Unit 4
Business World On!

Introduction to the system

(Web users)

Table of contents

Users access Unit 4 Business World On! (U4BW) in two different ways: web and back office, and both versions use the same database therefore contain the same data. Unless you are told otherwise you are a web user and this user guide is relevant to you.
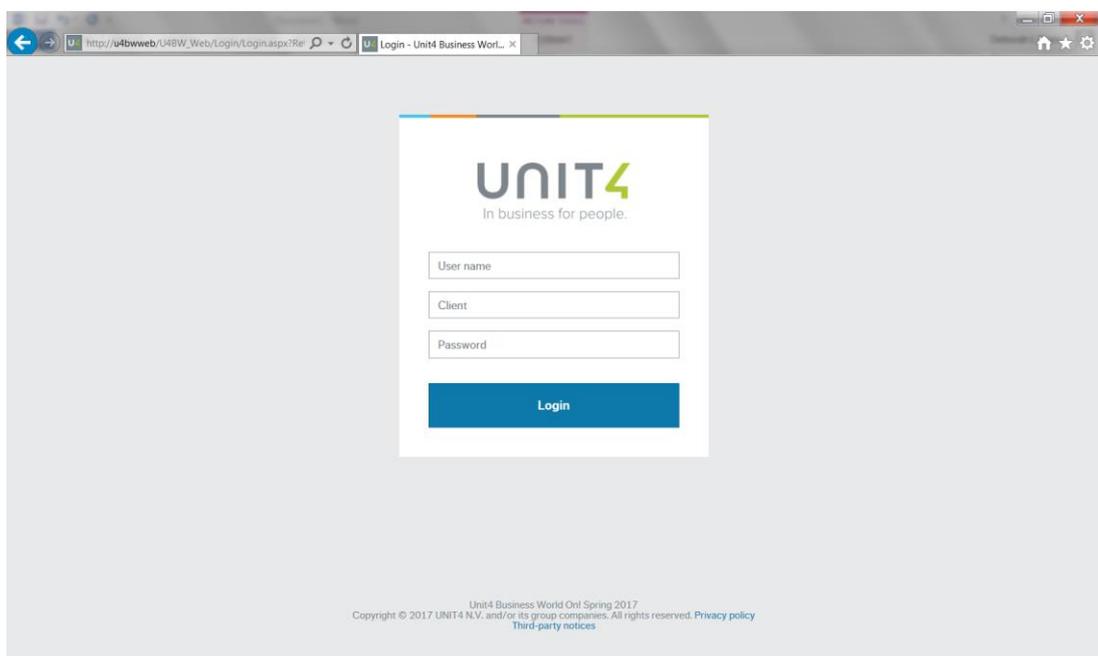
Logging in to the system

1. Open Internet Explorer and enter the following web address;

    http://u4bwweb/U4BW_Web

    If you wish to create a shortcut to the U4BW website on your desktop or within Internet Explorer, please see the Creating Shortcuts (Web users) document available on the intranet.

2. The following login screen appears;

3. Enter your user name in the first cell. It is usually the letter f, followed by your initials and the last three digits of your employee number.

4. Use the tab key to move to the next cell.

5. Enter 'CC' for Carmarthenshire Council in the **Client** cell. Tab again to the final field.

6. Enter your password in the final cell.

   Your initial password would have been supplied by the Systems department and can be changed once you have logged in. All passwords must be a minimum of 8 characters and contain the following;

   - One upper case letter
   - One number
   - A permitted special character (@, #, *, !, $, %, ?, =, ~, ^)

   Passwords expire every 122 days.

7. Select the **Login** button or press 'Enter'.

8. If the following message appears at the bottom of your screen with the option to save your password, please select 'No'.

Do you want to update your stored password for u4bwwebdev?	Yes	No	×

   This will avoid problems with logging in when the password changes.

