PowerSchool
Powering Brighter Futures

20.11 Navigation

General Navigation and Help Access

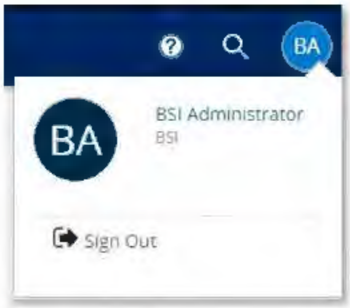
User's Quick Navigation Guide

BusinessPlus versions have been redesigned for cross-browser compatibility. All screens are responsive where the content will scale when the screen size is adjusted. Each new page opens in a new browser window.

Log in and Log out of BusinessPlus

Log in to access the BusinessPlus Dashboard using your user name and password. Add the URL to your internet browser's Favorites or Bookmarks bar for easy access.

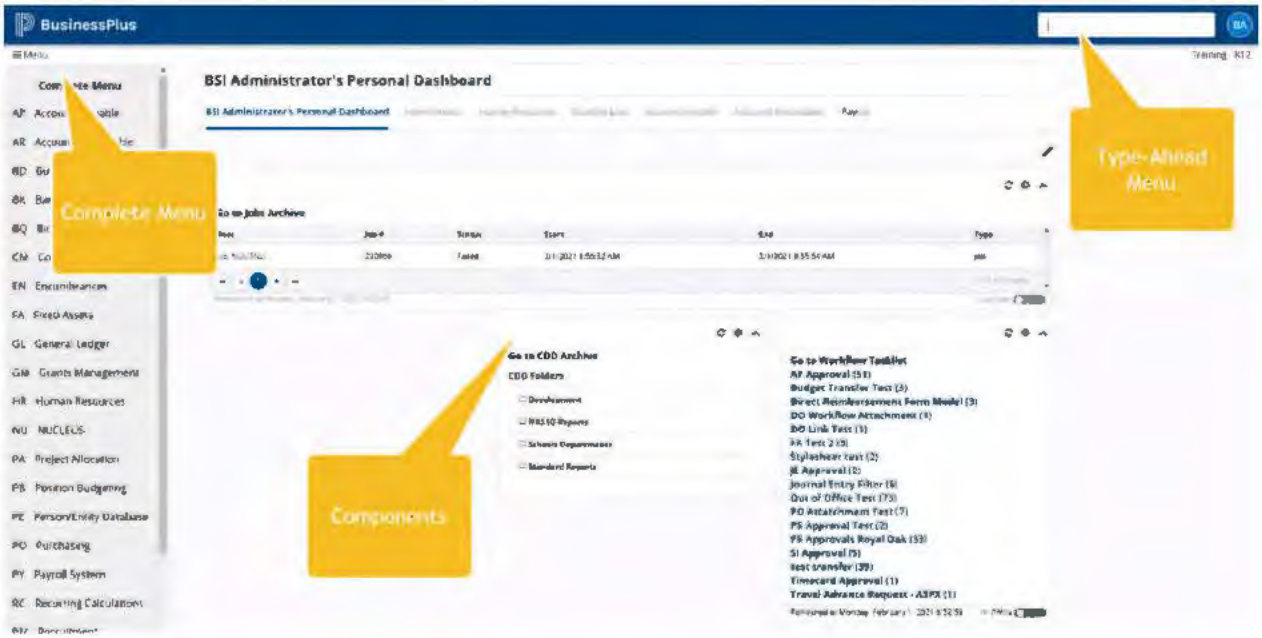
To log out of BusinessPlus, click your initials in the upper right corner and select Sign Out



Dashboards

Public Dashboards are configured by each District and are assigned to employees based on user security. Standard dashboards can be set up by functional areas like Accounting, Finance, Human Resources, Payroll, e.g.

Each user will also have a Personal Dashboard that can be customized. Choose from 6 layouts to customize the page by adding links components comprised of the Task List, Job Monitor, Weblink, Menu Masks, and Reports. The Personal Dashboard can be renamed.

