BG@100 FMS

BGSU/ PeopleSoft
Financial Management Solutions (FMS)
Principal Investigator's
Training Guide

BG@100 FMS

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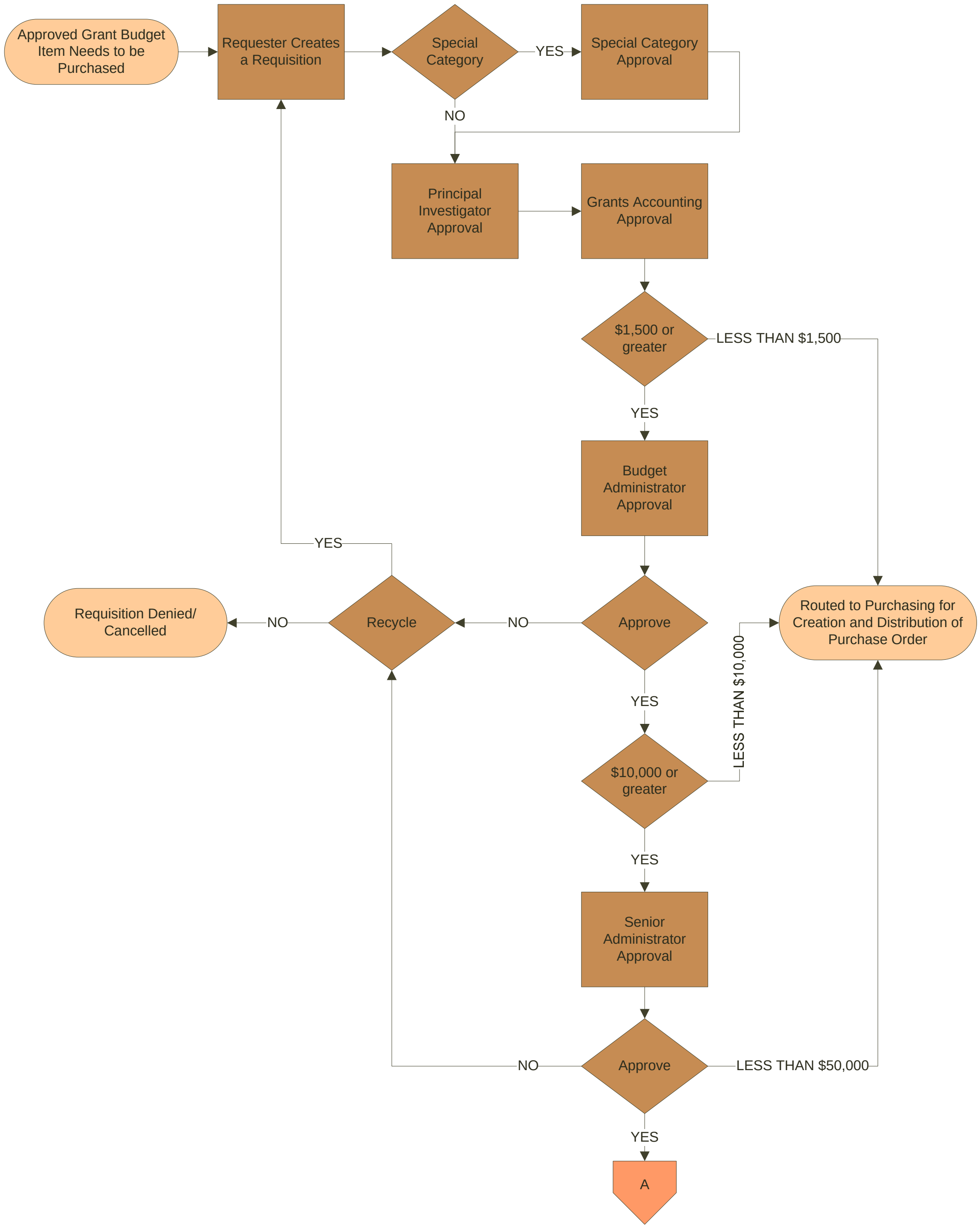
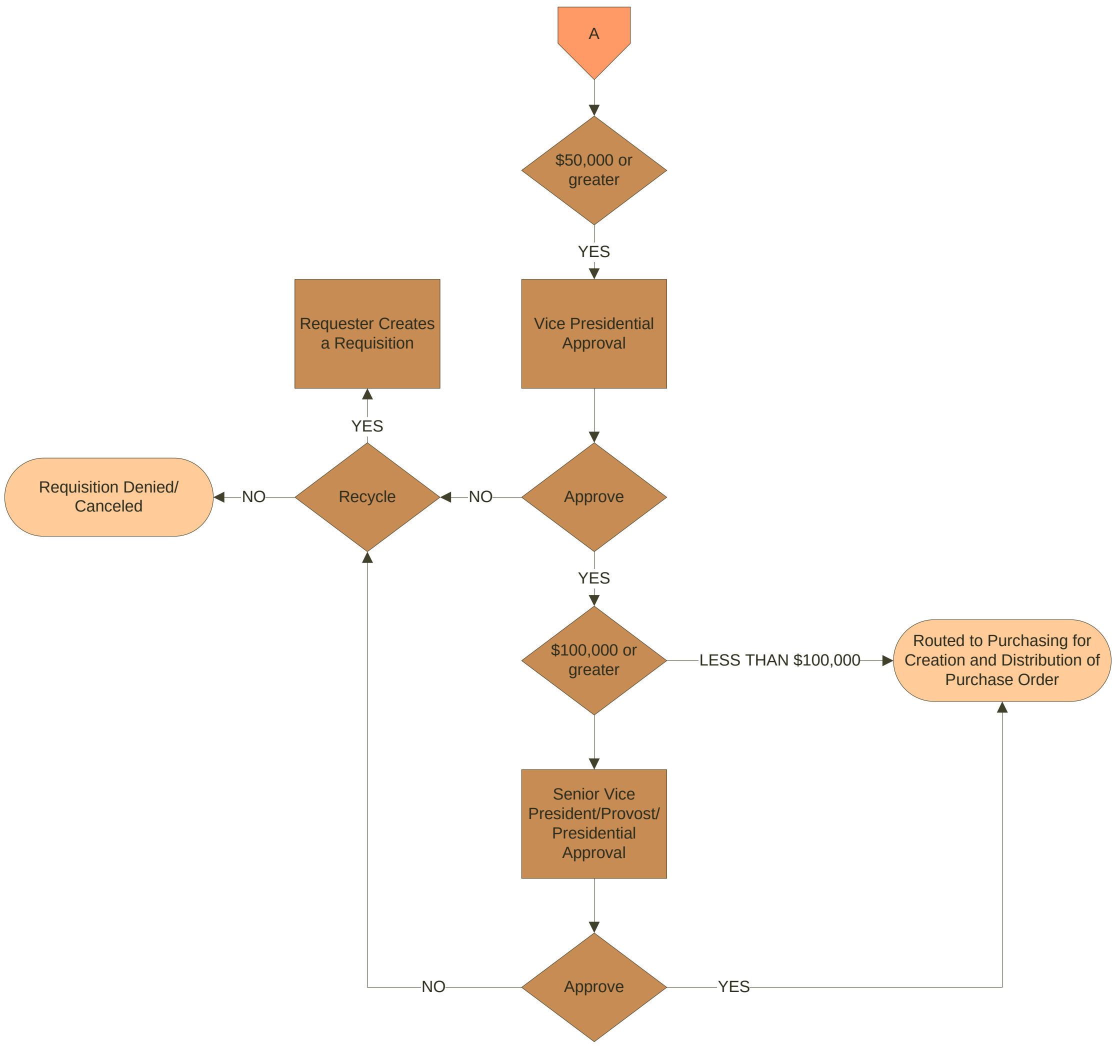
Financial Management Solutions
Requisition Approval Workflow for a Grant



Financial Management Solutions
Requisition Approval Workflow for a Grant
continued



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Signing in to PeopleSoft Financial Management Solutions (FMS)

Use the following steps to sign in to PeopleSoft FMS.

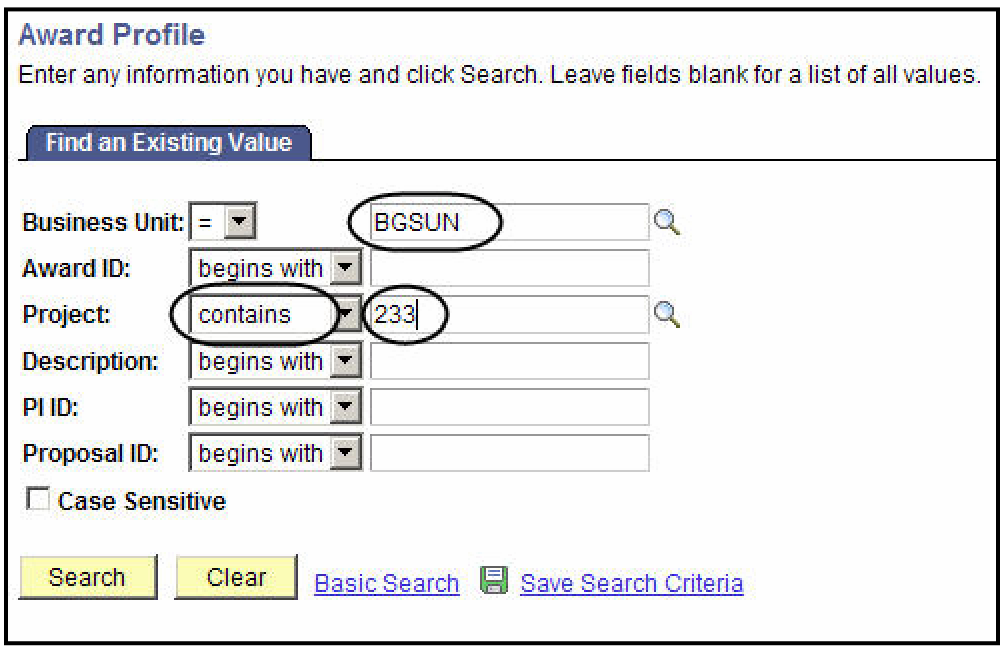
1. Open a web browser.
2. Enter **fms.bgsu.edu** in the Address text box.
3. Press the Enter key.
   The FMS Sign In screen is displayed.
4. Enter your BGNet Username and password.
5. Click the **Sign In** button. 

