



Business World User Guide
How to navigate the system
Shropshire Council

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1. Introduction

This guidance is a useful introduction on how to navigate around the Business World system. Please also refer to the Business World HR How to log in to the system.

2. Navigation

2.1 Terminology

- **Business World** - will be shortened to BW
- **Resource** - an employee
- **Position** - The post as listed on the establishment list.
- **Shropshire Learning Gateway** – SLG

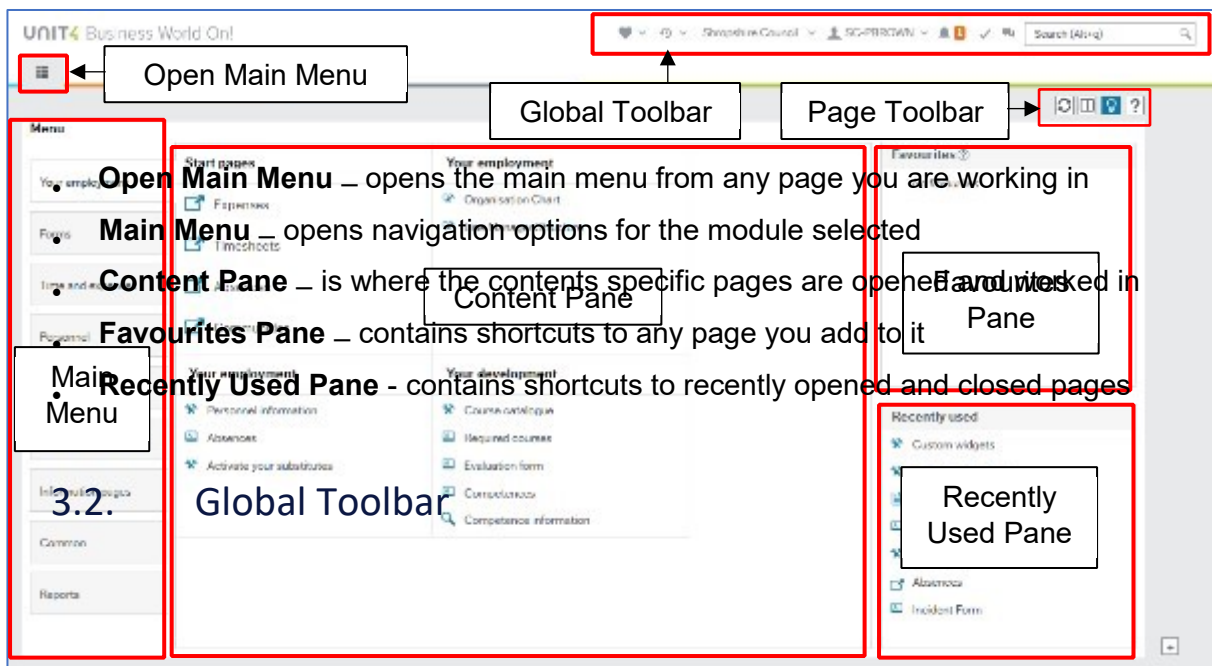
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- **Line manager** – refers to Administrator, Office Manager, Headteacher or other person as delegated by the school.

2.2 The Employee Home Page

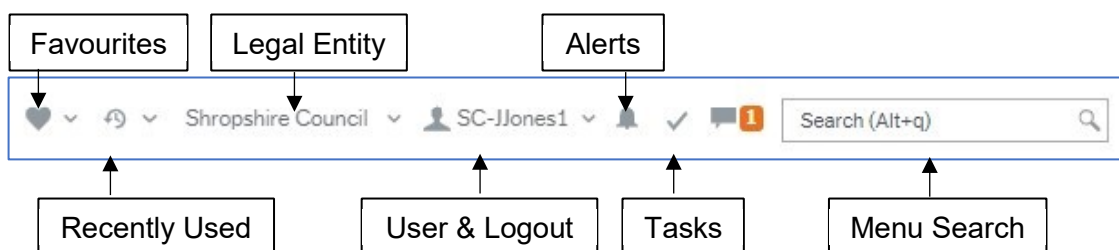
When you log on to Business World you will be directed to the Employee Home Page.

The Business World How To guides on the SLG provide guidance on how to select and complete HR forms.



2.3 The Global Toolbar

The Global Tool Bar is visible from all screens in Business World (BW).



- **Favourites** – opens the list of favourite shortcuts.
- **Recently Used** – opens the list of recently used pages.
- **Legal Entity** – displays the organisation you are logged into.

- **User & Logout** – displays your user name. The drop down contains options, including Logout.
- **Alerts** – is where your alerts are accessed from. An alert provides information that may be useful to you. They do not require actioning to progress anything. A white number on an orange background indicates how many alerts you have. When you have read the information, you can:
 - Click the **X** to close the screen. This will keep the alert in the list.
 - Click **Archive alert**, to send the alert to the archive.
 - Click **Delete alert** to remove the alert.
- **Tasks** – is where your tasks are accessed from. Tasks **must** be reviewed and actioned on a regular basis to ensure that tasks created in BW are progressed in a timely way. Line managers should open their tasks daily to ensure that timescales for approving/rejecting tasks are met.

Workflow Tasks are generated by BW according to a set of rules which are:

- Specific to each type of transaction, form or screen.
- Specific to each Legal Entity, School and approval level.

