



# Escape Introduction Guide

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## FIRST STEPS IN ESCAPE

For any technical questions remember to use our helpdesk system to request assistance. You can visit the helpdesk online at: <https://helpdesk.stocktonusd.net/> or call helpdesk at Ext 4357.

Information Service Department – Fiscal Team

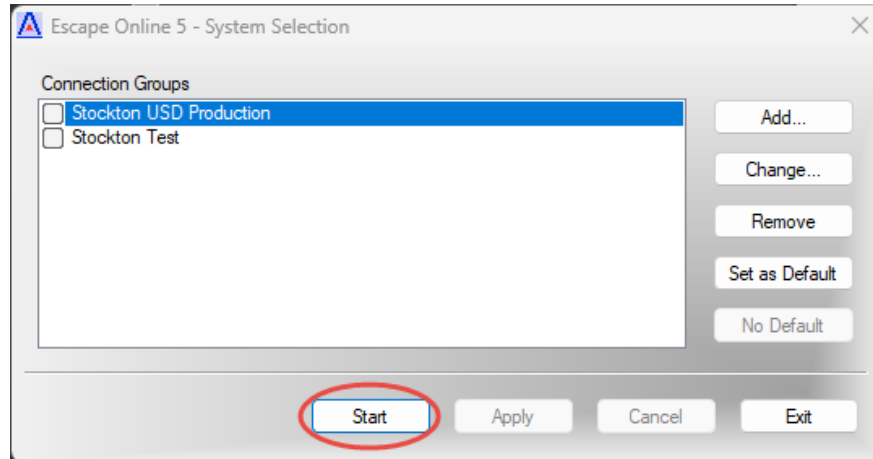
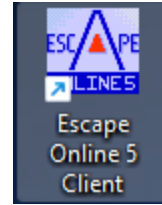
STOCKTON UNIFIED SCHOOL DISTRICT | 56 SOUTH LINCOLN STREET STOCKTON, CA 95203

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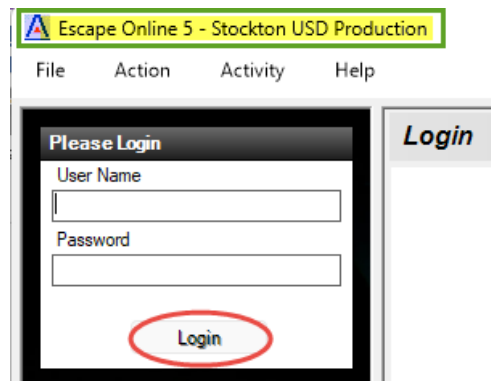
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## Escape Login

1. Locate the Escape Icon on your desktop:
2. Select the correct connection group:
  - a. Stockton USD Production – For live data
  - b. Stockton Test – Training/Testing

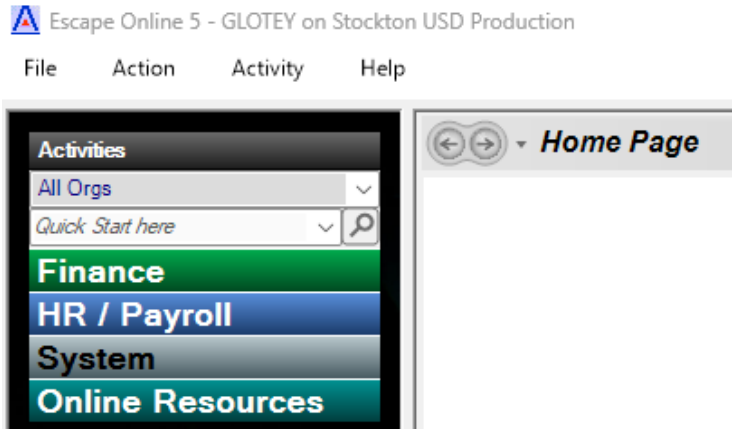


3. Press Start
4. A new window will appear with *Please Login* in upper left hand corner
  - a. Top left of the window will state which Connection you are logging into
    - i. Production or Test
  - b. Enter in your User Name – this is NOT case sensitive and will automatically be in all caps
  - c. Enter your Password – this IS case sensitive (For password resets log a ticket at <https://helpdesk.stocktonusd.net/> or you can call the helpdesk at Ext 4357 from any cisco phone)
  - d. Click Login or use the Enter key

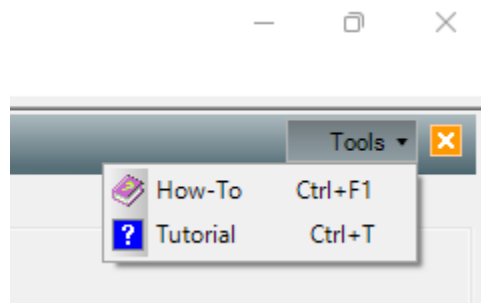


## Escape Activity Tree (color coordinated)

- The Activity Tree located on the left side is the navigation menu for Escape.
  - \*Note not all users will have access to all activities.

