# **ERP Job Aid** RI Enterprise Resource Planning



This guide consists of tips and tricks within the ERP System.

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### Home Page

The ERP system home page allows you to quickly access important dates, applications, and announcements.

The home page consists of worklets that display based on your security role within the ERP system. A typical homepage allows you to:

- Access the Menu for a list of applications.
- Search the ERP system to initiate tasks, to run reports, or to find information.
- View Notifications.
- Access your Inbox and Tasks requiring your attention.
- Access your Worker Profile.
- View Timely Suggestions.
- Access Important Dates.
- View items Recommended for You.
- View All Apps.
- View Announcements.

To return to the home page at any time, select the anchor logo in the top left corner.



# Menu

The Menu resides on the ERP system's navigation bar and provides access to various Apps (applications) and saved Shortcuts. You can add, rearrange, and remove Apps from the Menu.

#### Add Apps:

1. In the ERP system, select the Navigation Menu at the top left corner of the toolbar.



- 2. From the Apps tab, select (+) Add Apps.
- **3.** Type in an app name to search.
- 4. From the search results, to add an App, select the plus-sign icon.
- 5. To see the app added to the Menu, select Back to Menu.



# **Rearrange or Remove Apps:**

To remove an app:

- 1. In the ERP system, select the Navigation Menu at the top left corner of the toolbar.
- 2. From the Apps tab, select Edit.
- **3.** To remove, select the minus-sign icon.

#### To rearrange the order of the apps:

- 1. In the ERP system, select the Navigation Menu at the top left corner of the toolbar.
- 2. From the Apps tab, select Edit.
- **3.** Select and drag the app you want to move.
- 4. To save your changes, select Save Changes.

#### **Add Shortcuts:**

 In the ERP system, select the Navigation Menu at the top left corner of the toolbar, and then select the Shortcuts tab.



 To personalize your Shortcuts menu with commonly accessed tasks, reports, or external links, select the Add Shortcuts icon. In the Find Shortcuts search bar, enter the desired task, report, or external link and select the (+) icon to add it to your Shortcuts.

#### Remove a Shortcut:

- In the ERP system, select the Navigation Menu at the top left corner of the toolbar, and then select the Shortcuts tab.
- **2.** Select Edit.



3. To remove, select the minus-sign icon.

# Search Bar

The **Search Bar** is a quick way to find data or tasks. When using the search bar, you can use prefixes, a partial word, or a partial name.

(Note: To see a list of available prefixes, type in "?" in the ERP system search bar and then select enter on your keyboard.)

# Notifications

Notifications alert you to valuable information and do not require action.

#### **To view Notifications:**

1. In the ERP system, select the bell icon in the upper right-hand corner.



2. To manage notifications, select Viewing, and then select All or Unread.



3. To sort your notifications, select Sort By, and then select Newest on Top or Oldest on Top.

#### **System Account Preferences:**

1. In the ERP system, select your photo (or photo icon) at the top right corner of the toolbar.





- 4. Scroll down to the heading Channel, and then scroll through each Notification Type.
- By default, you will be on the Email notification delivery channel. (If not, select the Email tab.) To change the Frequency of when you receive an email notification for a specific Notification Type, scroll to a Notification Type, select the menu icon, and then make your selection, i.e., Daily, Immediately or Mute.

Channel		
Parent Notification Type	Absence Management	
Notification Type	Schedule Distribution: Request Time Off/Req	uest Absence
Frequency *	× Daily ∷	
	Search	
	O Daily	
Notification Type	O Immediately	
Frequency *	O Mute	

(Note: The ERP System primarily uses work email addresses for recipients of email notifications.) (Note: The Mobile Push Notification tab is when the ERP system pushes notifications through Apple Push Notifications and Google Cloud Messages, and the only Frequency option is 'Immediately'.) (Note: The Pop-up notification tab is not applicable to the State of Rhode Island.)

- 6. To save your changes, select OK.
- 7. Select Done.

### Inbox

The Inbox provides access to items that require your attention.

