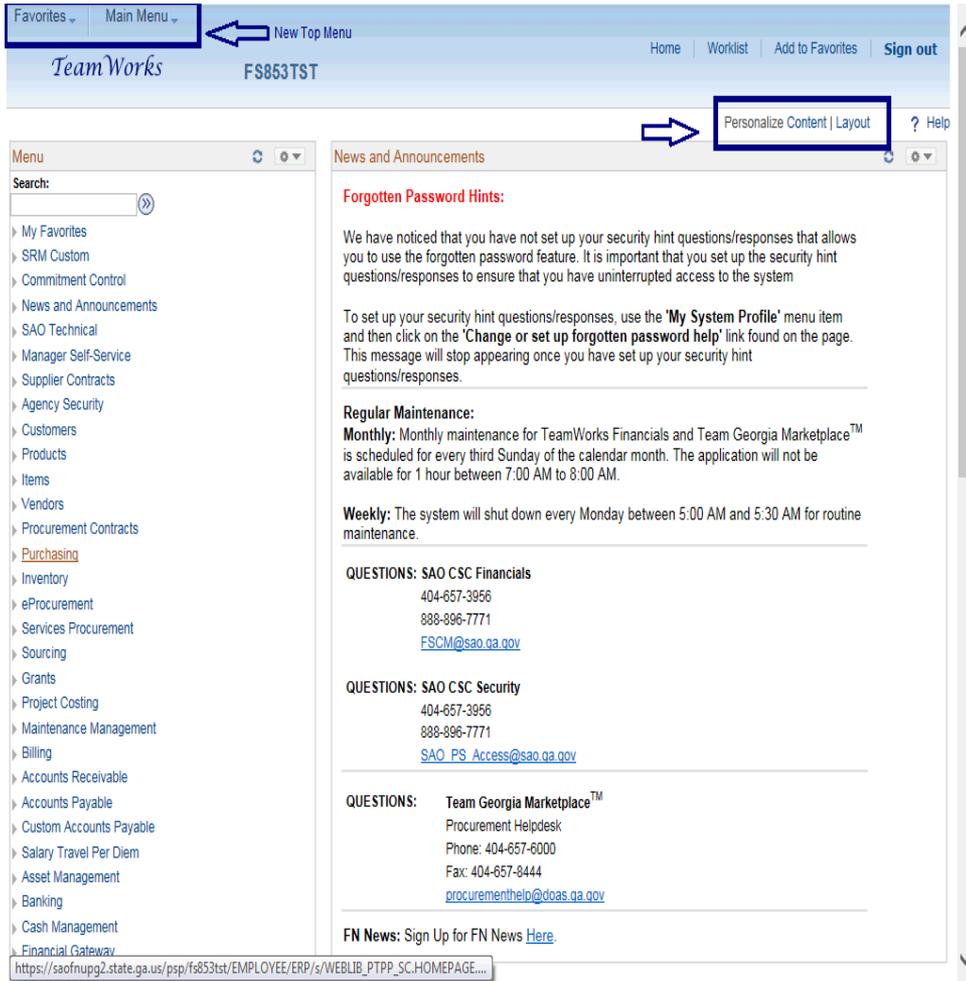




# Financial People Tools Upgrade New Menu Changes

May 2016



Favorites ▾ Main Menu ▾ ← New Top Menu Home | Worklist | Add to Favorites | Sign out  
 TeamWorks FS853TST → Personalize Content | Layout ? Help

**Menu**  
 Search:    
 > My Favorites  
 > SRM Custom  
 > Commitment Control  
 > News and Announcements  
 > SAO Technical  
 > Manager Self-Service  
 > Supplier Contracts  
 > Agency Security  
 > Customers  
 > Products  
 > Items  
 > Vendors  
 > Procurement Contracts  
 > Purchasing  
 > Inventory  
 > eProcurement  
 > Services Procurement  
 > Sourcing  
 > Grants  
 > Project Costing  
 > Maintenance Management  
 > Billing  
 > Accounts Receivable  
 > Accounts Payable  
 > Custom Accounts Payable  
 > Salary Travel Per Diem  
 > Asset Management  
 > Banking  
 > Cash Management  
 > Financial Gateway

**News and Announcements**  
**Forgotten Password Hints:**  
 We have noticed that you have not set up your security hint questions/responses that allows you to use the forgotten password feature. It is important that you set up the security hint questions/responses to ensure that you have uninterrupted access to the system  
 To set up your security hint questions/responses, use the 'My System Profile' menu item and then click on the 'Change or set up forgotten password help' link found on the page. This message will stop appearing once you have set up your security hint questions/responses.

