GALAXY WEB INTRODUCTION - VIEW FINANCIAL

Galaxy Web View Financial Screens

Riverside County Office of Education
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Contents

Introduction

Galaxy Web is designed to mimic what you had in the Legacy version of Galaxy with some new features. All of the screens that have been converted to Galaxy Web should function just as they do in the Legacy version.

If you're coming to this from the Legacy version, you will notice that when you opened a screen, it automatically opened your default web browser. This does not close your Desktop session, but rather, opens your browser to the new screen(s) as they're published. Eventually, all Legacy Galaxy will be converted to Galaxy Web and you will be able to just open a browser to the login screen and get to everything you had in the Legacy version.

Along with the new functionality, many of the features you find here will be shared on all the new screens published. We want you to explore and give us feedback as you open the new system we've built for you.

Galaxy Web screen names are in **_Bold_** and **_Italicized_** font type as seen below:
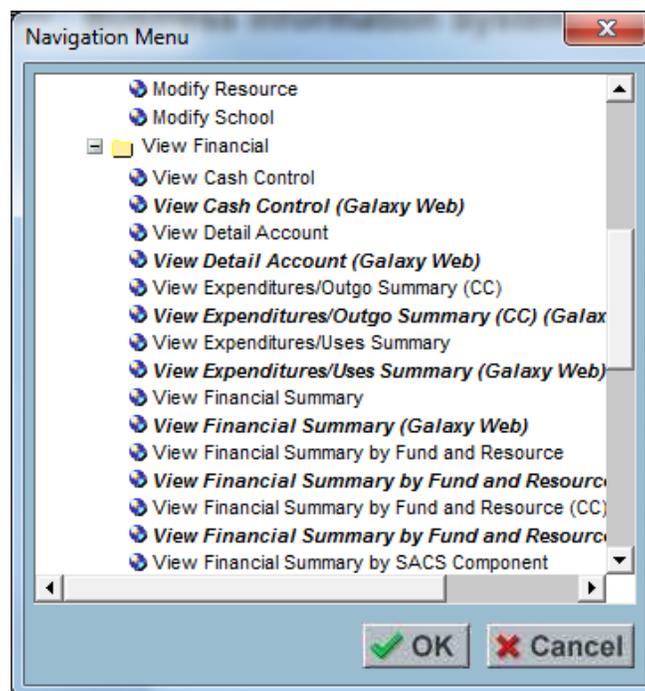
The screens, listed here are duplicated versions of the desktop version but you should notice the **_bold italicized text_** on all the new screens.

Logging In

New Password Requirements

Along with the new version of Galaxy Web, we have implemented new password requirements that will be part of your regular Galaxy Login requirements:

Increase password **minimum length from 6 to 8 characters**

Characters must come from **at least 3 of these 4 categories**:

1. Uppercase letter
2. Lowercase letter
3. Number
4. Symbols **(excluding ' " ; / : = \ |)**

Password cannot contain 3 or more consecutive characters of your user id, last name or first name and will now expire in 120 days rather than 90

Email Problems and Bugs

We have set up and email address specifically for Galaxy Web issues so that if you find any bug, it can get to the programmers quickly to be verified and fixed.

Please contact Melissa Elwood: **melissa.elwood@rccd.edu** and include the following in the email:

Email Subject: Summarize (1 line) the issue

In the email, please include the following

1. **Build Date:** (displayed in Galaxy Web Header)
2. **Browser Type:** (Chrome, Firefox, etc.) even better is to tell us the version too
3. **Contact info:** Your Name (or name of staff having issue), User ID, and telephone Extension (for follow up)
4. **Name of Screen** where bad behavior happened
5. **Explain** what steps you took leading up to the bug
6. **Describe** the buggy result in detail (screen shots are very helpful here too if possible)

Please do not email sensitive information
(Names, SSN, Addresses, Bank Accounts etc.)