How to View an Award

Use the following steps to view an award:

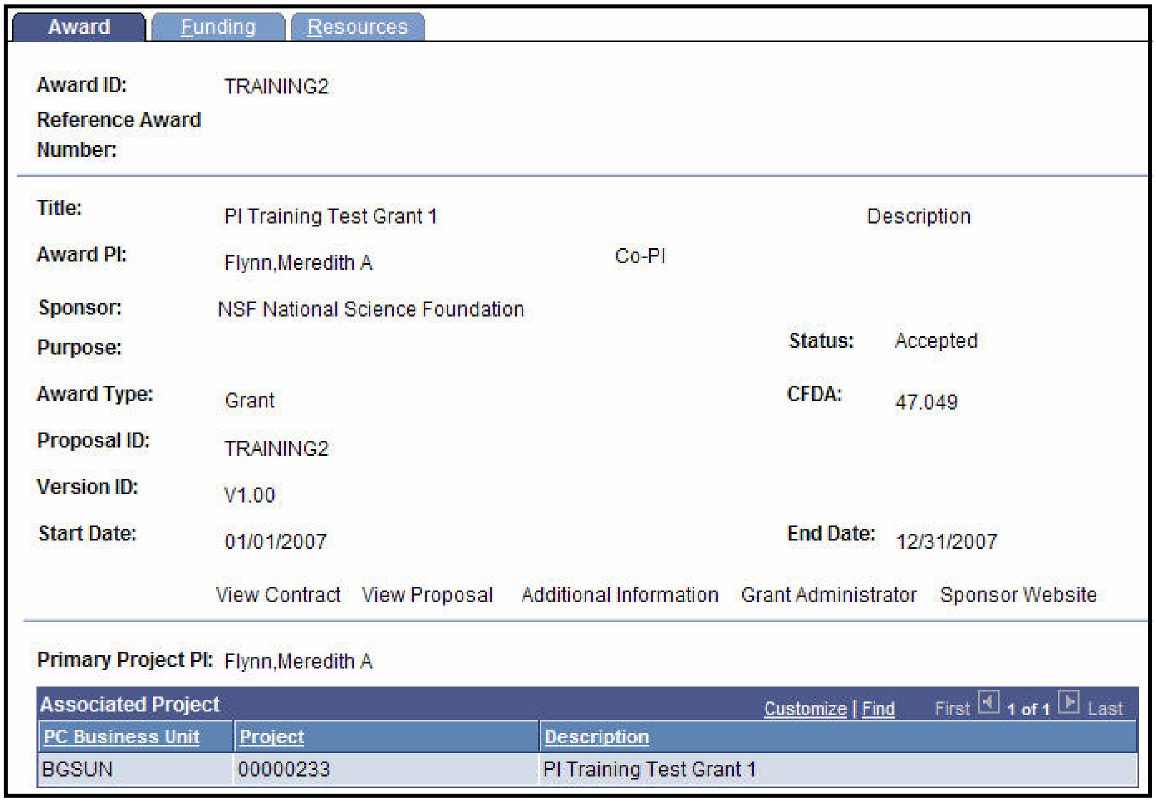
1. Sign in to FMS and click **Grants**, **Awards**, **Award Profile**.

2. The Award Profile page is displayed. Make sure that **BGSUN** is entered at the Business Unit. Change the Project drop-down box to **contains**. Enter the project number in the Project field. In the example below we are looking at the award profile for Project 233.



3. Click Search. The Award Profile is displayed as shown below. Check the following information for completeness and accuracy:

   - Title
   - Award PI
   - CFDA (if applicable)
   - Start Date of the award
   - End Date of the award



Award | Funding | Resources

Award ID: TRAINING2

Reference Award Number:

Title: PI Training Test Grant 1 Description

Award PI: Flynn,Meredith A Co-PI

Sponsor: NSF National Science Foundation

Purpose: Status: Accepted

Award Type: Grant CFDA: 47.049

Proposal ID: TRAINING2

Version ID: V1.00

Start Date: 01/01/2007 End Date: 12/31/2007

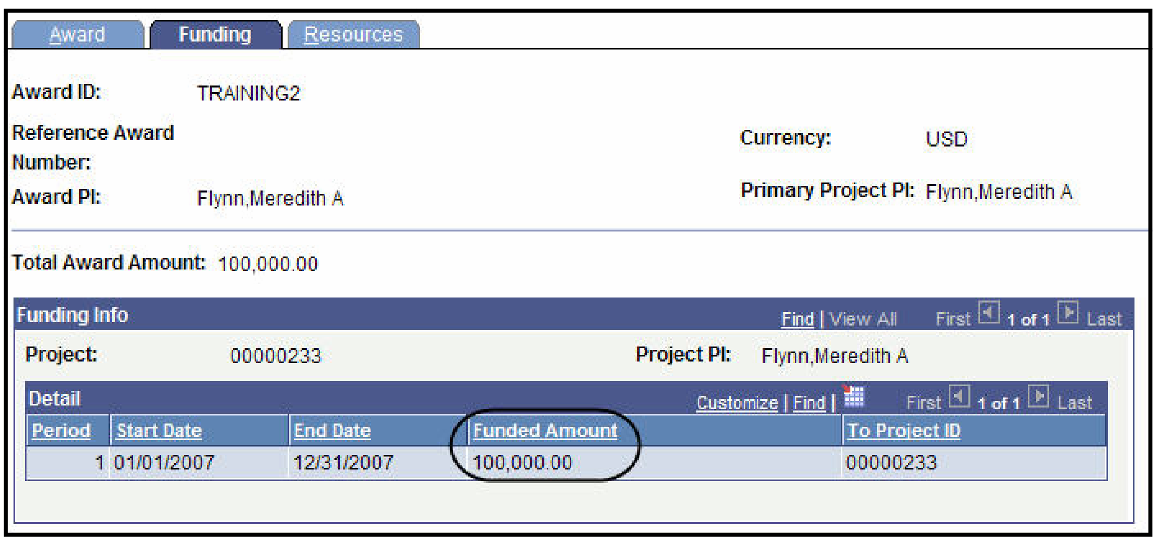
View Contract View Proposal Additional Information Grant Administrator Sponsor Website

Primary Project PI: Flynn,Meredith A

Associated Project Customize | Find First 1 of 1 Last

PC Business Unit	Project	Description
BGSUN	00000233	PI Training Test Grant 1

4. Click the **Funding** tab. Here you see the total funded amount.



Award | Funding | Resources

Award ID: TRAINING2

Reference Award Number: Currency: USD

Award PI: Flynn,Meredith A Primary Project PI: Flynn,Meredith A

Total Award Amount: 100,000.00

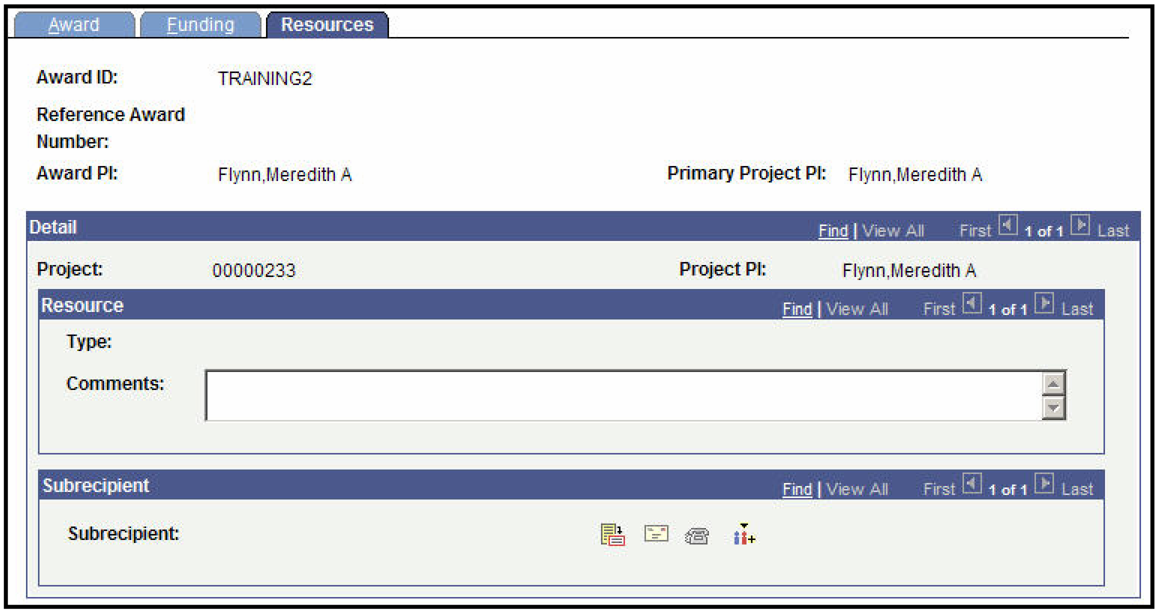
Funding Info Find | View All First 1 of 1 Last

Project: 00000233 Project PI: Flynn,Meredith A

Detail Customize | Find | First 1 of 1 Last

Period	Start Date	End Date	Funded Amount	To Project ID
1	01/01/2007	12/31/2007	100,000.00	00000233

5. Click the **Resources** tab. If an award includes a subcontract to another entity, this is where the information for that subcontract will be stored.