**Regular Maintenance:**  
**Monthly:** Monthly maintenance for TeamWorks Financials and Team Georgia Marketplace™ is scheduled for every third Sunday of the calendar month. The application will not be available for 1 hour between 7:00 AM to 8:00 AM.  
**Weekly:** The system will shut down every Monday between 5:00 AM and 5:30 AM for routine maintenance.

**QUESTIONS: SAO CSC Financials**  
 404-657-3956  
 888-896-7771  
[FSCM@sao.ga.gov](mailto:FSCM@sao.ga.gov)

**QUESTIONS: SAO CSC Security**  
 404-657-3956  
 888-896-7771  
[SAO\\_PS\\_Access@sao.ga.gov](mailto:SAO_PS_Access@sao.ga.gov)

**QUESTIONS: Team Georgia Marketplace™**  
 Procurement Helpdesk  
 Phone: 404-657-6000  
 Fax: 404-657-8444  
[procurementhelp@doas.ga.gov](mailto:procurementhelp@doas.ga.gov)

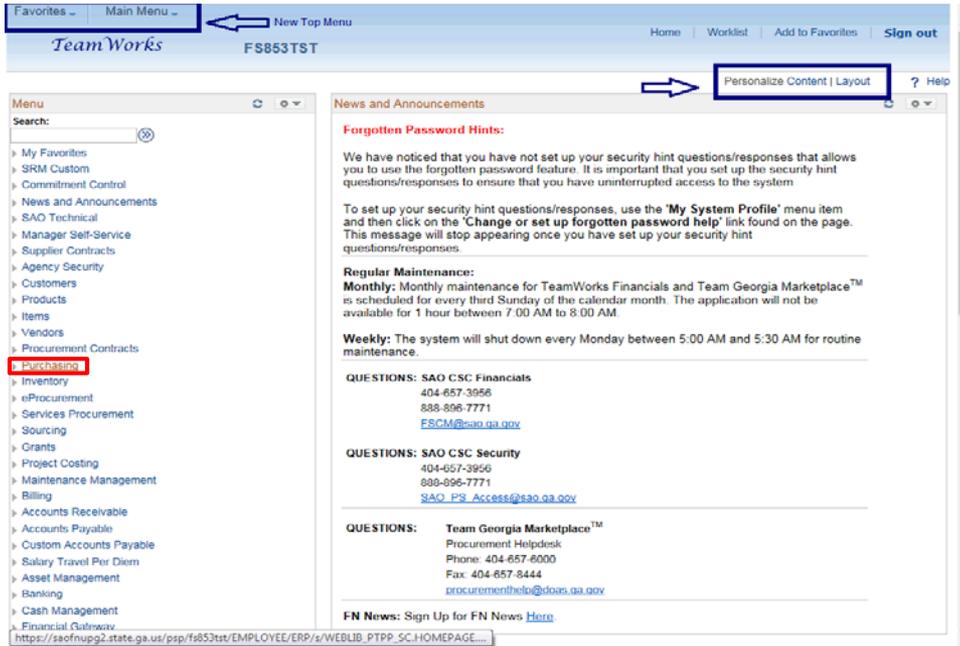
**FN News:** Sign Up for FN News [Here](#).

[https://saofnupg2.state.ga.us/psp/fs853tst/EMPLOYEE/ERP/s/WEBLIB\\_PTPP\\_SC.HOMEPAGE...](https://saofnupg2.state.ga.us/psp/fs853tst/EMPLOYEE/ERP/s/WEBLIB_PTPP_SC.HOMEPAGE...)

