Navigation Overview

Process

This Job Aid introduces the basic components of the Modernized SAMS application, including a review of Business Roles, logging in, the Home Page, navigation, QuickLinks, Widgets, User Profiles, the Primary Navigation Menu, and the Home Page Footer.

Related Job Aids

Refer to the documents listed below for additional information:

- TRN GS-102 Pages Overview
- TRN GS-103 Transaction Overview
- TRN GS-104 Common Transaction Actions

Table of Contents

A Word About Business Roles

Before we discuss how to get into SAMS, let's talk about how SAMS knows what to show you and what to give you access to.

When you first log in you are taken to your Home Page. The functionality of this page is defined by your Business Role. SAMS leverages Business Roles to tailor the application based on your job function and responsibilities. This enables SAMS to present information and data in a way that makes sense for you and streamlines your tasks in the application. For example, if you are an Accounts Payable staff member who processes payments, you probably don't need to maintain the Chart of Accounts.

Each Business Role has an associated Home Page that displays information relevant to that role, such as related links to application pages, widgets that display common and business area information, and various other types of media.

Business roles also customize navigation menus. In addition, each role is set up with one or more Business Processes and its corresponding activities.

You can have more than one Business Role within SAMS and you can easily change from one role to another without logging out, by simply selecting a new role from the My Roles list. This new Role then changes your Home Page and your navigation menus.

An important note: there is a difference between Business Roles and Security Roles.

- **Business Roles** drive what you see and how you see it.
- **Security Roles** drive what you can access and what you can do with that access, such as being able to create a specific type of transaction, view certain transactions, cancel a transaction, and so on.

Security Roles are an Administrative function and are driven by your log in information. They don't change based on your Business Role. We won't be reviewing Security Roles here.

Getting Into SAMS

Browsers

The preferred browsers for SAMS are Microsoft Edge, Google Chrome, and Mozilla Firefox. Additional browsers are available for Mac and mobile systems. Contact your System Administrator if you need information on these browsers.

Pop-Up Blockers

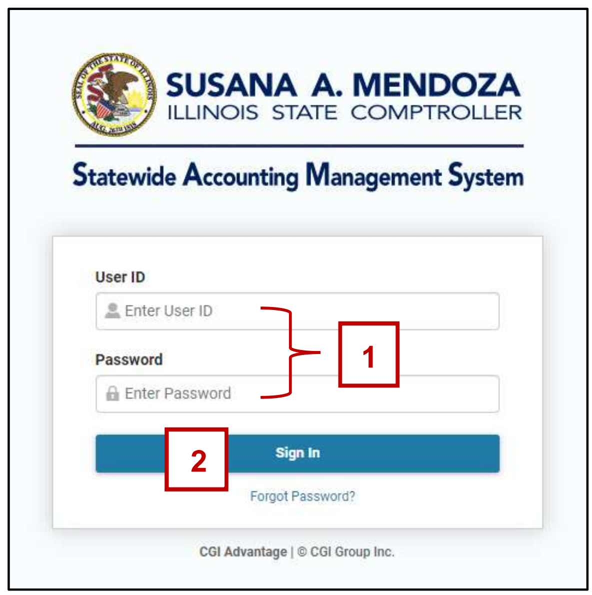
It is important to disable pop-up blockers in your browser to allow features such as Page Help to function properly.

Log In

Open your preferred internet browser window, type in the URL for SAMS in the Address field and press <Enter>. This takes you to the SAMS login window.

1. Enter your User ID and Password.
2. Click **Sign In** or press <Enter>.

***Password Recovery**: If you don't remember your SAMS Password, you can recover your account information by selecting **Forgot Password?** in the login window and following the reset instructions.*



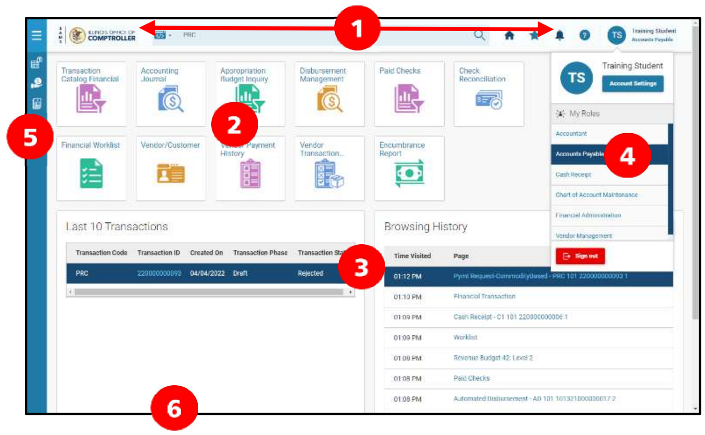
Home Page

After you successfully log in, you are taken to your **Home Page**. The Home Page you see is defined by your default Business Role. *Your Home Page may look different than the one shown here.*

Your Home Page includes navigation menus, QuickLinks, Widgets, and other links to multiple SAMS Transactions.