#### **To view Inbox:**

1. In the ERP system, select the inbox icon in the upper right-hand corner.



- To sort the tasks, select the display options icon, and then under Sort By, select Newest on Top, Oldest on Top, or Due Soonest on Top.
- 3. To change the display density of the tasks, select the display options icon, and then under **Display Density**, select **Simple** or **Detailed**.
- 4. To change the date appearance, select the display options icon, and then under **Date View**, select **Absolute** or **Relative**.
- 5. To search for a task, type a task name or a key word in the inbox search bar, and then select "enter" on your keyboard.

(Note: You can create a saved search to be reused for later.)

Q Search: Search Results
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6. To create a saved search, select Save, type in a title for your saved search, and then select Save.



7. To view Saved Searches, in the box right-side navigation, select **Saved Searches**, and then select a saved search.



8. To view all items in the inbox again, select the arrow preceding Search Results.

# ← Search Results

- 9. To manage filters, select Filters, and then select Manage Filters, Favorites, Overdue, or Delegated to Me.
- **10.** To see completed or previously initiated tasks, including approvals:
  - **a.** In the inbox right-side navigation, select **Archive**.
  - b. To sort the tasks, select the display options icon, and then under Sort By, select Newest on Top, Oldest on Top, or Due Soonest on Top.
  - c. To change the display density of the tasks, select the display options icon, and then under Display Density, select Simple or Detailed.
  - **d.** To change the date appearance, select the display options icon, and then under **Date View**, select **Absolute** or **Relative**.
  - e. To search for a task, type a task name or a key word in the inbox search bar, and then select 'enter' on your keyboard.

Q Search: Search Results

**11.** To approve tasks in bulk, select **Bulk Approve**, select the tasks to complete, and then select **OK** to approve or select **Cancel** to return to your inbox.

#### **Inbox Filters:**

Creating and saving filters allows you to refine the list of tasks in your ERP system inbox. You can create filters that apply to all business processes or for specific business processes and tasks. Filters can also contain conditions, providing more control over which actions display in your inbox.

- 1. Select My Tasks.
- 2. To create a filter, under My Tasks, select Filters.
- 3. Select Manage Filters.
- 4. Select Create My Tasks Filter.
- 5. To name the filter, type in a **Description**.
- 6. Under View Definition, select either:
  - a. For all Business Processes This filter will apply to all business processes, or
  - **b.** Business Process Type(s) This filter will apply to the selected business processes.

My Tasks Filter	(empty)	
Description *		
Maximum Row Limit	200	-
View Definition		
* O For all O Busine	Business Processes ess Process Type(s)	
O Busine	ess Process Type(s)	:=

- 7. To specify task(s) to include in a filter:
  - a. Select the Task(s) dropdown, and then select the task(s) you want to include.



- 8. To add Conditions to the filter, under Conditions select the plus-sign icon.
  - **a.** Select an And or an Or operator.
  - **b.** Select a **Source External Field**.
  - c. Select a Relational Operator.
  - d. Select a Comparison Type.
  - e. Select a Comparison Value.
  - f. Select OK and then select Done.
  - g. To apply the filter to your inbox, select My Tasks.
  - h. Under My Tasks, select Filters, and then select your newly created filter.
  - i. To remove a filter, under My Tasks, select All Items.

#### **Inbox Archive:**

You can view inbox items from the last 90 days.

- 1. Select My Tasks.
- 2. Under My Tasks, select Archive.
- 3. To sort your archived items, select Display Options.
  - a. To sort by newest, select Newest on Top.
  - **b.** To sort by oldest, select **Oldest on Top**.

#### **Error and Alert Messages**

Error messages and alert messages appear when updating or submitting information: Red error messages indicate that a task cannot be completed until the error is resolved. Orange error messages notify you of valuable information and do not prevent the task from being completed.

# **Navigation Tips**

Below is a list of useful icons you can use in the ERP system.

• **Related Actions** – Select the related actions icon to open a menu of options.



Filter – Select the filter icon to add a filter.



• Edit – Select the pencil icon to edit.



• Save Changes – Select the checkmark icon to save changes.

• Export to – Select the Excel icon to export to Excel.



• **Options** – Select the gear icon to perform actions related to the page.



• Expand or Full Screen – Select the expanding arrows to see a report, chart, etc., in full screen mode.



