

# PeopleSoft Financials for Macintosh

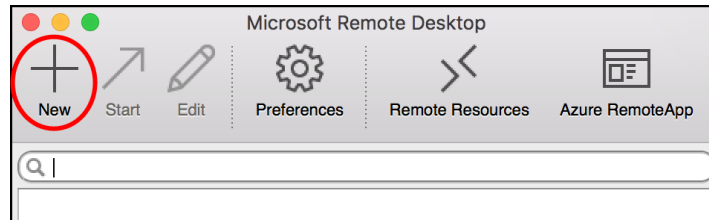
## Microsoft Remote Desktop for Macintosh

- Download **Microsoft Remote Desktop** from the Mac App Store
- Install the app and place a shortcut on the dock for easy access

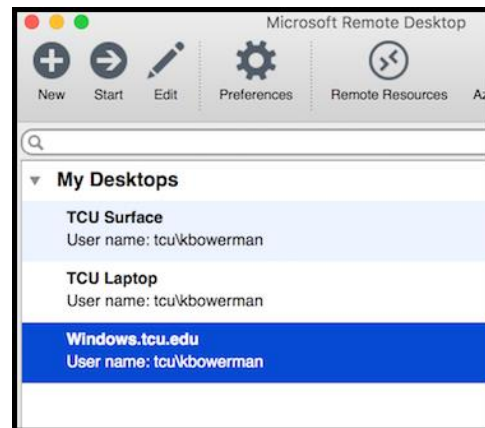
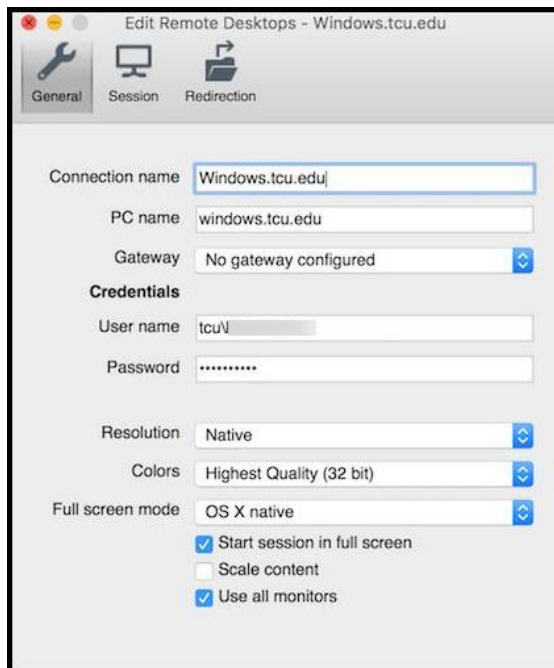


## Configure Microsoft Remote Desktop:

- Open **Microsoft Remote Desktop**
- Choose the **+** icon labeled **New**



- Connection name: **windows** (or any description you want)
- PC name: **windows.tcu.edu**
- User name **tcu\username**
- **Close the window.** (There is no save button.)
- The new configuration will appear in the list.

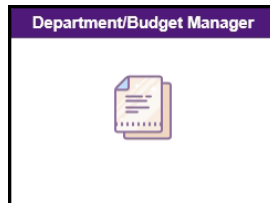


## To Make a Remote Connection:

- If you are off-campus, not connected to the TCU network, you must first make a VPN connection. VPN configuration instructions are located at the end of this document. If you are on-campus and connected to the TCU network, a VPN connection is not necessary.
- Open Microsoft Remote Desktop, select the windows.tcu.edu desktop connection and choose Start.
- Choose Continue when you see the message that the certificate is not valid.

## Running Financial Reports:

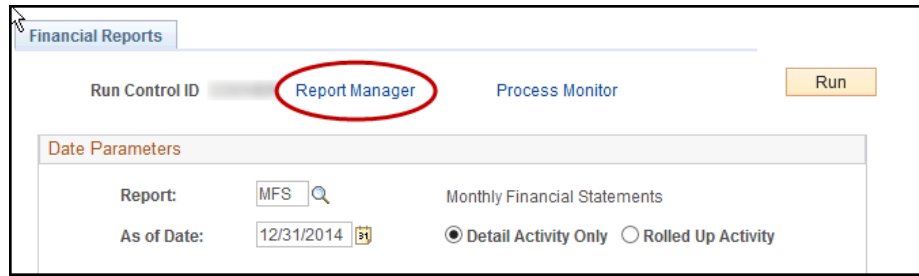
- You are now logged into a Windows Terminal Server. You may need to use the scroll bars on the right and bottom sides of the window to move around and view the entire window.
- Locate Internet Explorer and double-click the icon to open it.
- Login to <http://my.tcu.edu>, and select the Department/Budget Manager link.