QUICK STEPS

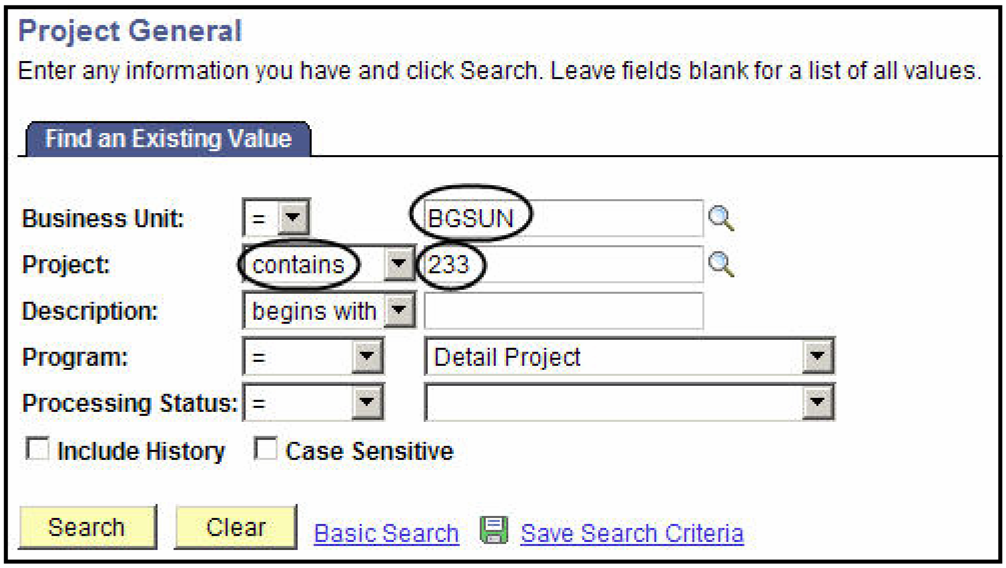
- ***To view an award:***
  - Click **Grants**, **Awards**, **Award Profile**
  - The **Award** tab contains general information about the award
  - The **Funding** tab displays the total funded amount
  - The **Resources** tab contains information for a subcontract if applicable

How to View a Project

Use the following steps to view a project:

1. Sign in to FMS and click **Grants**, **Awards**, **Project**.

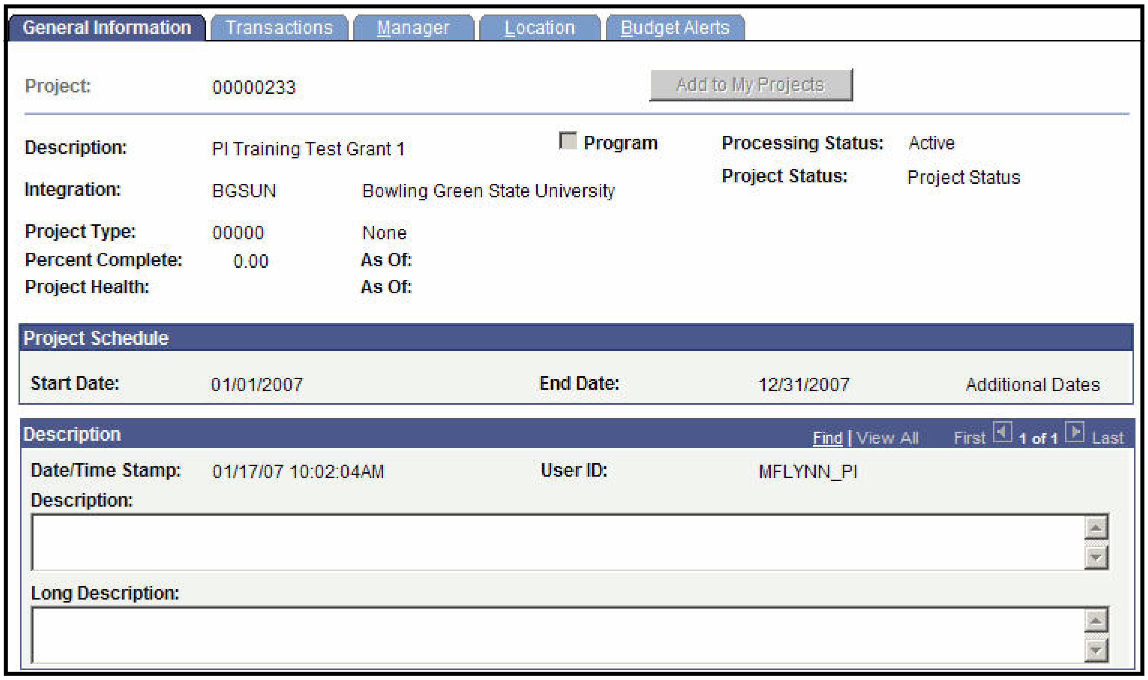
2. The Project General page is displayed. Make sure that **BGSUN** is entered at the Business Unit. Change the Project drop-down box to **contains**. Enter the project number in the Project field. In the example below we are looking at Project 233.



3. Click 

. The Search Results are displayed. Click the link to the project.

4. The **General Information** tab is displayed.



5. Click the **Manager** tab.

QUICK STEPS

- ***To view a project:***
  - Click **Grants**, **Awards**, **Project**
  - The two tabs you are interested in are **General Information** and **Manager**

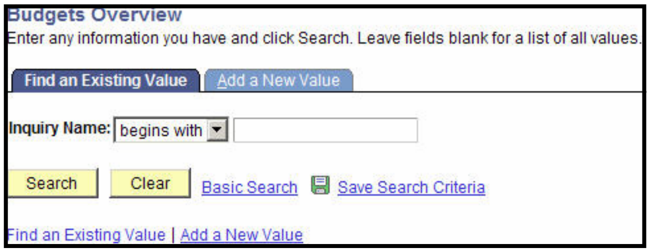
Viewing Your Budget

Use the following steps to create a budget inquiry:

1. Sign in to FMS.
   The Menu Pagelet is displayed at the left of the screen.

2. Click **Commitment Control**.
   The Commitment Control Navigation Page is displayed.

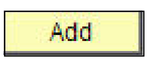
3. Click **Budgets Overview** in the **Review Budget Activities** folder.
   The Budgets Overview search page is displayed. In order to create an inquiry you have to select the Add a New Value tab.



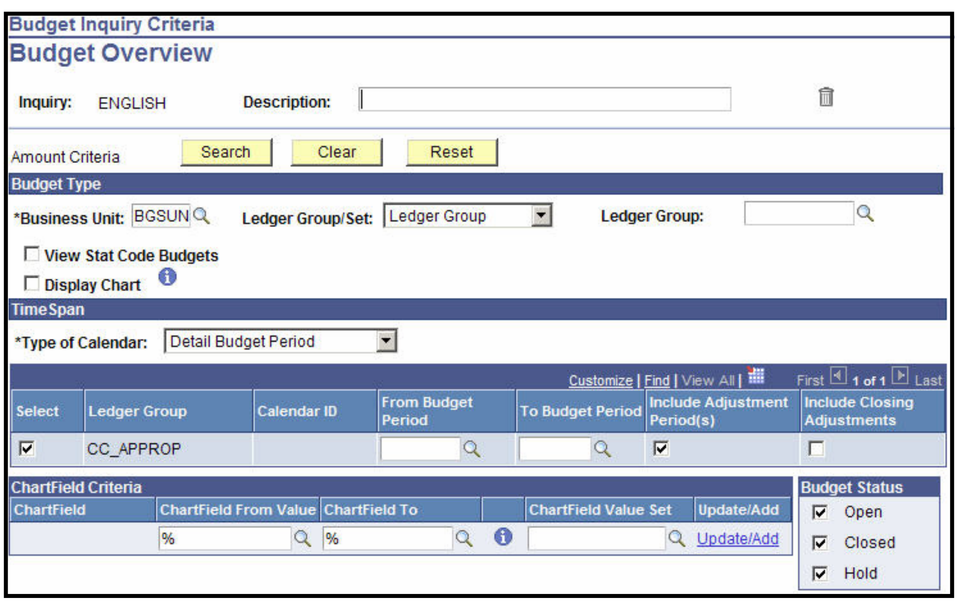
BUDGET TYPE

4. Click the **Add a New Value** tab.
   The Budgets Overview – Add a New Value page is displayed.

5. Enter a name for your budget inquiry in the **Inquiry Name** text box.
   This names the inquiry for future use.

6. Click 

.
   The Budget Inquiry Criteria page is displayed.