**Scenario:** You are learning how to use the new menu navigation in TeamWorks Financial's.

At the end of this topic you should be able to:

- Navigate in TeamWorks
- Sign out of TeamWorks



The screenshot shows the TeamWorks homepage interface. At the top, there is a navigation bar with 'Favorites', 'Main Menu', and 'New Top Menu' (indicated by a blue arrow). The user is logged in as 'FS853TST'. In the upper right corner, there is a 'Personalize Content | Layout' button (indicated by a blue arrow) and a 'Sign out' link. On the left side, a 'Menu' sidebar is visible, listing various system functions. The 'Purchasing' link is highlighted with a red box. The main content area displays 'News and Announcements' with sections for 'Forgotten Password Hints', 'Regular Maintenance' (Monthly and Weekly), and contact information for 'SAO CSC Financials', 'SAO CSC Security', and 'Team Georgia Marketplace'. A URL bar at the bottom shows the page path: 'http://saofnvp2.state.ga.us/psp/fs853tst/EMPLOYEE/ERP/s/WEBLIB\_PTPP\_SC.HOMEPAGE...'

## Step 1

The **TeamWorks Homepage** displays.

New changes include;

- New Look to Home Page
- Menu is now at the top
- Personalize Content and Layout option is now at the upper right corner of the screen.

Now, let's navigate in the new environment!

Click the **Purchasing** link.

Favorites - Main Menu - > Purchasing -

TeamWorks FS863TST Home Worklist Add to Favorites Sign out

Main Menu >

**Purchasing**

Manage requisitions, purchase orders, receipts, CPO contracts, and related data.

<p><b>Management Reporting</b> Management Reporting</p> <ul style="list-style-type: none"> <li>Minority Report (All RFQs)</li> <li>Minority Report (Inhouse)</li> <li>Minority Rpt By Origin</li> <li>2 More...</li> </ul>	<p><b>Requisitions</b> Create, maintain, reconcile or review requisitions information.</p> <ul style="list-style-type: none"> <li>Add/Update Requisitions</li> <li>Requester's Workbench</li> <li>Approve Chartfields</li> <li>4 More...</li> </ul>	<p><b>Request for Quotes</b> Create requests for quotes (RFQs), enter vendor responses, or award RFQs.</p> <ul style="list-style-type: none"> <li>Receipts</li> <li>Dispatch RFQs</li> <li>Add/Update RFQs</li> <li>5 More...</li> </ul>
<p><b>Purchase Orders</b> Add, maintain, and dispatch purchase orders.</p> <ul style="list-style-type: none"> <li>Add/Update Express POs</li> <li>Add/Update POs</li> <li>Buyer's Workbench</li> <li>13 More...</li> </ul>	<p><b>Receipts</b> Enter and load receiving data, generate accruals, review and report on receipts.</p> <ul style="list-style-type: none"> <li>Add/Update Receipts</li> <li>Maintain Delivery Information</li> <li>Maintain Activity and Comments</li> <li>2 More...</li> </ul>	<p><b>Return To Vendor</b> Create returns to vendor (RTV's), dispatch, reconcile or review RTV's.</p> <ul style="list-style-type: none"> <li>Document Status</li> </ul>

<https://saofnupg2.state.ga.us/psp/fs853tst/EMPLOYEE/ERP/s/>

## Step 2

Notice, when the menu selection was made, the left hand menu went away. You now must use the top menu to navigate to another page.

You can choose to navigate at the top menu or use the links under the menu selection you made.