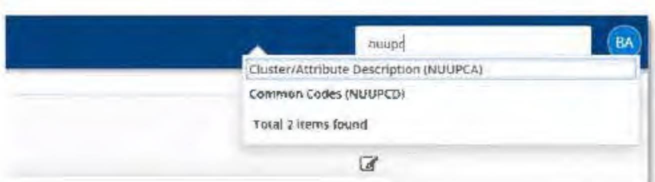


Navigating to Screens

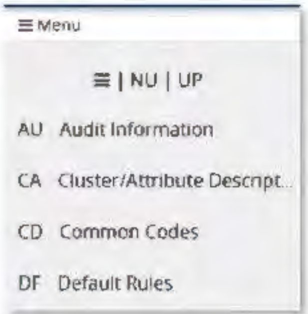
Navigate to screens from any dashboard using type-ahead functionality of the Menu Search, the All Menu, or a Dashboard Component.

- Menu Search - Use the magnifying glass in the upper right-hand corner. Type ahead searching by mask name.
- All Menu – Hide and Expand the menu. Click through modules to select the mask name.
- Component – Navigate to masks using components organized by function or process

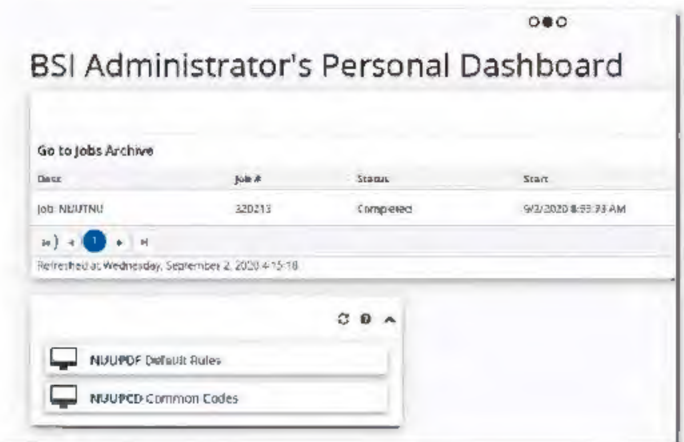
Menu Search



All Menu



Link Component



All three methods of accessing menu masks result in the screen opening in a new browser window. You can still return to the Dashboard or return to any other mask you were using by selecting that mask from the top header of the browser window.

Menu Masks

Each screen opens in Search mode. You can search within each field to narrow down search results. As you add items to search, the search filters can be seen at the left side of the page. Use the filter icon to select from different search options.