7. Make sure **BGSUN** is entered as the Business Unit.

8. Click next to Ledger Group.

   The possible Ledger Groups are displayed.

Look Up Ledger Group

SetID: BGSUN

Ledger Group: begins with

Look Up | Clear | Cancel | Basic Lookup

Search Results

View All — First 1-9 of 9 Last

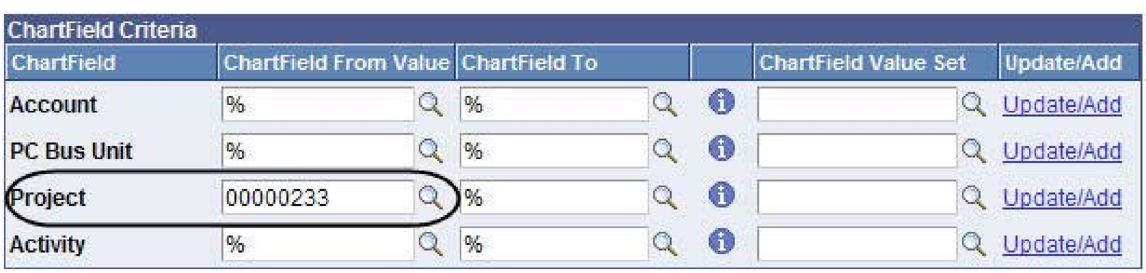
Ledger Group	Description	Ledger Group Type
CC_APPROP	Appropriation Ledger Group	Expense
CC_DETAIL	Detail Ledger Group	Expense
CC_GRANT	Detailed Budget	Expense
CC_LINE_AP	Line Item Budget Group	Expense
CC_LN_ATH	BUDGET LEDGER-APPROP-ATHL	Expense
CC_PROJECT	Projects Ledger Group	Expense
CC_P_G_REV	PROJECT-GRANT REVENUE BUDGETS	Revenue
CC_REV	Revenue Ledger Group	Revenue
CC_REV_INC	Revenue Incrementation Ldg Grp	Revenue

9. Click **CC_GRANT**.

   You are returned to the Budget Inquiry Criteria page.

CHARTFIELD CRITERIA

10. Enter your Project/Grant number in the **Project** text box found in the ChartField From Value column. The example below uses Project #00000233.

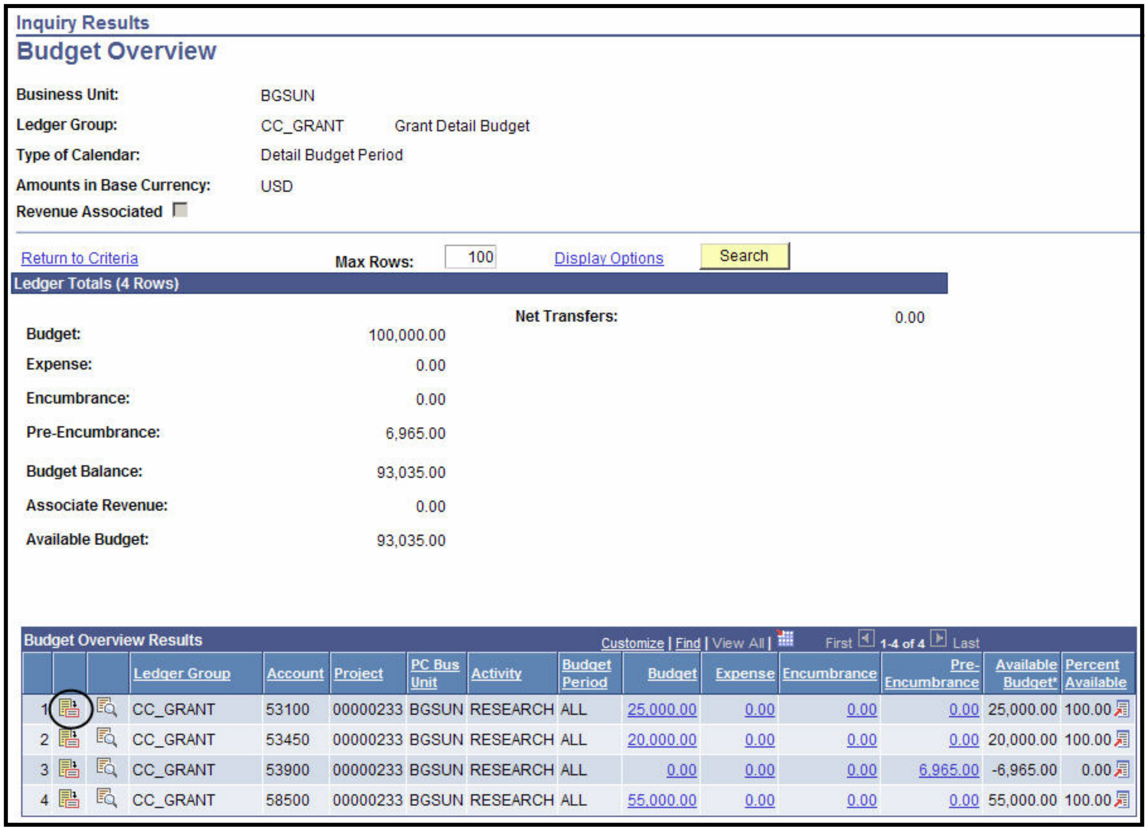


ChartField Criteria

ChartField	ChartField From Value	ChartField To		ChartField Value Set	Update/Add
Account	%	%			Update/Add
PC Bus Unit	%	%			Update/Add
Project	00000233	%			Update/Add
Activity	%	%			Update/Add

11. Click Search.

The Budget Overview page is displayed.



Inquiry Results

Budget Overview

Business Unit: BGSUN
Ledger Group: CC_GRANT Grant Detail Budget
Type of Calendar: Detail Budget Period
Amounts in Base Currency: USD
Revenue Associated

Return to Criteria Max Rows: 100 Display Options Search

Ledger Totals (4 Rows)

Budget:	100,000.00
Expense:	0.00
Encumbrance:	0.00
Pre-Encumbrance:	6,965.00
Budget Balance:	93,035.00
Associate Revenue:	0.00
Available Budget:	93,035.00
Net Transfers:	0.00

Budget Overview Results Customize | Find | View All | First 1-4 of 4 Last

	Ledger Group	Account	Project	PC Bus Unit	Activity	Budget Period	Budget	Expense	Encumbrance	Pre-Encumbrance	Available Budget*	Percent Available
1	CC_GRANT	53100	00000233	BGSUN	RESEARCH	ALL	25,000.00	0.00	0.00	0.00	25,000.00	100.00
2	CC_GRANT	53450	00000233	BGSUN	RESEARCH	ALL	20,000.00	0.00	0.00	0.00	20,000.00	100.00
3	CC_GRANT	53900	00000233	BGSUN	RESEARCH	ALL	0.00	0.00	0.00	6,965.00	-6,965.00	0.00
4	CC_GRANT	58500	00000233	BGSUN	RESEARCH	ALL	55,000.00	0.00	0.00	0.00	55,000.00	100.00

12. To see details for any of the account numbers, click (Show Budget Details) for that line.

The Budget Details page is displayed.

13. Click OK.

14. Click Save to save this inquiry.

Once you have added and saved a new Budget Overview Inquiry, you can use that inquiry to view your budget.

Use the following steps to view a budget inquiry:

1. Sign in to FMS.
   The Menu Pagelet is displayed at the left of the screen.

2. Click **Commitment Control**.
   The Commitment Control Navigation Page is displayed.

3. Click **Budgets Overview** in the **Review Budget Activities** folder.
   The Budgets Overview search page is displayed. In order to create an inquiry you have to select the Add a new Value tab.

4. Click the **Find an Existing Value** tab.
   The Budget Overview page is displayed.

5. Click Search. If you have only created one Budget Inquiry, you will be brought immediately to the budget overview for that inquiry. If you have created more than one inquiry, the Search Results are displayed. Just click the name of the inquiry containing the budget you want to view and the budget overview will be displayed.

QUICK STEPS

- ***To create a budget inquiry:***
  - Commitment Control > Review Budget Activities > Budgets Overview
  - Click **Add a New Value** tab
  - Enter a name for the inquiry and click Add
  - Make sure **BGSUN** is entered as the Business Unit
  - For the Ledger Group select **CC_GRANT**
  - Enter your Project/Grant number
  - Click Search
  - Click (Show Budget Details) to see the details for a specific account

- ***To view your budget using an inquiry that has been created:***
  - Commitment Control > Review Budget Activities > Budgets Overview
  - Click the **Find an Existing Value** tab
  - Click Search
  - If necessary, click Search again

Anatomy of a Requisition Approval Page

At the top of the page is general information about the requisition such as the requisition number and the name of the requester. Clicking the Requisition Details link enables you to see greater detail, such as the vendor name and the Ship To location.

Requisition Amount Approval

Unit:	BGSUN	Req:	0000000444	Requester:	Training Requester1 — Requisition Details
*Approval Action:	Approve	Approval Status:	In Process	View Printable Req	

A requisition can be approved, recycled, or denied. Clicking the **Approval Action** drop-down box enables you to select the appropriate action option. The options for the Approval Status are *In Process* and *Complete*. Clicking the **View Printable Req** button builds a PDF file of the requisition that you can then view.

