

# Favorites Screen Workshop



*We are a large group today but want to remain interactive so only mute your phone if you have a noisy office or if requested to do so.*

Thursday, March 23, 2023, from 2:00 PM - 2:30 PM (EDT)

Please join my meeting from your computer, tablet, or smartphone.

<https://meet.goto.com/773246901>

You can also dial in using your phone.

United States: +1 (224) 501-3412



*LuAnn Moore, Anthea Dimond, Theresa Campbell, Wendy Tarantola*



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# Tips for GoToMeeting



A screenshot of the GoToMeeting interface. The main window displays a slide titled "Favorites Screen Workshop" with a "User Favorites" button circled in red. The slide text includes: "We are a large group today but want to remain interactive so only mute your phone if you have a noisy office or if requested to do so.", "Thu, Mar 23, 2023 2:00 PM - 2:30 PM (EDT)", "Please join my meeting from your computer, tablet or smartphone.", "https://meet.goto.com/773246901", "You can also dial in using your phone.", "United States: +1 (224) 501-3412", and "LuAnn Moore, Anthea Dimond, Theresa Campbell, Wendy Tarantola". The ADMINS logo is at the bottom left of the slide. The GoToMeeting toolbar is visible at the bottom with icons for Mic, Camera, Screen, and Leave. A chat window on the right shows a message: "Me to Everyone: Welcome to the webinar. Please say hello when you join the meeting". Numbered callouts are placed over the interface: 1 points to the bottom toolbar, 2 points to a slider on the right, 3 points to the chat bubble, and 4 points to the camera and zoom controls on the right.

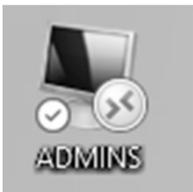
1. Controls appear when the mouse is moved onto the G2M window
2. Slider resizes the viewing canvas versus the attendee's area
3. Chat bubble allows for questions
4. Camera and zoom controls for screenshots or a closer look



# Begin by Logging in to AUC



For this workshop, please log in to the application; your shortcut probably looks like one of these:



The screenshot shows the 'ADMINS Unified Community - Please Sign In' web application. The page has a menu bar with 'File', 'Edit', and 'Help'. The main content area includes a 'Please Sign In:' section with a logo for 'THE UNITED COMMUNITY'. The login form contains fields for 'Username' (with 'THERESA' entered) and 'Password', and buttons for 'Login', 'Exit', and 'Reset Password'. A 'Training Mode' checkbox is also present. Below the login section are navigation tabs for 'IMPORTANT NEWS', 'About our products', 'Support Info', and 'E-newsletter'. An 'ATTENTION!' banner states: 'A Quarterly software update was installed on your site. Please click on the links below to review the March 2023 Product Release Notes'. The release notes are listed in a grid:

GL	MV	RC	SY
AP	RE	BU	
PO	PP	MB	
HR	TT	FA	

The status bar at the bottom of the browser window shows 'Ready'.



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# Locate the Favorites in the Menu



The Favorites menu is all the way to the right of the menu bar, just before the “Help” menu

[AUC] 73-Users Favorite Selection [theresa]

File Edit Ledgers Purchase Orders Accounts Payable Fixed Assets Human Resources Budget Collections Tax Motor Excise Misc Billing System Favorites Help

Users Favorite Selection

Theresa

1: Enter Vendors	16: Trial Balance	31: Bill Payment
2:	17:	32:
3: Purchase Order Entry	18: Transaction Detail Report w/Notes	33: Bill Locator
4:	19:	34:
5: Voucher Batch Entry	20:	35:
6:	21:	36:
7:	22:	37:
8:	23:	38:
9:	24:	39:
10:	25:	40:
11:	26:	41:
12:	27:	42:
13:	28:	43:
14:	29:	44:
15:	30:	45:

# Before Adding any Favorites



73-Users Favorite Selection [ ]

File Edit Ledgers Purchase Orders Accounts Payable Human Resources Budget Collections Tax Motor Excise Misc Billing System Favorites Help

Users Favorite Selection

Goto... Theresa

Actions

1 Add Favorite

2 Del Favorite

1:		16:		31:	
2:		17:		32:	
3:		18:		33:	
4:		19:		34:	
5:		20:		35:	
6:		21:		36:	
7:		22:		37:	
8:		23:		38:	
9:		24:		39:	
10:		25:		40:	
11:		26:		41:	
12:		27:		42:	
13:		28:		43:	
14:		29:		44:	
15:		30:		45:	

Ready

A small speaker icon with sound waves, located in the bottom right corner of the application window.