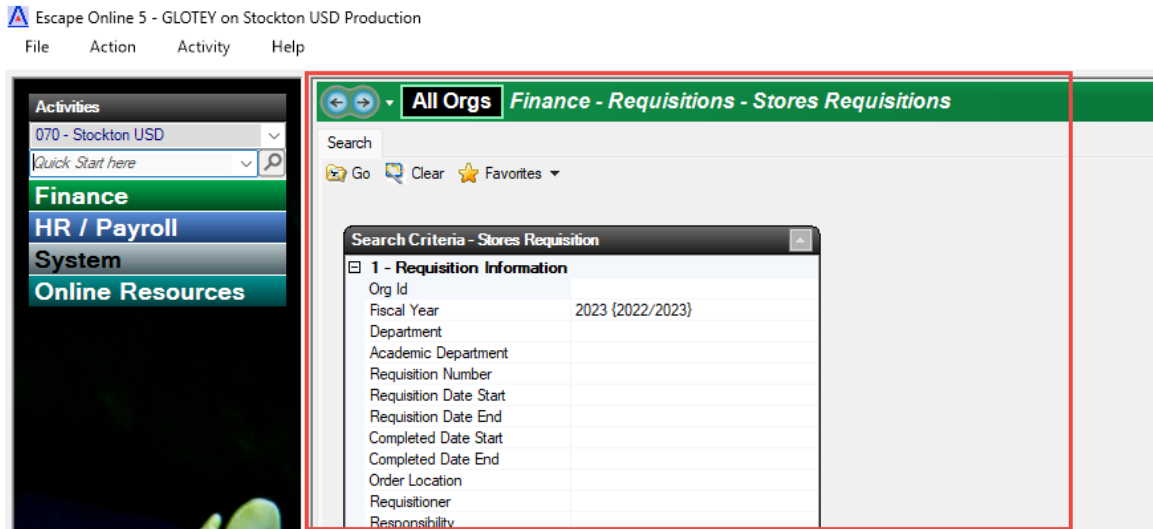


- [Finance](#)
- [HR/Payroll](#)
  - HR – Employee
  - Payroll
- [System](#)
- [Online Resources](#) - **IMPORTANT**
  - Links to documentation for activities, Escape features, Guides, Templates, Written and Video Tutorials
  - \*Note each screen within activities also has **Tools** in the top right of the screen which links to documentation and training guides specific to the screen.



## Navigating Your Open Screens

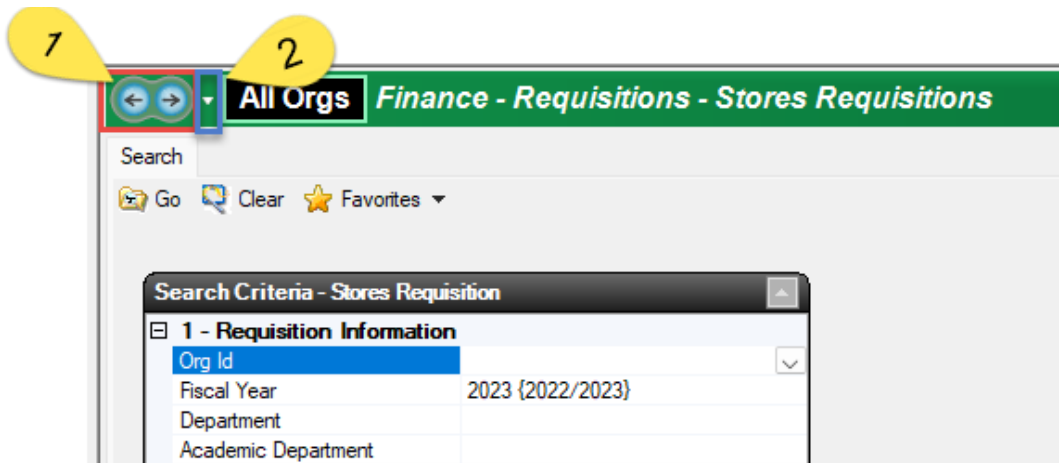
After you select an Activity from the Activity Tree, a screen will open up in the center of the window as shown in the red box below. This is called the Workspace.