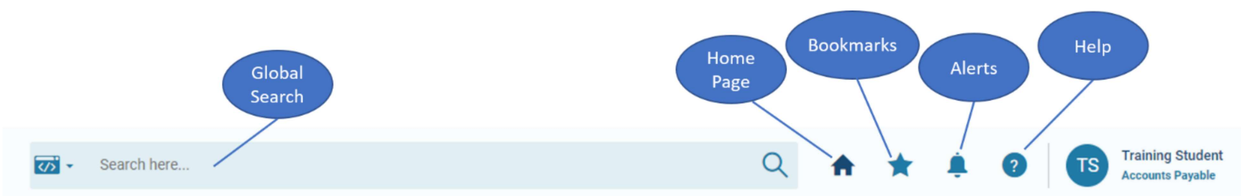
Sections of the Home Page discussed here are:

1. **Global Navigation**
2. **QuickLinks**
3. **Widgets**
4. **User Profile**
5. **Primary Navigation Menu**
6. **Footer**



Global Navigation

Global Navigation is always available at the top of the SAMS window and provides access to key pages/features.



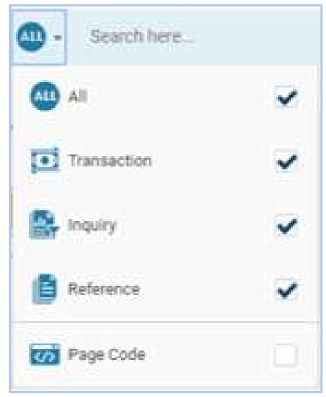
- The **Global Search** field allows you to search for a page and navigate directly to that page.
- The **Home Page** icon allows you to transition back to the Home Page from any page in the application.
- The **Bookmarks** icon shows your Bookmark folders and displays a list of all pages that you have bookmarked.
- The **Alerts** icon displays a list of unread alerts and opens the Alerts page, where you can view all current alerts.
- The **Help** icon displays help information in a pop-up window. *Just a reminder: disable the pop-up blocker in your browser to allow for SAMS to open the application help*.

Navigation is easy in SAMS and there are multiple ways to get around. HOWEVER, use only the buttons and links within the application, do ***NOT*** *use the back button on the browser.*

Global Search

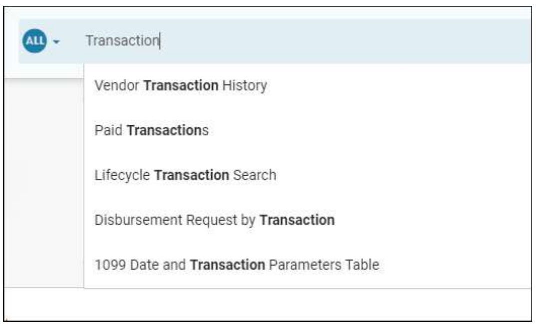
The Global Search field allows you to search for information in two ways: by entering related Text (e.g., Accounts Payable) or by a Page Code (e.g., VCC).

By clicking the **Category** drop-down arrow (at the far left of the Global Search bar), you can select just one or a combination of Text search preferences (All, Transaction, Inquiry, or Reference) or by Page Code, to help refine your search.



Text Search

Entering text in the Global Search field starts a search against the business activities and system resource targets, not only by name but also by description.

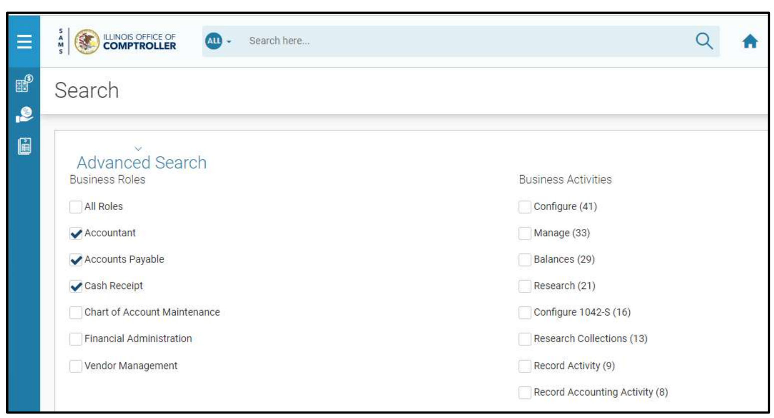


Text Search allows the use of wildcards. *Wildcards are reviewed in the GS-103 Transaction Overview Job Aid and are easily reached from the* ***Accessibility*** *link in the* Footer *of the SAMS application.*

By default, the Text Search preference uses your currently selected business role and is set to show *All* (*Transaction*, *Inquiry*, and *Reference*) types of pages. You can easily change the Search preference to select pages of a specific type by changing the Category.

Any matches found are displayed below the Global Search field. Click the page's name to open that page.

Advanced Search



If no match is found with a text search, you are presented with the **Advanced Search** page.

By default, the text search method uses All Roles in the search. If you would like to limit the search to include only a specific role or to search only a few of your roles, you can select the specific roles by selecting the appropriate option(s) in the Advanced Search page.

Within a Role, a search can also be narrowed down to include one or more Business Activities.