Comments: The Comments section is used if you recycle or deny a requisition. In the Comments section you would enter the reason why the requisition was denied.

Comment

This requisition has been denied. The workshop for which we were purchasing this has been canceled.

Amounts Details: The Amounts Details section shows the date the requisition was entered and the total amount.

Amount Details

Requisition Date:	11/06/2006	
Total Amount:		1,797.750 Dollar
Total Base Amount:		1,797.750 Dollar

Line Details: The Line Details section provides more detail. Here you see a description of the item(s) ordered, the quantity ordered and the item price.

Line Details Customize | Find | First 1-3 of 3 Last

Line	Sched	Status	Description	Category ID	UOM	Req Qty	Item Price	Amount	Currency	Buyer	RFQ Required
1	1	Active	MFG#FA1-12 Background Paper Wh	00055	EA	20.0000	39.95000	799.00	USD	MIRELAN	N
2	1	Active	MFG# FA20-12 Background Paper	00055	EA	15.0000	39.95000	599.25	USD	MIRELAN	N

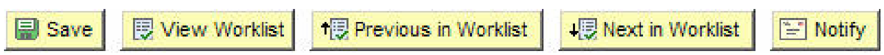
Distributions/Chartfields: The **Distributions/ChartFields** section shows you the Fund, Department Cost Center, and Account. The Department Cost Center (DCC) is what used to be the Agency/Org number and designates a department that is based on a fiscal year period. If the requisition is for a Project or a Grant, the Project/Grant chartfield and the Activity Chartfields will be displayed instead of the DCC.

You may also see requisition lines referencing other DCCs or Project/Grants outside of your area of appropriation. In this instance, the costs are being shared with another DCC or Project/Grant. Such requisitions will need to be approved by all the parties involved.

Distributions/ChartFields — Customize | Find | First 1-3 of 3 Last

Line	Sched	Distrib	Amount	GL Unit	Fund	DCC	Account	Program	Project/Grant	Activity	Rev Class
1	1	1	799.00	BGSUN	10000	006100	53900				
2	1	1	599.25	BGSUN	10000	006100	53900				
3	1	1	399.50	BGSUN	10000	006100	53900				

Processing Buttons: The Processing Buttons enable you to save the approval action, view your entire worklist, view the previous requisition in your worklist, view the next requisition in your worklist and, send an email with a link to the page you are presently viewing. ***NOTE:*** The recipient of the mail must have the same or higher level of security to access and view the page.



Other Links—In the upper right corner of the page there are a number of other links.

New Window enables you to open a new window in FMS and perform another task. By opening a new window you can perform more than one task at the same time.

Help accesses PeopleSoft FMS help screens.

Customize Page enables you to make changes to some of the page settings such as the order of where the mouse pointer moves when the tab key is pressed.

http copies the URL of the current page to the clipboard.

Home takes you back to the FMS Menu Pagelet.

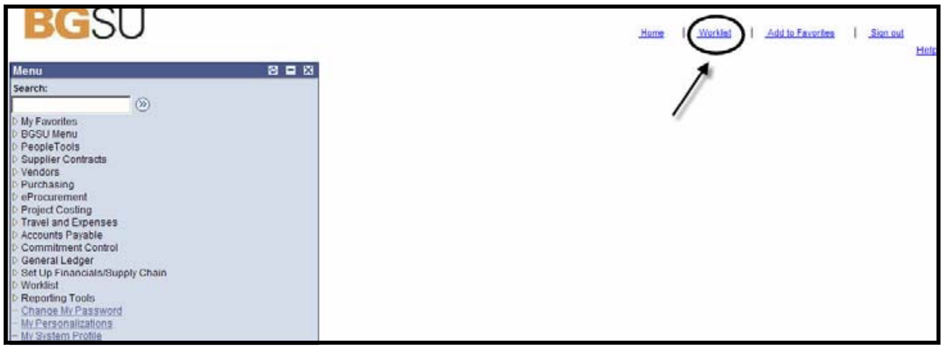
Add to Favorites enables you to mark a page you use frequently so that you can open that particular page quickly and easily.

Sign out signs you out of the system. Clicking Sign out is the proper way to end your FMS session.

Approving a Requisition

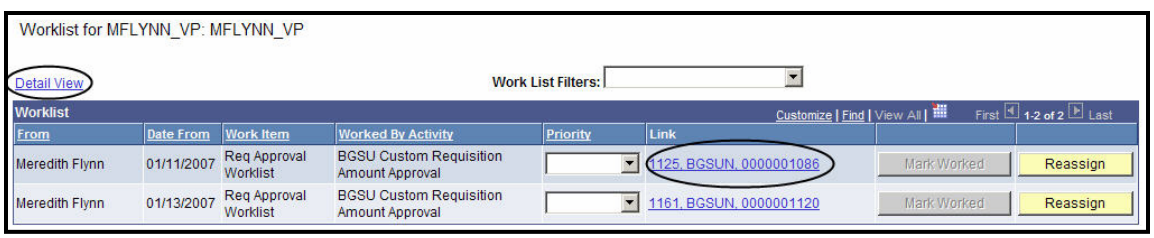
Use the following steps to view and approve a requisition:

1. Sign in to FMS and click Worklist.



2. Close the Menu Pagelet by clicking on the Close button in the upper right corner.

3. Your Worklist is displayed. Your screen should look similar to the one below:



4. When you first access your worklist, it is in summary view. To see more detail, click the Detail View link. Scroll across to see all the columns that are now displayed. For example, you can now see the Comments column. If someone reassigns a requisition to you, any comments that person has added will be displayed in this column.

5. Click the link to the requisition. For example, in the screen above you could click the link to requisition 1086.

6. To see more details on this requisition, click the Requisition Details hyperlink. A new window is opened.

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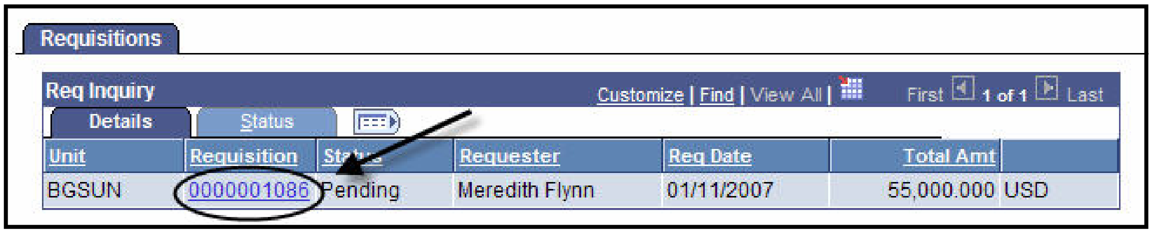
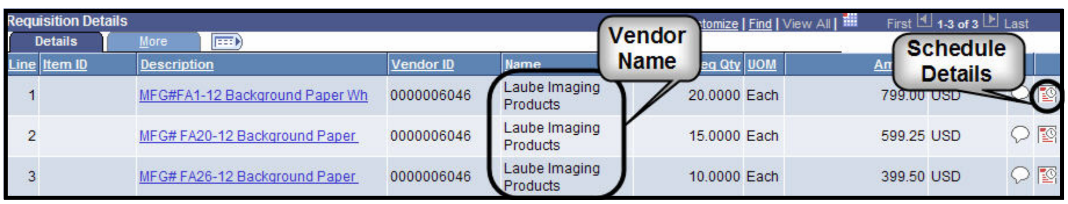
7. Click the Maximize button to maximize the window.

8. Click the **Requisition** link. In the example below you would click the link to requisition 1086.



9. The Line Details page is displayed. You can now see who the Vendor is. Click the **Schedule Details** button at the end of the line.



10. The Shipment Details page is displayed. Click the **Ship To** link to see the Ship To address.

11. The Ship To address is displayed as shown on the following page.

12. Click OK. The Shipment Details page returns.

13. Click Return. The Line Details page returns.

14. Click Return. You are back to the original Requisitions page.

15. Close the window by clicking the close button in the upper right corner of the window. Do not close the window using the Sign Out link. This will exit you out of the FMS session.

16. You are going to approve this requisition. The default Approval Action is Approve. Click Save.

17. Notice at the top of the page the Approval Status now says “In Progress”. The requisition has now been sent to Grants Accounting for completion. You have finished approving this requisition.

Quick Steps

➤ ***To Approve a Requisition:***

- Click the Worklist Link.
- Click the link to the requisition.
- To see the Vendor click the Requisition Details link and the link to the requisition. A new window opens.
- To see the Ship To address click the Schedule Detail s icon and click the **Ship To** link.
- Close the new window that was opened.
- Click Save to approve the requisition.