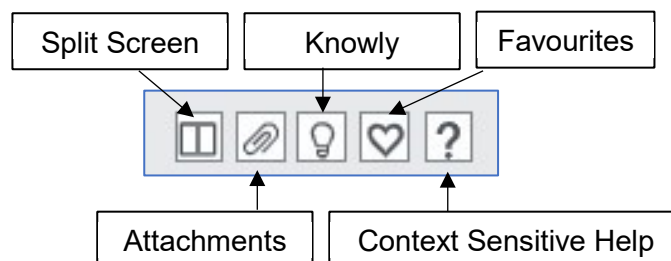
The Workflow Tasks ensure that the correct person or team is notified of an action requirement. A link is provided to open the record requiring action. An example of this would be to approve a change of contract, a new starter form, or an expense claim.

A white number on an orange background indicates how many tasks you have.

- **Menu Search** – allows you to search for and then open screens.

2.4 Page Toolbar

The Page Toolbar icons will change to reflect the open screen. The icons will be described later in the guidance.



- **Split Screen** – allows two screens to be open at the same time.
- **Attachments** – allows files to be added to records.
- **Knowly** – is a means of sharing knowledge with other users or recording notes for yourself.
- **Favourites** – opens the list of favourite shortcuts.

- **Context Sensitive Help** – opens Help for the screen that is active.

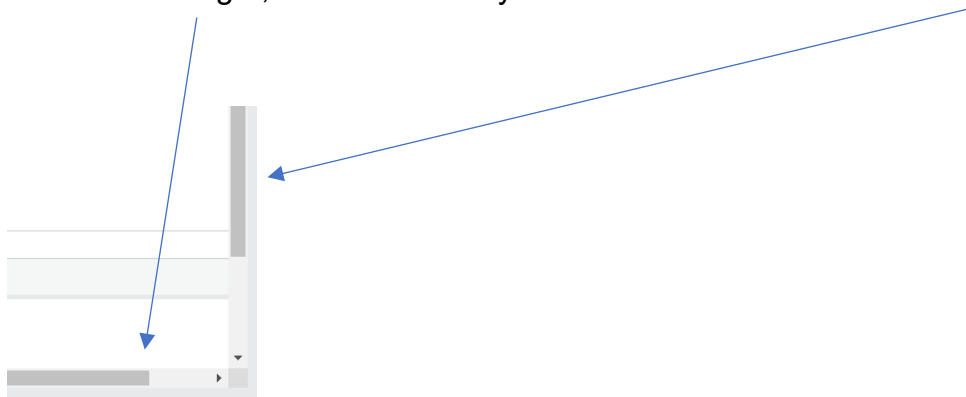
2.5 Tabbing and scroll bars

Business World uses the **Tab Key**, rather than the Enter Key, to move from field to field and record the entry of data. **Always “Tab”** out of a field after entering data (whether by typing or choosing from a drop-down list). This allows Business World to react to your choice, e.g. by automatically prepopulating other related information.



Scroll Bars

Please ensure you are familiar with the scroll bars to move the screen up and down or left to right, this will ensure you can see the whole screen.



2.6 Value Lookup

Value Lookup is a search function that is found across many areas of Business World. It helps to find specific attributes and/or categories that you can then select. The Value Lookup icon is **three dots** on a field.



Clicking this will open another field. **Press search**, then select the result you were looking for to populate the field.

Attribute value	Attribute	Description	Period from	Period to
EP	PREFCONT	Email - Personal	0	
EW	PREFCONT	Email - Work	0	
L	PREFCONT	Letter	0	
T	PREFCONT	Telephone	0	

2.7 Saving

When completing a form in Business world e.g. a New Starter Form or Contractual Change Form, if you need to save the form and go back to it later, **click 'Save as draft'** and make a note of **the form ID number**. It is good practice to make a note of form numbers whether saving as draft or submitting a form.

To log back into the saved form, e.g. to log back into a New Starter Form, select 'Forms', select the appropriate form 'New Starter Form'

Menu

- Your employment
- Forms**

Absence (SC)	New Starter (SC)
Adoption Leave Request Form	New Starter Declaration (P46)
Maternity Notification Form	New Starter Form
Paternity Leave Request Form	Induction Form

A new screen will open, delete (New) and press the space bar, all forms previously saved as draft by the originator will appear. Select the appropriate form and tab to load, it can be completed and submitted or worked on again and saved as draft.

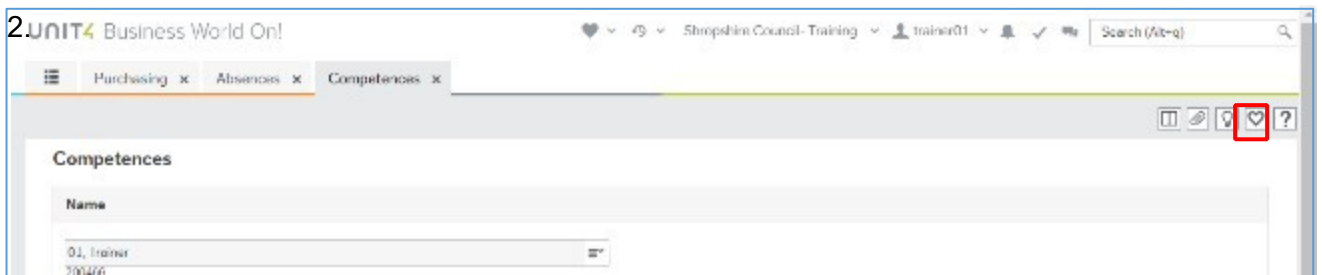
Form ID*
[NEW] [v]
[NEW]
Form description*
New Starter
Form owner

2.8 Favourites

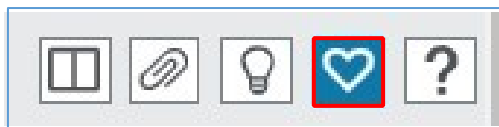
Favourites is a means of creating shortcuts to the screens you use most often.

