

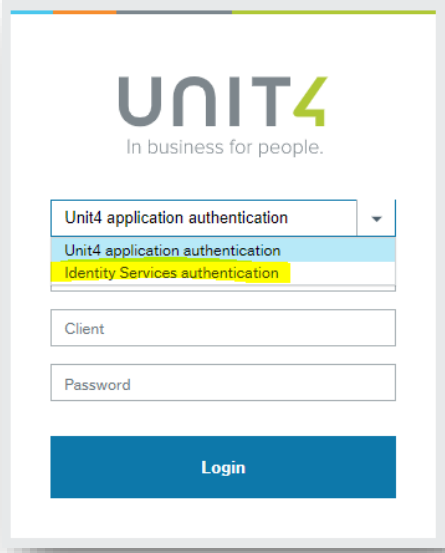


Business World User Guide

Title	Getting Started
Summary	<p>This guide has been created for all users of Business World and will contain useful information on using the WEB version of the system.</p> <p>You will receive a link to Business World which you should add to your favourites bar in internet explorer for ease of access.</p>
Audience	All Business World users
Content	<ol style="list-style-type: none"> 1. Logging on via Single Sign on 2. Adding Business World To The Favourites Bar 3. Overnight Processes 4. The Menu 5. Task Manager – Simple mode 6. Task Manager – Detailed mode 7. Web Screen Information 8. Save, Clear or Exit The Window 9. Adding Favourites To The Menu 10. Field Help Search 11. Using Wildcards 12. Working in Split View 13. Reports 14. Keyboard Shortcuts 15. Guidance and Support 16. Further information


1. LOGGING ON SINGLE SIGN ON

- Logging on to Business world has changed to **Single Sign On**. This means you no longer need to enter a username or a password to log on. Please follow the simple three steps below:
- Please select **Identity Services Authentication** as per the screenshot below highlighted in yellow and click login.



The screenshot shows the Unit4 login interface. At the top is the Unit4 logo with the tagline 'In business for people.'. Below the logo is a dropdown menu for authentication. The dropdown is open, showing three options: 'Unit4 application authentication' (selected), 'Unit4 application authentication', and 'Identity Services authentication' (highlighted in yellow). Below the dropdown are two input fields labeled 'Client' and 'Password'. At the bottom is a blue 'Login' button.

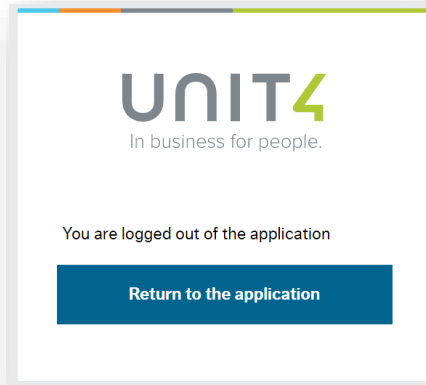
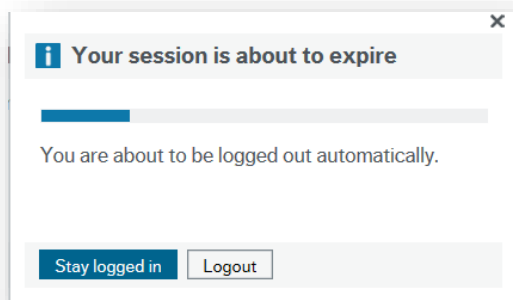
- As this may be the first time you are logging in using single sign on, you may need to click **Accept** on the Terms pop up:



The screenshot shows a Terms of Service pop-up dialog box. At the top is the Unit4 logo. Below the logo is the text 'Business World Desktop would like your permission to:'. There are two checkboxes: 'Use your user identifier' (checked) and 'Use your profile information' (checked). Below the checkboxes is a blue button labeled 'Yes, I agree'.

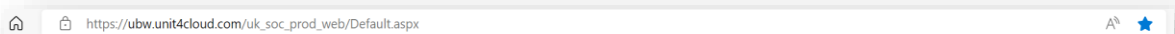
- Each subsequent time you log in, you will only need to select **Identity Services Authentication**.

- If you have any issues using this facility, please send an email to Business World Support BW.help@southampton.gov.uk with a screenshot and details of your issue.
- Session timeout – if there has been no activity in your Business World session for several minutes, the session may time out. Through single sign on you will see one of the messages below. You will be informed your session is about to expire or find you have been logged off. If you have been logged off you can just select **Return to the application**.



