BGSU/ PeopleSoft
Financial Management Solutions (FMS)
Principal Investigator’s
Training Guide
Financial Management Solutions
Requisition Approval Workflow for a Grant
continued

A

$50,000 or greater

YES

Requester Creates a Requisition

Vice Presidential Approval

NO

Recycle

NO

YES

NO

Approve

YES

$100,000 or greater

LESS THAN $100,000

Senior Vice President/Provost/Presidential Approval

Routed to Purchasing for Creation and Distribution of Purchase Order
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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
4. Click the **Funding** tab. Here you see the total funded amount.

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:
  o Click Grants, Awards, Award Profile
  o The Award tab contains general information about the award
  o The Funding tab displays the total funded amount
  o 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 **Search**. The Search Results are displayed. Click the link to the project.

4. The **General Information** tab is displayed.
5. Click the **Manager** tab.

![Manager tab](image)

**QUICK STEPS**

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

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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.*
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 **Add**.

   *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](image)

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](image)
11. Click **Search**.  

   The Budget Overview page is displayed.

![Budget Overview Page](image)

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.

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**14 Principal Investigator's Training Guide**
Use the following steps to view a budget inquiry:

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

➢ To view your budget using an inquiry that has been created:
  o Commitment Control > Review Budget Activities > Budgets Overview
  o Click the Find an Existing Value tab
  o Click Search
  o 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.

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.

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

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.
**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 Table]

**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.

![Processing Buttons]

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

4. Click ✗ to close the window.
QUI CK STEPS

➢ To View a Printable Requisition:
  o Click Worklist
  o Click the link to the requisition
  o Click View Printable Req
  o 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 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:
  o From the Menu Pagelet select Vendors > Vendor Information > Add/Update > Vendor
  o 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 Search. For example, you may want to see the approval status for the requisition entered 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.

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.

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.

**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.*

![Requisition Status Table]

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**QUICK STEPS**

- **To check the status of a requisition:**
  - Purchasing > Requisitions > Review Requisition Information > Document Status
  - Enter your search criteria
  - Click
  - 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 Open. 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.
QUICK STEPS

➢ To view a report:
  
  o Click Reporting Tools, Report Manager

  o To see details of the report click the tabs at the bottom of the screen
**Keyboard Shortcuts**

PeopleSoft 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.

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