2.8.1 To add to your favourites:

1. Navigate to the required screen



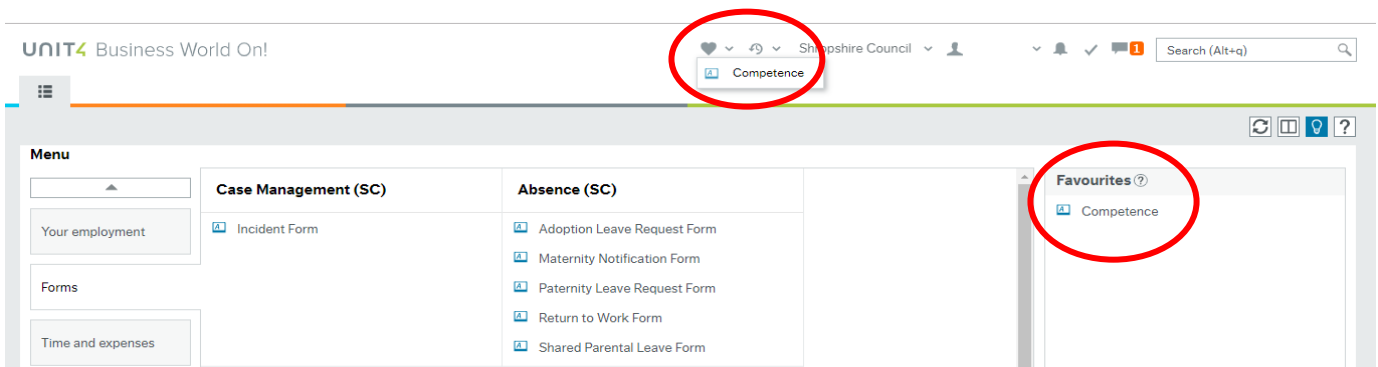
2. Click **Mark as favourite**



3. The icon will become blue. **Clicking it again will remove it from the favourites list.**

2.8.2 To view Favourites:

Favourites can be accessed from the dashboard in two places.

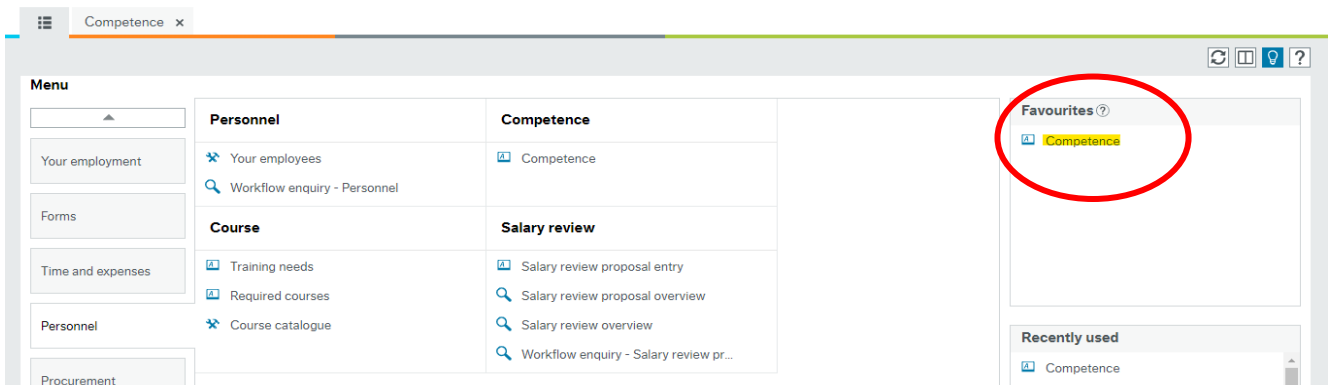


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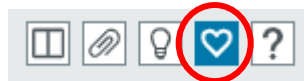
- The **Favourites** icon on the Global Toolbar produces a popup list of screen shortcuts.
 - The **Favourites** pane contains the same list of screen shortcuts.
- Click either of the links shown to open them.**