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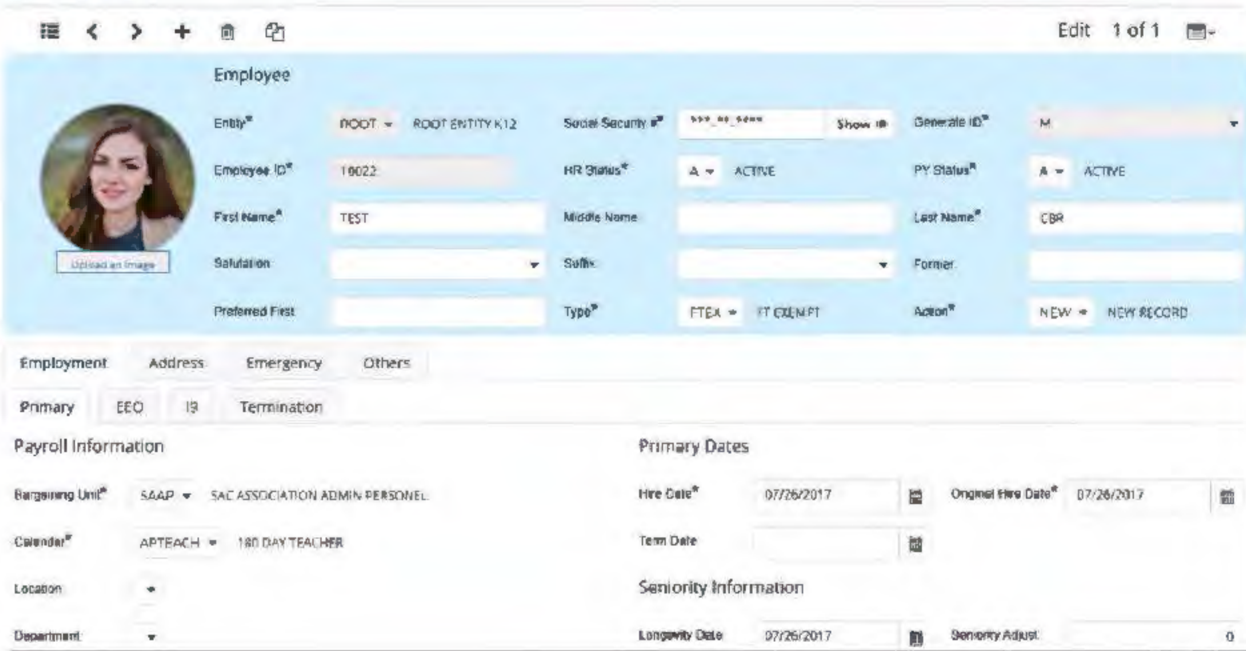
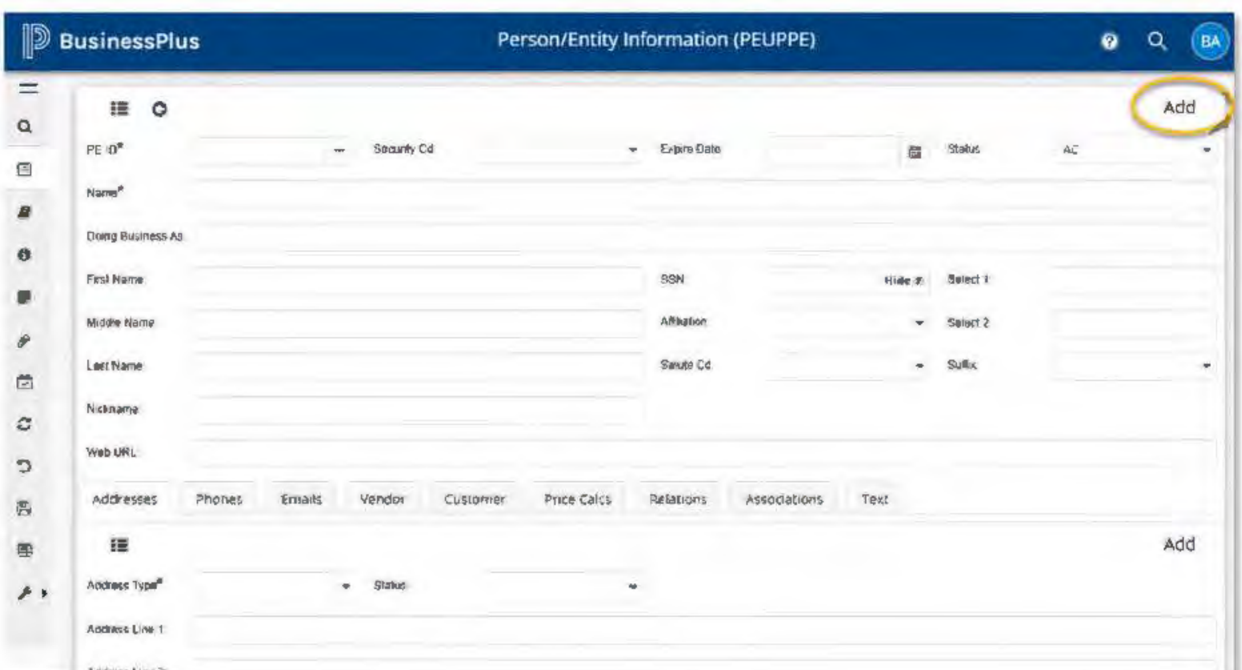
Resulting records will be initially returned in Grid mode. Select the blue box with the pencil at the left to place the records into edit mode.

Grid Mode

Edit Mode



Click the plus sign to change to Add mode for data entry. Once in Add mode, the word Add appears in the upper right-hand corner.

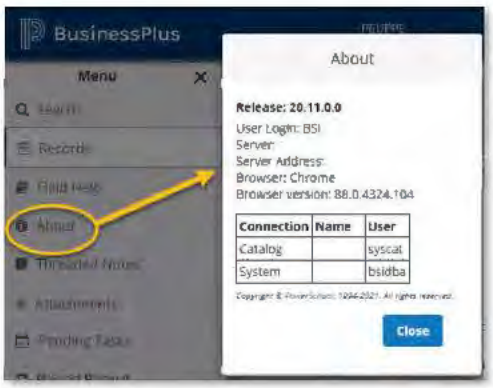


To close a mask, click on the X in the browser tab to exit the screen.

Each screen has a Page Menu on the left side. Click on the two lines at the top to expand or minimize the page menu. A complete list of the Page Menu icons are at the end of this document.