2. ADDING BUSINESS WORLD TO THE FAVOURITES BAR

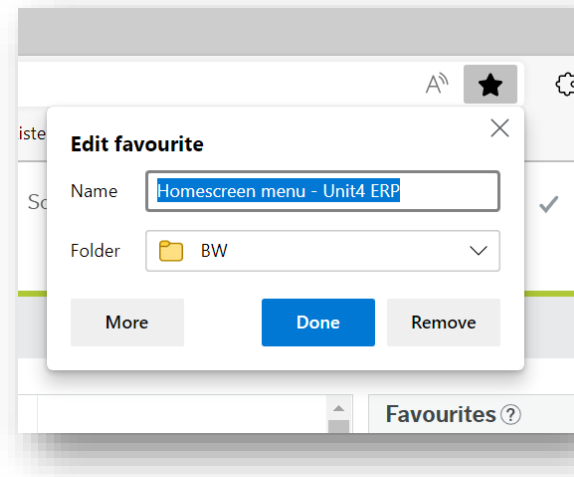
- In order to make it quicker to access Business World, save a link to the **Favourites** Bar. To do this go to **Edge** and type: [Login - Unit4 ERP \(unit4cloud.com\)](https://login.unit4cloud.com)
- Or click on the above link and copy this (Ctrl C). When you can see the Unit4 Logon Screen click on the URL link at the top of the page



- Hold down the Ctrl and C buttons on your keyboard together to copy to the clipboard. Click the **Favourites** icon, top right of the screen Select the **Add to favourites** tab:



- In the name field type a meaningful phrase to assist with locating the shortcut e.g. 'Login to Business World', and if you like you can add to a folder on your favorite bar, then Click **Done**:



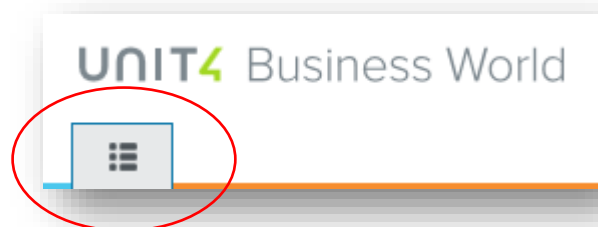
- When you are ready to use the shortcut, go to **Edge** and to your **Favourites**. Select the Business World link from the list.