2.8.3 To remove from Favourites

1. Click on the link for the appropriate page you would like to remove.

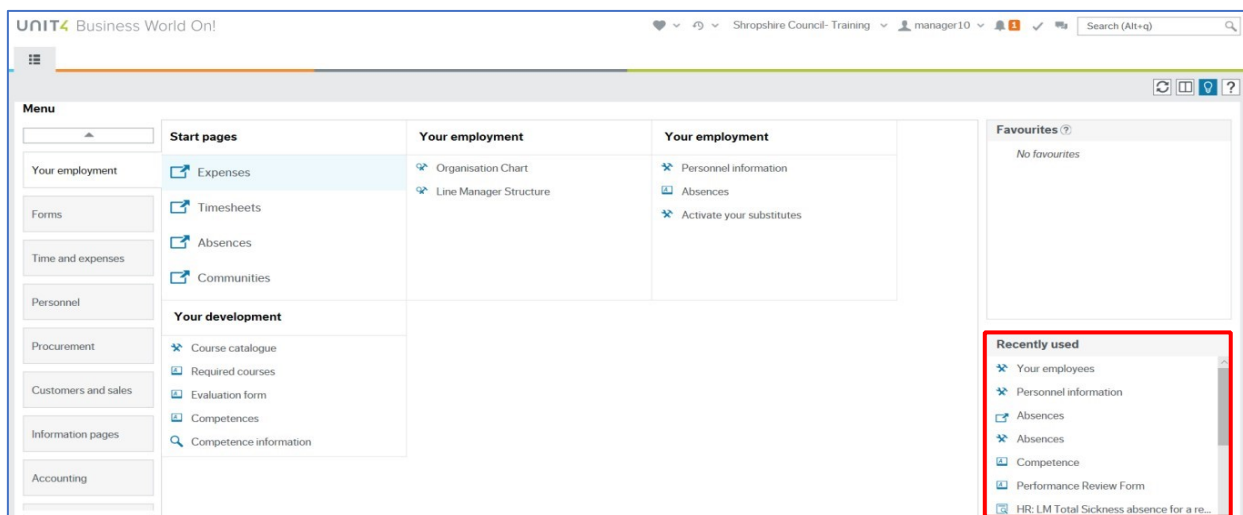


2. Click the blue **remove from Favourites** icon.



2.9 Recently Used

The **Recently used** pane is a list of the 20 most recently opened screens (whether or not they are in the Favourites pane).



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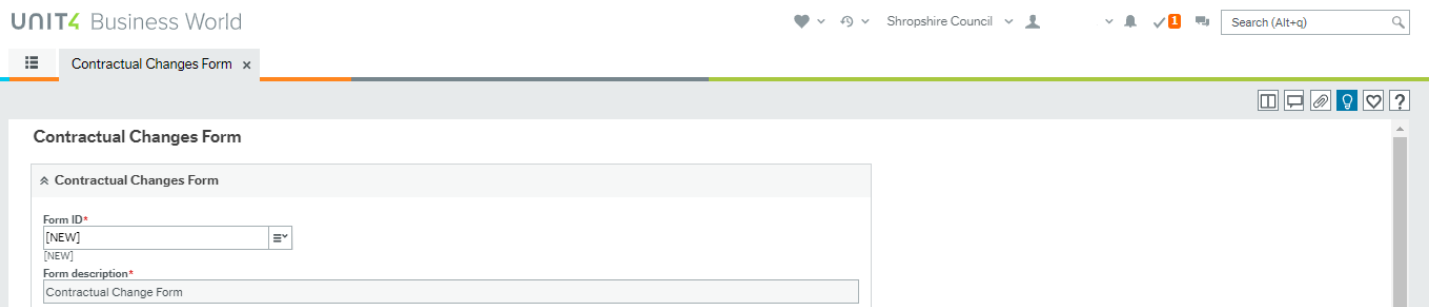
Each new screen that is opened is automatically added to the **Recently used** pane.

2.10 Split View

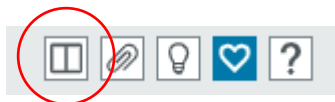
The **Split View** function allows you to have two screens open at the same time.

2.10.1 Opening two screens

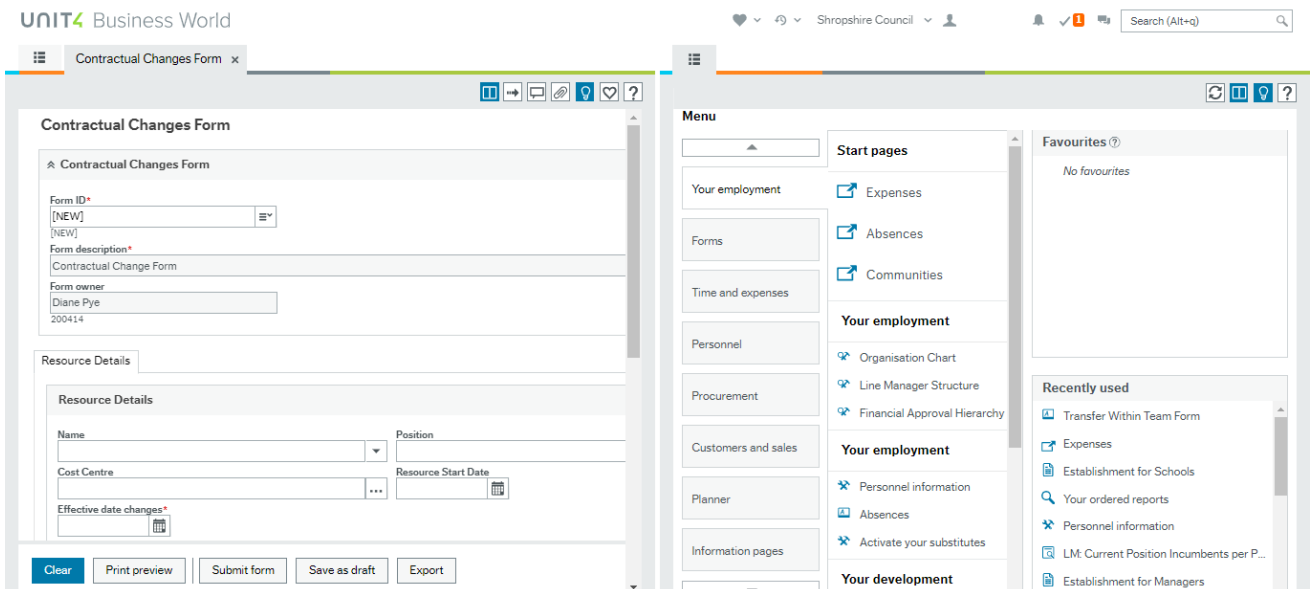
1. Open the first screen that you want. **Contractual Changes Form** in this example