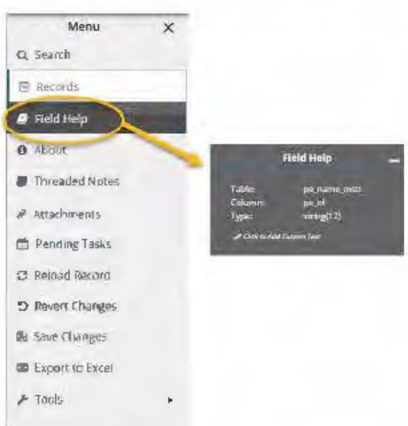
To Find Version

Select the i in the black circle to see system information.



To Open Field Help

Select the book to turn on or off Field Help. Field help can be minimized and expanded.

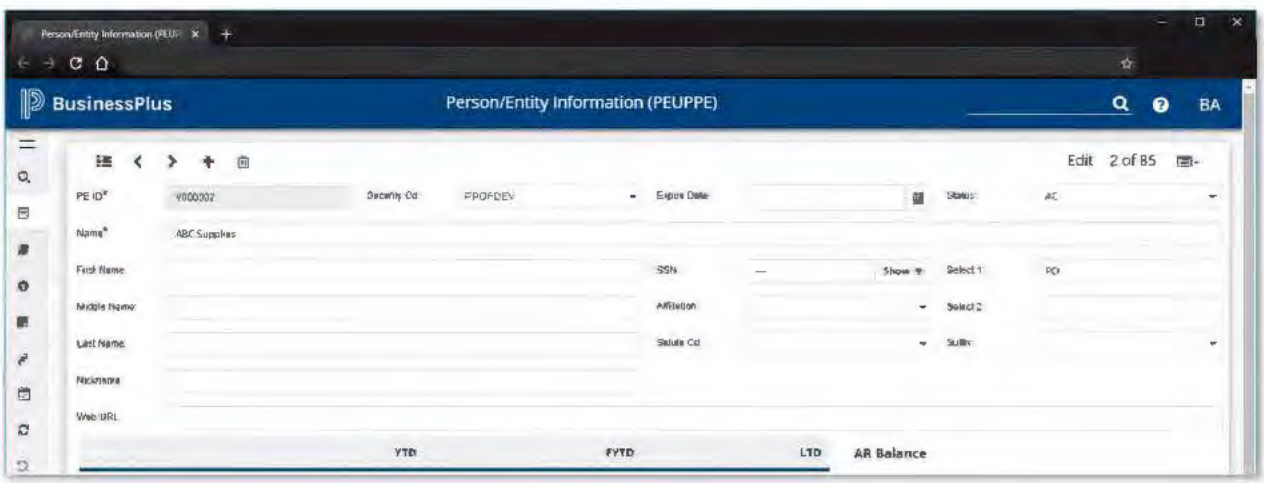


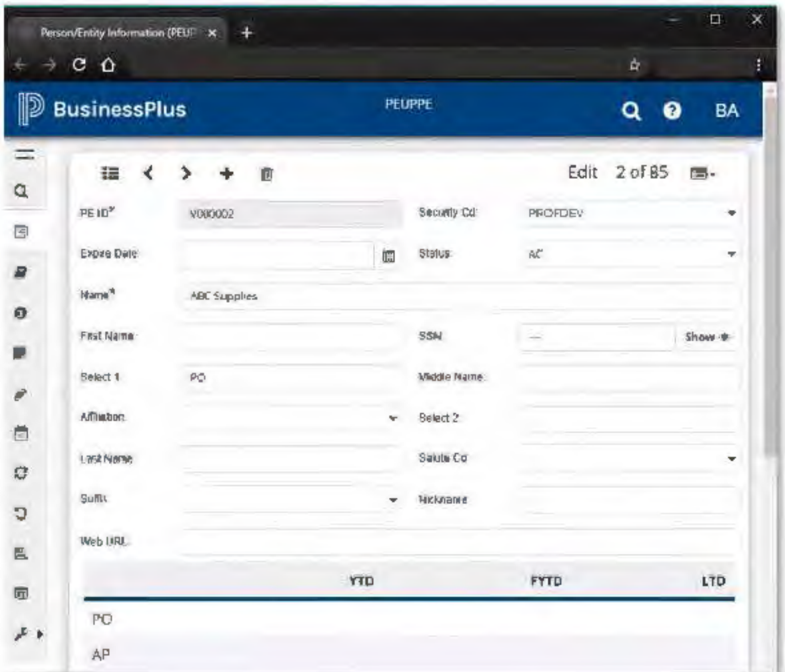
To Use Screen Links

If a screen has related pages that can be linked to, the square with the arrow icon will be available and linked screens will be available to select.