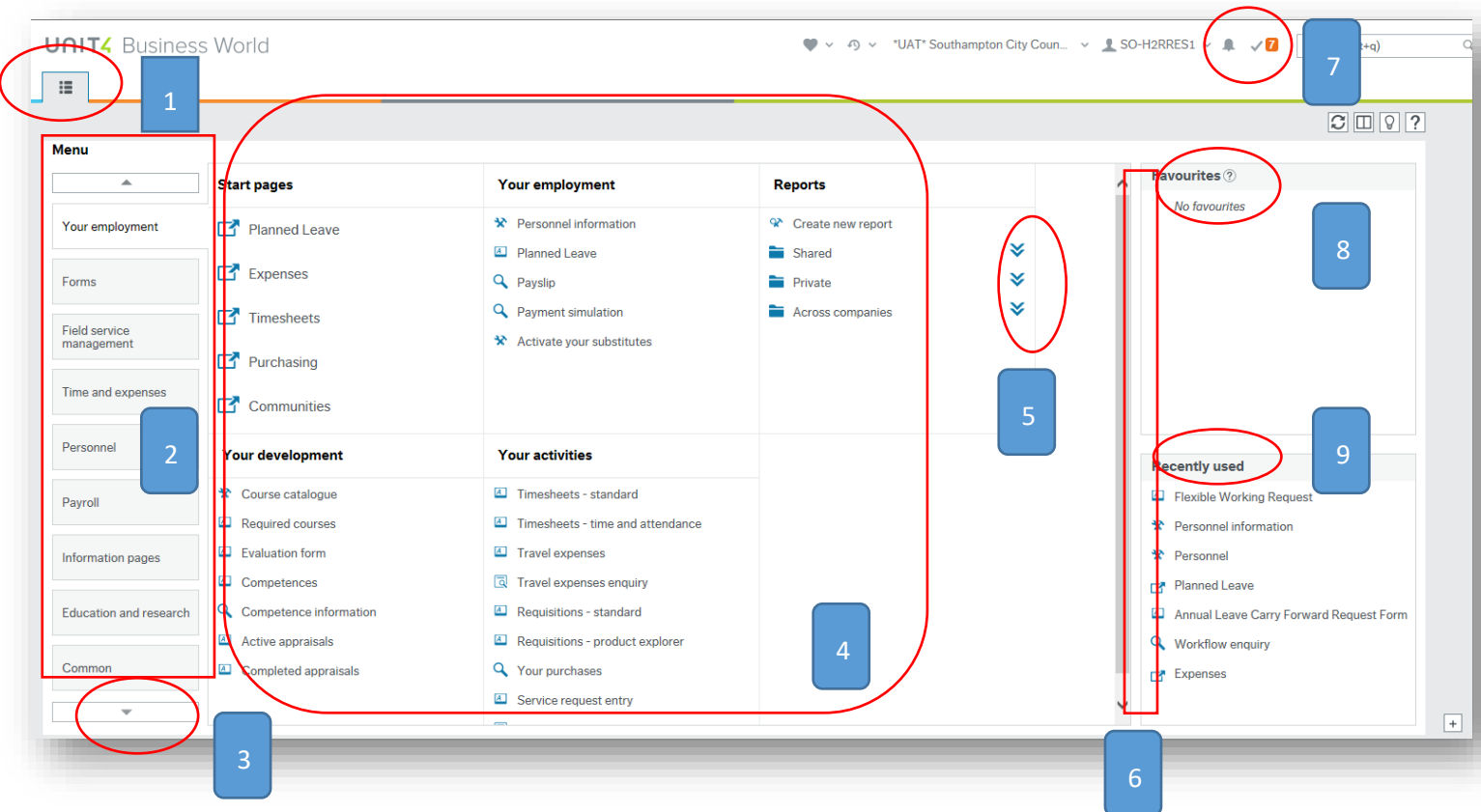
3. OVERNIGHT PROCESSES

- When a person's record has been set up on Business World, the record cannot be used until the next day for recording purposes. An overnight process is required to be run. Any leave booked will not be deducted from the total remaining until the following day

4. THE MENU

- Once you have logged onto Business World, the Home Page screen will be displayed.
- When you have navigated to relevant sections from the Home Page, **DO NOT** use the back button at the top left of the screen to go back a page as this will log you out of Business World. Instead, use the Menu icon at the top of the screen.

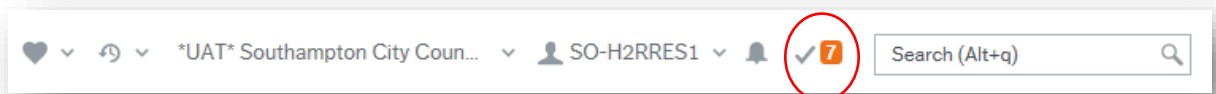




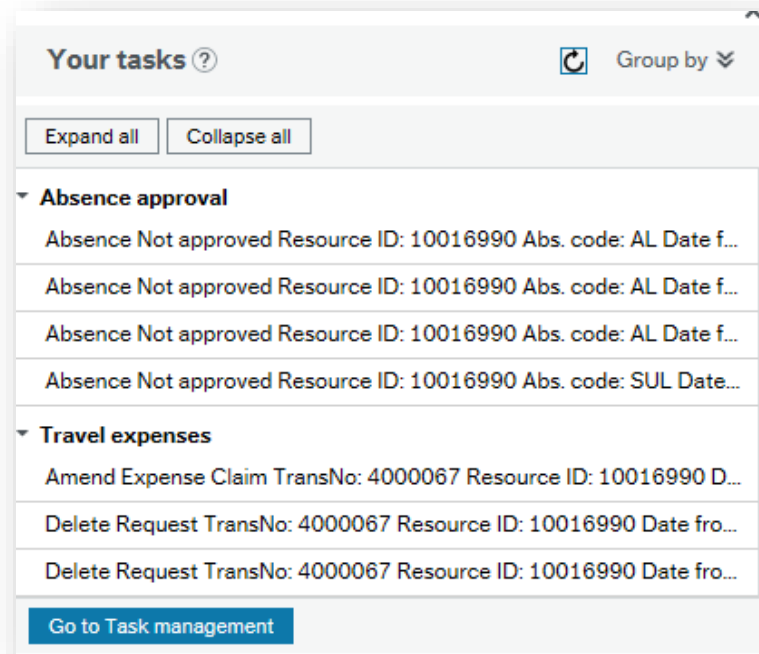
1. Menu
2. Menu categories
3. Drop down list for further categories
4. Sub Menu choices
5. Drop down lists for selection
6. Scroll Bar
7. Tasks awaiting action
8. Favourites (can be added here)
9. Your recently used screens

5. TASK MANAGER SIMPLE MODE

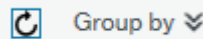
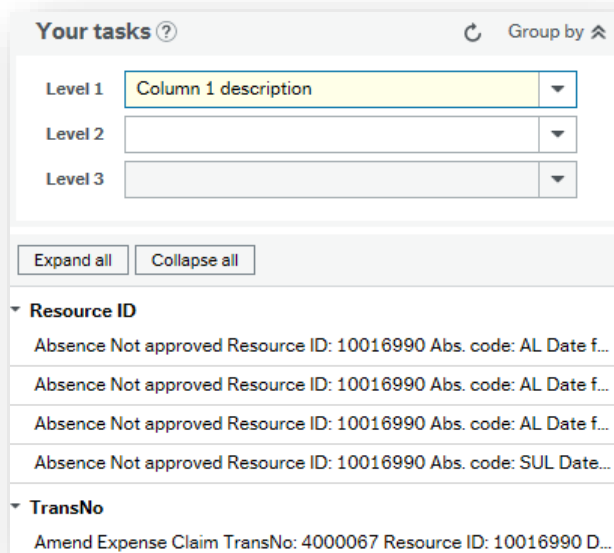
- Task Manager holds all your tasks requiring action or authorisation. This may be orders, payments, purchase cards, absence requests and sales order credit notes. It can be accessed in simple mode or detailed mode, dependent upon your requirements.



