ERP Job Aid
RI Enterprise Resource Planning

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

Contents

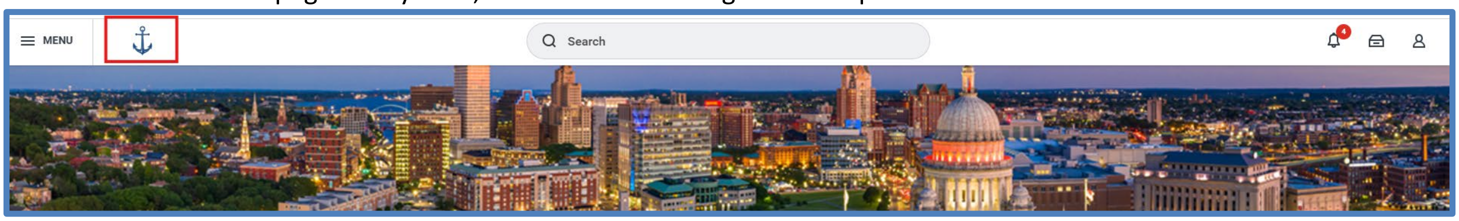
Home Page

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.



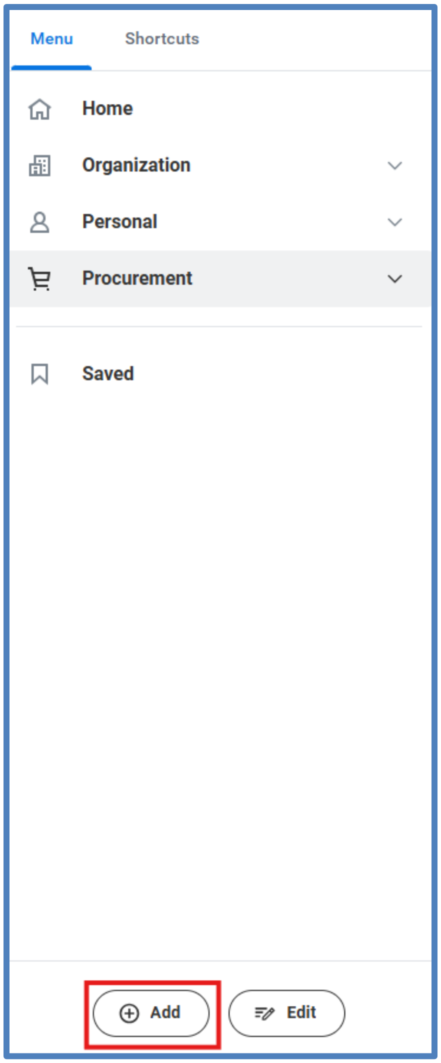
Menu

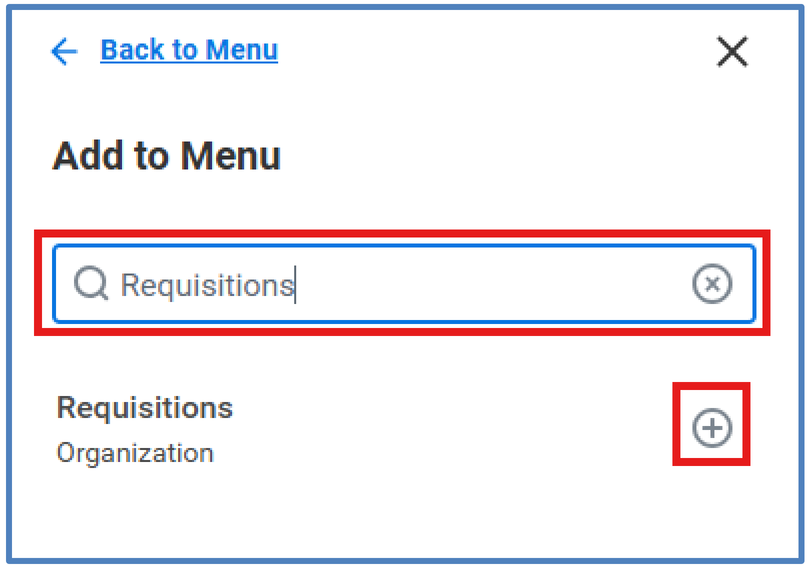
The **Menu** resides on the ERP system's navigation bar and provides access to various **Apps** (applications) and saved **Shortcuts**. You can add, rearrange, and remove **Apps** from the **Menu**.