Resizing Pages

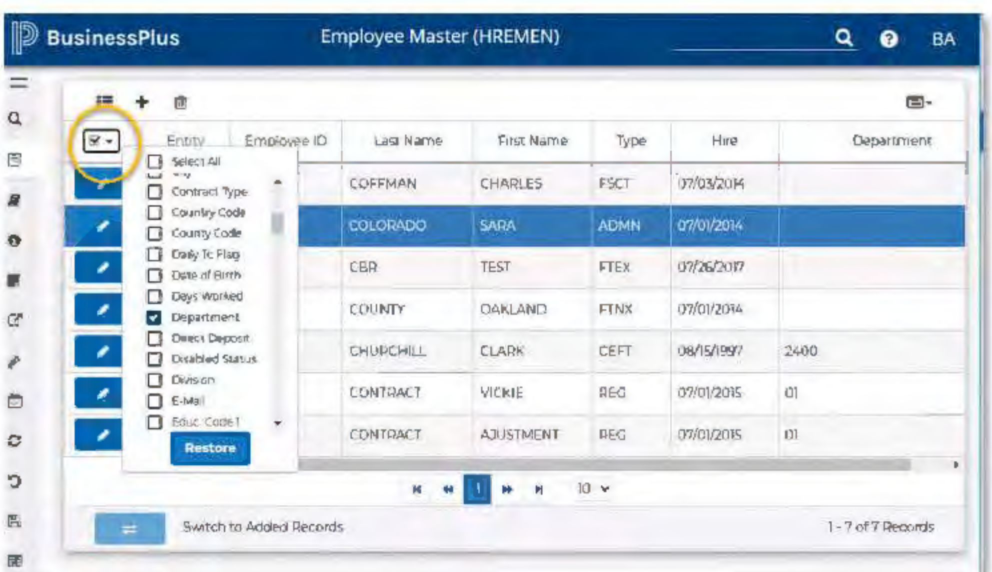
Content on screens will resize as the size and shape of the screens are moved. The following two screen examples are the same screen but have been dragged smaller or larger. Notice that the fields are relocated on the screen to accommodate the new orientation.





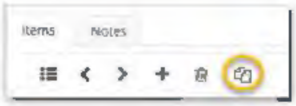
Column Selection

You can add or reduce the number of columns displayed on the grid. Select the checkbox and click to add or remove items. Use the Restore button to return the columns to their default setting.
You can also grab and reorder columns in your display.

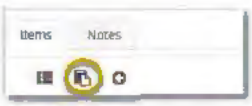


Using Copy / Paste to add a new record

In many pages, you can take advantage of a copy/past functionality to copy information forward to new records. In Edit mode, you will see the Copy icon, where available.



Once selected, you will see the Record Copied message.
Click the plus sign to add a new record.
Select the Paste icon and the information from the previously copied record is available for editing as your new record.