- If you hover your mouse over the small tick, the word 'tasks' is displayed. The figure in red show the number of outstanding tasks.
- To access tasks in simple mode, click on the tick. If you have all required information in this view, it is a far less busy screen to work with.

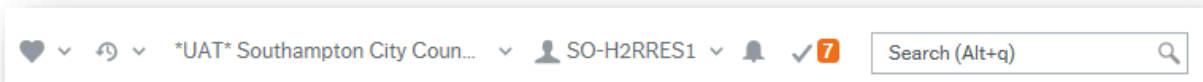


- To select and view a task from the list, single click the row and the task will be displayed.
- In the above view, you can Group tasks of a similar type by clicking the 'Group by' drop down list, go to the Level 1 drop down list and select 'Column 1 description'. This will sort the list into type i.e. all the Absence notifications will be together.

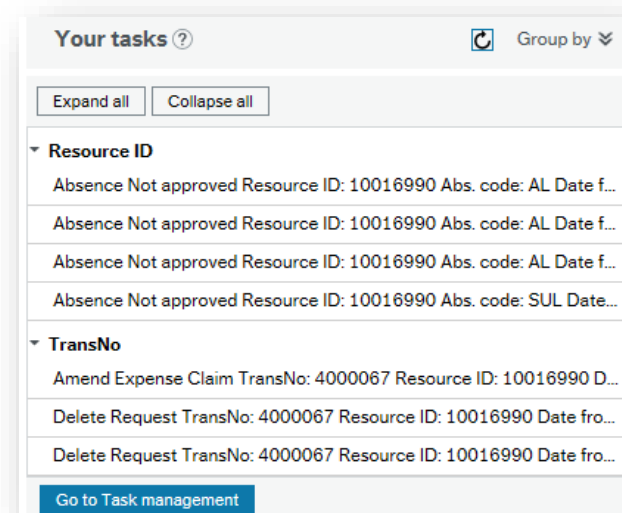


6. TASK MANAGER DETAILED MODE

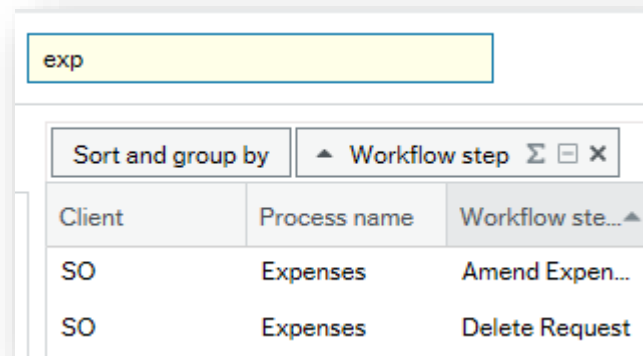
- If you hover your mouse over the small tick, the word 'tasks' is displayed. The figure in red show the number of outstanding tasks.
- To access tasks in simple mode, click on the tick. If you have all required information in this view, it is a far less busy screen to work with.