Search results appear beneath the Advanced Search section. You can then select the page name in the Search Results section to go directly to that page.

You can also access Advanced Search by selecting the magnifying glass icon at the far right of the Global Search field.

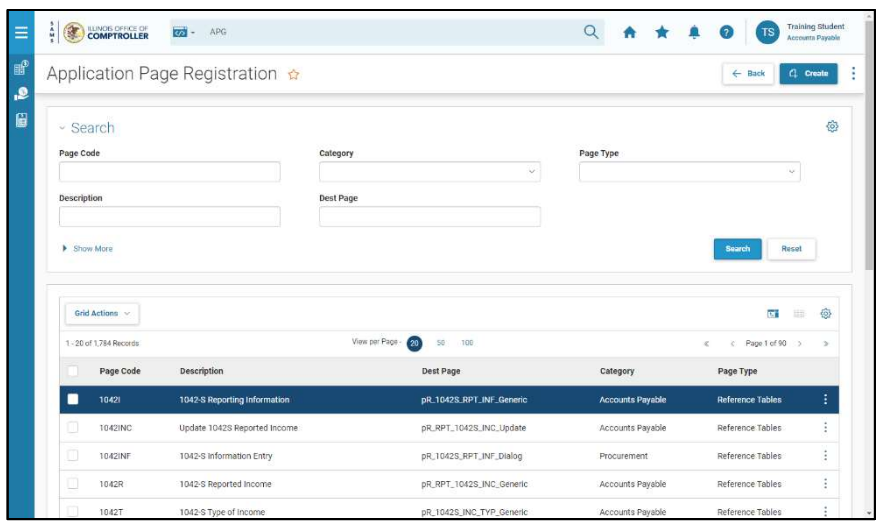
Page Code Search

To search by Page Code, click the Category drop-down arrow to select **Page Code** and begin typing the Page Code.

When searching by Page Code, any matches found are displayed below the Global Search field. Click the page's name to transition to that page.

If no match is found for the Page Code entered, a message appears beneath the Global Search field indicating that no match was found.

APGS Application Page Registration



To display all page codes available, use the Page Code search to go to the **APGS** Application Page Registration (Financial) page. Filters are available in the Search section to help focus the search.

Wildcards can be used in the **Description** field to expand your search.

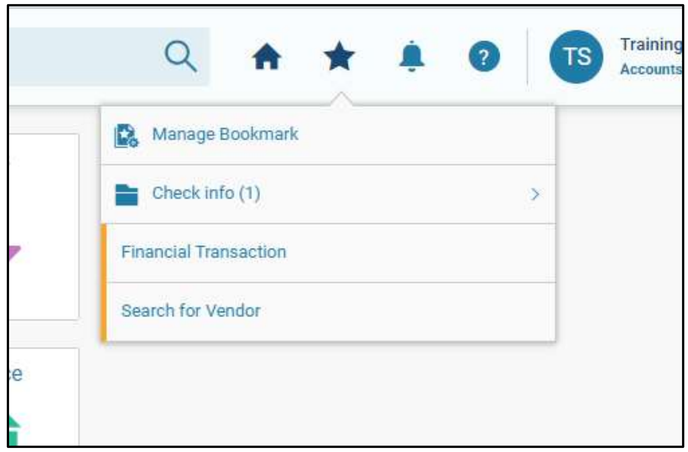
Once the desired Page Code is displayed, click the 3-dot menu at the far right side of the highlighted record and select *Open Page* to access the page.

Home Page Icon

You can return to your Home Page from any location with SAMS by doing a left mouse-click on the **Home Page** icon (house) in the *Global Navigation* area.

You can use a right mouse-click on the **Home Page** icon to open an additional SAMS application in either a new tab or a new browser window, using the same Business Role, without closing the current tab or window.

Bookmarks Icon



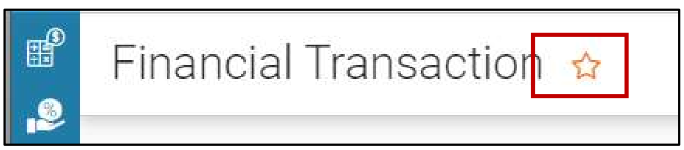
The **Bookmarks** icon (star) in the *Global Navigation* area displays a pop-up list of pages that you have bookmarked. You can navigate directly to a bookmarked page by selecting the page name from the list displayed after clicking the Bookmarks icon.

Select the Bookmark icon at the top of the page to display the list of Bookmarks. Open the page or transaction by selecting the link.

If the bookmark was added to a folder, you must first select the folder from the bookmark list and then select the desired bookmark.

Add a Bookmark from a Page

To add a bookmark directly from a transaction or a page, select the **Star** icon next to the page's name. A pop-up window allows you to create a personalized name for the bookmarked page and to specify if you want to place the link into an existing Folder. You can also create and name a new folder in this pop-up window.



If you do not specify a folder for your page, then *Default* is selected in the Folder field and the page is added to the end of your bookmark listing (not inside any folder).