Galaxy Web Timeout

Galaxy will time you out of your session after 60 minutes

Warning: Session Timeout Imminent

Warning: Your session is about to time out.

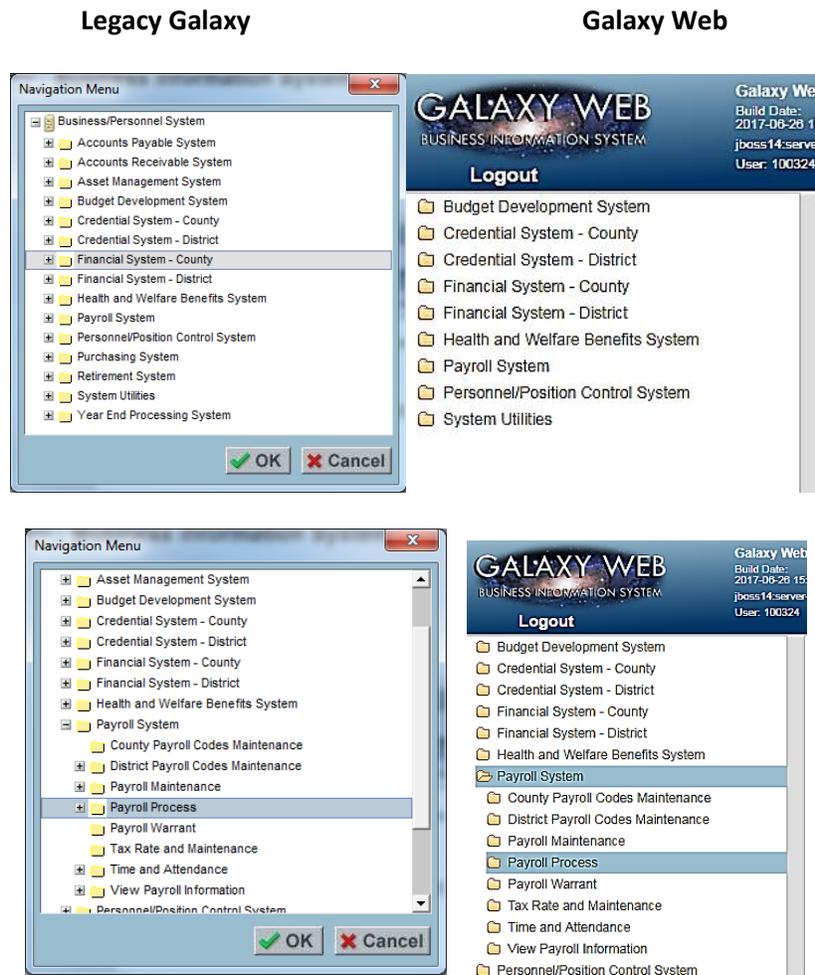Your session will time out in 01:27

Click the "Keep My Session Active" button below to extend your session

Keep My Session Active

Navigation

Folder Tree

The Folder Tree or Navigation Menus list in Galaxy Web is located in the left panel. The folders expand when you click on them just like clicking the plus symbol in Legacy Galaxy.

Legacy Galaxy   **Galaxy Web**

To view the folder tree in Galaxy Web, click the left panel open/close button
To open a Galaxy Web screen, left click on a screen name and it will open it in the current browser tab.

Open Multiple Galaxy Web Sessions

Open multiple sessions of Galaxy Web by right-clicking on a screen name in the left panel, and a new tab on your browser will open. If it does not open, verify that pop-ups are not blocked for Galaxy Web.

To view these side-by-side, separate your tabs to have them in different windows and resize them to view them next to each other.

Looking at the new screens…

Required and Optional Fields

Required fields are yellow. Optional fields are white.