- Click the **Go to Task management** tab at the bottom of the window

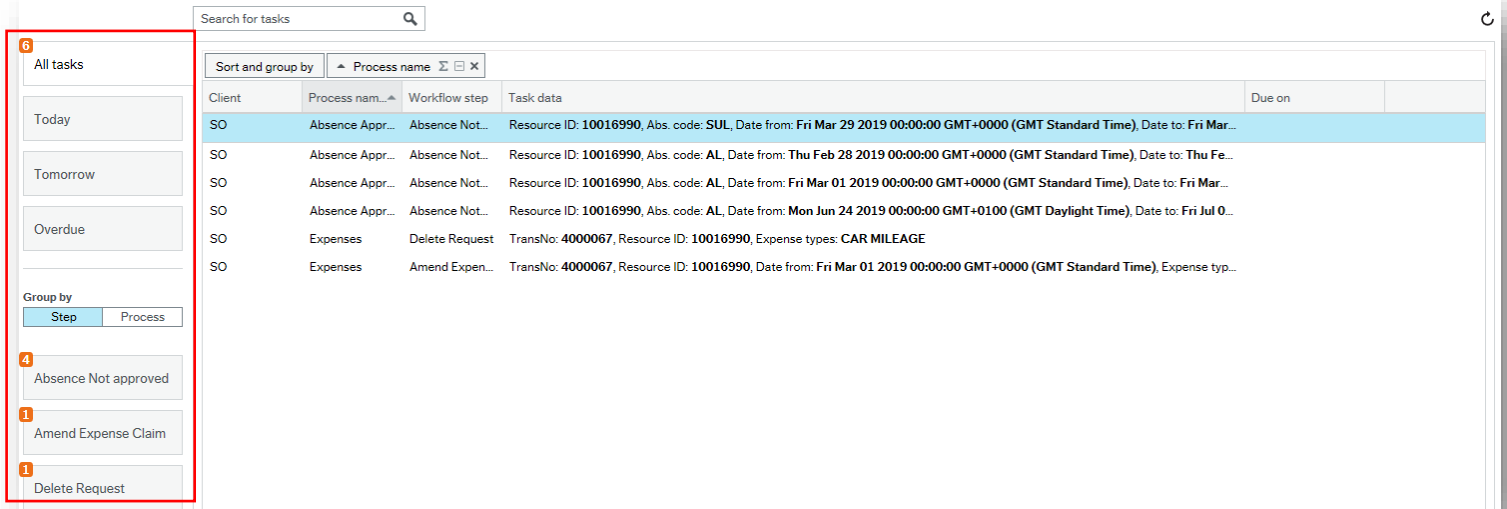


- There are several ways to sort tasks. The **Sort and group by** tab allow you to sort by the type of process (e.g., by process name), click ok. The **workflow steps** allow you to sort by the type of task e.g., **amend Absence claim**. There is a tab at the top to **Search for tasks**. By typing the first few letters of the type of task, a matching list will be displayed. In some 'free type' fields, pressing the space bar will return a list of choices or return you to the full list.

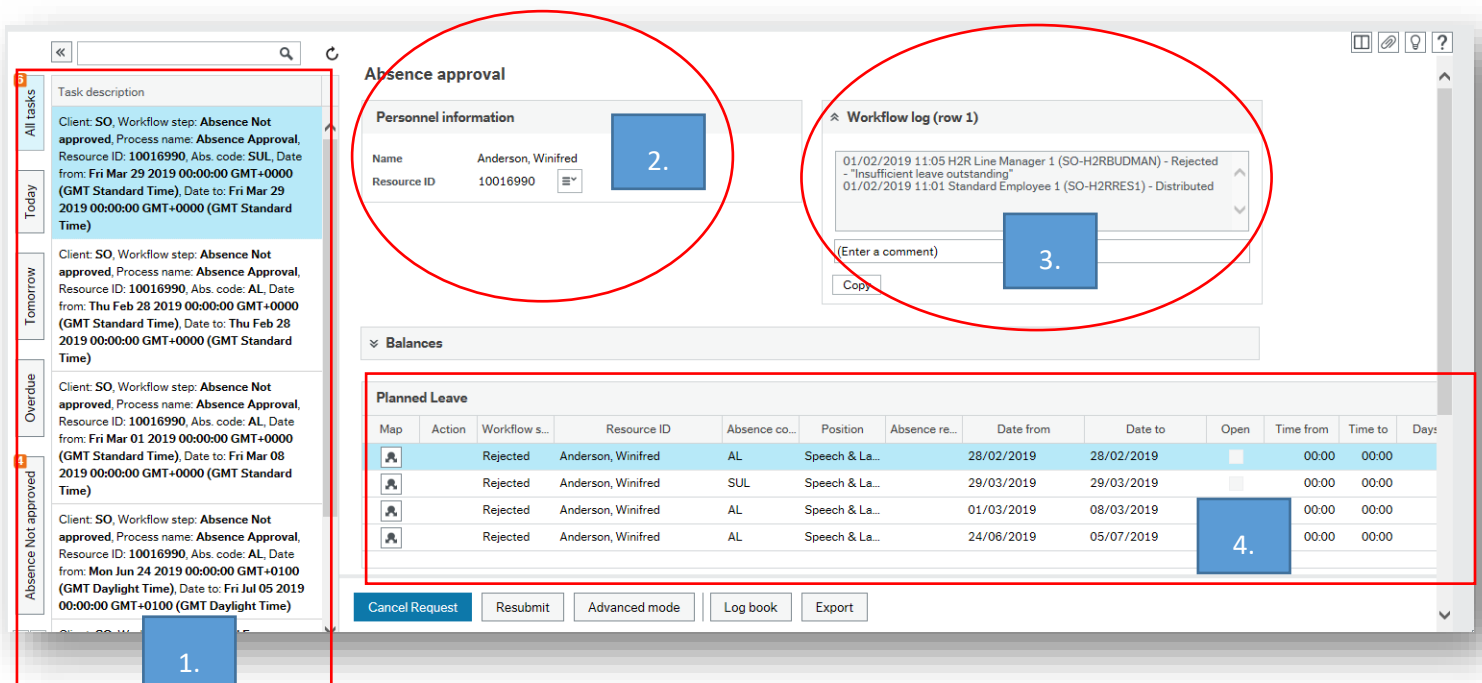


- The left-hand side of the screen gives further display options. There are tabs for tasks due by **'Today'**, **'Tomorrow'** and those **'Overdue'**. (NB this may not be set up currently.)

