and then click the OK button. All saved views appear in the Home Navigation Pane.

Agencies ▾

Type to filter (F3) | No.

**Limit totals to:**

✗ Where Date Filter ▾ is 07/01/19..06/30/20

✗ And Department Filter ▾ is 1000

+ Add Filter

No. Name Address

**Save View As** ✕

**i** Add this View to the Navigation Pane

Name: Agencies - [View]

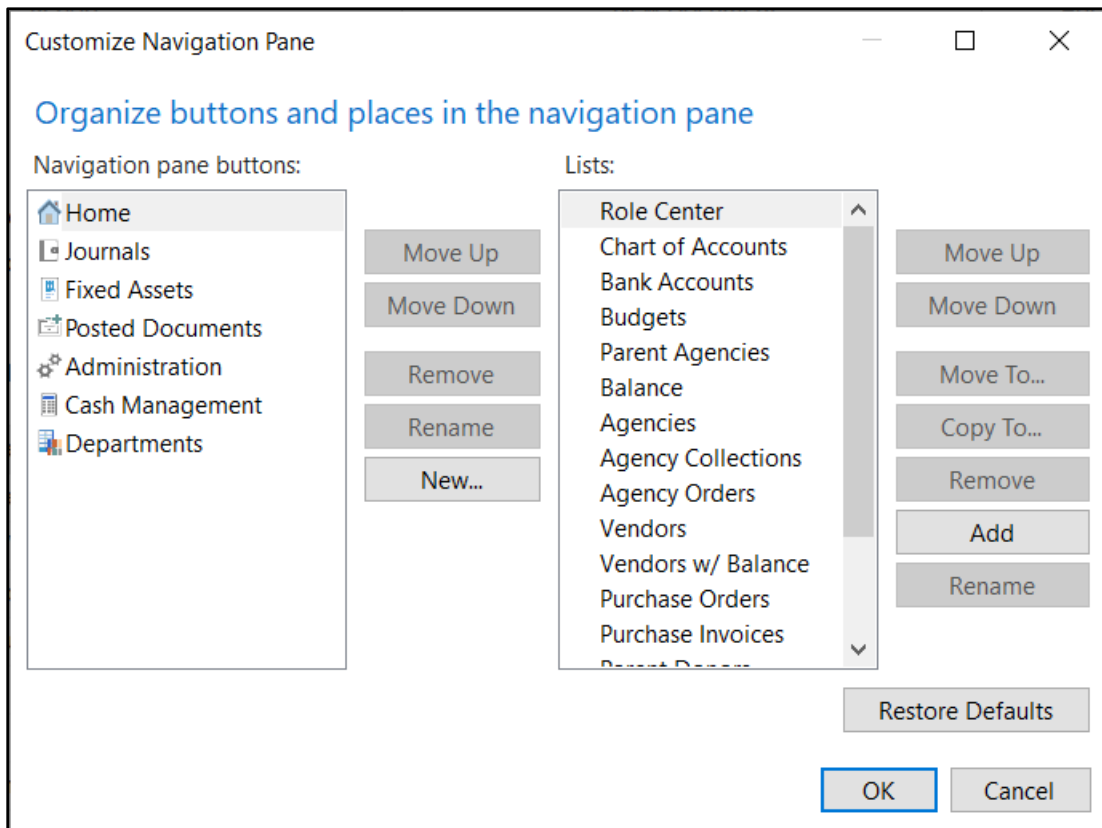
Activity Group: Home ▾

OK Cancel

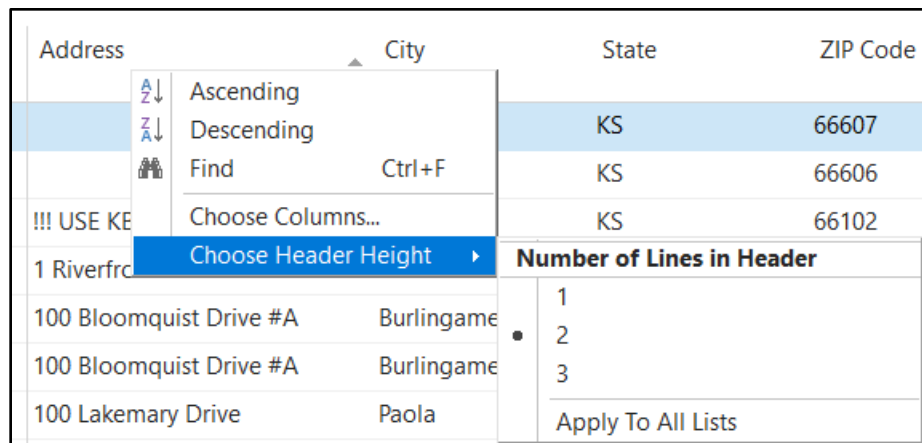
- To delete a saved view, find the view in your Home menu. Right click on it and select Customize Navigation Pane. Once you have found you view in Lists: select Remove and then click the OK button.

## Navigation Pane – Customization

To Customize the Navigation Pane, right click in the Navigation Pane and select “Customize Navigation Pane”



- **Column Height.** To change the column height on a List, right click on any field and then select Choose Header Height. Select 1, 2, or 3 as the number of lines. Select “Apply To All Lists” to change the height on all List Pages.