List Fields

List fields are similar to entry fields. However, instead of typing a value, you select a value from a drop-down list. To view the list of values, click the arrow button on the right side of the field. Then, click a value to enter into the field.
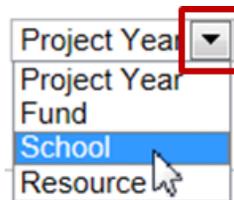
*The arrow button on a list field indicates that values are selected from a drop-down list.*

Pop-up List Fields

Pop-up list fields are similar to list fields. However, if you click an ellipsis (three dots) button the values appear in a small pop-up instead of in a drop-down list. Pop-up buttons are provided when there are too many values to display as a drop-down list.
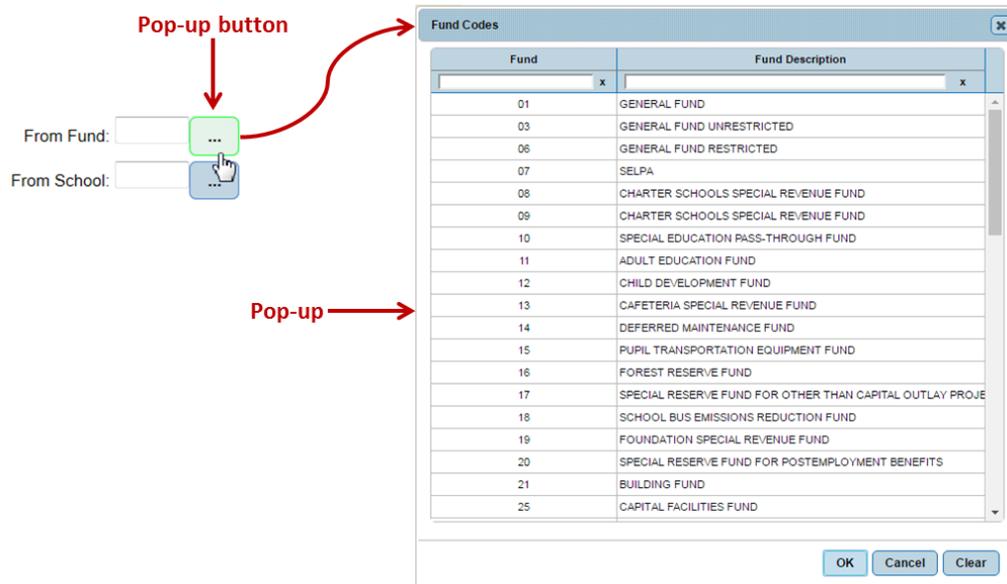
A button with three dots (an ellipsis) next to a field indicates that available values can be selected from a pop-up.

Some pop-ups allow you to type a value ("self") in a field at the top of the pop-up. The list is filtered (shortened) to display only those values that match what you type.
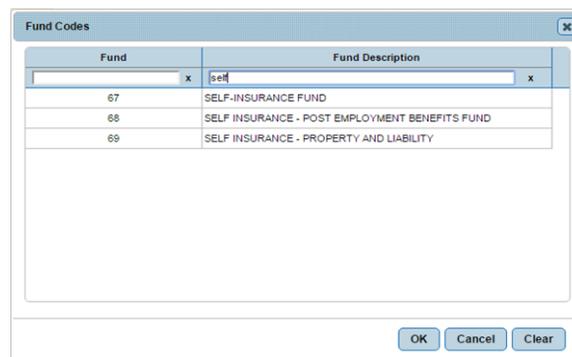
In this example, typing a value in the Fund Description field shortens the list by displaying only items that start with the exact value you type.

Note

- Search boxes search from left to right so you cannot search for "Insurance" and get the same result in the list below.

Date Fields

Date fields allow you to specify a date, which you can type into the field or select from a pop-up calendar. Default values usually appear in date fields.

You can type a date into a date field, or you can select a date from the pop-up calendar.