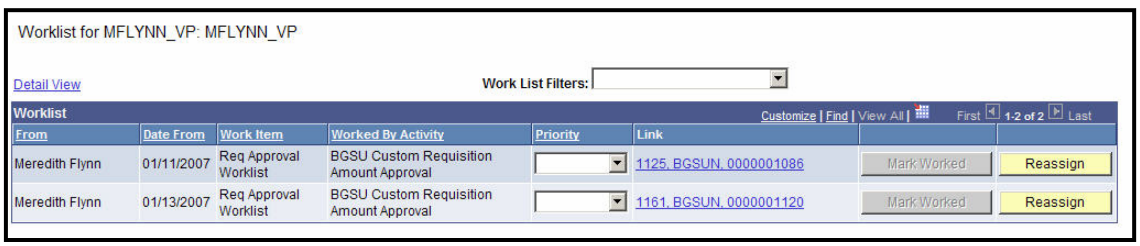
Denying a Requisition

Use the following steps to view and recycle a requisition:

1. Sign in to FMS and click Worklist.

2. Close the Menu Pagelet by clicking on the Close button in the upper right corner.

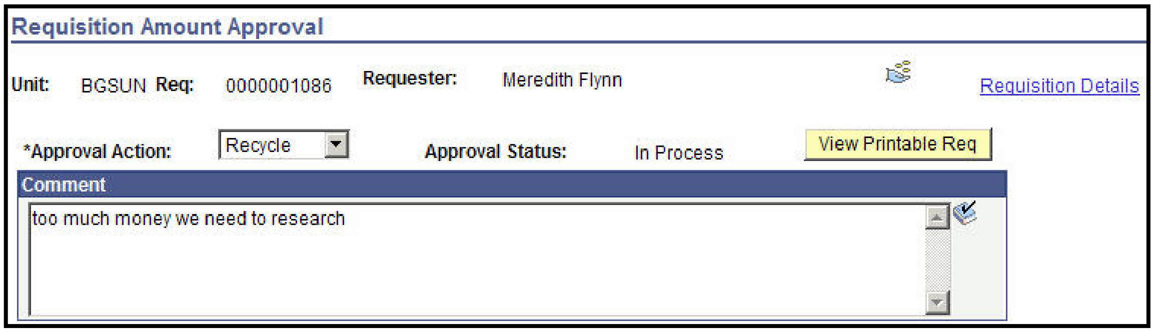
3. Your Worklist is displayed as shown below:



4. Click the link to the requisition.

5. Click the **Approval Action** drop-down box and select Deny.

6. When you deny a requisition you need to add a comment letting the requester know why it is being denied as shown below. This comment will appear in the e-mail notification that is automatically sent to the requester.



7. Once you have selected **Deny**, click Save.

QUICK STEPS

- ***To Deny a Requisition:***
  - Click the Worklist link.
  - Click the link to the requisition.
  - Select *Deny* from the **Approval Action** drop-down box.
  - Enter a comment explaining why the requisition was recycled or denied.
  - Click Save.

How to View a Printable Requisition

Use the following steps to view a printable requisition:

1. Sign in to FMS and click Worklist. Your Worklist is displayed.

2. Click the link to any requisition.

   The Requisition Amount Approval page is displayed.

3. Click View Printable Req .

   A new window is open. This step is building a PDF file that can then be printed. After a few moments, the requisition is displayed in the window.

Requisition

Ship To: BG@100 Project Office
414 E Wooster
Bowling Green State University
Bowling Green OH 43403

Business Unit:	BGSUN	
Req ID:	Date	Page
0000000119	12/12/2006	1
Requester		Currency
Training Requester1		USD
Requester Signature		

Line-Schd	Item	Description	Mfg ID	Quantity UOM	Price	Extended Amt	Due Date
1-1		MFG# FA1-12 Background Paper White 107"x12 yds		20.0000 EA	39.95	799.00	12/27/2006
	Buyer: MO Vendor: 0000006641 Laube Imaging Products						
				Line Total:		799.00	
2-1		MFG# FA20-12 Background Paper Black 107"x12 yds		15.0000 EA	39.95	599.25	12/27/2006
	Buyer: MO Vendor: 0000006641 Laube Imaging Products						
				Line Total:		599.25	

4. Click ☒ to close the window.

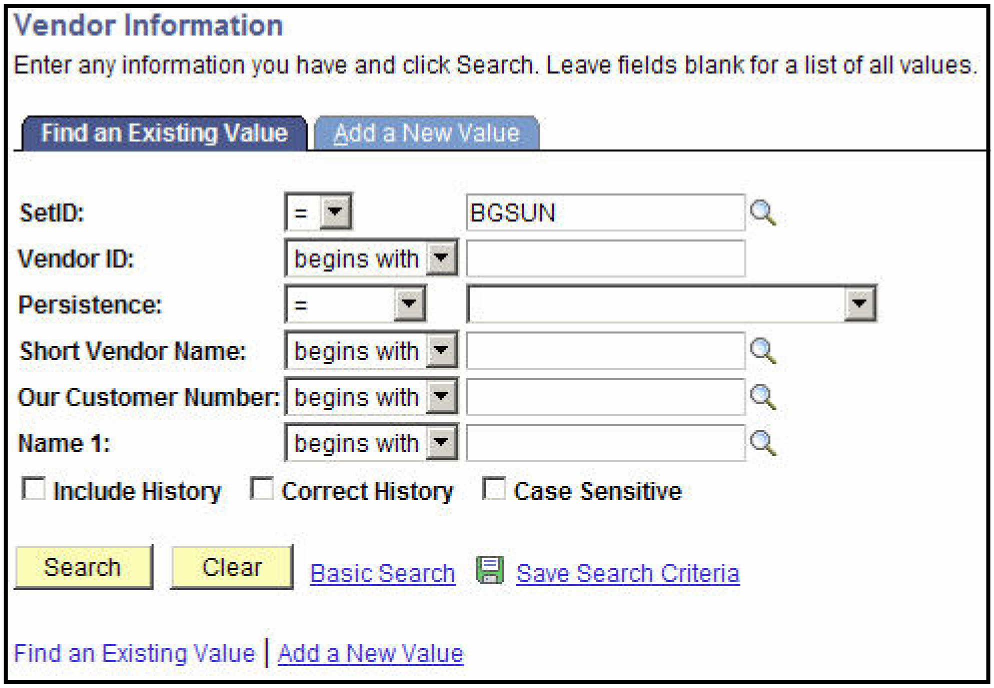
QUICK STEPS

- ***To View a Printable Requisition:***
  - Click Worklist
  - Click the link to the requisition
  - Click View Printable Req
  - Click to close the Queued window

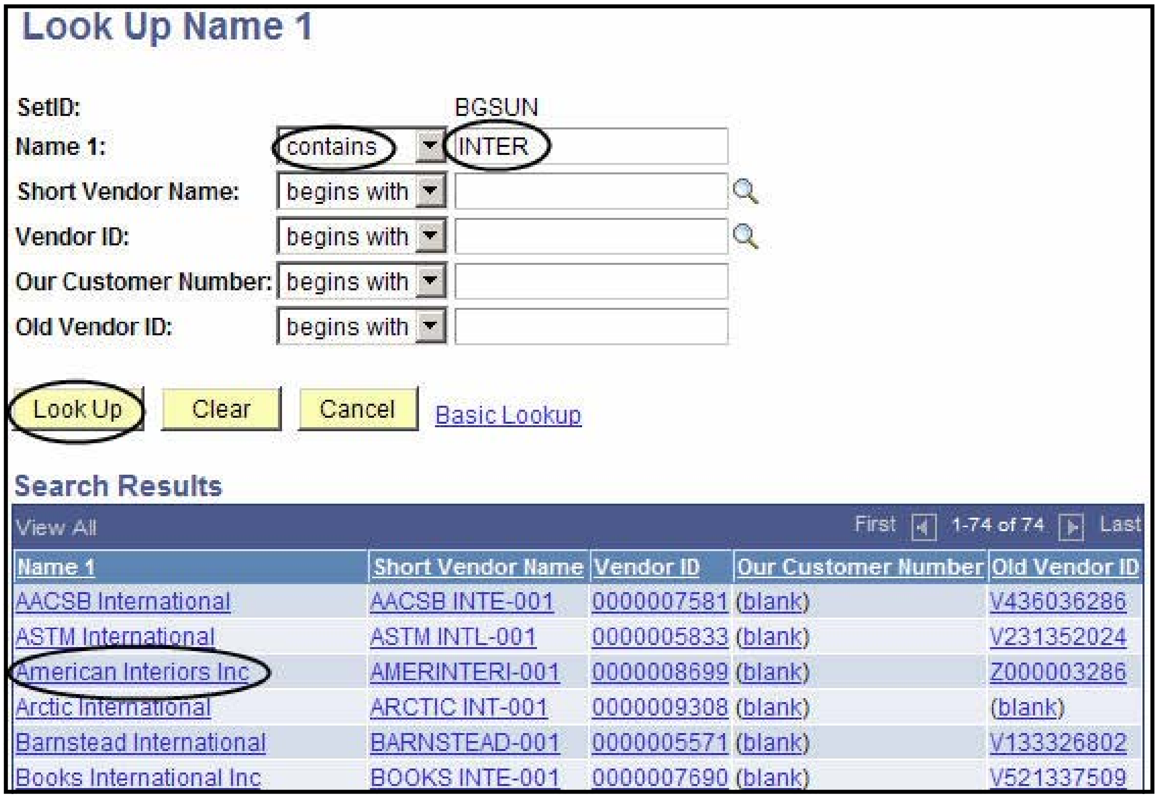
How to Review Vendor Information

Use the following steps to review vendor information:

1. Sign in to FMS. You need to access the Menu Pagelet.
2. From the Menu Pagelet, click **Vendors, Vendor Information, Add/Update,** and **Vendor**. The Vendor Information Search page is displayed as shown below. Make sure BGSUN is entered in the SetID field. If it is not, enter it either by typing it in the text box or selecting it using the Look Up icon .