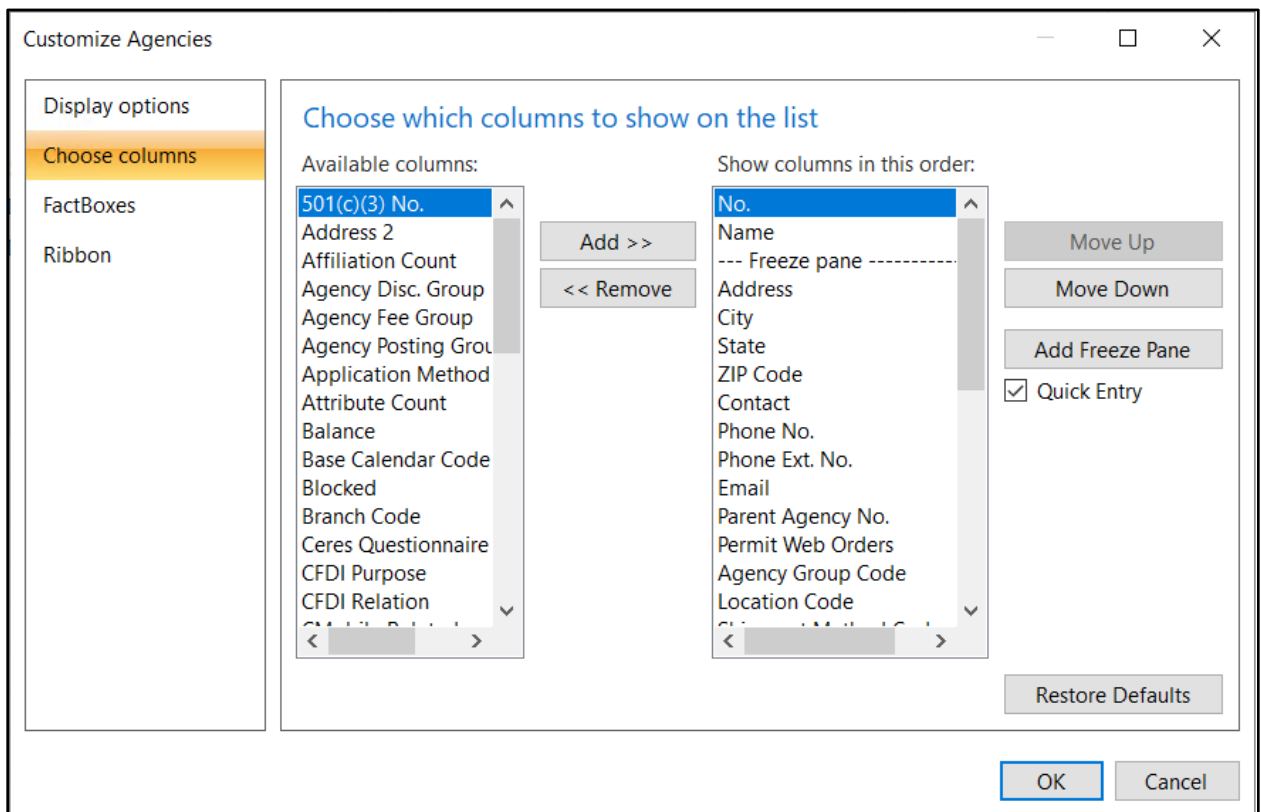




- Choose Columns. To add, remove, or change how columns display, right click on a field in the List and then select Choose Columns. The fields on the left in the Available columns list are the fields that you can add. Whereas the fields on the right in the Show columns in the order are the fields that currently display.
  - Click on the Add >> button to add fields
  - Click on the Remove << button to remove fields
  - Click on the Move Up or Move Down buttons to change the order in which the fields display
  - To make scrolling easier, select Add Freeze Pane to freeze fields on the List

**Note:** Most Ceres list pages already contain a Freeze Pane.

  - To restore the system defaults, click on the Restore Defaults button.