Note

- Current date is highlighted in green in the calendar.
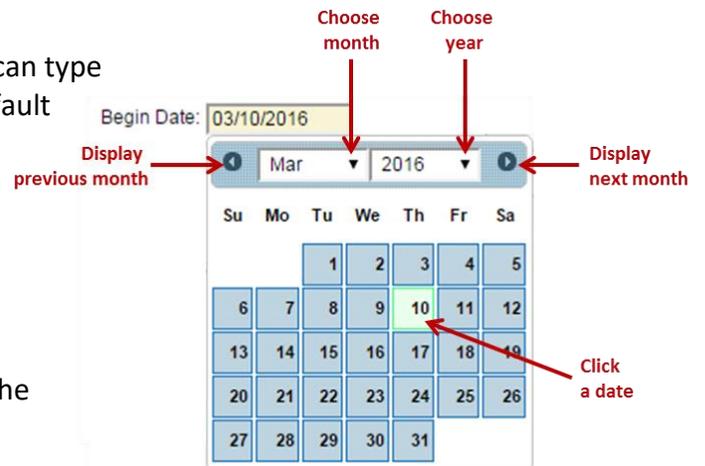
Galaxy Web Only feature:

The *View Financial Summary* screen includes a **Fiscal Year** dropdown list that allows you to select a previous fiscal year. When a prior fiscal year is selected, the Begin Date and End Date columns are changed to the first and last dates in the selected fiscal year.

Display Fields

Display fields contain information that can be viewed, but not changed. These fields are gray, and you cannot type into them or select values for them.

Display fields are gray. You can only view information in display fields.

Default Field Values

A **default** is a value that appears in a field when you first open a Galaxy Web screen or tab. The initial value of a field is often blank, allowing you to input your own value. The value may be programmed in Galaxy Web to appear a certain way, such as date fields that format a date using the month, day, and year (mm/dd/yyyy). Or, the value may come from a Galaxy Web module you are not working with. For example, when you are working with employee benefits information in the Health & Welfare Benefits module, some of the default information about an employee comes from the Personnel/Position Control module.

Default values appear when you open screens or a new tab. Fields with no default value are blank.

Check Boxes

Check boxes are small squares that you check or uncheck to specify a particular setting. You can check boxes that are white, but you can only view boxes that are gray (dim).

You can check or uncheck these active (white) check boxes.

You cannot check or uncheck these display-only (gray) check boxes.

Areas

Some fields that are related to each other are grouped together in a box called an **area**. An area box has a descriptive name. For example, an area labeled **Transaction Type** may contain a set of check boxes that can be selected when searching for financial transactions.

An area indicates that the fields inside the box are closely related to each other.

Cells

Some screens use rows and columns to display information as a table.   Similar to Excel spreadsheets, the intersection of a row and a column is called a **cell**. Values are displayed and/or entered into these cells.

A cell is the intersection of a row and a column when information is presented in a table format

Messages

When you work with Galaxy Web, informative **messages** appear. These messages communicate information to you, such as letting you know that information you entered was saved successfully or that a value you typed was not correctly entered.

Confirmation Messages

Confirmation messages affirm that the information you entered on a Galaxy Web screen is valid. For example, when you enter data, and then click **Save**, a confirmation message appears if the data was valid and saved to the database.
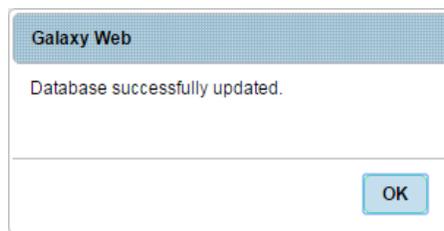
This confirmation message indicates that an action was performed as intended and the information was saved.

Error Messages

Error messages are similar to validation messages, but they are either not field-value dependent or they indicate that a serious error has occurred. For example, an error message is issued if the debit and credit amounts of paired transaction do not match. Error messages appear after you click **Find** from Search tabs or **Save** from Detail types of tabs.
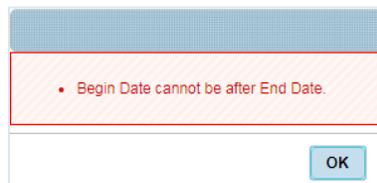
The sample error message above indicates that an action cannot be performed or data entered is incorrect or not allowed.

