



Business System Navigation Quick Reference Guide

Key Navigation Features

Click the **Menu** button to display the Menu Pane, which lists all the Business modules and screens.

Click **Help** on any screen to display field descriptions and instructions.

Each module includes multiple screens. When you click the module name on the Menu Pane, the system displays the first screen in the module, along with **tabs** across the top of the screen. Each tab shows the name of a screen.

To display another screen within the same module, just click the appropriate tab.

Menu Pane

When you click the Menu button, the **Menu Pane** is displayed. The Menu Pane lists all the screens available to you.

Click **+** to expand the list of screens.

Click **-** to hide the list of screens.

Function Icons

Function icons are displayed below the Menu button. Depending upon the screen you are looking at, different icons are displayed.

- Print** a copy of the current screen.
- Attach** a file to a record or display an existing attachment.
- Select a **Report** (blue) to print or a **Process** (red) to run.
- Display a list of processes in the **Job Queue**.
- Import** data from a spreadsheet to fields on the screen.
- Export** the displayed screen data to a spreadsheet.
- Log Out** of the system.

Screen Header

The **Breadcrumb Trail** shows "where you are" in the menu structure.

Basic information about the currently displayed record is shown in the screen header.

Many screens include a **Search Box** so you can quickly search for and display a different record. Type letters or numbers of the ID to start the search.

The current **fiscal year** is displayed when you sign on. Click the year if you need to change to a different fiscal year.



Action Buttons

<< Req Void Save & Continue Save & Post Clear Clone Add

Action Buttons are provided at the very bottom of each screen to enable you to perform a specific action. The buttons that are displayed vary by screen.

Click **Clear** to undo entries or changes you have made. This does not undo changes to a saved record.

Click **Add** to display a new screen of fields so you can add a new record.

Click **Clone** to copy the details of the currently displayed record to create a new record.

Click **Save** to save new or changed data.

Click **Save & Continue** to save the data you have entered but not post it.

This button enables you to resume data entry later.

Click **Save & Post** to save the data and post it.

Click **Delete** to remove the currently displayed record.

Click **Void** to void the currently displayed record.

Yellow buttons (such as Req above) function like a Back button, but they redisplay the previous related screen. **Example:** If the Finance > Requisition > Header screen is displayed, clicking the Req button redisplay the Finance > Requisition > Search screen.

Options Button

The **Options** button in the top right enables you to set the currently displayed screen as the default sign-on screen and to change your password.

Options Help

Iti-Year Comparison

User Info Change Password

Name: SMITH, Jane
Login ID: guest
Last Login: Tuesday, April 30, 2013 01:02 PM

Name:
Acct. Type:
Exclude Cl:

Current default screen:
Finance > Inquiry > Accounts > Search

Set Current Screen as Default

To make the currently displayed screen be the first screen you see each time you sign on, click **Set Current Screen as Default** in the User Info tab.

To change your password, click the **Change Password** tab, enter a new password, then click **Save**.

User Info Change Password

Password:
Confirm Password:

Clear Save

Favorites List of Screens

Click the **Favorites icon** to display the Favorites list and the History list.

Finance > Inquiry > Accounts > Search

Menu

☆ Favorites close


- HR / Payroll > Employees > Job and Payment > Deta...
- HR / Payroll > Fill Vacancy Request > Search
- HR / Payroll > Position Control > Search
- HR / Payroll > Timesheet > Search
- System Admin > Security > Users

History

- Finance > Inquiry > Accounts > Search

The **Favorites icon** gives you direct access to the screens you use most. You can add and delete screens from the list as needed.

To display a screen in the **Favorites** or **History** list, click the underlined screen name.

To add a screen to the **Favorites** list, first display the screen, click the Favorites icon, then click the Add icon  that appears to the left of the screen name in the History list.