2. Click **Split screen**.

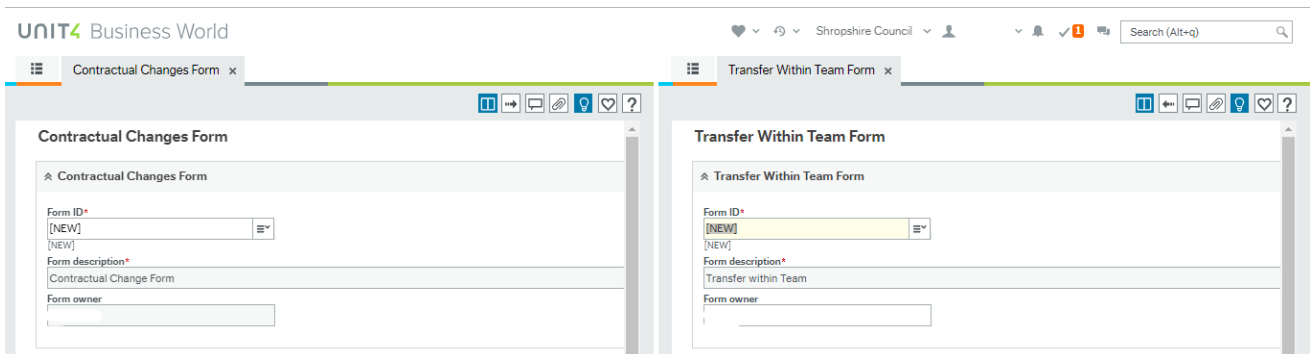


3. The **Menu** is now open to the right of the selected screen and the split view icon is blue.



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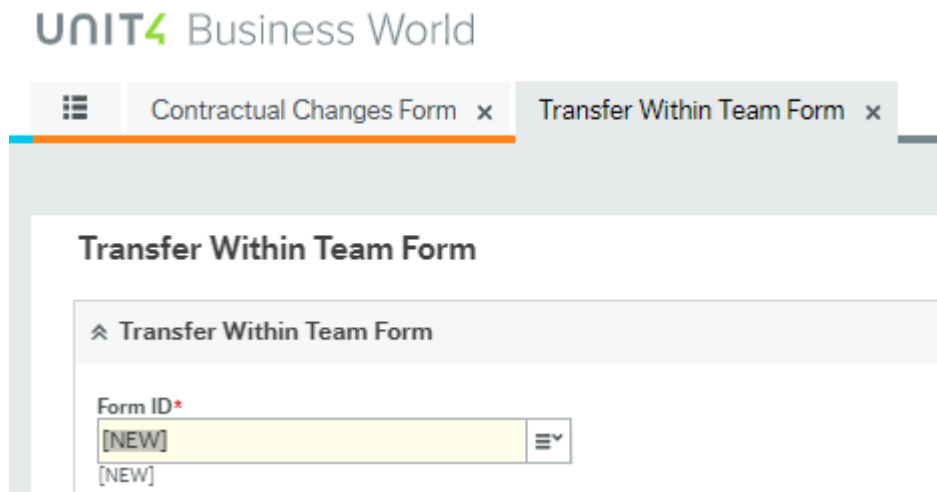
4. Select the next screen to be opened from the menu, **Transfer Within Team Form** in this example.



Both screens are now open at the same time.

2.10.2 Return to a single screen

1. Click the blue **split view** icon.
2. A single screen remains open, with two screen tabs now available (the split view icon is now white).



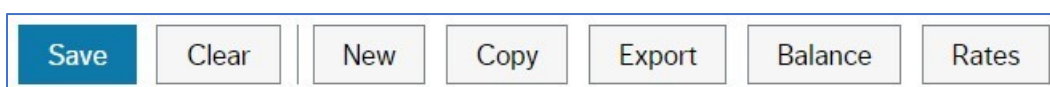
2.11 Screen Tabs

It is possible to have multiple screens opened in BW and each will open in its own window, as shown below.



2.12 Action Buttons (at the bottom of Personnel screens):

The action buttons apply to the Personnel information screens, whichever variant is being viewed.



- **Save** - this will save any changes made to the record
- **Clear** – this normally clears the current data. Does not work on Personnel information
- **New** – for **HR use only** when creating new resources. It is not used by **Schools**
- **Copy** - for **HR use only** when creating new resources. It is not used by **Schools**
- **Balance** – lines 7 to 11 are applicable to schools employees.
- **Export** – this produces a report that could be printed.

2.13 Attaching Documents

There are situations where documents need to be attached to a form in BW. An example would be a New Starter Form, the Office Manager/Administrator needs to add recruitment documents.