3. Click the Look Up icon next to the **Name 1** text box. The Look Up Name 1 page is displayed as shown below. Say you wanted to look up the vendor American Interiors. Changing the drop-down box for **Name 1** widens your search. Enter a portion of the name in the **Name 1** text box. Click Look Up. The vendor is listed in the Search Results table. Click the link to the vendor you want to look up.



4. Click Search. The **Summary** tab is selected and summary information on the vendor you selected is displayed. The **Addresses** tab provides information on the vendor's address, the **Contacts** tab provides information on sales representatives and the **Location** tab provides information on how you conduct business with this particular vendor.

QUICK STEPS

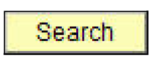
- ***To Look Up Vendor Location and Other Vendor Details:***
  - From the Menu Pagelet select **Vendors** > **Vendor Information** > **Add/ Update** > **Vendor**
  - Search for the vendor name

Checking the Requisition Approval Status

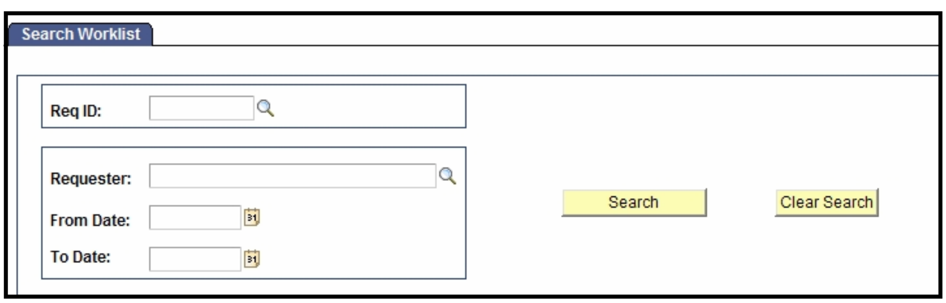
The *Monitor Worklist* will allow you to track the approval status of a requisition, from the requester to all approvers (*Special Category Approvers*, *Grants/Project Approvers*, *Budget Administrator*, *Senior Administrator*, *Vice-President*, and *President*). Additionally, the monitor displays one of three statuses: *Available* (requisition is available to be selected by an approver), *Selected* (requisition has been selected by an approver), and *Worked* (approver has selected an Approval Action and has saved the Requisition Approval Page).

Use the following steps to check requisition approval status:

1. If necessary, sign in to FMS.
2. From the **Menu Pagelet** click **BGSU Menu, Workflow, Monitor Worklist.**

3. The **Search Worklist** page is displayed. Enter the desired search criteria and click 

. For example, you may want to see the approval status for the requisition enter by your departmental **Requester.**



4. The **Worklist** is displayed. Note the following columns: *Requisition ID*, *Requisition Status*, *Date*, *Requester (username)*, *Worklist Name*, *OPRID (username of approver)*, *Worklist Instance Status*, *Instance Worked/Date/Time*, and *Instance Available Date/Time.*

   In the following example, the requisition is *available* for the approver to select. The requisition is in the approver's worklist but no action has been taken on it.

Worklist — Customize | Find | View 10 | First 1-100 of 5110 Last

	Requisition ID	Requisition Status	Date	Requester	Work List Name	OPRID	Worklist Instance Status	Instance Worked Date/Time	Instance Available Date/Time
1	0000001136	Pending	01/16/2007	Req01	Req Approval Worklist	APPS02	Available		01/16/07 9:32:26AM
2	0000001136	Pending	01/16/2007	Req01	Req Approval Worklist	APPS05	Available		01/16/07 9:32:26AM

5. In the following example, the requisition has been *selected* by the approver but he or she has yet to select an approval action. The approver is reviewing the requisition details.

12	0000001136	Pending	01/16/2007	Req01	Req Approval Worklist	APPS01	Selected		01/16/07 9:32:26AM

6. In the last example, the requisition has been *worked* by the approver. The approver has selected an approval action and has saved the **Requisition Amount Approval** page.

13	0000001136	Pending	01/16/2007	Req01	Req Approval Worklist	APPB10	Worked		01/16/07 9:28:49AM

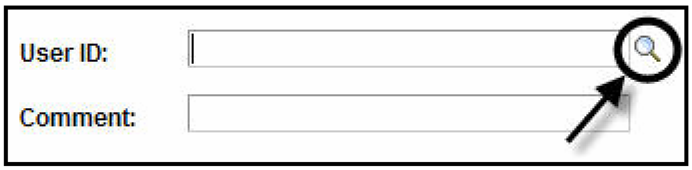
QUICK STEPS

- ***To check requisition approval status:***
  - Click **BGSU Menu, Workflow, Monitor Worklist**
  - Enter the search criteria and click **Search.**

How to Reassign a Requisition

Use the following steps to reassign a requisition:

1. Sign in to FMS and click the Worklist link. Your Worklist is displayed.
2. Find the requisition you want to reassign. Click Reassign .
3. Click for User ID.



4. Select the person to whom you are reassigning the requisition.
5. Enter a comment in the Comment text box indicating what you would like the recipient to do with the requisition. The comment will be displayed in Detail View under the Comment column of your replacement approver.
6. Click OK .

QUICK STEPS

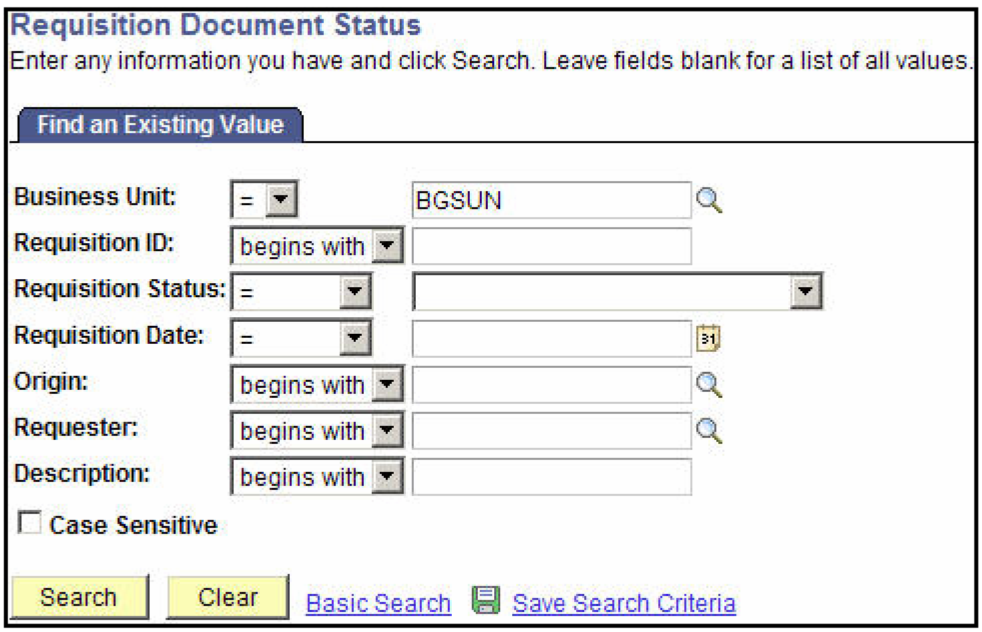
- ***To reassign a requisition:***
  - Click the Worklist link
  - Click Reassign for the requisition you want to reassign
  - Click for User ID
  - Select the person to whom you are reassigning the requisition
  - Enter a comment in the Comment text box
  - Click OK

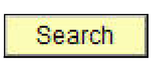
Checking the Status of a Requisition

Use the following steps to check the status of a requisition:

1. Sign in to FMS.
2. From the Menu Pagelet click **Purchasing**, **Requisitions**, **Review Requisition Information** and **Document Status**. Make sure BGSUN is entered in the Business Unit field. If it is not, enter it either by typing it in the text box or selecting it using the Look Up icon .

   The Requisition Document Status page is displayed. There are a number of ways you can search for a requisition. You can search using the Requisition ID number, Requisition Status, Requisition Date, Origin, Requester, or the Description.



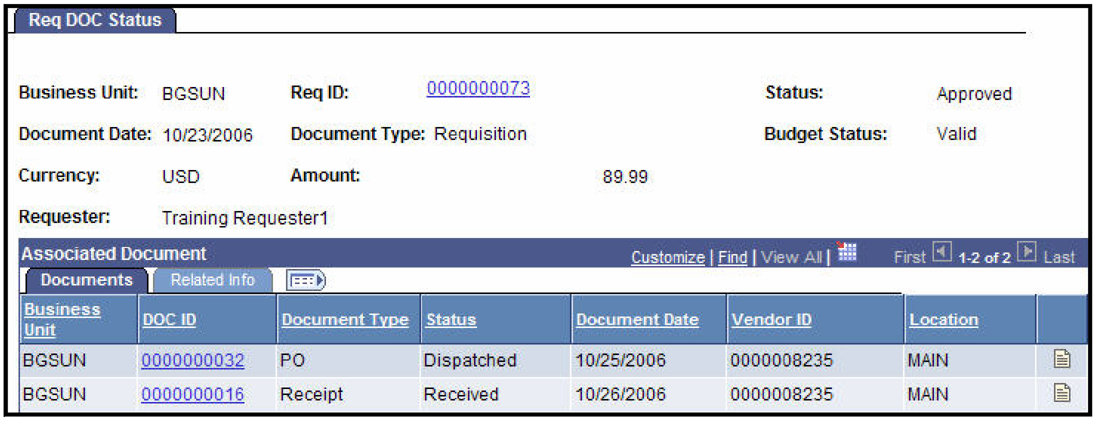
3. Enter your search criteria.
4. Click 

.