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:

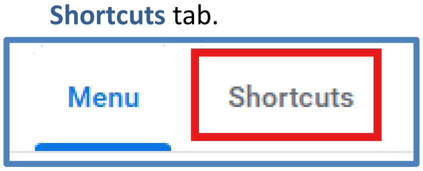
1. In the ERP system, select the Navigation **Menu** at the top left corner of the toolbar.
2. From the **Apps** tab, select **Edit**.
3. To remove, select the minus-sign icon.

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:

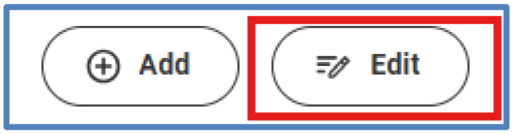
1. In the ERP system, select the Navigation **Menu** at the top left corner of the toolbar, and then select the **Shortcuts** tab.



2. 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:

1. 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.)*

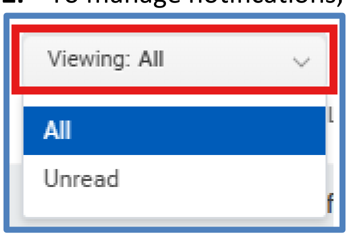
Notifications

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.

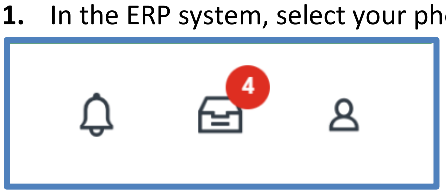
2. To manage notifications, select **Viewing**, and then select **All** or **Unread**.



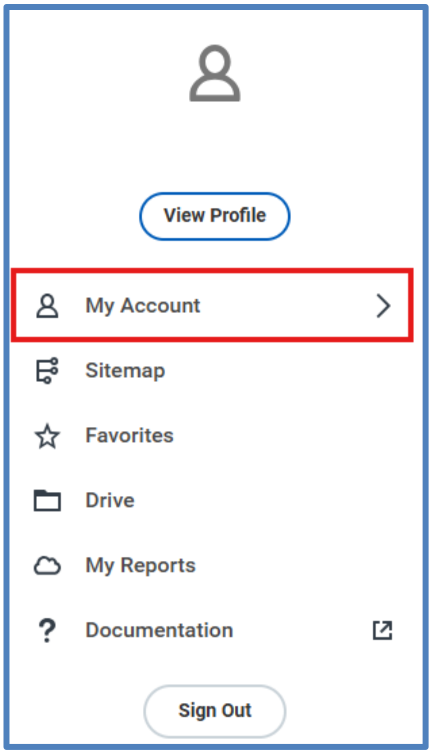
3. To sort your notifications, select **Sort By**, and then select **Newest on Top** or **Oldest on Top**.

System Account Preferences:

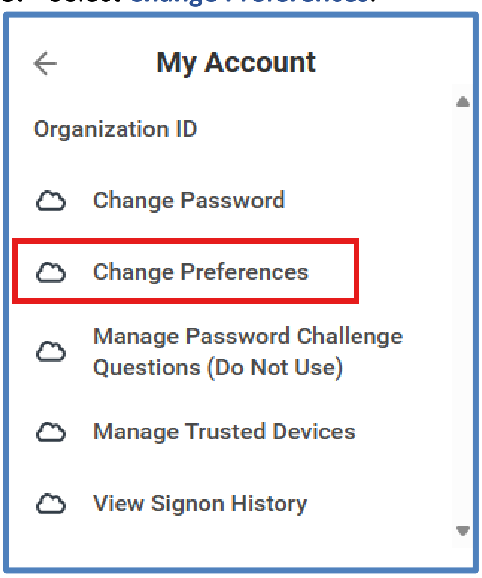
1. In the ERP system, select your photo (or photo icon) at the top right corner of the toolbar.