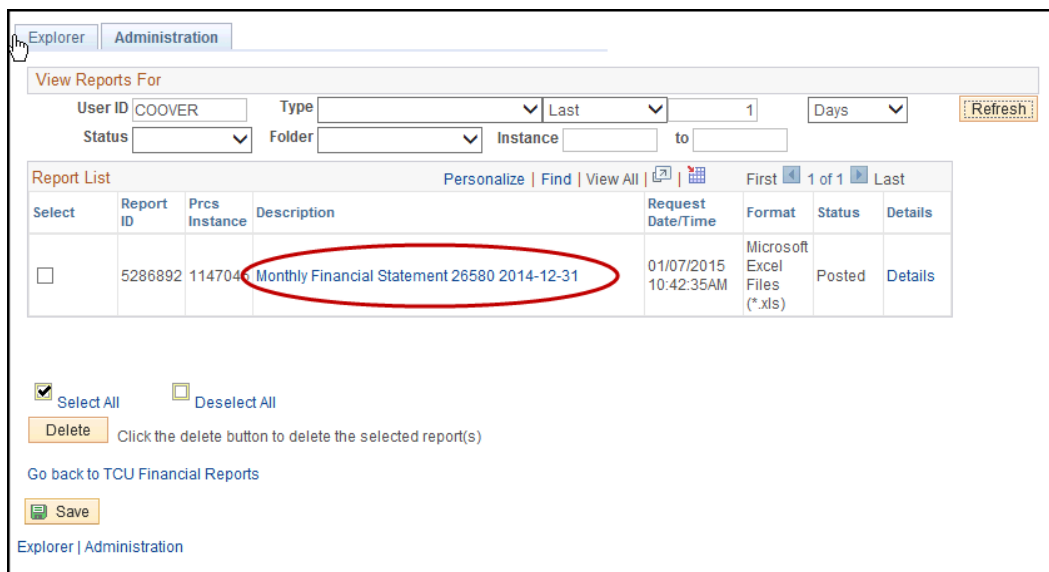
- Documentation for report creation is available in the links near the bottom of the window. (See the image below.) Training classes are also available from Financial Services.

A screenshot of the 'Financial Reports' application interface. The window title is 'Financial Reports'. At the top, there are tabs for 'Run Control ID', 'Report Manager', and 'Process Monitor', along with a 'Run' button. Below this, there are two main sections: 'Date Parameters' and 'Chartfield Parameters'. In the 'Date Parameters' section, 'Report' is set to 'MFS' (Monthly Financial Statements) and 'As of Date' is '12/31/2014'. There are radio buttons for 'Detail Activity Only' (selected) and 'Rolled Up Activity'. In the 'Chartfield Parameters' section, 'Business Unit' is 'TCU' (Texas Christian University). There are input fields for 'Department', 'Fund Code', and 'Project', each with a search icon. At the bottom of the window, there are three links: 'MFS Documentation', 'Fund Documentation', and 'Project Documentation', which are circled in red. Other buttons at the bottom include 'Save', 'Return to Search', 'Add', and 'Update/Display'. A 'Back to TCU Financials Home' link is also present.

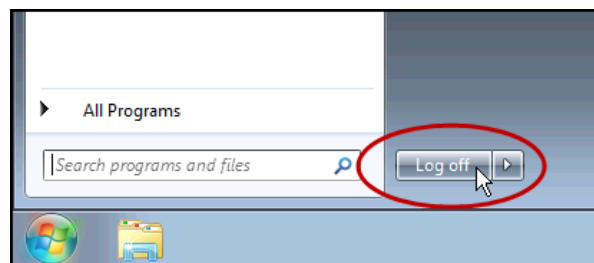
- After running a report from the windows terminal server, the report window will not automatically open. You must choose the **Report Manager** link to open the report.



- From the Report Manager, click the **filename** link to open the report.