# Let's Add some Favorites

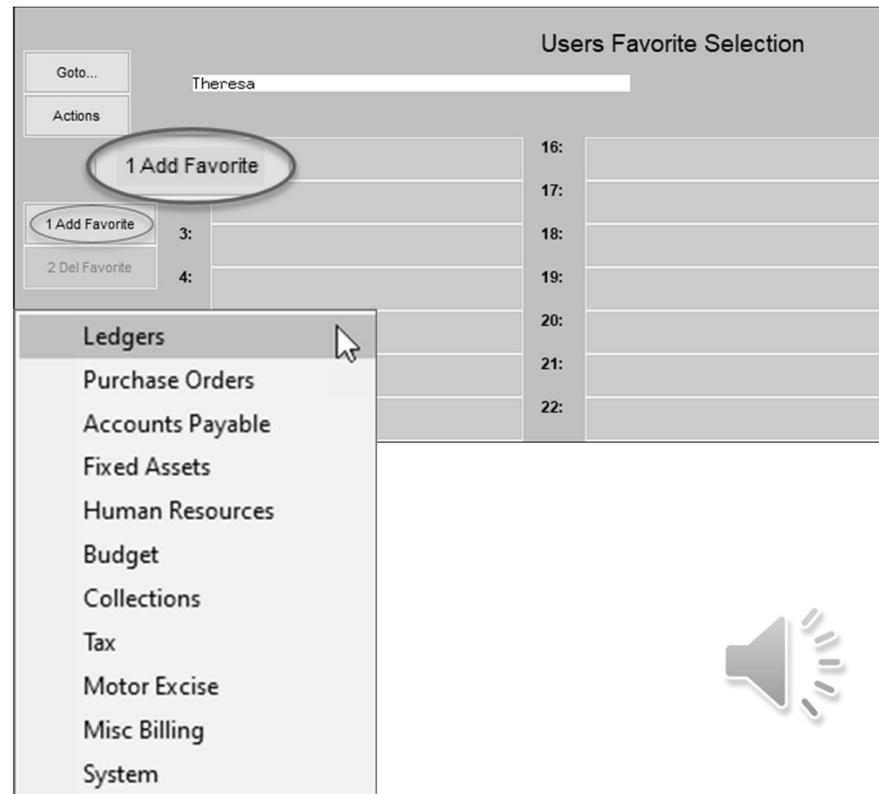


On the invite, we asked you to jot down task numbers of your frequently used screens and reports.

Click on [Add Favorite]

A list of modules available to you is displayed

Select the module; I am clicking on Ledgers



# Select Menu Item; click [OK]



Menu	Task Description	Tof
Queries	1125 Account Balance Inquiry - Period Breakdown	^
Queries	1145 Account Balance Listing	
Queries	1009 Chart of Accounts Inquiry	
Queries	1321 Maintain Elements	
Queries	1110 Transaction History	
Queries	1105 Journal History	
Queries	1126 Transaction DETAIL History	
Queries	1120 Work in Progress Transactions	
Queries	1115 GL Transactions to Post	
Queries	1041 GL Transaction Codes	
Queries	1080 Users Account Security Inquiry	
Queries	1890 Log of Deleted Journals	
Reports	1590 Ledger Year to Date Reports	
Reports	1500 Trial Balance	
Reports	1533 Trial Balance w/WIP	
Reports	1501 Expenditure Summary	
Reports	1523 Expenditure Summary w/WIP	
Reports	1526 Expenditure Summary (w/ Legacy Accounts)	
Reports	1514 Projected Expenditure Summary	

- Account Balance Inquiry
- Account Balance Listing
- Chart of Accounts Inquiry
- Account Elements
- Transaction History
- Journal History
- Transaction Detail History
- Review Work In Progress Transactions
- Unposted Transactions
- GL Transaction Codes
- Users Account Security Inquiry
- Log of Deleted Journals

The available tasks are shown in the same order as they appear on the menu.



# This is *My* Favorites Screen



Click on the "H" button to make this your home screen. If you change your mind later, contact the superuser on site or [support@admins.com](mailto:support@admins.com)

The screenshot shows the 'Users Favorite Selection' screen with a menu of items. Callouts A, B, C, and D point to the following items:

- A: AP Disbursement Warrant History
- B: Billing History
- C: Check Unposted Transactions for Errors
- D: Payroll Disbursement Warrant History

Other visible items in the menu include: Transaction History (Summary), Account Balance Inquiry, Journal History, Voucher Selection Error Report, View All Vouchers (Bills), Voucher Batch Entry, AP/PO Dashboard, Employee Maintenance, Bill Locator, Bill Payment, and Write Off Small Balances.



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# Questions?



Send email to [support@admins.com](mailto:support@admins.com)