Favorites - Main Menu - Purchasing -

TeamWorks FS863TST Home Worklist Add to Favorites Sign out

Main Menu >

**Purchasing**  
Manage requisitions, purchase orders, receipts, CPO contracts, and related data.

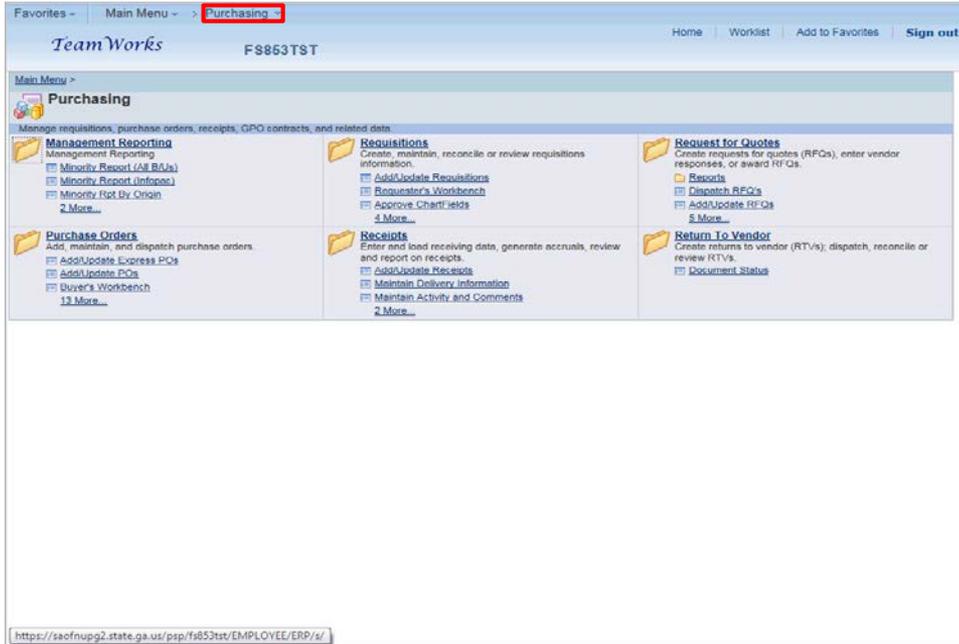
<p><b>Management Reporting</b> Management Reporting</p> <ul style="list-style-type: none"> <li>Minority Report (All RFQs)</li> <li>Minority Report (Infosec)</li> <li>Minority Rpt By Origin</li> <li>2 More...</li> </ul>	<p><b>Requisitions</b> Create, maintain, reconcile or review requisitions information.</p> <ul style="list-style-type: none"> <li>Add/Update Requisitions</li> <li>Requisition Workbench</li> <li>Approve Chartfields</li> <li>4 More...</li> </ul>	<p><b>Request for Quotes</b> Create requests for quotes (RFQs), enter vendor responses, or award RFQs.</p> <ul style="list-style-type: none"> <li>Receipts</li> <li>Dispatch RFQs</li> <li>Add/Update RFQs</li> <li>5 More...</li> </ul>
<p><b>Purchase Orders</b> Add, maintain, and dispatch purchase orders.</p> <ul style="list-style-type: none"> <li>Add/Update Express POs</li> <li>Add/Update POs</li> <li>Buyer's Workbench</li> <li>13 More...</li> </ul>	<p><b>Receipts</b> Enter and load receiving data, generate accruals, review and report on receipts.</p> <ul style="list-style-type: none"> <li>Add/Update Receipts</li> <li>Maintain Delivery Information</li> <li>Maintain Activity and Comments</li> <li>2 More...</li> </ul>	<p><b>Return To Vendor</b> Create returns to vendor (RTV/s), dispatch, reconcile or review RTV/s.</p> <ul style="list-style-type: none"> <li>Document Status</li> </ul>