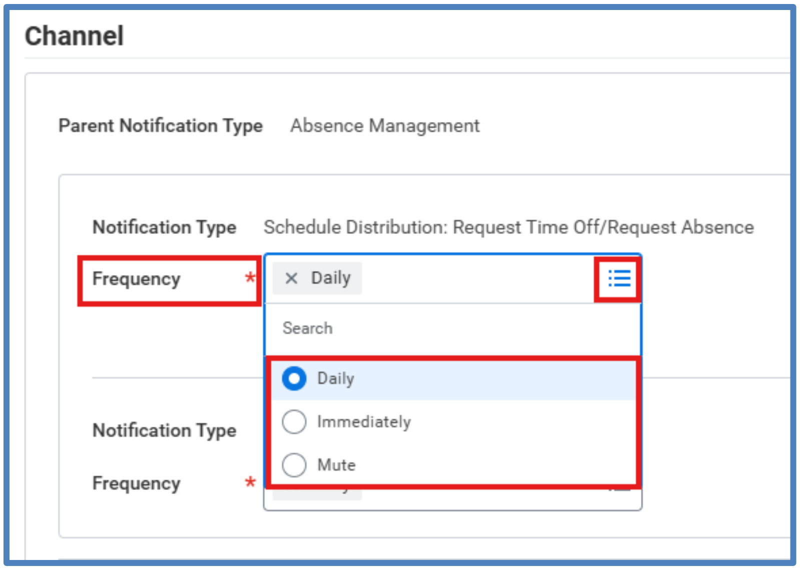
2. Select **My Account**.



3. Select **Change Preferences**.



4. Scroll down to the heading **Channel**, and then scroll through each **Notification Type**.
5. 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**.



(**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.)*

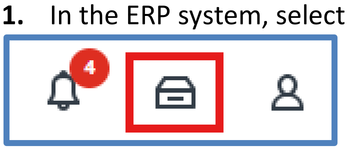
6. To save your changes, select **OK.**
7. Select **Done.**

Inbox

The Inbox provides access to items that require your attention.

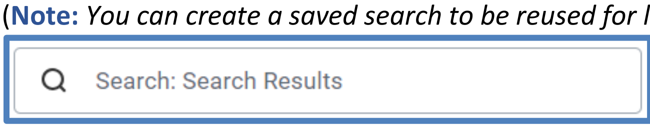
To view Inbox:

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

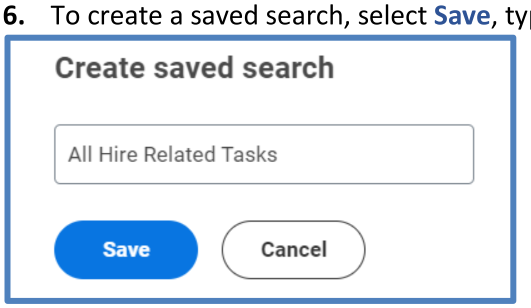


2. To sort the tasks, select the display options icon, and then under **Sort By**, select **Newest on Top**, **Oldest on Top**, or **Due Soonest on Top**.
3. To change the display density of the tasks, select the display options icon, and then under **Display Density**, select **Simple** or **Detailed**.
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.

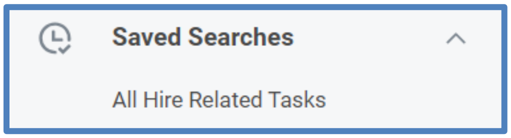
(**Note:** *You can create a saved search to be reused for later.)*



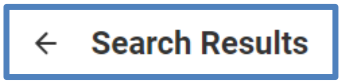
6. To create a saved search, select **Save**, type in a title for your saved search, and then select **Save**.