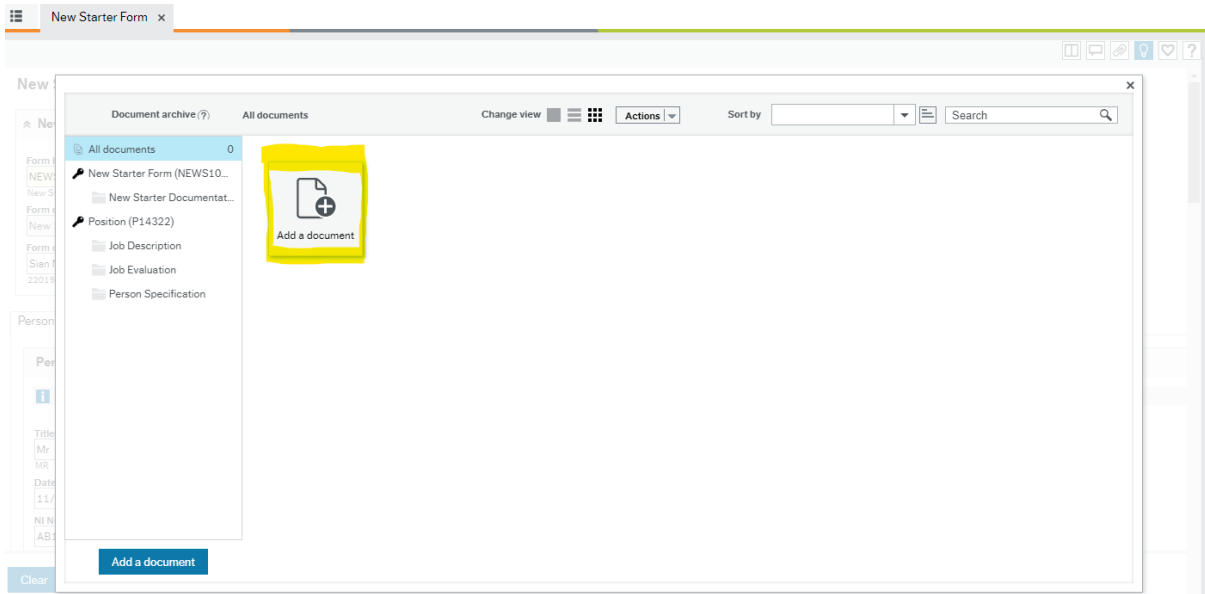
2.13.1 Scan and save the document(s).

2.13.2 With the appropriate form open, (in this example a New Starter Form) click the paperclip icon.

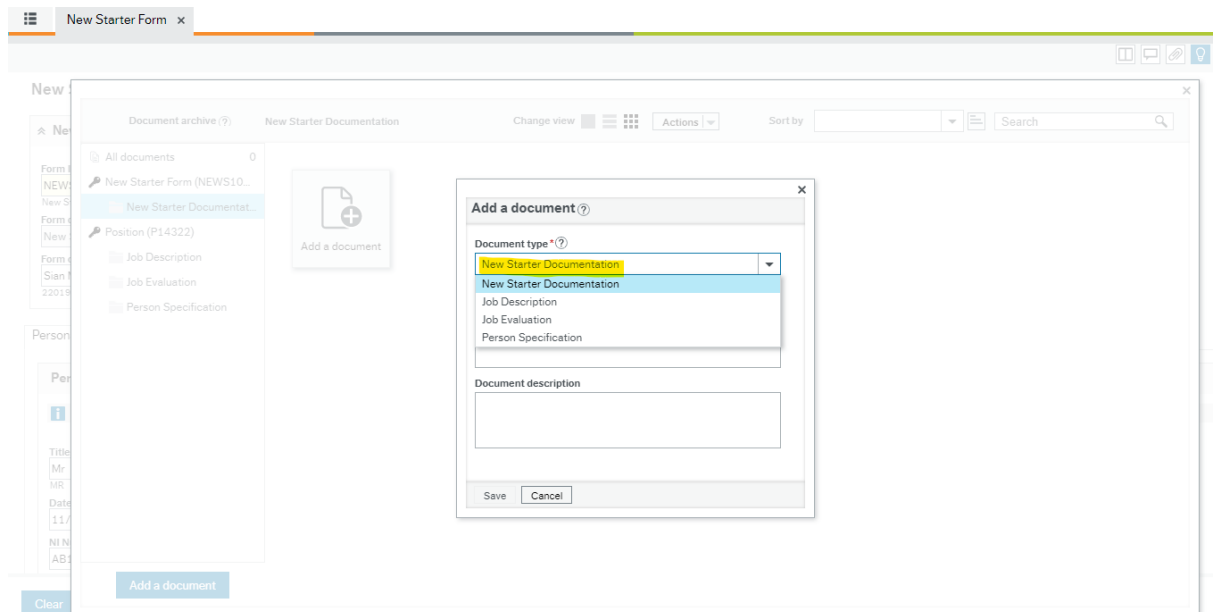


A new screen will open. Click on 'Add Document'

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Document Type, select as appropriate, (this example shows New Starter Documentation).