<https://saofnupg2.state.ga.us/ppp/fs853tst/EMPLOYEE/ERP/s/>

### Step 3

**Decision:** Please make a selection from the options listed below.

- Top Menu Navigation  
Go to step 4
- Standard Menu Navigation  
Go to step 10

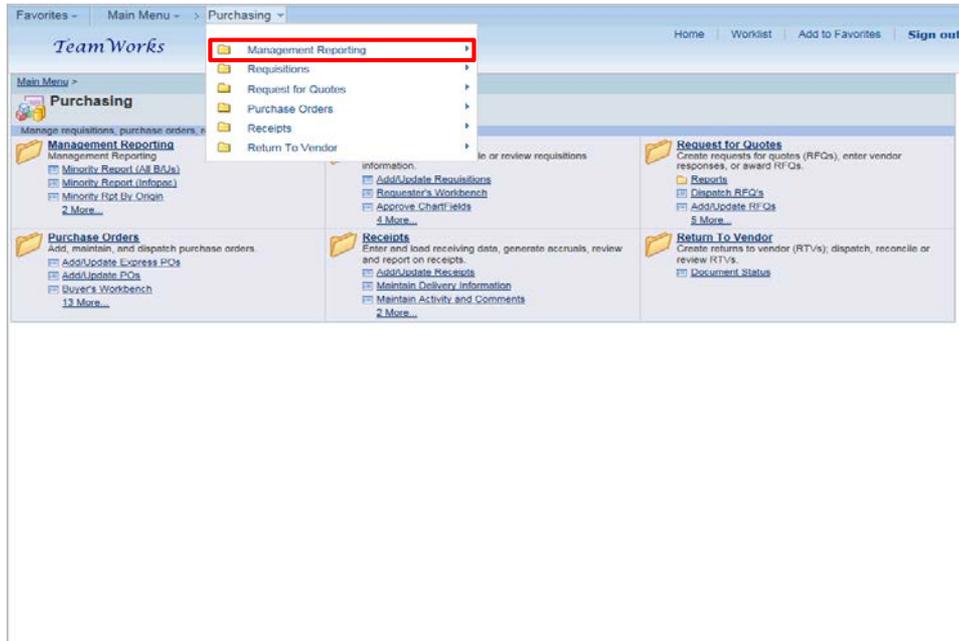


The screenshot shows the TeamWorks web application interface. At the top, there is a navigation bar with 'Favorites -', 'Main Menu -', and 'Purchasing -' (the latter is highlighted with a red box). Below this, the user's name 'TeamWorks' and the user ID 'FS863TST' are displayed. The main menu is titled 'Main Menu >' and 'Purchasing'. Under 'Purchasing', there is a sub-menu 'Management Reporting' with options: 'Minority Report (All RFQs)', 'Minority Report (Infopage)', 'Minority Rpt By Origin', and '2 More...'. Below that is 'Purchase Orders' with options: 'Add/Update Express POs', 'Add/Update POs', 'Buyer's Workbench', and '13 More...'. To the right, there are three columns of menu items: 'Requisitions' (Create, maintain, reconcile or review requisitions information) with options 'Add/Update Requisitions', 'Requester's Workbench', 'Approve Chartfields', and '4 More...'; 'Receipts' (Enter and load receiving data, generate accruals, review and report on receipts) with options 'Add/Update Receipts', 'Maintain Delivery Information', and '2 More...'; 'Request for Quotes' (Create requests for quotes (RFQs), enter vendor responses, or award RFQs) with options 'Receipts', 'Dispatch RFQs', 'Add/Update RFQs', and '5 More...'; and 'Return To Vendor' (Create returns to vendor (RTV/s), dispatch, reconcile or review RTV/s) with option 'Document Status'. At the bottom left, the URL 'https://saofnupg2.state.ga.us/prp/fs853tst/EMPLOYEE/ERP/s/' is visible.

## Step 4

You chose to navigate using top menu navigation.