# Reports

You can use the ERP system search bar to find and run reports. You can use the categories on the left side on the search results to further refine the search results.

#### Search for a Specific Report:

- 4. Using the Workday Search Bar, type in the name of the report.
- **5.** Select the report from the search results (that appear as you type.)
- (Note: Search results may vary based on your security access.)

(Note: Depending upon the report selected, you may be prompted to enter more information.)

Q	Find Purchase Orders
Ē	Find Purchase Orders Report

#### Search for a Report Using a Keyword:

- 1. Using the Workday Search Bar, type in a keyword, and then select enter.
- (Note: The ERP system does not recognize misspelled words.)
- 2. To refine your search and to view reports that match your search, select Tasks and Reports.
- **3.** Select a report from the search results.

≡м	ENU	Ĵ		Q Purchase	$\otimes$
				Simplified Search is Disabled	
Д	Save Peopl	<b>d Categories</b> e	~ 1	Tasks and Reports	
Г	Tasks	and Reports	29	Report	
:=	More	Categories	>	<u>Purchase Order to Print</u> Report This advanced report enables administrators to view when the delivered <b>purchase</b> order print layout is used to send <b>purchase</b> orders to suppliers.	
				Purchase Order Lines not Received   Report   This Advanced report uses the Purchase Order Lines report data source, enabling you to list Purchase   Order Lines for goods with unreceived quantities.   Purchase Orders for Date Range by Company   Due to	
				This report provides <b>Purchase</b> Orders issued by Company. You can specify the date ranges to narrow the <b>Purchase</b> Orders returned.	
				Find Purchase Items Report Use this report to search for <b>purchase</b> items with search criteria you know. Example: Item Identifier, Spend Category, Item Group, or Item Tags. Find Purchase Orders	
ද්දා	Conf	gure Search		Report View <b>purchase</b> order information for all selected <b>purchase</b> orders. Details include version, company, PO status, memo, supplier, PO date, due date, amount, currency, supplier contract, and a list of receipts and	
0	View	Search Tips		invoices for each <b>purchase</b> order. You can drill into the receipts and invoices for more information. Required prompt: none Optional prompts: Company, Supplier, <b>Purchase</b> Order, <b>Purchase</b> Order Date, Due Date, Contract, Requisition, Requester, Invoice, Created by Worker, Approving Worker, Worktags	

#### **Configure Search:**

- **1.** Using the Workday Search Bar, type in the name of the report and select enter.
- 2. Use the toggle icon to disable Simplified Search.

Q Search		
Simplified Search is Disabled		
3. Select Configure Search.		
錼 Configure Search		
⑦ View Search Tips		

- 4. Drag and drop commonly accessed categories to the Saved Categories field.
- 5. Select Save.

(Note: These categories will now appear when you use the Search field.)

Con	Configure Your Search ×			
Drag a	and drop to reorder both lists.			
Saved What a	Saved Categories What are the categories you would like to search first? (Minimum of 1)			
	People			
	Tasks and Reports			
	Procurement			
More What	Categories are the categories you do not want to show?			
	Staffing			
	Projects			
	Assets			
	Banking and Settlement			
	Expenses			
	Financial Accounting			
	Grants			
	Revenue			
	Inventory			
	Budgets			
	Organizations			
	Recruiting			
	Student			
	Security			
	Integrations			
	Reporting			
	Processes			
	Drive			
S	Gancel			

#### **Reporting Tools:**

• Filter Only – Select the filter icon to add a new filter (or filter by selecting each column heading).



• View/Edit Grid Preferences – Select the grid icon to change the column structure by dragging and dropping.



• Fullscreen Viewing Mode – Select the expanding arrows icon to see the report in full-screen mode.



• **Export to Excel** – Select the Excel icon to export the report to Excel.



• Export to Worksheet – Select the worksheet icon to export to Worksheet.

Support: DOA.ERPFINANCE@doa.ri.gov



• **Expand/Collapse Chart** – Select chart icons to expand or collapse the chart.



• Collapse Rows – Select the collapse rows icon to collapse the rows.



• Expand Rows – Select the Expand Rows icon to expand the rows.