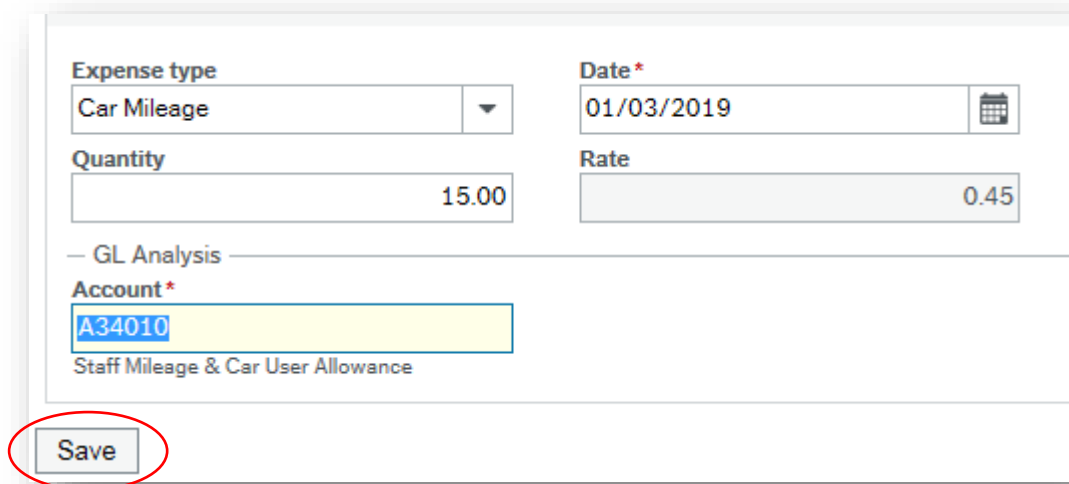
- To view a task, single click the relevant row. The screen displayed is quite a busy one. The left-hand side of the screen shows all tasks allocated to you. If you are logged on as an employee, the middle of the screen shows all tasks relating you as the selected employee. If you are logged on as a manager, you will see all tasks relating to your team.



- Click the relevant task to display the detail. The following screen will be displayed.



1. Allocated tasks for the person logged on
 2. The selected person's name and Reference ID (unique number allocated by Business World)
 3. The workflow processes
 4. All tasks for the identified person (or for the team if you are logged on as a manager)
- A screen can have buttons within each section. You can select **'Add'** to add further information or you can put a tick in the box of the relevant row and select 'Delete' to remove the row.
 - It is possible to make changes in this view to the displayed document (the example shows changes to the **'Expense details'** section). Once changes have been made, tick the **'Save'** Tab.

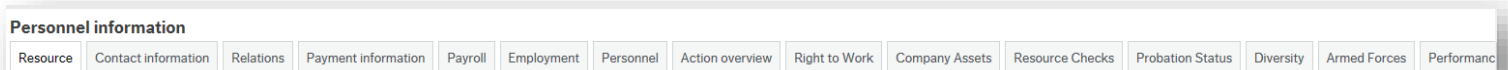


The screenshot shows a form for entering expense details. It includes the following fields:

- Expense type:** A dropdown menu with "Car Mileage" selected.
- Date*:** A date field with "01/03/2019" and a calendar icon.
- Quantity:** A text field with "15.00".
- Rate:** A text field with "0.45".
- GL Analysis:** A section header.
- Account*:** A text field with "A34010" and a yellow highlight. Below it, the text "Staff Mileage & Car User Allowance" is visible.
- Save:** A button at the bottom left, circled in red.

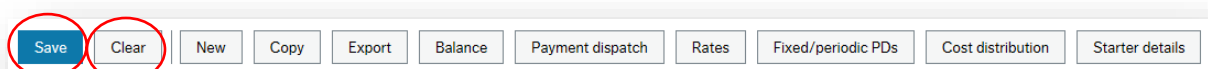
7.WEB SCREEN INFORMATION

- Web screen information appears once you have selected a window. For example, accessing the Personnel information screen. Within this screen there are several tabs, running along the top of the page to select the area you wish to work with.



The screenshot shows the "Personnel information" screen with a row of tabs at the top. The tabs are: Resource, Contact information, Relations, Payment information, Payroll, Employment, Personnel, Action overview, Right to Work, Company Assets, Resource Checks, Probation Status, Diversity, Armed Forces, and Performance.

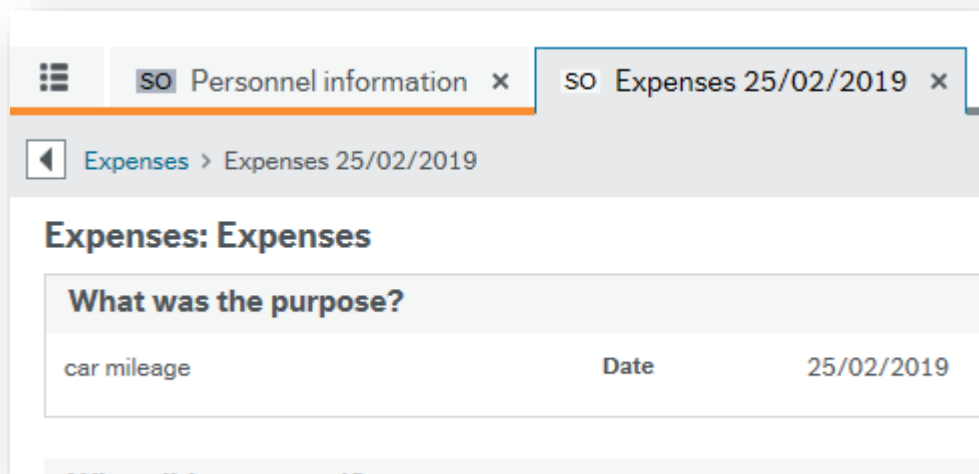
There are also a series of tabs along the bottom of the screen allowing you to clear details currently on screen or save what you have entered.