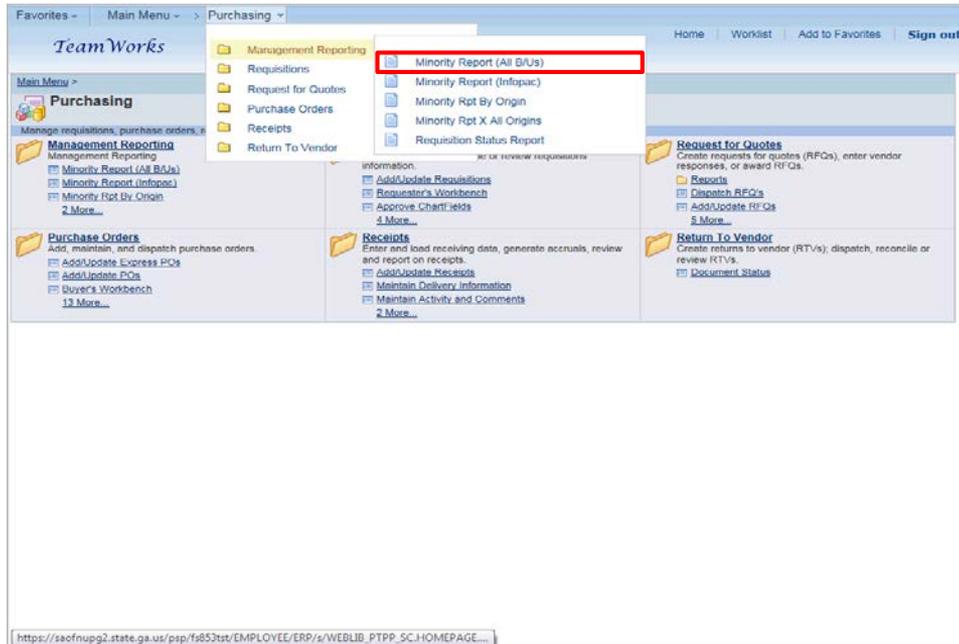
Click the **Purchasing** button.



## Step 5

After making your selection, a drop down menu will display

Click the **Management Reporting** menu.



Step 6

A sub-menu will display.

Click the **Minority Report (All B/Us)** menu.



## New Menu Changes

Favorites - Main Menu - Purchasing - Management Reporting - Minority Report (All B/Us)

**TeamWorks** FS863TST [Home](#) [Worklist](#) [Add to Favorites](#) [Sign out](#)

New Window | Help |

### Minority Report(All B/Us)

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID:

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

<https://saofnupg2.state.ga.us/prp/fs853tst/EMPLOYEE/ERP/h/?tab=DEFAULT>

### Step 7

The selected page displays, and you are ready to complete the fields.

Return to the home page by clicking the **Home** link.



## New Menu Changes

### Step 8

Once you have returned to the homepage, the left hand menu navigation will be displayed.

Click the **Sign out** link.

The screenshot shows the TeamWorks application interface. At the top, there is a navigation bar with "Favorites", "Main Menu", and "TeamWorks FS853TST". Below this is a search bar and a "Sign Out" button. The left-hand menu is expanded, showing various categories like "My Favorites", "SRM Custom", "Commitment Control", "News and Announcements", "SAO Technical", "Manager Self-Service", "Supplier Contracts", "Agency Security", "Customers", "Products", "Items", "Vendors", "Procurement Contracts", "Purchasing", "Inventory", "eProcurement", "Services Procurement", "Sourcing", "Grants", "Project Costing", "Maintenance Management", "Billing", "Accounts Receivable", "Accounts Payable", "Custom Accounts Payable", "Salary Travel Per Diem", "Asset Management", "Banking", and "Cash Management". The main content area displays "News and Announcements" with sections for "Forgotten Password Hints", "Regular Maintenance" (Monthly and Weekly), and "QUESTIONS" for SAO CSC Financials and Team Georgia Marketplace. A "Sign Out" link is visible in the bottom right corner of the main content area.



## New Menu Changes

The screenshot shows the login interface for the 'Financial Systems' application. At the top left is the State of Georgia seal. The title 'Financial Systems' is centered in a blue header. Below the header, the text 'PeopleSoft FSCM' is visible. The main content area contains a login form with the following elements: 'Database: F88531ST', 'User ID' and 'Password' input fields, a 'Sign In' button, and a 'Forgot your password?' link. Below the form is an 'Important Notice' section with a paragraph of text regarding the application's use policy. At the bottom, there is a 'QUESTIONS:' section with three columns of contact information for SAO CSC Financials, SAO CSC Security, and Team Georgia Marketplace Procurement Helpdesk.

Database: F88531ST

User ID

Password

[Forgot your password?](#)

**Important Notice**

This is a State of Georgia application. It is provided to conduct official State business and must be used appropriately. All individuals using this application must follow the appropriate use policy and procedures defined by their individual Agencies or as defined by Georgia Technology Authority's appropriate use policy. All information in the system belongs to the State of Georgia and may be read or monitored by authorized persons.