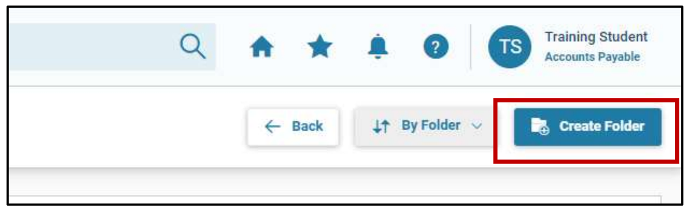
Manage Bookmarks

Manage your bookmarks by selecting the **Manage Bookmarks** link, which appears after selecting the Bookmark icon on the *Global Navigation* area.

In the Manage Bookmarks window, you can view all bookmarks that you have created. This page provides three views:

- **Alphabetically** - You can sort the bookmarks alphabetically to see an alphabetical list of all bookmarks.
- **By Folder** - If you have created bookmark folders, then you can select *By Folder* to see all bookmark folders. You can then expand the folders to view any bookmarks included in that folder. Any bookmarks not assigned to a folder will appear under the Default section.
- **By Category** - This view allows you to view bookmarks by category (for example: Inquiries, Reference Tables, or Transactions).

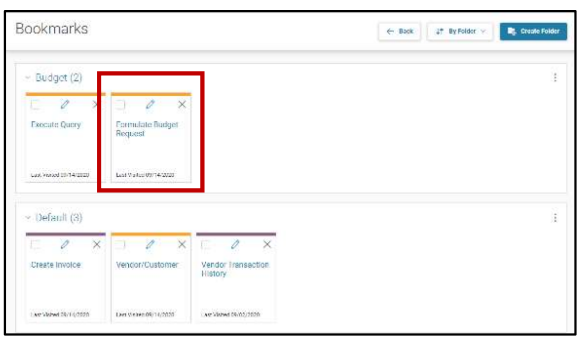
Create A Bookmark Folder



If you select the *Create Folder* option while in the Manage Bookmark page, then a **Folder Name** field appears that allows you to enter a name for the new folder. After you select **Save**, the new bookmark folder is created.

You can rename folders if the view applied to the page is By Folder. Select **Rename Folder** from the folder's 3-dot menu, enter the new folder name and select OK. You can delete folders by selecting **Delete Folder** from the folder's 3-dot menu, as well.

You can move a bookmark to an existing bookmark folder by selecting the pencil (edit) icon on the bookmark's card. This opens a new window that allows you to select a different folder. You can also rename the bookmark via this window.



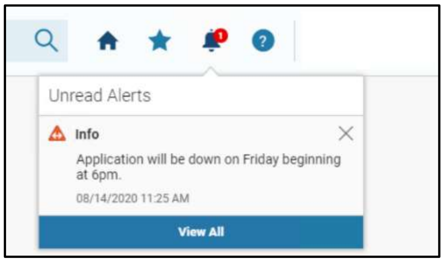
Additionally, you can move a bookmark or multiple bookmarks to a different folder by selecting the bookmarks check box (when in By Folder view) and then select **Move to Folder** from the menu. A new window opens that allows you to select the new folder for all selected bookmarks.

You can delete a bookmark by selecting the “X” (close) icon for the bookmark's card. A pop-up window will require you to verify that you want to remove the bookmark. You can also select the check box for a bookmark card or multiple bookmark cards and then choose **Delete Selected** from the 3-dot menu.

Alerts Icon

Alerts are used to send messages in SAMS. Alert messages can be used to notify all users, groups of users, or specific users. The sending of alerts is primarily a system administration task and not something that individual users interact with except to review what is sent to them.

When the **Alert** icon (bell) in the *Global Navigation* area has a red circle with a number, the number indicates the number of alerts you have received but not read.



Selecting the alert icon will open a listing of New Alerts. The Alerts page is opened to the Received tab, displaying all alerts that have not expired or been personally deleted.

The “X” (close) icon will remove the icon from the New Alerts listing, but does not delete the alert from your ‘inbox’ of alerts. The full listing of alerts can be opened from the View All button at the bottom of the New Alerts listing.

When an Alert is sent with a priority of *Critical*, the message will pop up over what you are currently viewing. If you are not logged in, the alert will appear at the next log in, as long as it has not already expired. The notification includes an *OK* link that takes you to the New Alerts listing.

Examples of alerts:

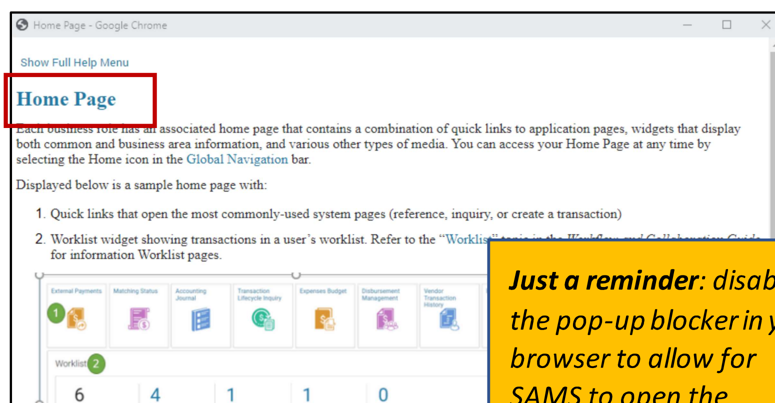
1. Alert message “SAMS will be coming down for maintenance at 6:00 PM tonight. All users must log out of the system by that time.” can be sent to all users in the system.
2. Alert message “Your password will expire in 12 days.” Can be sent when a user logs in and his/her password is expiring.
3. Alert message “Budget Analysts please submit your Budget Amendments no later than noon on the 10th day of session” can be sent when users that belong to the Budget Analysts role log in.