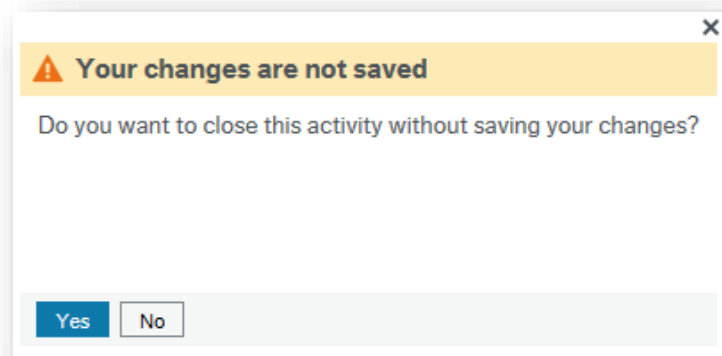
The screenshot shows a row of buttons at the bottom of the screen. The buttons are: Save, Clear, New, Copy, Export, Balance, Payment dispatch, Rates, Fixed/periodic PDs, Cost distribution, and Starter details. The "Save" and "Clear" buttons are circled in red.

8. SAVE, CLEAR OR EXIT THE WINDOW

- At the bottom of each screen are some buttons. When you have completed your request, order, or transaction, using the SAVE button will assign a unique transaction or order number. The document will then be visible in the workflow where appropriate. Use the clear button when you are viewing a document or if you wish to clear the screen and start again.
- To exit a window, click on the X at the top left of the window.

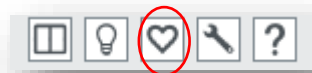


- If you attempt to exit without saving, a warning message will be displayed.

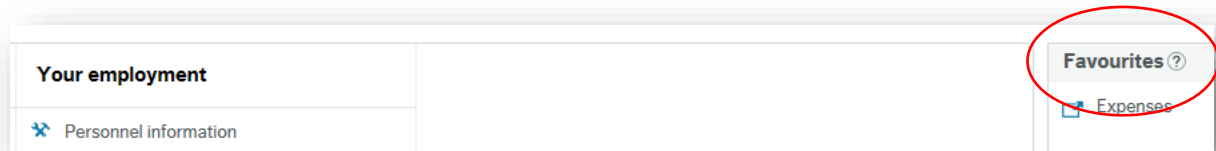


9. ADDING FAVOURITES TO THE MENU

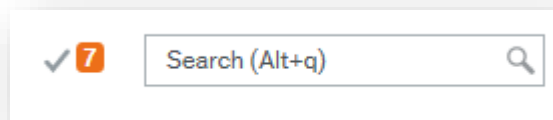
- It is possible to add frequently used items to your favourites section of the menu. Access the screen you wish to add (e.g. Expenses). Click the heart icon at the top of the screen and the item will be added to the main menu. If you wish to remove it from your favourites, go to the favourites section on the menu, select the item and click on the heart shape again (you will notice, it is no longer shaded).



- See example below where expenses has been added as a favorite to the main menu.



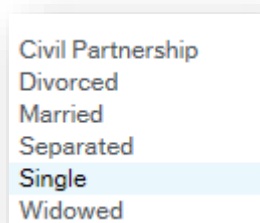
- Main Menu Search: It is possible to search for items using the search tab, found in the top right corner of the page. This will work if you know the specific screen name i.e. 'Time Off'. (Driven by field name at the top of the return.)



10. FIELD HELP SEARCH

- When a field is empty, there is usually a drop-down selection list available.

- By clicking on the drop-down arrow, a list will be displayed for you to select:



- Another way of bringing up the list is to click in the field and press the space bar on your keyboard.

- A further way of searching within some fields is starting to type the resource you are seeking e.g. Breakfast.

The screenshot shows a search window titled "What did you spend?". It has a search bar with the text "Breakfast" entered. Below the search bar, there is a dropdown menu with "Breakfast" selected. To the left of the search bar, there is a checkbox labeled "Category".

11. USING WILDCARDS

- The use of wildcards only works on **Value lookup** windows. When using a wildcard, replace part of the text with an *. E.g., if searching for “office chair” you can type ***chair***.

12. WORKING IN SPLIT VIEW

- It is possible to work in ‘**Split View**’ whereby you can view two windows at the same time.
- Click the **Split View** icon at the top right of the window.