By logging into this application, you agree to abide by all established Enterprise, State and Federal policies governing the appropriate use of State of Georgia resources.

**QUESTIONS:**

SAO CSC Financials	SAO CSC Security	Team Georgia Marketplace™ Procurement Helpdesk
404-657-3956	404-657-3956	Phone 404-657-6000
888 896 7771	888 896 7771	Fax: 404 657 8444
<a href="mailto:FSCM@sao.ga.gov">FSCM@sao.ga.gov</a>	<a href="mailto:SAO_PS_Access@sao.ga.gov">SAO_PS_Access@sao.ga.gov</a>	<a href="mailto:procurementhelp@doas.ga.gov">procurementhelp@doas.ga.gov</a>

### Step 9

You successfully navigated in the new Financial TeamWorks System.

**End of Procedure.** Remaining steps apply to other paths.

Step 10

You have chosen to navigate using the former menu path.

Find the **Management Reporting** option.

Favorites ▾ Main Menu ▾ > Purchasing ▾

Team Works FS853TST Home Worklist Add to Favorites Sign out

Main Menu >

**Purchasing**

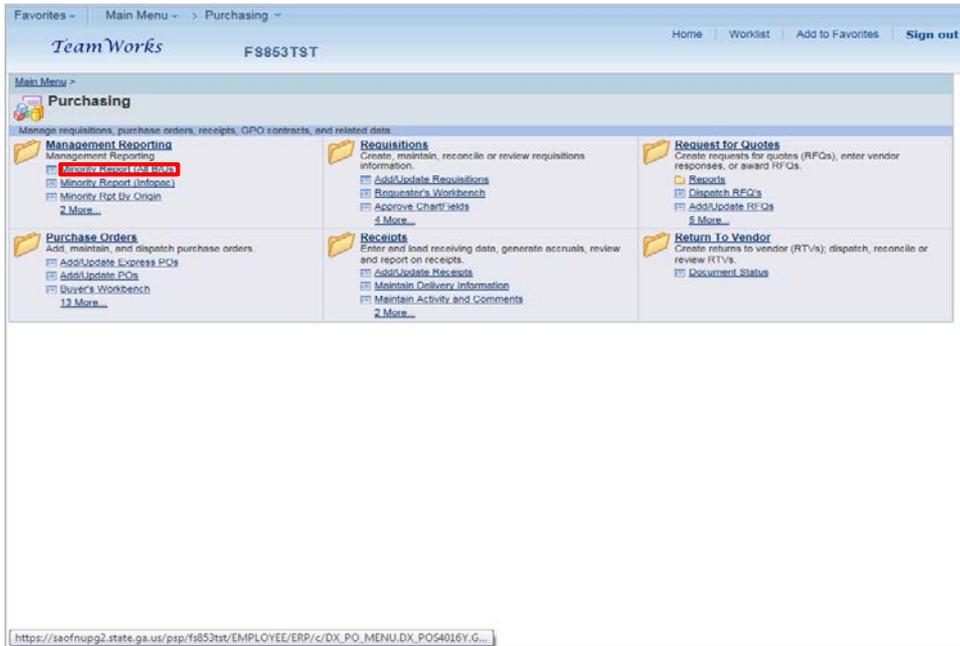
Manage requisitions, purchase orders, receipts, GPO contracts, and related data.

<p><b>Management Reporting</b> Management Reporting</p> <ul style="list-style-type: none"> <li>Minority Report (All BUs)</li> <li>Minority Report (Infopac)</li> <li>Minority Rpt By Origin</li> <li>2 More...</li> </ul>	<p><b>Requisitions</b> Create, maintain, reconcile or review requisitions information.</p> <ul style="list-style-type: none"> <li>Add/Update Requisitions</li> <li>Requester's Workbench</li> <li>Approve ChartFields</li> <li>4 More...</li> </ul>	<p><b>Request for Quotes</b> Create requests for quotes (RFQs), enter vendor responses, or award RFQs.</p> <ul style="list-style-type: none"> <li>Reports</li> <li>Dispatch RFQ's</li> <li>Add/Update RFQs</li> <li>5 More...</li> </ul>
<p><b>Purchase Orders</b> Add, maintain, and dispatch purchase orders.</p> <ul style="list-style-type: none"> <li>Add/Update Express POs</li> <li>Add/Update POs</li> <li>Buyer's Workbench</li> <li>13 More...</li> </ul>	<p><b>Receipts</b> Enter and load receiving data, generate accruals, review and report on receipts.</p> <ul style="list-style-type: none"> <li>Add/Update Receipts</li> <li>Maintain Delivery Information</li> <li>Maintain Activity and Comments</li> <li>2 More...</li> </ul>	<p><b>Return To Vendor</b> Create returns to vendor (RTVs); dispatch, reconcile or review RTVs.</p> <ul style="list-style-type: none"> <li>Document Status</li> </ul>