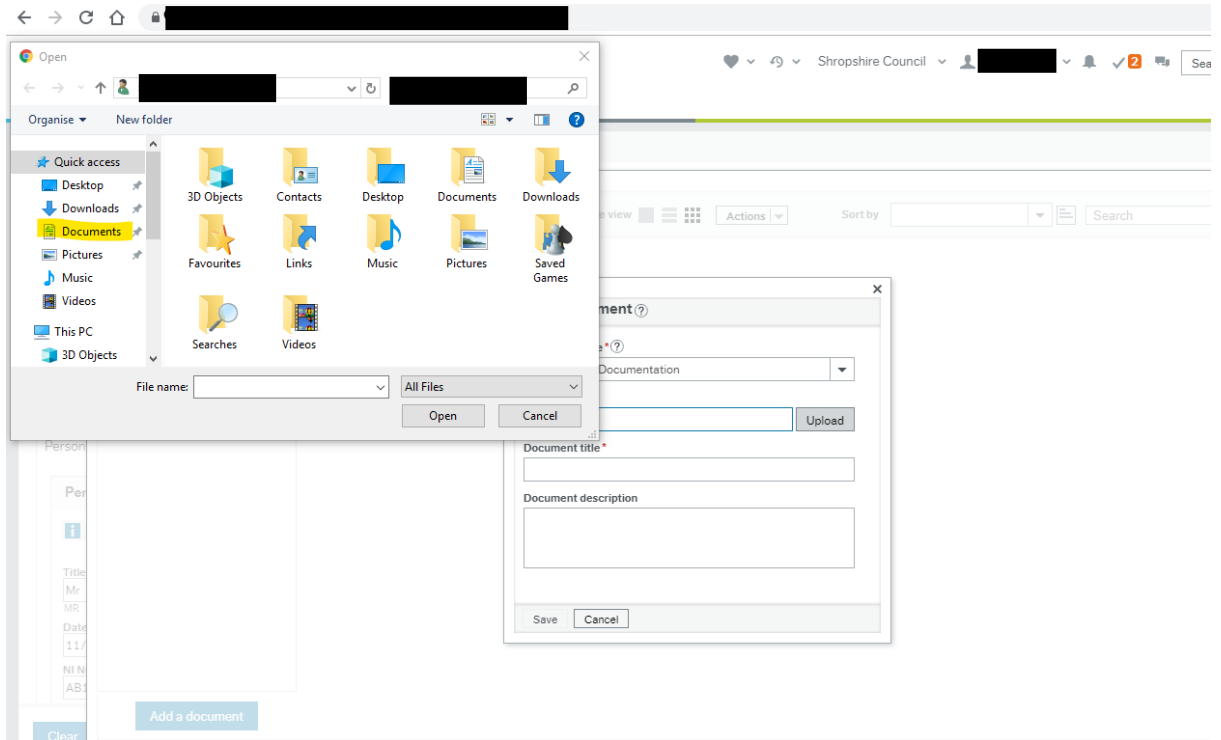


At 'File Name' click 'Upload'

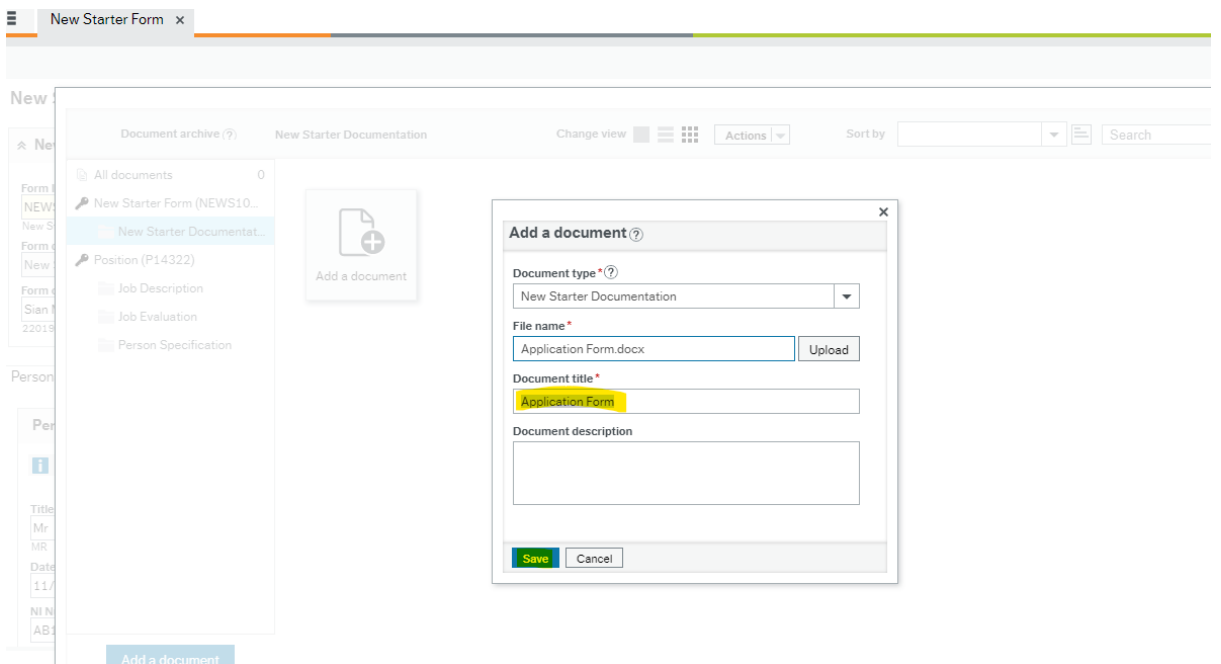
File name *	<input type="text"/>	Upload
Document title *	<input type="text"/>	

To attach the saved document, find the folder where you have saved the documents. Only upload documents relevant to the resource. Double click on the document to attach it or, click on the document once and then press 'Open'.