Alert Actions:

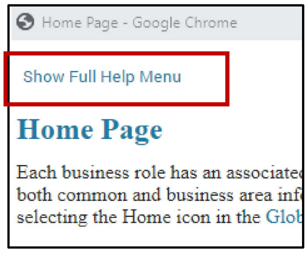
- **Mark as Read** – Changes the display of the alert to a read status.
- **Mark as Unread** – Changes the display of the alert back to an unread status for tracking purposes.
- **Delete** – Removes the alert upon demand instead of waiting for it to expire.

Help Icon

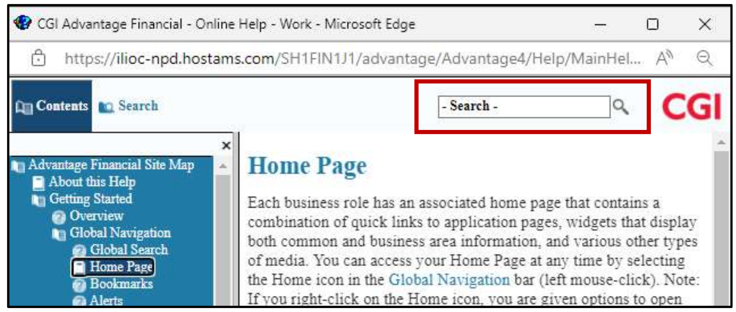
The **Help** icon (question mark) in the *Global Navigation* area opens a window that displays help for the **specific page you are currently on**. The Help system is a great way to find answers and/or help with the page you are on.



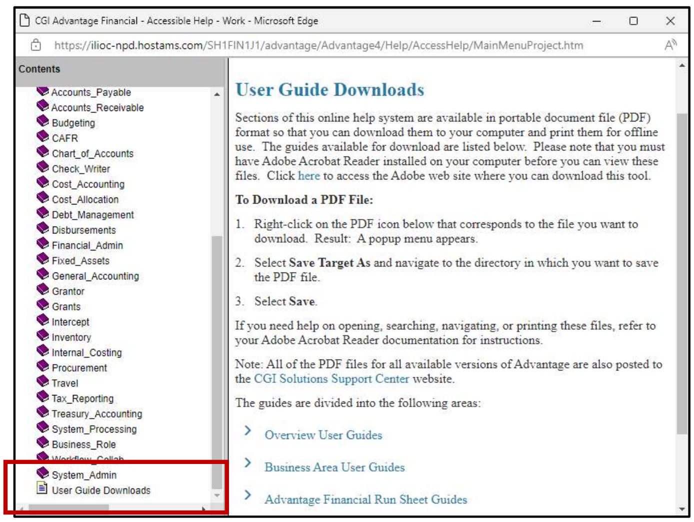
***Just a reminder**: disable the pop-up blocker in your browser to allow for SAMS to open the application Help.*



Select the **Show Full Help Menu** link in the upper left corner of the Help window to view the full online help system. You can navigate using links, the Table of Contents, or the search feature in the online help.



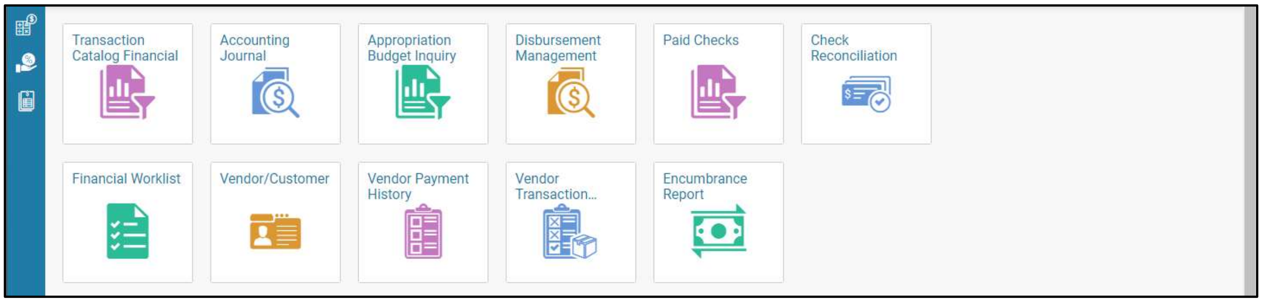
A **User Guides Downloads** link is also provided at the very bottom of the list of Contents. This takes you to a page that enables you to download a PDF version of each guide that is provided in online help format, as well as download the guides that are provided only in PDF format.