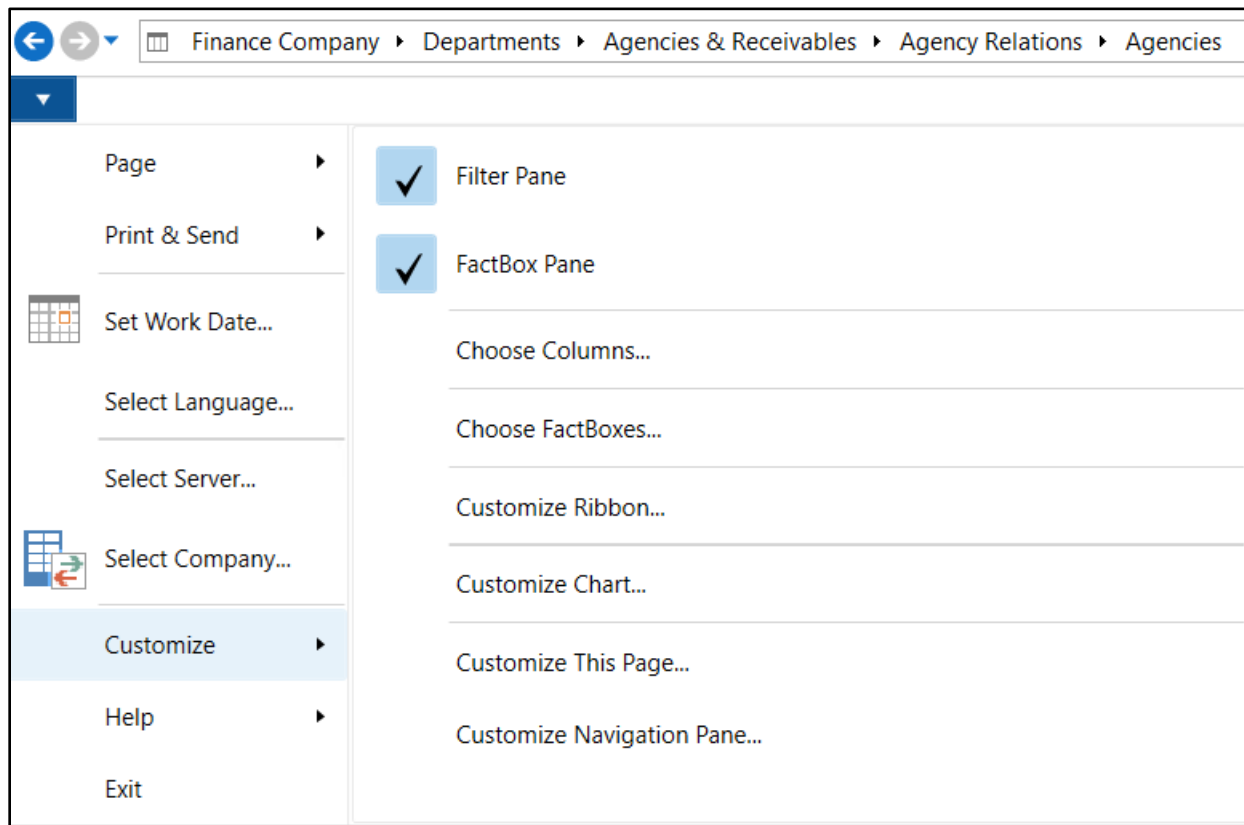
## Charts

You can create charts on the fly in a list page. However the chart settings are not retained when you close Ceres. See Customization section for more information. You can also:

- Display the chart pane via the Customize Navigation Pane
- Select two or three elements for the chart
  - Two elements = Two dimensional chart
  - Three elements = Three dimensional chart
- You can use multiple values within one dimension

## Customization Options for Other Entities

To customize pages, select the Drop-Down Command button on the command bar and click on Customize.



- Filter Pane – Allows you to hide or show the Filter Pane on the page.
- FactBox Pane – Allows you to hide or show the Fact Boxes on the page.
- Choose Columns... – Allows you to control the order of each field in the list as well as determining which fields are to be displayed.
- Choose FactBoxes... – Allows you to choose which fact boxes are displayed on the page if you are showing fact boxes.
- Customize Ribbon – Allows you to customize the command ribbons displayed on this page. You can hide options you do not use, reorganize, and promote your most used functions to the Home section on the ribbon bar.
- Customize Chart... – Allows you to create and specify the criteria to display a chart on the list data displayed.
- Customize This Page – This is an alternative way to access many of the above features from one centralized page.
- Customize Navigation Pane – Allows you to add, change or delete options from the menu system.