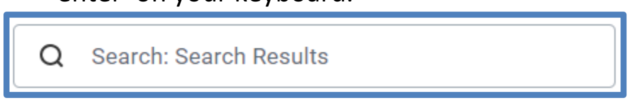
7. To view Saved Searches, in the box right-side navigation, select **Saved Searches**, and then select a saved search.



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



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.

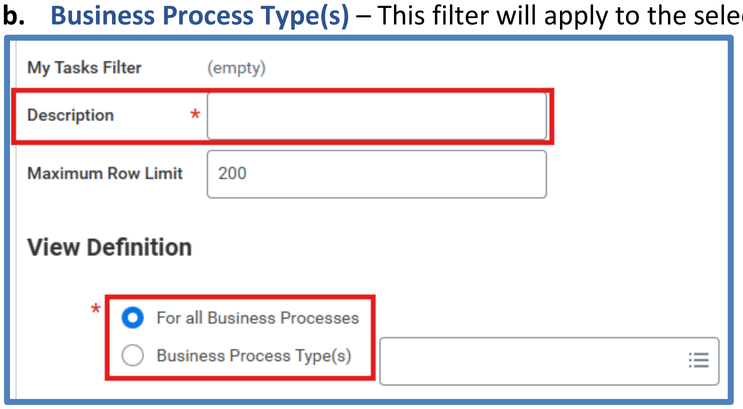


11. To approve tasks in bulk, select **Bulk Approve**, select the tasks to complete, and then select **OK** to approve or select **Cancel** to return to your inbox.

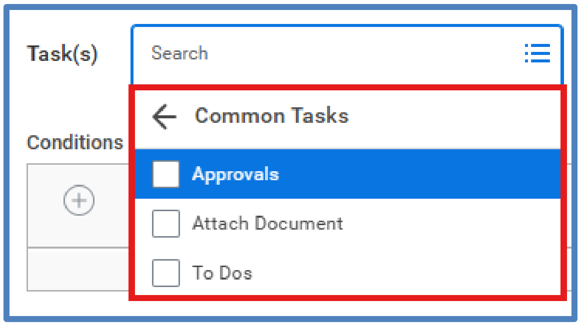
Inbox Filters:

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.



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**.

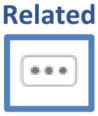
Error and Alert Messages

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.



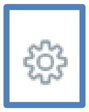
- **Filter** – Select the filter icon to add a filter.

- **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.