When you open a new screen when one is already open it may seem like the previous screen is closed. This is not the case.

There are two ways to navigate to previously opened screens:

1. Clicking the back and forward arrows
2. Clicking the drop down arrow to view all open screens

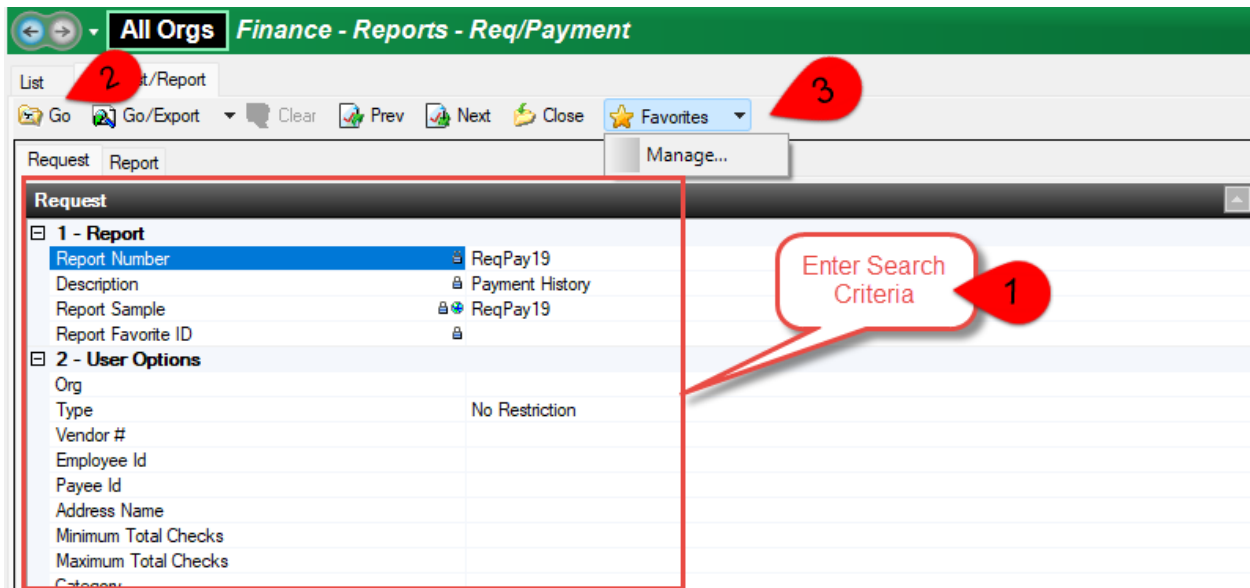