   A list of the requisitions meeting your search criteria is displayed.

5. Click one of the requisitions.

   Your screen will look similar to the following. Under Associated Documents you can see the status of the requisition and view the other documents connected to it.



Req DOC Status

Business Unit: BGSUN Req ID: 0000000073 Status: Approved

Document Date: 10/23/2006 Document Type: Requisition Budget Status: Valid

Currency: USD Amount: 89.99

Requester: Training Requester1

Associated Document — Customize | Find | View All | First 1-2 of 2 Last

Documents | Related Info

Business Unit	DOC ID	Document Type	Status	Document Date	Vendor ID	Location
BGSUN	0000000032	PO	Dispatched	10/25/2006	0000008235	MAIN
BGSUN	0000000016	Receipt	Received	10/26/2006	0000008235	MAIN

QUICK STEPS

➢ ***To check the status of a requisition:***

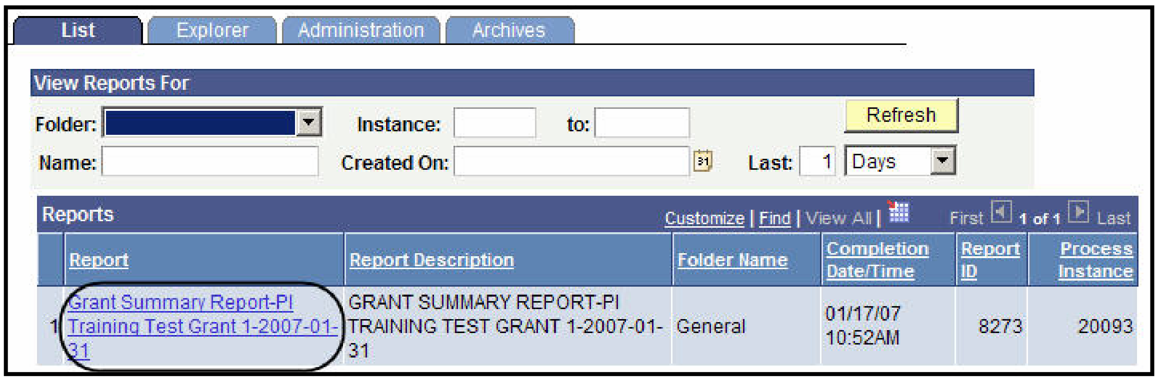
- Purchasing > Requisitions > Review Requisition Information > Document Status
- Enter your search criteria
- Click Search
- Click the requisition

How to Access a Report

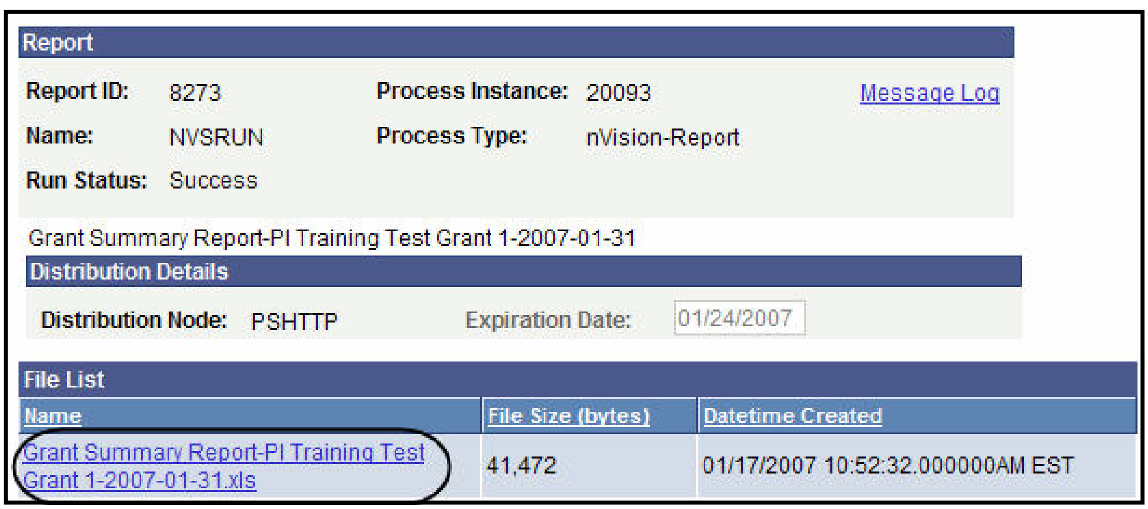
Use the following steps to access a report:

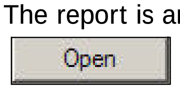
1. Sign in to FMS and click **Reporting Tools, Report Manager.**

2. Click the link to the report.



3. Click the link to the report again.



4. The report is an Excel spreadsheet file so you will be asked if you want to open the file. Click 

. The report opens in on the Summary tab. To view details of the report click the tabs at the bottom of the spreadsheet. Since this is an Excel file, you can save the report on your own hard drive if needed.

BGSU
Bowling Green State University

Bowling Green State University
Grant/Project Summary Report

Report ID:	GRANTDTL	*Grant/Project ID*	00000233 PI Training Test
As Of Date:	2007-01-31	Budget Fiscal Year	2007
		Period Ending Date	2007-01-31

Grant Award information

Award #:	0000922838	*Award Title*	PI Training Test Grant 1		
		Award Start Date	2007-01-01	*Dept ID*	035100
PI /Mgr	Flynn,Meredith A	*Award End Date*	2007-12-31	*Dept Name*	Math and Statisitics Dept

Account	Description	Original (F)	Adjustment (G)	Total Budgeted Amount (H=F+G)	MTD Expenses (J)	Fiscal YTD Expenses (K)
				$0.00		
				$0.00		
				$0.00		
53100	Office Supplies	25,000.00	0.00	25,000.00	1,000.00	1,
53450	Research Supplies	20,000.00	0.00	20,000.00	700.00	
53000	SUPPLIES	$45,000.00	$0.00	$45,000.00	$1,700.00	$1,7
				$0.00		
				$0.00		
				$0.00		
				$0.00		
58500	Capital Equipment Over $3500	55,000.00	0.00	55,000.00	0.00	
58000	MISCELLANEOUS EXPENSES	$55,000.00	$0.00	$55,000.00	$0.00	
				$0.00		
Total by	all expenses	$100,000.00	$0.00	$100,000.00	$1,700.00	$1,7

Pre-Enc / BudgetDetails / Open POs / ExpenseDetail / Summary

QUICK STEPS

- ***To view a report:***
  - Click **Reporting Tools, Report Manager**
  - To see details of the report click the tabs at the bottom of the screen

Keyboard Shortcuts

People Soft includes keyboard shortcuts that can be used as alternatives to using the mouse. There are two categories of these keyboard shortcuts: hot keys and access keys. A printable list of these shortcuts are available while online by pressing Ctrl+K while on a search or transaction page.

Hot Keys

When any one of the following hot key combinations is pressed the corresponding action occurs. Several of the hot key combinations perform different actions depending on the currently active page. The following table outlines the shortcuts that you can use in place of clicking the equivalent action button.

Hot Keys	Action
ALT + 1	Save a page in a transaction. Moves to the Search or Add button on a search or look up page. Moves to the OK button on a secondary page.
ALT+2	Returns to the search page from the transaction page.
ALT+3	View the next row in the list when the button is active.
ALT+4	View the previous row in the list when the button is active.
ALT+5	Accesses the Look Up page in place of the magnifying glass or calendar prompt. Opens the Calendar Prompt.
ALT+6	Opens the pop-up window on a page.
ALT+7	Inserts a row in a grid in place of the plus sign or scroll area.
ALT+8	Deletes a row in a grid in place of the minus sign or scroll area.
ALT+9	Accesses the Help line.
ALT+0	When in Expert Entry mode, activates the Refresh button, which validates the data entered on the page.
ALT+.	View the next set of rows in a grid or scroll area.
ALT+,	View a previous set of rows in a grid or scroll area.
ALT+/	Finds data in a grid or scroll area.
Alt+’	Views all rows of data in a grid, scroll area, or search page results list.
Alt+	Toggles between Add a New Value and Find an Existing Value on a search page.
CTRL+J	Displays the system information page.

CTRL+K	When on a search or transaction page, accesses a page with a list of keyboard navigation shortcuts using hot keys and access keys.
CTRL+Y	Toggles the Menu Pagelet between collapse and expand.
CTRL+Z	Accesses the menu search box.
CTRL+TAB	Toggles the focus through the frame set.
ENTER	Activates the OK button, where appropriate. On a search page, activates the Search button. On a Look Up page, activates the Lookup button.
ESC	Activates the Cancel button, where appropriate.

Access Keys

Access keys can be used for page tabs to help you move between pages in a component. Access keys are identified by the underlined letter in the page tab name. To access a page, press ALT plus the underlined letter, and then press ENTER.