Validation Messages

Validation messages appear in the validation panel and indicate that something is wrong with the data you entered according to business rules specified in Galaxy Web. For example, a validation error may indicate that you left a required field blank or that you entered text into a field that requires a dollar value. Validation messages usually appear after you click **Find** from Search tabs or **Save** from Detail types of tabs.

The right side of Galaxy Web tabs contains an Error Pane that appears when validation messages are encountered. When you click a message in the Error Pane, the field in error is highlighted so you can easily find the information you need to correct. When you correct errors, and then click **Save**, the error panel closes, unless there continues to be at least one error.

This validation error indicates that the value entered in the Goal column is invalid because it is not a number.

Occasionally, a validation error may appear in a popup. In this case, click **OK** to clear the error, and then correct the issue.

This validation message indicates that the value you entered into the named field must be a number, not letters.

Entering Search Information

Wild Card Characters

Wild card characters enable you to use special symbols in your search criteria to widen or narrow the scope of information to find. For example, to find information about all employees whose last name starts with the letters *SMI*, you type *SMI** into a **Last Name** field.

You can optionally use one of the following wild card characters in your search criteria.

Asterisk (*) or Percent (%)
Replaces one or more letters or numbers. For example, to find all last names that start with JOHN, type *JOHN** or *JOHN%*.

Forward slash (/) or Underscore (_)
Replaces one letter or number. For example, to find all Object codes that begin with **4** and end with **0**, type *4//0* or *4__0* .

 Note

- ***Not all Galaxy Web fields accept wild card characters. The wild card features are available in the same screens as Legacy Galaxy.***
- Other characters can be used on some Galaxy Web screens. These are explained in pertinent Galaxy Web user guides and online help topics.

Standard Functions

Standard functions are used to perform operations such as adding a row of data, saving the data you enter, or printing information that appears on a Galaxy Web screen. Galaxy Web is designed so that you can perform these basic functions in a standardized way, usually by clicking a button. For example, to find information in Galaxy Web that matches data you specify, you click a button named **Find**. To save information to an Excel spreadsheet, you click a button named **Excel**. These buttons do the same thing on any Galaxy Web screen on which the buttons appear.

When buttons appear on a Galaxy Web screen, they may be available to use or they may be unavailable (dim). Buttons are unavailable while there are other actions that must be performed. For example, the **Save** button may be unavailable until you make changes on the tab that need to be saved.

Active buttons are blue. Inactive buttons are gray (dim).

Finding Information

Just like in Legacy Galaxy, the **Find** button is used to look for information in Galaxy Web.

An important feature of Galaxy Web is to use search criteria to find information that is already entered into Galaxy Web. Once found, you can view, modify, or delete the information depending on the task you need to do. On nearly all Galaxy Web screens, the first tab is named Search.

To find information, do the following from any Galaxy Web screen that contains a **Find** button on the Search tab.

1. From the Search tab, type or select search criteria in any open field.

2. Click **Find**. Another tab opens and information that matches your search criteria appears.

This example shows how criteria specified on the Search tab are used to find information that is displayed on another tab.

Printing and Downloading Info

Using the Print Button

The **Print** button sends information that appears on the current Galaxy Web screen to your browser, from which you can optionally print the information.
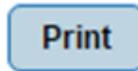
To send information to a browser window, do the following from any Galaxy Web screen that contains a **Print** button.