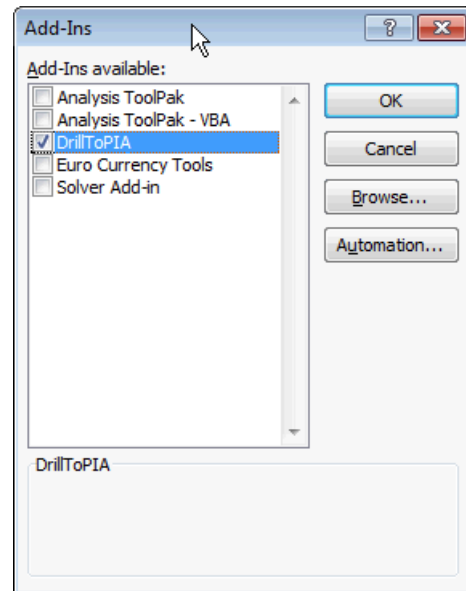
- When finished running reports, **log out of PeopleSoft Budget Manager**. Click the hamburger menu in the upper left corner of the screen and choose **Sign Out**.
- Don't forget to **logout of windows.tcu.edu terminal server**. Locate the **Start** button at the bottom left corner of the window Click the **Start** button and select **Log off**.



## Helpful Tips and Troubleshooting

### Activate Drilldown Add-In in Excel 2010 or 2013 or 2016

- Open **Excel 2010** or **2013** or **2016**
- Click the **File tab** in the upper left corner of the window
- Select **Options**
- Choose **Add-Ins** from the left menu
- Click the **Go button** at the bottom of the Add-in window
- Check the **DrillToPIA** box and click **OK**
- You may have to close Excel and re-open Excel to see the Add-ins tab.



### Turn off Pop-Up Blocker in Internet Explorer

- Select **Settings**
- Select **Pop-up Blocker**
- Select **Turn Off Pop-up Blocker**

### Clear Cache and Cookies in Internet Explorer

- Select **Tools** from the menu
- Select **Internet Options**
- Under **Browsing History**, select **Delete**
- Check the appropriate boxes, including **Cookies**
- Click the **Delete** button
- Click **OK**

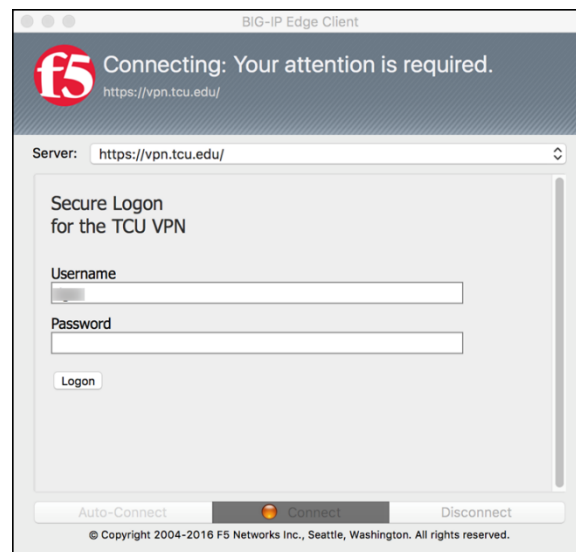
## VPN Setup for Macintosh

### Installing the F5 Big-IP Edge VPN Client:

- Go to this Box Share: <https://tcu.box.com/v/vpn-installers>
- Sign in with your **TCU username and password**.
- Open the folder for **Mac OS X**.
- Click on **BIGIPEdgeClient.zip** and download it to a location on your Mac.
- Open the **BIGIPMacEdgeClient.zip**.
- Running BIGIPMacEdgeClient.zip will extract a folder to your desktop named **BIGIPMacEdgeClient**. Open the folder BIGIPMacEdgeClient and run **mac\_edgesvpn.pkg**. This will install F5 BIG-IP Edge Client for Mac OS X.

### Using the F5 Big-IP Edge VPN Client:

- Open the **applications folder** (or use Spotlight to do a search) and run **F5 BIG-IP Edge Client**.  
**Note:** Add the app to your dock for easy access.
- Click **Connect**. If any updates are needed, they will be downloaded to the F5 program.
- **Log in** with your TCU credentials and click **Connect**.
- In the upper right corner of your screen, in the menu bar, you will see a notification showing F5 is connecting. Also you will see the F5 icon running.



- When finished, click on the F5 Icon in the menu bar upper right of your screen and click the **Disconnect** button.