The online help is also provided in an accessible format and can be reached by selecting the **Accessibility** link in the *Footer* of the SAMS application.

QuickLinks

QuickLinks take you directly to a destination with a single click. QuickLinks are specific to the Business Role you are in and will change when you change Business Roles.



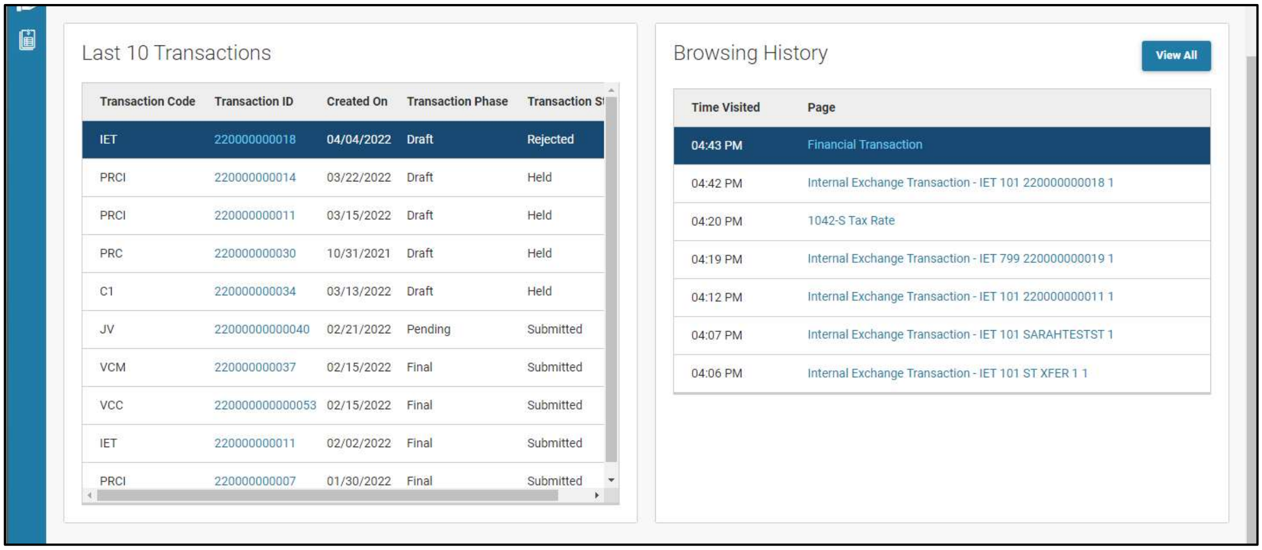
These can be configured as:

- **Application Page**: Any navigable page (reference, inquiry, or create a transaction) can be represented as a QuickLink. When clicked, you will be taken directly to the page in SAMS.
- **External URL**: A QuickLink can be configured to go to an external website/URL. When clicked, the system will open the URL in a separate window.
- **Report**: A QuickLink can be configured to open a report directly. When clicked, the system will open the report in a separate window.

To open a page, click the QuickLinks icon.

Widgets

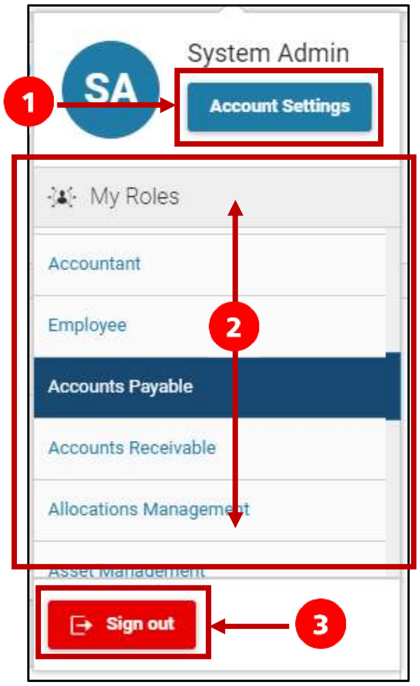
Widgets are specialized content areas/containers on the Home Page. These can include links to applications (transaction listing, worklist) or embedded analytics that pull data from multiple places.



The most common widgets are:

- **Last 10 Transactions widget** lists the last 10 transactions you acted upon. If you are the creator, the transaction will stay in your listing until acting upon the 11th transaction. If you approved, rejected, modified, cancelled, etc., the transaction, then the transaction will remain in your listing until either you act on the 11th transaction or another user acts upon the transaction, whichever comes first. Click the link in the **Transaction ID** column to open the transaction.
- **Browsing History widget** lists the recent pages accessed by you in your current session. A page can be a transaction, reference table, or inquiry page. Changing business roles will not clear the history, but logging out will. You can transition directly to any previously viewed page by selecting the link in the **Page** column. The **View All** button will expand the widget presentation to show a much longer history.