## Card Page

**Edit - Agency Card - B0129 - Safehome, Inc.**

**HOME ACTIONS NAVIGATE REPORT**

**General**

No.: B0129 Location Code: KAN

Parent Agency No.: 1090 Shipment Method Code: PICKUP

Name: Safehome, Inc. FBC County Code: KS-LEAVENW

Address: 2000 Main St. FBC Agency Category Code: BATTERED

City: Topeka UNC Activity Status: ACTIVE

State: KS Agency Approval Date: 5/5/2011

ZIP Code: 76677 Agency First Order Date: 12/7/2012

Balance (\$): 0.00 Monitoring Expiration Date: 12/31/2022

Credit Limit (\$): 0.00 Last Modified By: ESOPRO\RXF

Fund No.: UR Blocked: Dormant: ☐

**Address & Contact**

**Address** Address: 2000 Main St.

**E-Documents** Invoice Delivery Email: karenk@esopro.com

**Agency Distribution Hi...**

Agency No.: B0129

Ongoing Orders: 68

Ongoing Invoices: 0

Ongoing Return O...: 0

Ongoing Credit M...: 1

Posted Shipments: 305

Posted Invoices: 246

Posted Return Rec...: 18

Posted Credit Me...: 22

**Agency Statistics**

Agency No.: B0129

Balance (\$): 0.00

**Distributions**

Outstanding Ord...: 0.00

Shipped Not Invd...: 0.00

Outstanding Invoi...: 0.00

Total (\$): 0.00

Credit Limit (\$): 0.00

Overdue Amounts...: 12,323.84

OK

A Card Page can include:

- Command Bar
- Ribbon Bar
- FactBox Pane
  - Notes – You can add notes from the Card Page. You can also notify and send the note to other users to alert them of an action that needs to be taken.

**Notes**

To:

Notify: ☐

Save Cancel

- Links – Allows to link documents to a specific Page.