## Favorites

Favorites is a great way to speed up routine searches and report runs

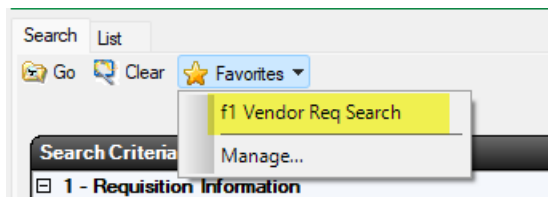
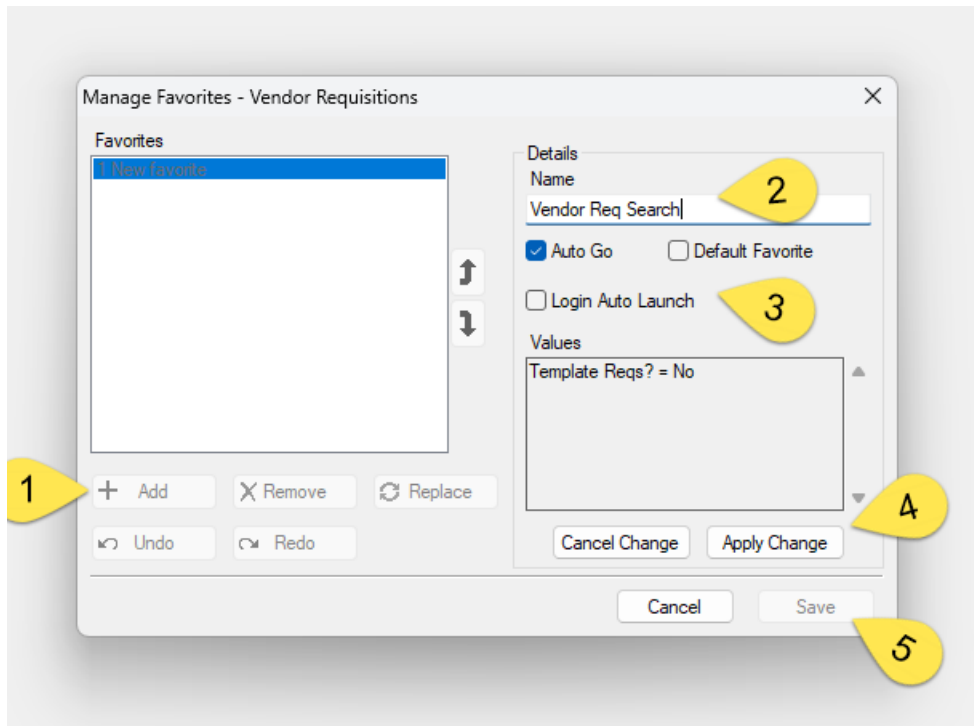
To create a favorite:

1. Enter the Search Criteria
2. Click Go (this will generate a list fitting your search criteria)
3. Click on Favorites -> Manage



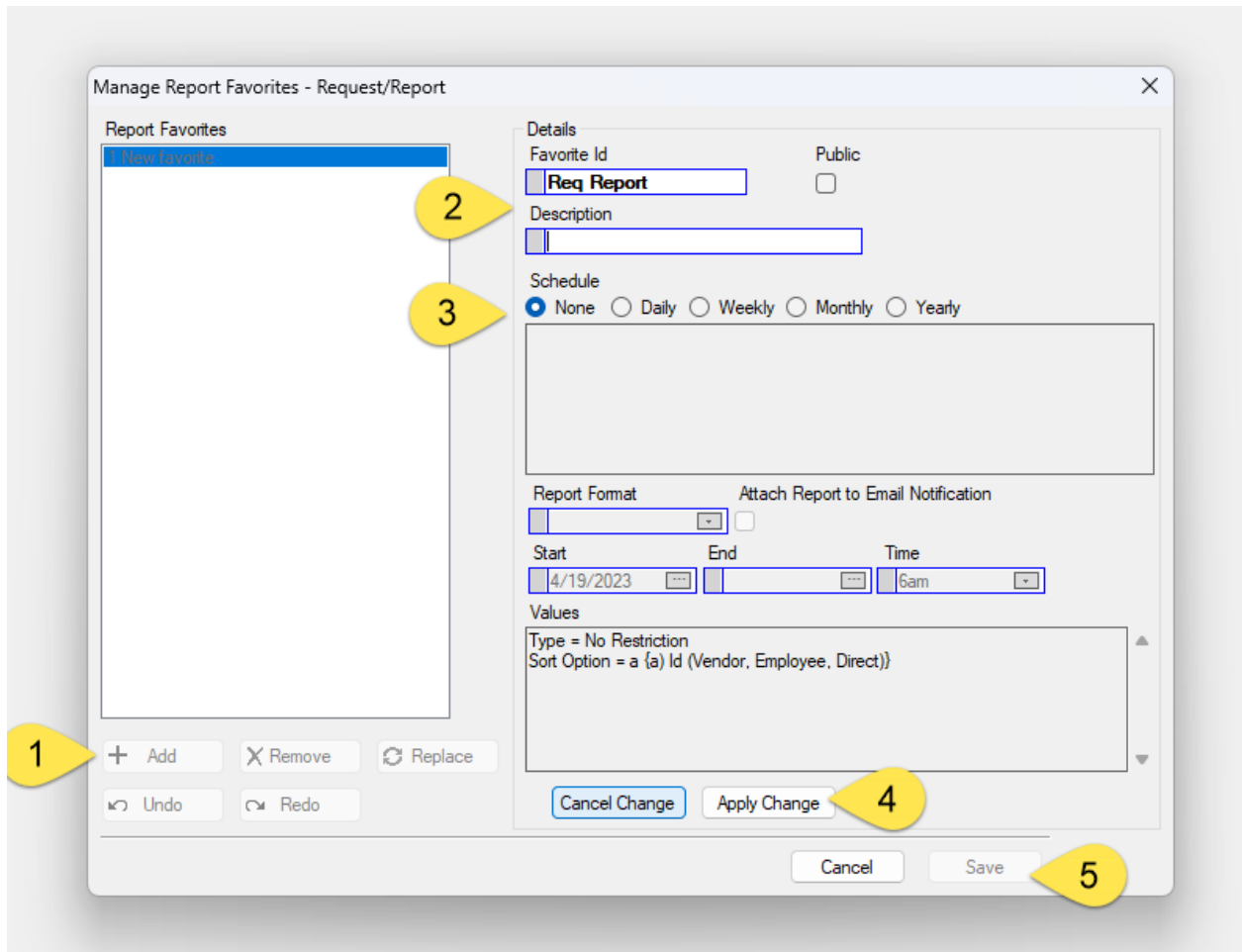
Search Favorites:

1. Click + Add at the bottom left
2. Give a name to your favorite
3. Tic the boxes needed:
  - a. Default Favorite – Will be your default every time in the screen (useful for the most common searches)
  - b. Auto Go – the search will automatically launch when favorite is selected (useful as a 2<sup>nd</sup> default)
  - c. Login Auto Lunch – Not recommended
4. Click Apply Changes
5. Click Save
6. Now when you go to the Favorites menu you'll see your favorite listed for selection.



### Report Favorites:

1. Click + Add at the bottom left
2. Give a report favorite name and description
3. If the report needs to be run on a schedule, select the frequency, format, and run start/end
4. Click Apply Change
5. Click Save
6. You'll now see your newly created favorite in the Favorites drop down
  - a. If the Favorite was created with a schedule the report output can be found under My Reports
  - b. If the Report Favorite was created with the Public box checked, this will be available for other users to see and create their own version





## Reports

Reports are housed under two different modules **Finance** and **HR / Payroll**.

\*Note access to the modules and activities under each module is based on security if you require access to a specific module or activity to complete your tasks reach out to your manager.



(screenshots on next page)

1. Click on Reports – This will display report sub categories
2. Click on the subcategory to view a list of reports
3. Double click a report to run
4. Enter report Criteria
5. Click Go – Your report will display in a new window

**Activities**  
070 - Stockton USD  
Quick Start here

**Finance**

- Budget
- Fiscal
- Requisitions
- AP
- AR
- Assets
- Purchasing
- Stores
- Work Orders
- Processes
- Reports**
  - Admin
  - AR
  - Assets
  - Budget
  - Fiscal
  - Ledger
  - Req/Payment
  - Stores
  - Work Order

Report Description	Report Name
Account Balance Transaction Detail by Object	Fiscal03
Account Component (Object) Summary-Balance	Fiscal01
Account Transaction Detail-Balance	Fiscal17
Budget Detail by Account	Budget04
Requisition Listing	ReqPay02
Requisition Snapshot List	ReqPay21

**070 - SUSD Finance - Reports - Admin**

List Req Report

Go Report Clear Prev Next Close Favorites

Request Report

**Request**

- 1 - Report**
  - Report Number: ReqPay02
  - Description: Requisition Listing
  - Report Sample: ReqPay02
  - Report Favorite ID:
- 2 - Requisition criteria**
  - Fiscal Year: 2023 (2022/2023)
  - Department:
  - Order Location:
  - Starting Requisition Date:
  - Ending Requisition Date:
  - Total Cost Minimum:
  - Total Cost Maximum:
  - Starting Requisition Number:
  - Ending Requisition Number:
  - Requisition Type: No Restriction
  - Requisition Status: No Restriction
  - Category:
  - Order Type: No Restriction
  - Requisitioner:
  - Created by User Id:
  - On Hold?: Yes - include reqs on hold

## My Reports

This activity houses data of your previously ran reports. It will house how the report were ran (selection criteria) and the resulting data (report copy) which was output.

## **Quick Keys Cheat Sheet**

Escape has a quick cheat sheet guide for common shortcuts, symbols and commands:

<https://help.frontlinek12.com/Documents/ERPCA/Guides/QuickKeys.pdf>