1. If information on the screen appears in rows and columns, optionally sort the information as desired.

2. Click **Print**. The following message will appear
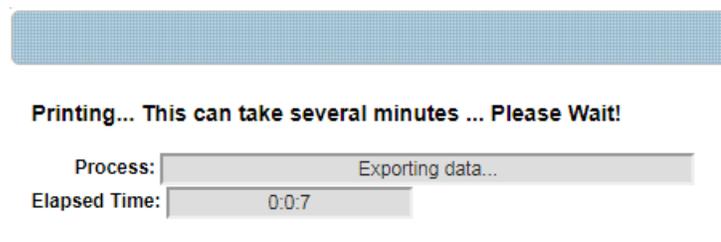
3. If the current tab contains rows and columns that can be expanded to show more detail, a message appears (for more information, see *Expanding Rows on page 18*).
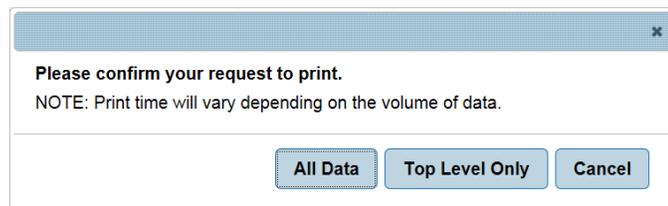
Do one of the following:

- *To include detailed information that appears on expanded lists*, click **All Data**.

- *To exclude detailed information that appears on expanded lists*, click **Top Level Only**.

The information on the Galaxy Web screen appears on a new browser tab or window, depending on your browser settings.

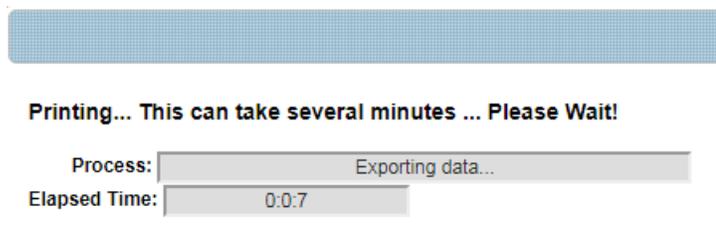4.   Use your browser options to view or print the displayed information.

Exporting to Excel

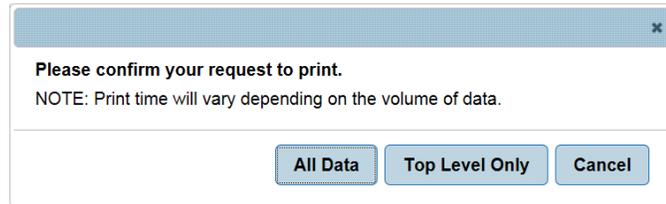The **Excel** button creates an Excel file of the screen contents seen in Galaxy Web.
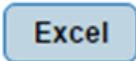
To export information to Excel, do the following from any Galaxy Web tab that contains an **Excel** button.

1.   If information on the screen appears in rows and columns, optionally sort the information as desired.

5.   Click **Excel**. The following message will appear

Printing... This can take several minutes ... Please Wait!

Process:	Exporting data...
Elapsed Time:	0:0:7

2. If the current tab contains rows that can be expanded to show more detail, a message appears:

Do one of the following.

- *To include detailed information that appears on expanded lists*, click **All Data**.

- *To exclude detailed information that appears on expanded lists*, click **Top Level Only**.

3. Follow prompts that may be issued by your browser to open or save the file.

4. Excel opens, and the information on the Galaxy Web tab appears in a new spreadsheet.

5. Use Excel to view, manipulate, save, or print the data.

Working with Rows and Columns

When you work with data that appears in horizontal rows and vertical columns, you use standard **row and column functions** to manipulate the tabular data. For example, on many Galaxy Web screens, you can sort rows of information, add new rows of data, expand and collapse rows to show more or less information, and resize column widths.

Sorting Rows

On many Galaxy Web screens, information that appears in rows and columns can be sorted by one column. Each column has a title called the **column heading**.

Tabs with information presented in rows and columns provide headings to identify each column.