## FastTabs

B0129 · Safehome, Inc.				
General	Safehome, Inc.		76677	▼
Address & Contact	76677	John Smith	karenk@esopro.com	▼
Invoicing	GENERAL	GENERAL		▼
Payments	30			▼
Information				
Shipping	KAN		PICKUP	▼
501(c)(3)				

- FastTab
  - Can be opened or collapsed by clicking on the up/down arrow on the right
  - You can add, hide, or remove fields on a FastTab
  - When a FastTab is collapsed, some field values can display on the FastTab. To display the field needs to have an Importance Status of Promoted. The options are: Standard = Always display; Additional = Only display when you click on the “Show more fields” button on the FastTab, and Promoted = Display the field value when the FastTab is collapsed.

## Customization Options

The same customization options listed above apply to Card Pages. Other options that are available are:

- Re-organize the FastTabs by removing or re-ordering them.
- Add or remove tasks from the New, Process, or Reports areas of the Action Pane.
- Create a custom area of the Action Pane.

## Task Page and Customizing

Typical examples of Task Pages are documents or journals where task are performed. Below is an Agency Order Task Page

**AO-01134 - Synergy Services-2**

**General**

Agency No.: A0442

**Sell-to**

Agency Name: Synergy Services-2

Address: Do Not Disclose

City:

State: MO

ZIP Code:

Contact No.: A0442

Contact: A0442 Contact 1

Sell-to Contact Phone:

Sell-to Contact Phone Ext.:

Shipment Date: 8/5/2019

Shipment Method Code: DELIVER

Location Code: KAN

Zone Code:

Posting Date: 8/5/2019

Order Date: 7/29/2019

Due Date: 8/5/2019

External Document No.:

Assigned User ID:

Appointment Time: 10:30:00 AM

Shopper:

Shopper Name:

Your Reference:

Order Modifications: Food Bank Only

Order Version: 1

Status: Open

Fund No.: UR

Mobile Pantry:

Send to Voxware:

Outstanding Picks: 0

Posted Shipments: 0

**Lines**

Type	No.	Description	Available Quantity	Location Code	Zone Code	Bin Code
Item	10602	Corn Meal	33	KAN		

**Dist. Hist. Sell-to FactBox**

Agency No.: A0442

Ongoing Orders: 51

Ongoing Invoices: 0

Ongoing Return O...: 1

Ongoing Credit M...: 3

Posted Shipments: 84

Posted Invoices: 57

Posted Return Rec...: 0

Posted Credit Me...: 4

**Agency Details FactBox**

Agency No.: A0442

Phone No.:

Email:

Fax No.:

Credit Limit (\$): 40,000.00

Available Credit ...: 27,096.69

Payment Terms ...:

Contact: A0442 Cont...

**Order Line FactBox**

Item No.: 10602

Required Quantity: 2

**Availability**

Shipment Date: 8/5/2019

Available Invento...: 34

Scheduled Receipt: 0

OK

A Task Page can include:

- Command Bar
- Ribbon Bar
- FactBoxes
- FastTabs – As outlined above you can re-organize the FastTabs and add or remove fields.
- OK Button
  - There are some Task Pages that allow the user to edit directly and include the OK button on the bottom of the Page. Clicking OK simply saves the edits made to the Page and does not actually process the Page.
  - Other Pages involve actual processing, in which case you must click on that button in the Action Pane or select the function under the Actions menu on the Command Bar.

## Analysis Pages with Trendscales

**Edit - Budget - BUDFY20**

**HOME ACTIONS**

**Manage** **Process** **Report**

**BUDFY20**

**General**

Budget Name: BUDFY20 View by: Month

Show as Lines: G/L Account Rounding Factor: None

Show as Columns: Period Show Column Name: ☐

**Budget Matrix**

Filter Clear Filter

Code	Name	Budgeted Amount	Jan 2020	Feb 2020	Mar 2020	Apr 2020	May 2020
400000	Support: Individual						
401000	Support: Corporate	-2,000.00	-2,000.00				
402000	Support: Foundations & Tru...						
403000	Support: United Way Alloca...						
404000	Support: Religious & Other						
409000	Support: Government						
400100	Support: ...						