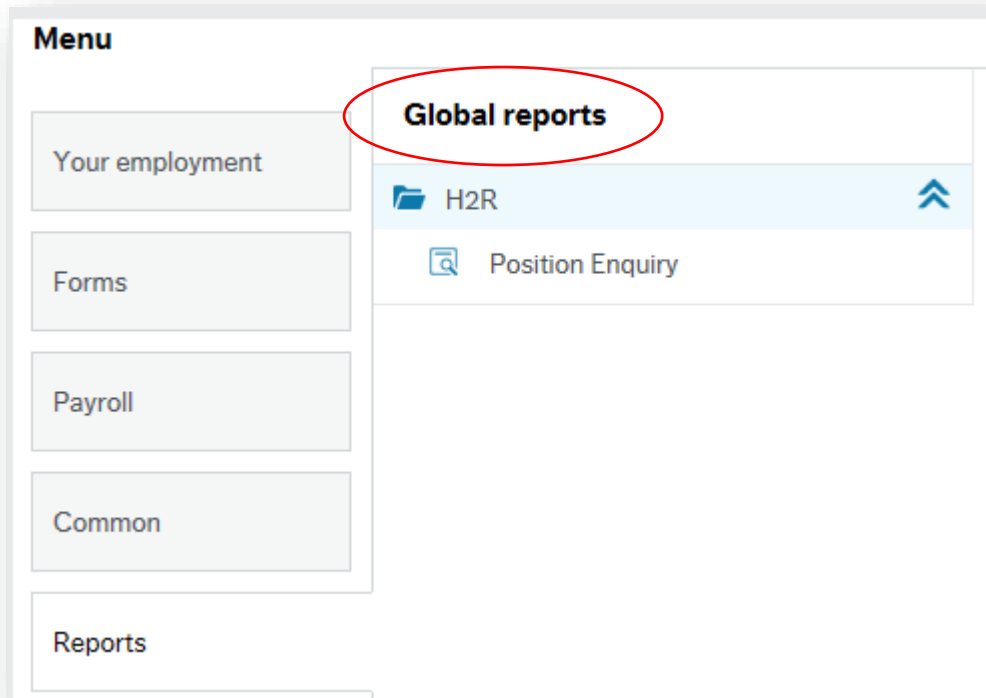
- Your view will be split see example below

The screenshot shows a split view window. The left pane displays a "Maternity Leave Form" with fields for "Form ID*" (containing "[NEW]"), "Form description*", and "Form owner" (containing "Anderson, Winifred" and "10018990"). The right pane displays a "Menu" with sections for "Your employment", "Forms", "Payroll", and "Common". Under "Start pages", there are links for "Time Off", "Expenses", "Timesheets", and "Purchasing".

- To return to a single view window, click the split view Icon again.

13. REPORTS

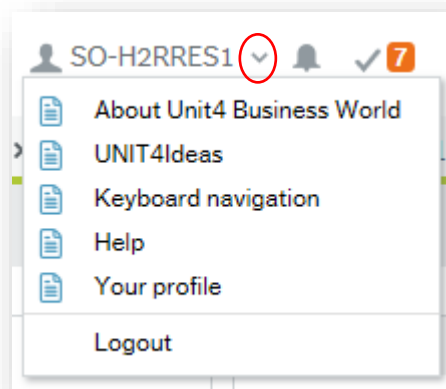
- There are many reports in Business World and the majority are located via the **Reports** tab.

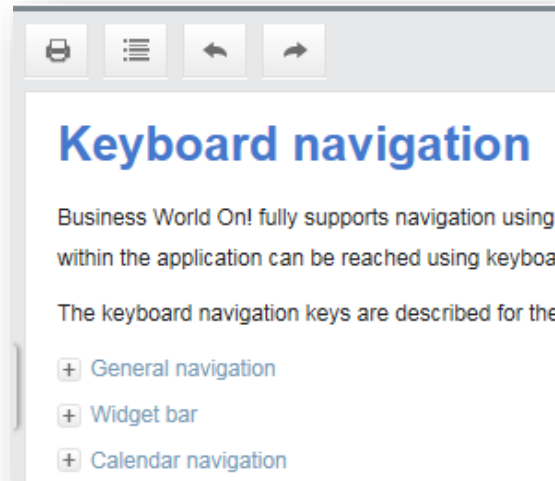


- Some reports will be found within the module itself or in the **Accounting** tab.
- You can also access reports by searching for them using the **Menu Search**.

14. KEYBOARD SHORTCUTS

- To access a list of keyboard shortcuts, click the drop-down list next to your ID at the top of the page and select Keyboard Navigation. Click the 'expand all' icon to display the list of headings:





15. GUIDANCE AND SUPPORT

- User guidance is available on staff stuff and from within Business World itself (within the module) e.g. Absence window for absence guidance.
- The lightbulb will be shaded blue if there is guidance available.



16. FURTHER INFORMATION

- If you have any further questions, please do not hesitate to contact the Business World inbox at: bw.help@southampton.gov.uk
- For further guides on how to do tasks please visit our dedicated Business World tutorial site at [Business World \(southampton.gov.uk\)](http://Business World (southampton.gov.uk)) (Please note: This link above doesn't work for schools, please contact bw.help@southampton.gov.uk and we can email tutorials.)