[https://saofnupg2.state.ga.us/psp/fs853tst/EMPLOYEE/ERP/c/DX\\_PO\\_MENU.DX\\_POS4016Y.G...](https://saofnupg2.state.ga.us/psp/fs853tst/EMPLOYEE/ERP/c/DX_PO_MENU.DX_POS4016Y.G...)

## Step 11

Click the **Minority Report (All B/Us)** link.



The screenshot shows the TeamWorks web application interface. At the top, there is a navigation bar with 'Favorites -', 'Main Menu >', and 'Purchasing -'. Below this, the 'TeamWorks' logo and the user ID 'FS863TST' are displayed. The main content area is titled 'Main Menu >' and 'Purchasing'. A sub-header reads 'Manage requisitions, purchase orders, receipts, CPO contracts, and related data.' The menu is organized into four columns:

- Management Reporting** (Management Reporting):
  - Minority Report (All B/Us) - This link is highlighted with a red box.
  - Minority Rpt By Origin
  - 2 More...
- Requisitions** (Create, maintain, reconcile or review requisitions information):
  - Add/Update Requisitions
  - Requester's Workbench
  - Approve Chartfields
  - 4 More...
- Request for Quotes** (Create requests for quotes (RFQs), enter vendor responses, or award RFQs):
  - Receipts
  - Dispatch RFQs
  - Add/Update RFQs
  - 5 More...
- Purchase Orders** (Add, maintain, and dispatch purchase orders):
  - Add/Update Express POs
  - Add/Update POs
  - Buyer's Workbench
  - 13 More...
- Receipts** (Enter and load receiving data, generate accruals, review and report on receipts):
  - Add/Update Receipts
  - Maintain Delivery Information
  - Maintain Activity and Comments
  - 2 More...
- Return To Vendor** (Create returns to vendor (RTV/s), dispatch, reconcile or review RTV/s):
  - Document Status

At the bottom of the page, a URL is visible: [https://saofnup2.state.ga.us/prp/fs853tst/EMPLOYEE/ERP/c/DX\\_PO\\_MENU.DX\\_POS4016Y.G...](https://saofnup2.state.ga.us/prp/fs853tst/EMPLOYEE/ERP/c/DX_PO_MENU.DX_POS4016Y.G...)



## New Menu Changes

### Step 12

The selected page will appear.

Favorites - Main Menu - Purchasing - Management Reporting - Minority Report (All B/Us)

TeamWorks FS863TST Home Worklist Add to Favorites Sign out

New Window Help

#### Minority Report(All B/Us)

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Search Criteria

Run Control ID: begins with

Case Sensitive

Search Clear Basic Search Save Search Criteria

Find an Existing Value Add a New Value

<https://saofnupg2.state.ga.us/psp/fs853tst/EMPLOYEE/ERP/h/?tab=DEFAULT>



## New Menu Changes

Favorites - Main Menu - Purchasing - Management Reporting - Minority Report (All B/Us)

TeamWorks FS863TST [Home](#) [Worklist](#) [Add to Favorites](#) [Sign out](#)

New Window | Help |

### Minority Report(All B/Us)

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID:

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

<https://saofnupg2.state.ga.us/psp/fs853tst/EMPLOYEE/ERP/h/?tab=DEFAULT>

### Step 13

Return to the Home page by clicking the **Home** link.  
Go to step 3