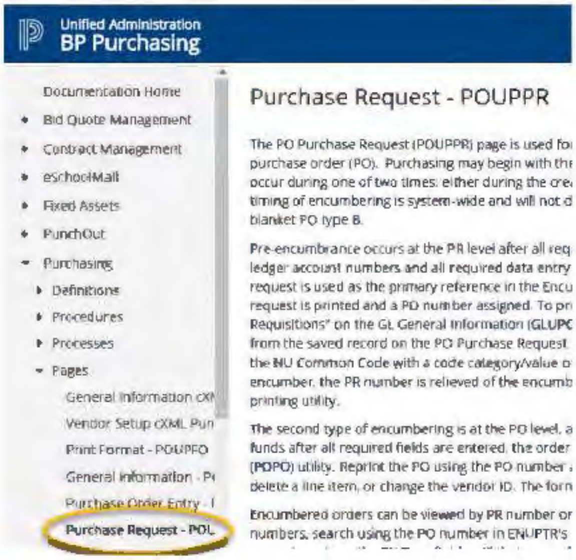


Page Help Catalog

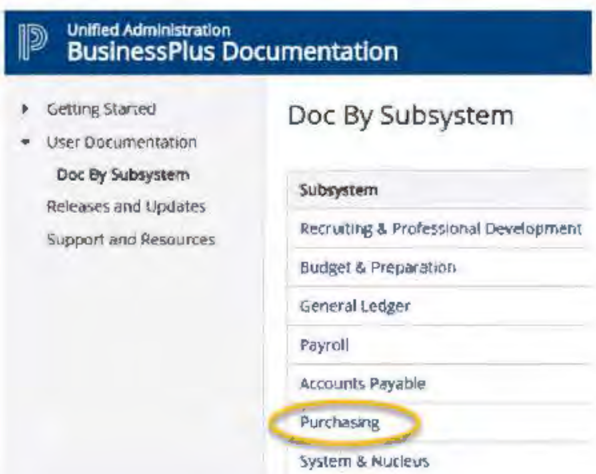
Page help can be selected on each screen by selecting the question mark in the upper right-hand corner. When the page help comes up there is a search option at the top right. You can search in the document for any topic and it will return matching records. You can select additional help topics by using the navigation at the left side of any active help screen.

You can also enter the help section at the main dashboard page. Using this method, search for your content by drilling down on documents by the subsystem.

Help from the Purchase Request Screen



Help from the main Dashboard



Page Menu Options

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Page Menu Options

Symbol	Name	Description
	Expand / Minimize	Expand or minimize the page menu.
	Search	Enable Search mode. Entered selection criteria appear under "Search Criteria," listing the page or tab name. Click the X to remove.
	Advanced Search	Save entered selection criteria. Must be in Search mode to display this option.
	Records	Display selected record(s) in Grid or Single Record view.
	Field Help	Display field-related database information in lower right corner of the page. **Custom Field Help** can be managed by selecting the pencil icon on the field help window.
	About	Displays release, user, server, connection and Web browser information.
	Threaded Notes	Displays saved threaded notes. Selecting a saved note or the "Add New Thread" button opens the Update Generic Text (**SYUTTXUP**) page, filtered based on the screen the user came from, to manage threaded notes. User must have required security to view all information.
	Screen Links	Displays links to related screens, if available.
	Attachments	Displays Documents Online attachments, if any. Valid user permissions and at least one **attachment definition** need to be in place for this functionality to work. If more than one attach definition exists for a given page, select the correct attach destination from the drop-down before attaching the file. To attach a file, select "Add New Attachment." Use the search field to search for a specific attachment (type).
	Reload Record	Reloads the current record.
	Revert Changes	Reverts all changes since the record was last saved. If no changes were made, the option is grayed out.
	Save Changes	Save changes. If no changes were made, the option is grayed out.
	Export to Excel	Opens the Export to Excel window from which users can select what data to export to Excel.
	Tools	Screen-specific tools appear in **bold.** Standard screen tools: **Ledger Settings** — Change ledger preferences. GL Ledger reads from **GLUPGN**. **View Last Changes** — Displays most recent set of changes. **Data Dictionary** — Formerly called "Consolidated Field Help." Displays database information for all page fields. Option to export data to .csv file.

Page Header

Symbol	Description
	Search by BusinessPlus mask.
	Displays page-related documentation.
UN	Displays user information and sign out option.
UN NAME USER	Selecting the Account Info button displays the user's name and title.
Sign Out	Sign out of BusinessPlus.

Single Record View Controls

Symbol	Description
	Switch to Grid view.
	Go to previous record. If there are no previous records, this button is blocked.
	Go to next record. If there are no additional records, this button is blocked.
	Add a new record.
	Back to grid from Add mode.
	Delete current record.
	Copy current record.
	Paste record.
	Select page sort option. Business rules (NUUPDF) can be applied to screens and sort options. Use the Record Info link to view record data and log history. Use Copy Record to copy the current record.
	Switch to Added Records.

Grid View Controls

Symbol	Description
	Switch to Single Record view.
	Select which columns to display in search results.
	Switch to Added Records.
	Edit the selected record in Edit mode.
1 2 3 ... 5	Use the arrows or page numbers to view additional search results.
10	Select the number of rows to display in the Search results window. Options are 5, 10 and 20.
1 - 10 of 239 Records	Informs the user which subset of records out of the total number of records is currently displayed.