



College Financial System User Procedure

Title:

Place Documents on the Navigator

Description:

Specific documents you wish to access frequently may be placed on the Documents tab of the Navigator. Your document list is different for each responsibility.

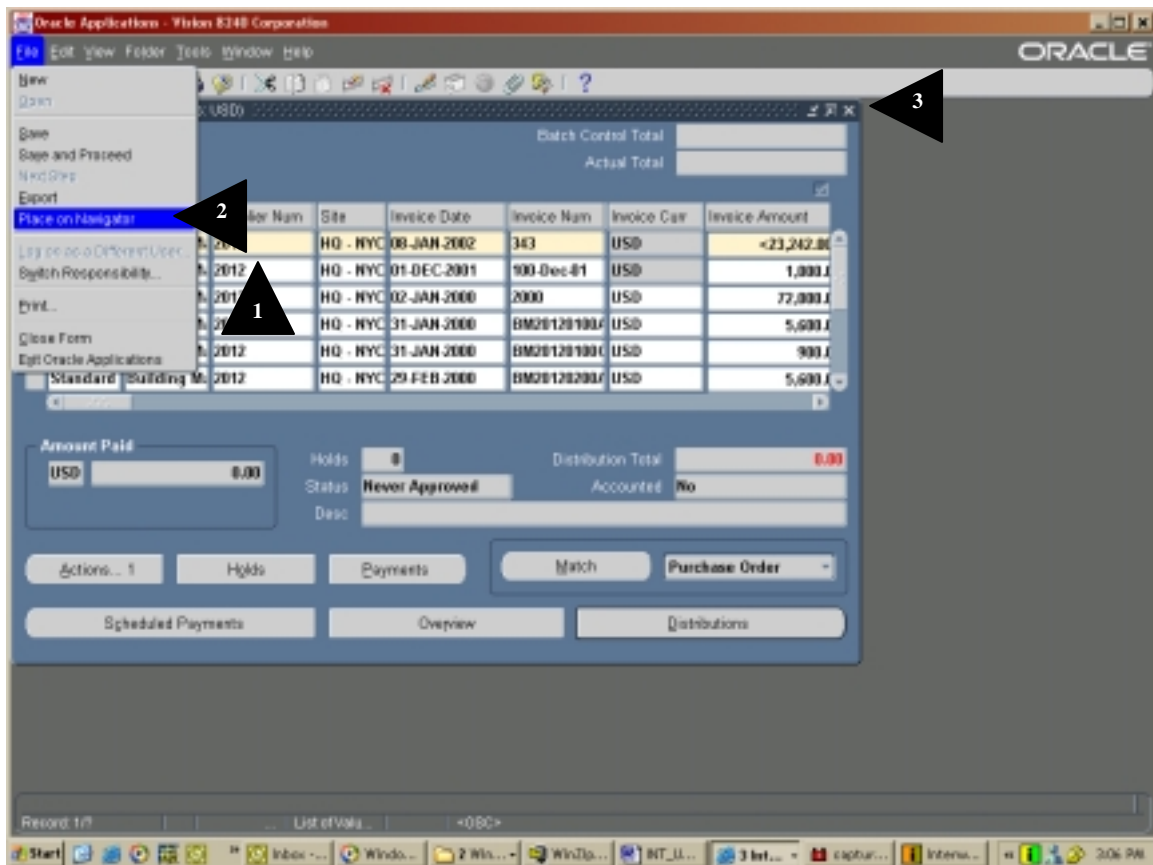
College Financial System Prerequisites:

- *You must have created a document in a College Financial System application*

<i>Menu Path</i>
Navigate to your desired application.

Window Name:

Invoices



You may place documents on the Navigator in multiple College Financial System modules. This example uses a credit memo in Payables.

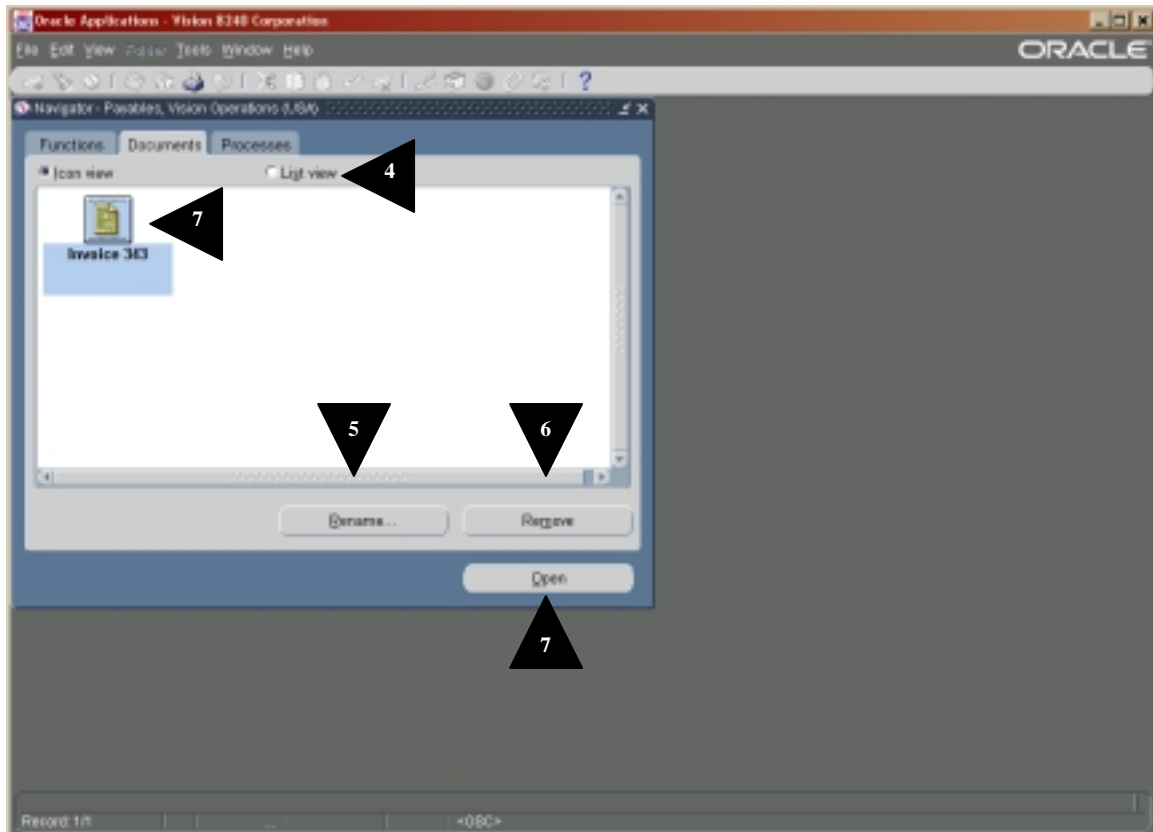
Field Name Description/Action

 **Note:** Query the document you wish to save on the Navigator.

1. Select the appropriate document record.
2. Select Place on Navigator from the File menu.
3. Close this window to return to the Documents tab in the Navigator.

Window Name:

Documents




Your document appears on the Navigator Documents tab.

Field Name	Description/Action
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4. Select the List View radio button to view your documents in list form.

5. Click on **RENAME** to rename your document.

6. Click on **REMOVE** to remove your document from the Navigator.

 **Note:** This does not remove the document from the database.

7. Double-click on your document icon to open the document or click once on it and click on **OPEN**.



End of procedure