User Profile



Your **User Profile** is accessed by clicking anywhere in the User Profile area in *Global Navigation*. The User Profile contains three sections:

1. **Account Settings**
2. **My Roles**
3. **Sign out button**

Account Settings

You can modify your personal settings by selecting the **Account Settings** button, which transitions you to the *Account Settings* page. The Account Settings page is divided into the following tabs:

- **Personal Information** - The Personal Information tab displays the user's name, email, and contact information. You must contact a site administrator to change any of this information.
- **Password Management** - The Password Management tab allows you to change your SAMS password. You must enter your current password in the Current Password field and then enter your new password in the New Password and Confirm Password fields. Select **Save** to save your new password.
- **Security Question Management** - The Security Question Management tab allows you to set up a security question and answer pair that will be used if you forget your SAMS password or you get locked out of SAMS. Select **Save** to save your changes to this tab.
- **Preferences** - The Preferences tab allows you to modify your usability preference settings. Select **Save** to save your changes to this tab. Any changes made to this section will take effect after you log out and log back in.
  - **Enable Auto Tabbing** – This selection allows you to specify your usability preference setting for tabbing. Select the **Enable Auto Tabbing** check box to skip icons (such as the calendar icons and the pick list icon) while tabbing. Once selected, it stays until you change it.
  - **Minimize Information Tabs** – This selection specifies whether you want the information area for all tabs to be minimized or expanded by default. When minimized, only the first line of information is displayed. Select the **Minimize Information Tabs** check box to enable. Once selected, it stays until you log out.
  - **Hide Toolbar and Pagination** – This selection allows you to specify if you want to hide or display the toolbar and pagination area of read-only grids. Once selected, it stays until you log out.
- **Change Email Alert Settings** - The Change Email Alert Settings tab allows you to change your Alert Email Notification setting and your Email Address for receiving the notifications. The Alert Email Notification feature provides the ability for you to receive an email when an Alert is sent in SAMS. Select **Save** to save your changes to this tab.

My Roles

When the User Profile area is expanded, you can view a list of all roles assigned to you. Switch to a different role by simply selecting the role from the list. Switching your Business Role changes your Home Page as well as the Primary Navigation bar on the left.

Your Primary role and display order of your roles are defined by System Administration.

Sign Out

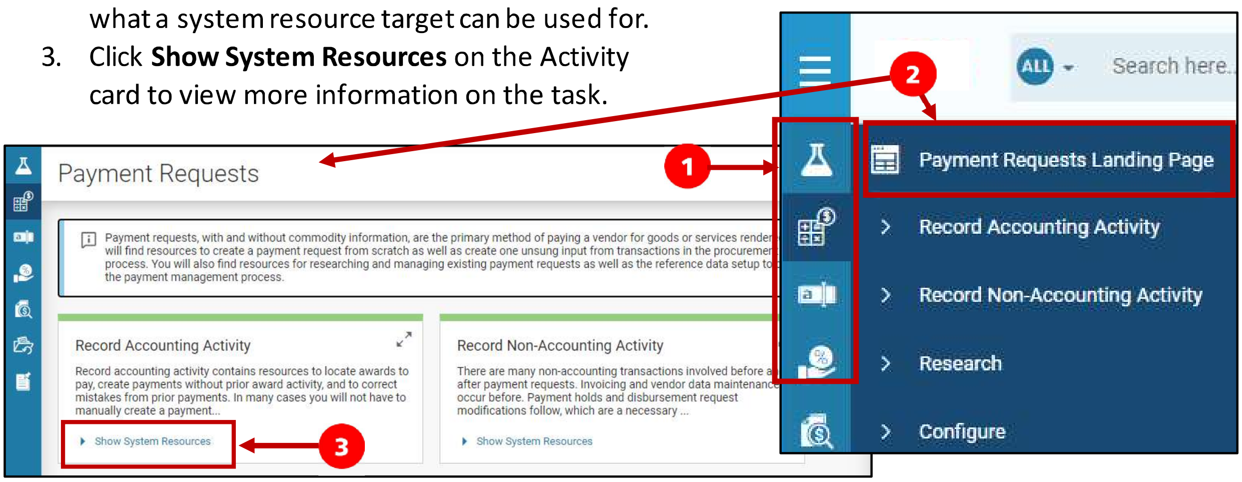
Log out of SAMS by selecting the Sign Out button. It is recommended to use the Sign out button rather than close the browser window as this ends your SAMS session.