**Filters**

OK

- Fields on the General FastTab control the way the matrix is displayed whereas the fields on the Lines FastTab may be different based on the specific Page. Common options on the General FastTab are:
  - Show as Lines or Show as Columns
  - View by or View as
  - Rounding Factor
  - Show Column Name
- When appropriate, there may also be a Filters FastTab to limit the records that display on the Lines FastTab. Common filters are :
  - Date filter
  - G/L Account filter
  - Dimension filters
- Click Previous Column/Next Column to move the display forward or backward.
- If you have more than 12 columns, click Previous Set/Next Set to jump the display forward or backward.

## Customization Options

The same customization options listed above apply to Analysis Pages.

## Role Centers

A Role Center can be assigned to each user based on the tasks or roles they perform. There are a number of base Role Centers available in Ceres 5 such as Accounting Manager, Shipping Receiving Manager, Agency Relations, etc. With training, food banks can also tailor the base Role Center components that are assigned to their users as opposed to the users needing to make the changes individually. A default Role Center is assigned to each user, and should be reviewed/ updated via the User Personalization page.

## Navigation Pane

- Content in the Navigation Pane is defined as part of the Role Center definition
- Entries in the Navigation Pane open List Pages only
- Links to Lists associated with Cues will always be displayed

## Activities Part

The screenshot displays the 'Product Donation Coordinator' role center. At the top, the title 'Product Donation Coordinator' is shown in blue. Below it is a grey bar with the word 'Activities' and a small upward arrow. Underneath this bar is a 'Filter' section with a red 'X' icon and the text 'Clear Filter'. The main content area is divided into three sections: 'Pre-arrival Follow-up on Donation Orders', 'Post Arrival Follow-up', and 'My User Tasks'. The 'Pre-arrival' section contains two blue tiles: 'To Send or Confirm' with a document icon and the number 19, and 'Upcoming Orders' with a document icon and the number 0. To the right of these tiles is a blue link labeled 'New Donation Order'. The 'Post Arrival Follow-up' section contains two blue tiles: 'Outstanding Donations' with a document icon and the number 2, and 'Donation Return Orders - All' with a document icon and the number 4. To the right of these tiles is a blue link labeled 'New Donation Return Order'. The 'My User Tasks' section contains a single blue tile labeled 'Pending User Tasks' with a checklist icon and the number 3.

Section	Item	Count	Action Link
Pre-arrival Follow-up on Donation Orders	To Send or Confirm	19	New Donation Order
	Upcoming Orders	0	
Post Arrival Follow-up	Outstanding Donations	2	New Donation Return Order
	Donation Return Orders - All	4	
My User Tasks	Pending User Tasks	3	

- The Activities Part is not required, but will exist if the Role Center Profile includes any Cues or Links.
  - Cue - A Cue is a visual representation, including a record count, of work to be performed. Clicking on the Cue displays the list of the corresponding records in the Content Area. For example, if you click on the Outstanding Donations Cue the following List displays.

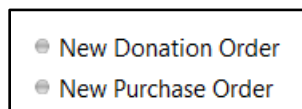
Donation Orders, Outstanding Donations

Type to filter (F3) No.