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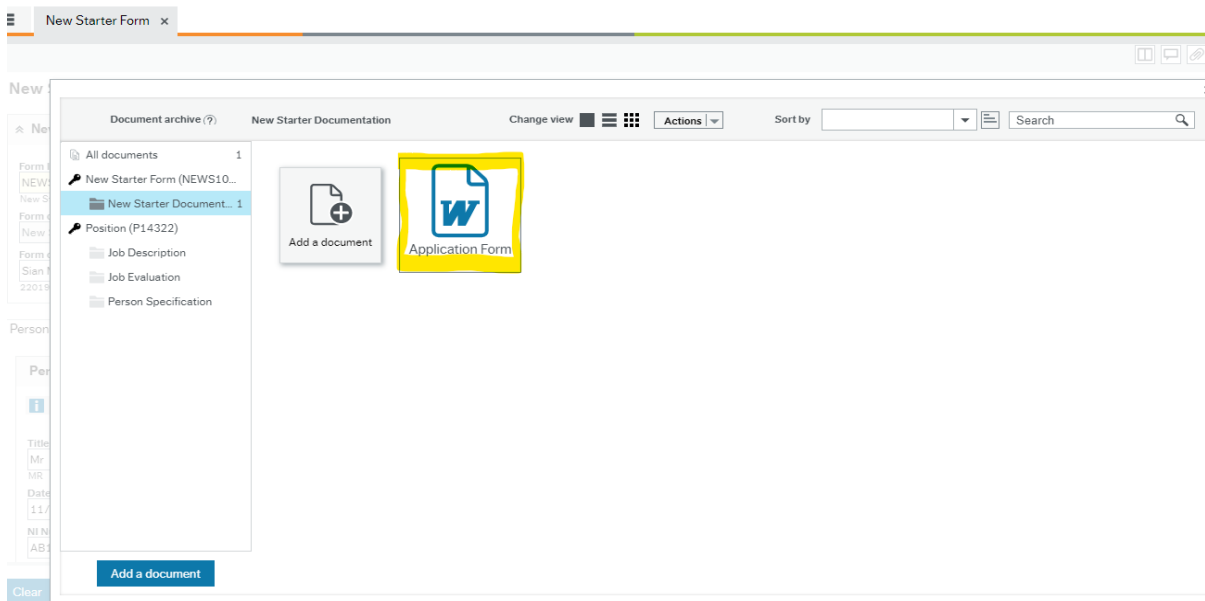


Tab through and press SAVE.



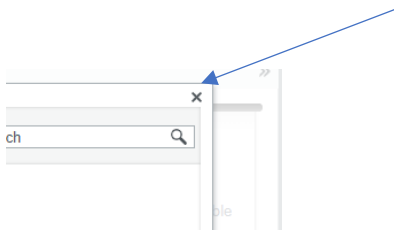
The application form has been attached to the form.

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Repeat the process as necessary to attach all of the forms.

Click the X to close the attachment window.



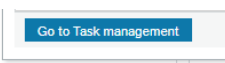
2.14 Tasks

As described in 2.3 above, tasks require action. Every form submitted will workflow to a senior manager for consideration and approval or rejection.

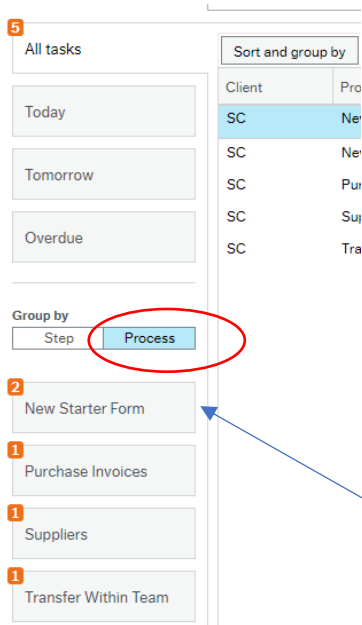
This example shows that 5 tasks are awaiting action by the Headteacher:



Click on the number hi-lighted in red. Then click 'Go to Task Management':



A new window will open. On the left hand side, the tasks can be grouped by Step or Process. Click Process



In this example, there are 2 New Starter Forms, a purchase invoice, suppliers and Transfer within Team Form awaiting action. Click on the New Starter Form box.

Sort and group by					
Client	Process name	Workflow step	Co	Attr.value	Due on
SC	New Starter Form		SC	NEWS10000248	
SC	New Starter Form		SC	NEWS10000267	

Then Click in the line of the first form and review the details.

Use the scroll bars to move across and down the page.

- If all of the details are correct, click '**Approve**'. The Form will follow the pre-determined workflow.
- **If the form is incorrect or has missing details it must be rejected.** When a form is rejected a comment needs to be made so the originator is aware of the reason for rejection and what changes need to be made if they wish to resubmit the form. The originator is then able to amend or withdraw the form.

Workflow log (row 1)

11/09/2019 12:14 [redacted] - Distributed

(Enter a comment)

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2.15 Additional Information.

Contact Ask.Hr@shropshire.gov.uk if you have any queries.