To sort rows of information, do one of the following:

- *To sort rows in ascending order*, click the desired column heading once. The rows are sorted with the lowest value at the top of the screen and the highest value at the bottom of the screen.

- *To sort rows in descending order*, click the desired column a second time. The rows are sorted with the highest value at the top of the screen and the lowest value at the bottom of the screen.

Unsorted rows   *Rows sorted in ascending order by the Object column.*   *Rows sorted in descending order by the Object column.*

Note

- The **Row ID** column that appears on all tabs with rows and columns is usually sortable. However, sorting by the **Row ID** column is disabled on screens that return large numbers of rows.

Expanding Rows

Some rows are expandable so that additional details can be viewed. The **Expand List** (blue triangle) button on the left side of rows displays the additional rows of information.

When you can see the additional rows of information, the list of information is in **expanded list view**.

In this example, the expanded list view shows the funding lines associated with a particular transaction.

 Note
- Columns in expanded lists can be sorted.
- Some Galaxy Web screens provide an **Expand All Rows** button that you can click to expand all rows on the tab at the same time.

Collapsing Rows

Once a row of information has been expanded, it can be collapsed to its original view by clicking the **Collapse List** (downward pointing blue arrow) button.

When you click this button, the expanded list view returns to its original, collapsed state called the **collapsed list view**.

In this example, the expanded list view has been closed and the data returns to collapsed list view.

Note

- Some screens provide an **Expand All Rows** button that you can click to expand all rows on the tab at the same time. If you use this button, the name of the button changes to **Collapse All Rows**. Click this button to return the tab to the original, collapsed row view.

Resizing Columns

You can make columns of information wider or narrower. To resize a column, click and drag the double-arrow bar between the column titles to the right or to the left.

Click here

Transaction ID	Transaction Date	Update Timestamp	Fund	School	Resource	PY	Goal
AF00000015	07/16/2012	07/16/2012	09	800	0048	0	0000
AF00000016	07/16/2012	07/16/2012	03	800	0048	0	0000
AF00000017	07/17/2012	07/17/2012	09	800	0048	0	0000
AP00000001	07/02/2012	07/02/2012	03	600	0811	0	3800

Drag left

Transaction ID	Transaction Date	Update Timestamp	Fund	School	Resource	PY	Goal
AF00000015	07/16/2012	07/16/2012	09	800	0048	0	0000
AF00000016	07/16/2012	07/16/2012	03	800	0048	0	0000
AF00000017	07/17/2012	07/17/2012	09	800	0048	0	0000
AP00000001	07/02/2012	07/02/2012	03	600	0811	0	3800

narrower

Drag right

Transaction ID	Transaction Date	Update Timestamp	Fund	School	Resource	PY	Goal
AF00000015	07/16/2012	07/16/2012	09	800	0048	0	0000
AF00000016	07/16/2012	07/16/2012	03	800	0048	0	0000
AF00000017	07/17/2012	07/17/2012	09	800	0048	0	0000
AP00000001	07/02/2012	07/02/2012	03	600	0811	0	3800

wider

This example shows how dragging a column to the left makes the column narrower and dragging it to the right makes it wider.

Moving Columns

You can move columns to rearrange the order of information that appears. To move a column, click the column title, and then drag it left or right and drop it to the desired location.

Object	Normal Balance	Debit Amount	Credit Amount	Trans Type
3322		0.00	6,185.00	7
3222	CR	0.00	32,001.00	1

Object	Debit Amount	Credit Amount	Trans Type	Normal Balance
3322	0.00	6,185.00	7	CR
3222	0.00	32,001.00	1	CR

This example shows how moving a column allows you to arrange information to your preference.

Note

- You cannot save the location of columns that you have moved. The next time you display the screen, the columns will appear in their default order.

Moving Rows

You can move rows to rearrange the order of information that appears. To move a row, click a row, and then drag and drop it to the desired location.