Filter: Order • Released • Yes • No • Donor

No.	Donor No.	Donor Name	Address	City	State	ZIP Code	Posting Date	Order Date	Shipment Date
DO-00297	RF1-100	Test RF Supplemental Address...	add1	city	st	99999	9/14/2018	9/14/2018	
DO-00299	PD00386	Wal-Mart Supercenter #4475 -...	395 N. K 7 Highway	Olathe	KS	66061	3/19/2020	6/13/2018	

- Link – A Link will open the specified Page and are usually reserved for tasks. For example, clicking on the New Donation Order Link will open up a new (blank) Donation Order



New - Donation Order - DO-00486

HOME ACTIONS NAVIGATE

View Edit New Delete Manage Post... Post and Print... Send... Release Copy Document... Process Create Inventory Put-away / Pick... Create Pallets Statistics Notes Links Refresh Clear Filter Show Attached Page Go to Previous Next

DO-00486

General

No.: DO-00486 Order Date: 3/26/2020

Parent Donor No.: Document Date: 3/26/2020

Donor No.: Donor Order No.:

Donor Name: Donor Shipment No.:

Address: Donor Invoice No.:

City: Responsible Person Code:

State: Fund No.:

ZIP Code: FBC Product Source:

Contact: UNC Product Source:

Phone No.: FBC Product Category:

Ext.: FBC Reason for Donation:

Donor Statistics

Gross Weight: Gross Weight

This Month: 0.00

This Year: 0.00

Last Year: 0.00

To Date: 0.00

Notes

Click here to create a new note.


There is nothing to show in this view.

- You can group Cues and Links together under a Header. In the screen shots above, you can see that Agency and Donor/Vendor activities are linked.



## My Notifications Part

Notifications display on the Home Page, any notes created via the Notes feature where the users checked the Notify box and indicated a user for the note to be delivered to. The Note here is a link to the task or card that was the source of the note.

My Notifications  ^			
From	Created Date	Note	Page
ESOPRO\RXF	1/29/2020	buy more!	Item Card - 1...

- Entries displayed are user specific.
- Using the Action menu (gears), you can open the note or open the associated record.

## Microsoft Outlook Part

Allows the user to specify whether or not to display their mail, calendar, and tasks within their Role Center. This requires that Outlook and Ceres 5 were configured to communicate during initial setup.

Microsoft Outlook ^	
<b>Mail</b>	
Inbox	0
<b>Calendar</b>	
<b>Tasks</b>	

## My...Part

Allows the user to display their top or specific records.

My Agencies			
Manage List Open New Find Filter Clear Filter			
Agency No.	Name	Phone No.	Balance (\$)
B0129	Safehome, Inc.	555-444-3333	19,734.12
A0442	Synergy Services-2		725.00
A0592	TLC For Children and		1,766.49

- The following types of records can be display in the My...Part section
  - Agency
  - Donors
  - Vendors
  - Items
- Records are manually added or removed by clicking on Manage List. Users can then open the specific Card from the Role Center, saving the time of navigating to the List Page and opening it up from there.

## Links Part

Links are a way to link a documents or files to a specific record. Documents or files are linked to Card or Task Pages, and can be displayed on the List Page. From the List Page, the document or file can be opened.

Links
Link Address
\\esp-sql.esopro.com\ESP\CLI...
\\carbon\esp\CLIENT\Active\...
C:\Users\RXF\Desktop\TerreH...
C:\Users\Public\Pictures\Sam...
C:\Users\RXF\Desktop\GRO-R...

- Links are Role Center specific but are visible by all users assigned to that Role Center.

## Customization Options for a Role Center

Just like Pages, each user can customize their Role Center in the Windows client. The components defined in the customization sections of the document actually customize the assigned Role Center for the users. Any of these changes would be lost if the Role Center assigned to the User is changed.

- Menus – Re-organize the Action or Reports menus, including removing task, adding heading text to separate tasks on the menu, or create groups so that tasks are accessed from the submenu.
- Navigation Pane – Re-organize the entries on the Navigation Pane. You can also create a custom Activity button.
- Customize this Page – Allows you to add or hide Parts on the Role Center.
- Delete Personalization Settings
  - UI Settings – Removes your personal settings
  - Automation Settings - Settings stored when you click on default buttons on some messages, such as Always Allow.
  - File Handling Settings – Settings that are stored when you indicate a program to use for specific file types.

## Related Topics

Ceres 5 Profile Configuration