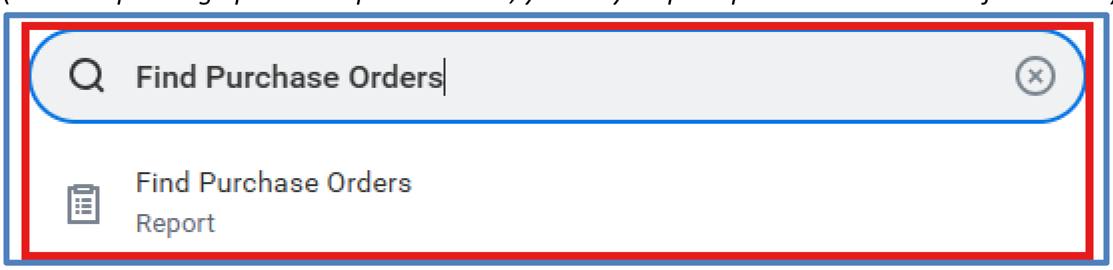
Reports

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.)*

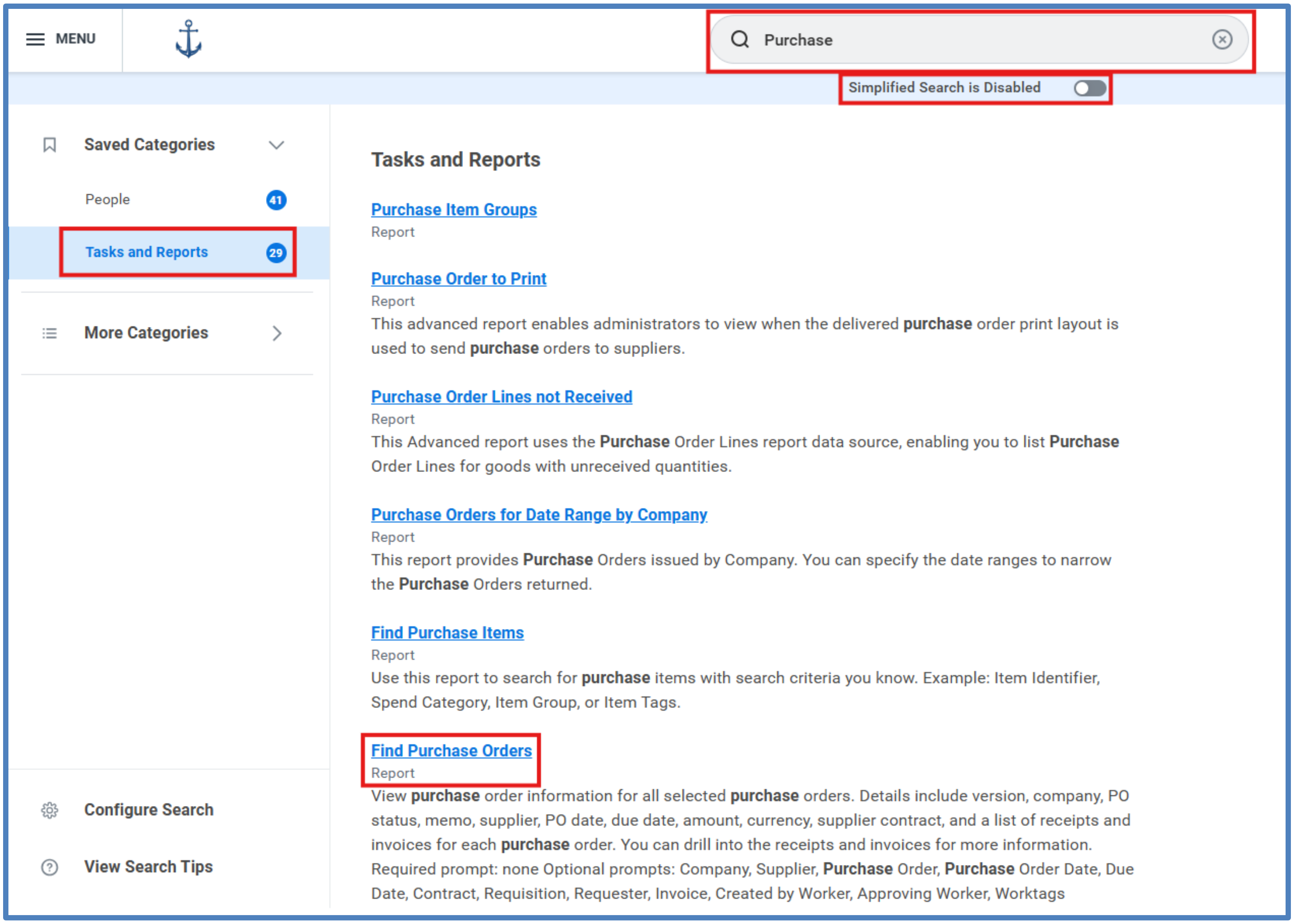


Search for a Report Using a Keyword:

1. Using the Workday Search Bar, type in a keyword, and then select enter.

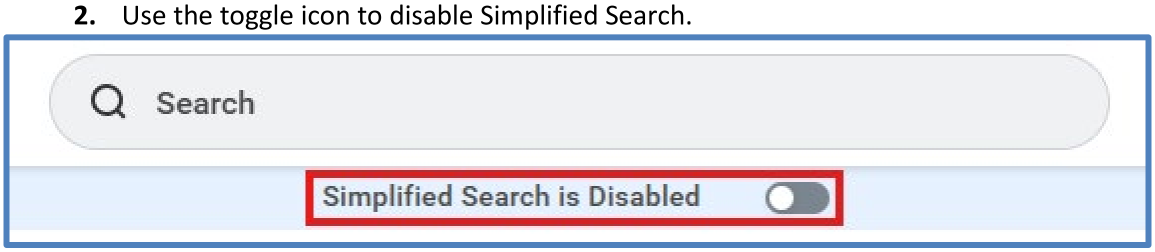
(**Note:** *The ERP system does not recognize misspelled words.)*

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.