Row ID	Posted Flag	Approved by District	Approved by County	District	Transaction ID	Transaction Date
1	☑	☑	☐	39	FT00001577	03/10/2016
2	☑	☑	☐	39	FT00001577	03/10/2016
3	☑	☑	☐	39	FT00001577	03/10/2016
4	☑	☑	☐	39	FT00001577	03/10/2016

Click a row → (row 2)

Row ID	Posted Flag	Approved by District	Approved by County	District	Transaction ID	Transaction Date
1	☑	☑	☐	39	FT00001577	03/10/2016
3	☑	☑	☐	39	FT00001577	03/10/2016
4	☑	☑	☐	39	FT00001577	03/10/2016
2	☑	☑	☐	39	FT00001577	03/10/2016

Drag it up or down and drop it → (rows 4 and 2)

This example shows how moving a row allows you to arrange information to your preference.

Note
- You cannot save the location of rows that you have moved. The next time you display the screen, the rows will appear in their default order.
- You cannot move rows that appear in expanded lists.

Viewing Column Totals

Some columns of information contain numbers, currency, or other values where the total may be useful information. On many Galaxy Web screens, columns of numbers and amounts are totaled for you on the last row of the tab. As you scroll down to view more rows on the tab, the blue totals row is always visible.

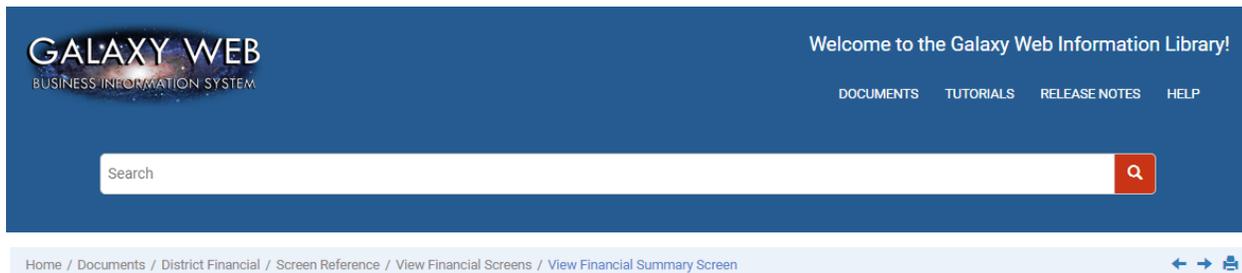|				
3401	DR		0.00	5,8
3401	DR		0.00	5,8
3401	DR		0.00	5.8 ▼
				▶
Totals:			89,333,612.26	91,222,723.

Column totals →

Opening Online Help

The **Help** button opens an online help topic that describes the current Galaxy Web screen and provides links to related information. The help topic appears on a new browser tab or in a new browser window depending on how your browser settings are defined.
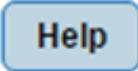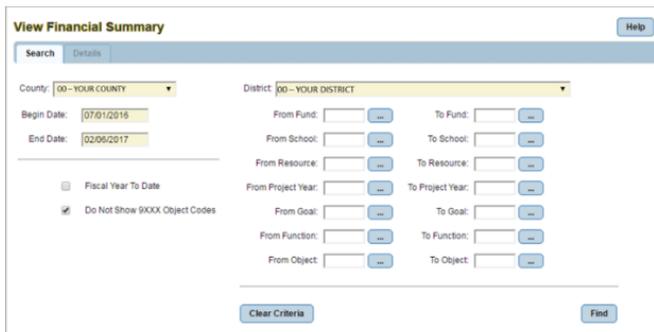

To open online help, click the **Help** button from any Galaxy Web screen.

This example shows the first help topic that appears when you click the Help button from the View Financial Summary screen.

Disabling Pop-up Blockers

Important Note

- • If Online Help does not open in a new tab, verify that pop-ups are not blocked for Galaxy Web. Below are some different pop-blocking messages you might see.