Primary Navigation Menu

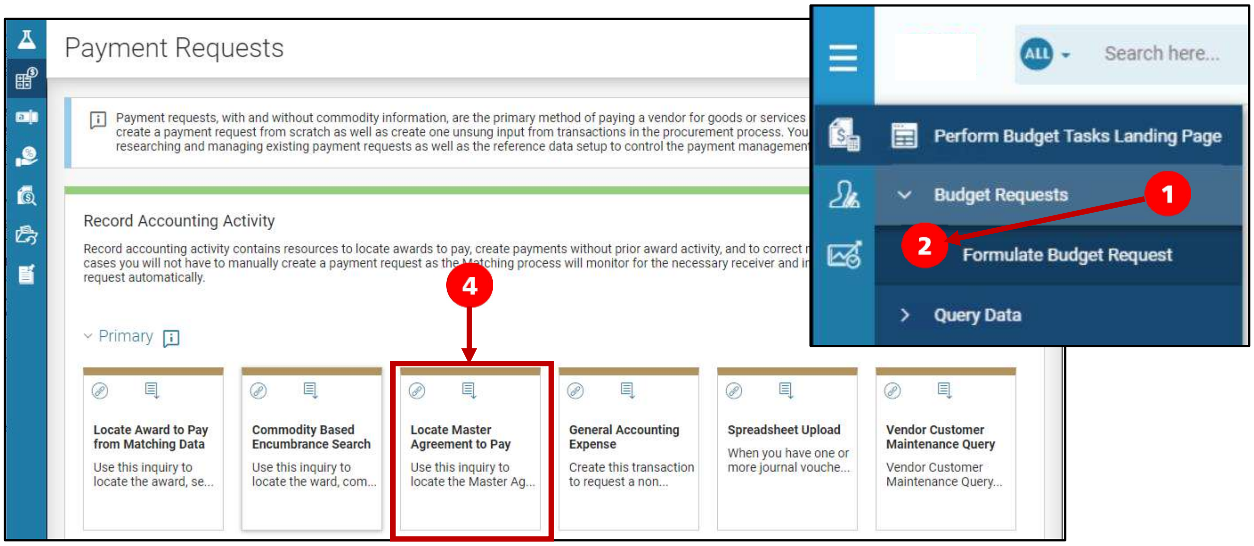
Each Business Role has navigation available from the **Primary Navigation Menu** (far left panel). The contents are driven by your Business Role. *Your Primary Navigation Menu may look different than the one shown here.*

Navigation starts with an icon for each Business Process within a Business Role (i.e., Payment Requests). Business process and business activity are just organizational folders that help to organize the system resource targets.

1. Selecting the Business Process icon opens the **Landing Page** entry for that Process (*please note that the icons shown here may be different than those on your Home Page*).
2. Clicking the Landing Page displays the business activities and system resource targets of the primary navigation. It also displays details on what is contained within a business activity and what a system resource target can be used for.
3. Click **Show System Resources** on the Activity card to view more information on the task.



4. Each activity on a Landing Page provides guidance on how to complete tasks as well as links to pages to perform these tasks.



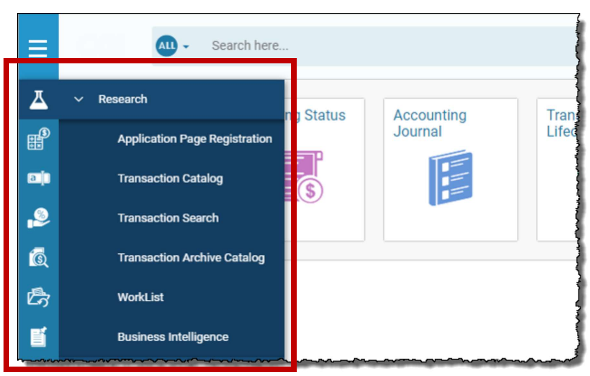
To open a Page:

1. Click a menu icon, then
2. Click a sub-menu icon.

Research Menu

Based on your Business Role, the Primary Navigation Menu may also contain a Research Menu. This Menu provides links to:

- **Transaction Catalog** to search for or create a transaction.
- **Worklist** for approvals.
- **Business Intelligence** for reporting.

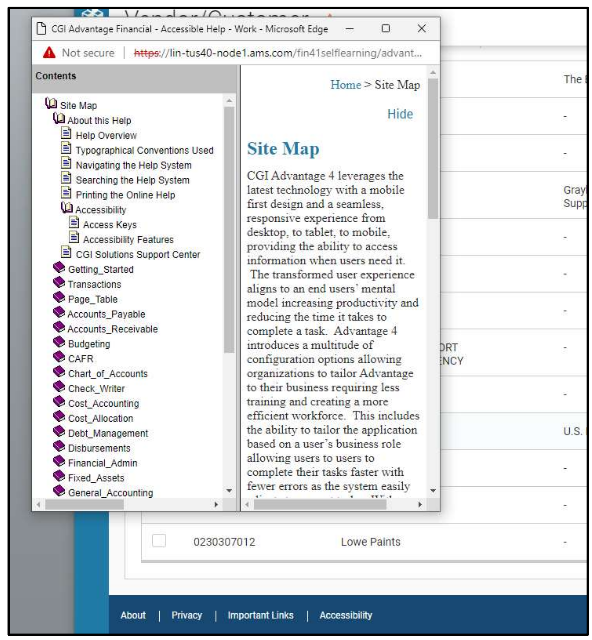


Footer

The Footer displays at the bottom of every page in SAMS. **System** information displays at the bottom left, **Environment** information is at the bottom right.

System information contains:

- **About** – opens a pop-up window that provides the release number for SAMS along with copyright information.
- **Privacy** – opens a pop-up window that includes any privacy information for the application.
- **Important links** – opens a pop-up window that includes links to other pages outside of the SAMS application.
- **Accessibility** – opens a pop-up window that displays the **Site Map** for the entire online help system. The list of System Level and Page Level Shortcut Keys are also available through the Accessibility Features section of the pop-up window.



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