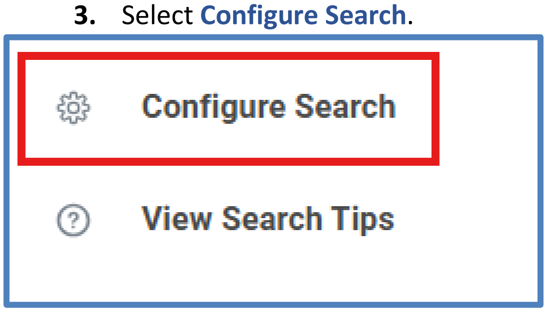


Configure Search:

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.

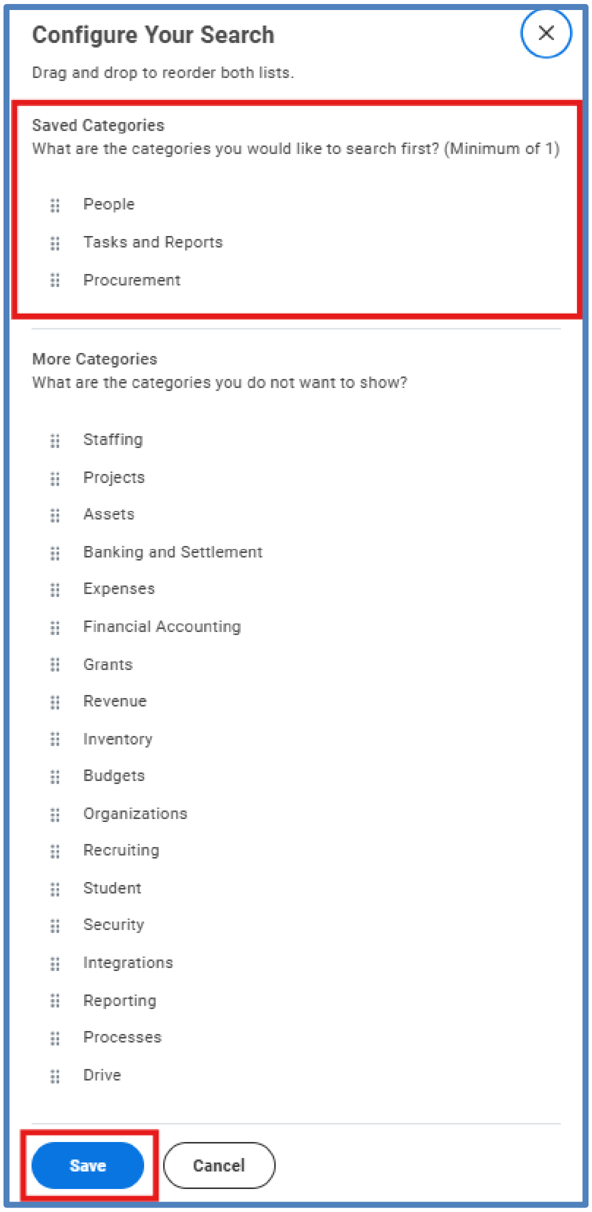


3. Select **Configure Search**.



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.)*

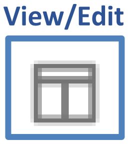


Reporting Tools:

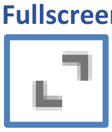
- **Filter Only** – Select the filter icon to add a new filter (or filter by selecting each column heading).

- **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.

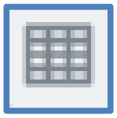
- **Export to Excel** – Select the Excel icon to export the report to Excel.

- **Export to Worksheet** – Select the worksheet icon to export to Worksheet.

- **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.