Main menu screen and functions

If your login has been successful, the following screen will appear;
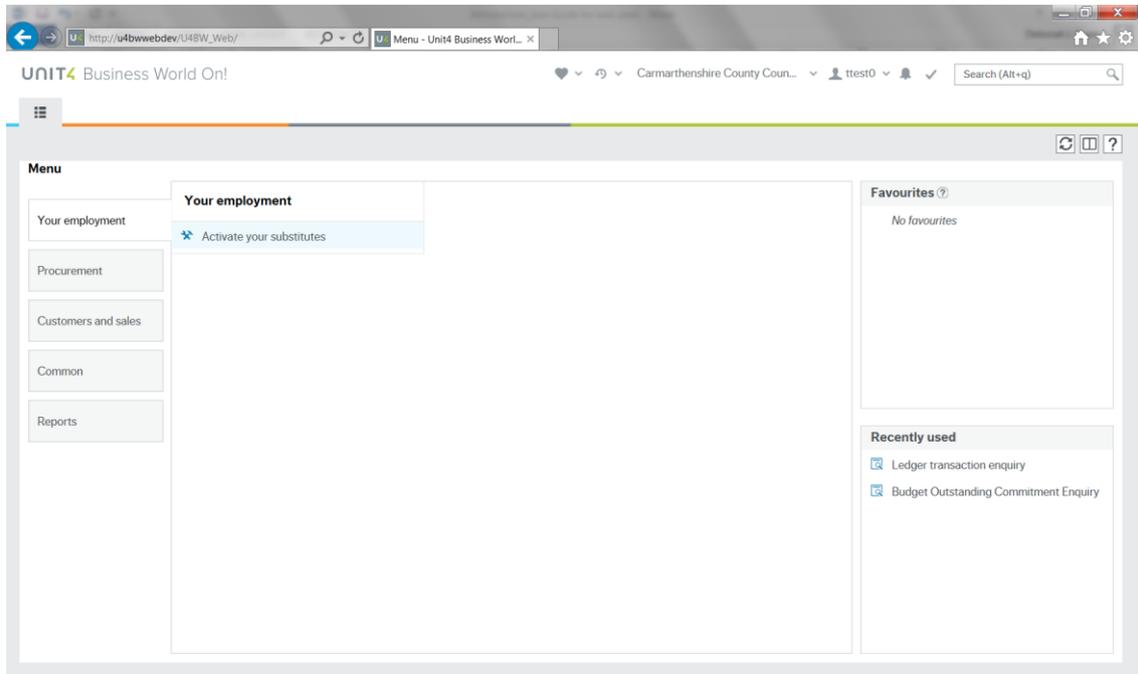
This is the main menu screen, and will always be the first screen you see when you log in. Your screen may look slightly different to this as the options available to users differ depending on their access rights and roles.

The main menu screen has been split into numbered sections on the next page, and each section is explained in detail on pages **6-8**.
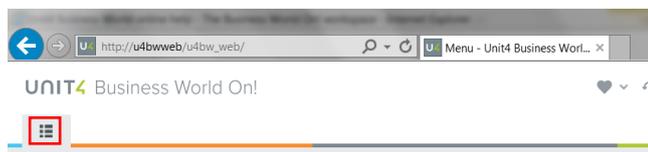
1. **Modules**
   This is the main menu section that contains all accessible modules. The tab containing the main menu cannot be closed, and by selecting the button highlighted below, you can return to the main menu screen easily when in any screen within U4BW;

   When a module is selected, the related items for that module are listed in the main pane. If the module you require does not appear, please contact the Systems department.

2. **Main pane**
   This area is known as the main pane. When a module is selected, the related items are shown here, separated into sections.

   Folders

   Where there is a double arrow facing downwards beside an item ⌄ it means there are items within the folder ▇. By clicking on the double arrows, the selection will expand to reveal the contents of the folder and the arrows will change to facing upwards ⌃.
   To collapse the selection to original view, click on the double arrows again.

   Activity type

   Each item that appears in the main pane is preceded by an icon representing the activity type. Find below a list of the various types of activity;

	The enquiry/maintenance icon allows mainly enquiry on existing records and also editing of detail level data.
	This is the enquiry icon, and when selected a user-defined enquiry window opens allowing read-only data to be retrieved.
	This is the maintenance icon, and allows existing records to be viewed, edited and deleted at both header and detail level.
	The master page icon allows new records to be entered. An example would be the **Requisition – Standard** page.
	This is the standard enquiry window icon and when opened, data can be viewed as read-only with no editing options.
	This is the standard reports icon.

Item
By clicking on an item, a new tab will open.
When you have finished with the tab, simply select the cross beside the tab name.
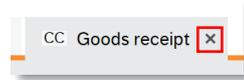
3. **Favourites**
Your favourites can be viewed in two ways; as a list in the **Favourites** pane when in the main menu screen, or by selecting ♥ˇ in the page header that remains visible in all screens.

Adding an item to your favourites list
Open the activity you would like to add to your favourites list. On the right hand side of the tab header, select the ♡ icon. The icon will now appear like this ♡ and the item has been successfully added to your favourites list.

Removing an item to your favourites list
To remove an item from your favourites list, click on the ♡ icon.

4. **Recently used**
Your recently used items can be viewed in two ways; as a list in the **Recently used** pane when in the main menu screen, or by selecting ↺ˇ in the page header that remains visible in all screens.

The list will update each time a new item is selected, with the most recent selection on top.

5. **Client**
This is the client you are currently using based on the client code entered at login. Some users have access to more than one client, and selecting this option will show all available clients in list form.

6. **Action**
This is known as the Action menu button, and is used to logout of the system and change password when required.

7. **Alerts**
This is the Alerts button, and is currently deactivated.

8. **Tasks**

    When there are tasks awaiting your attention, you will see an orange box containing a number beside this tick. By selecting the icon, all of your current tasks will appear and individual tasks can be opened.

9. **Search**

    This search engine allows you to search for items, activities, files or records throughout the entire application. When a word is entered, a list of all items containing that particular word will appear.

10. **Reload menu, Split view and Help**

|	
⟳	The reload button resets all menus and will redirect you to the main menu screen.
⊞	This option allows the screen to be split into two equal parts so that two different items can be open at the same time. The icon will now appear like this ⊞. You can resize the split view horizontally by hovering the mouse over the divider until the resize handle ←‖→ appears and dragging the handle either left or right as required. When you have finished with the split screen, deselect the ⊞ button on the tab you would like to close and it will revert back to original view.
?	Selecting this option will open the Unit 4 Business World On! help menu in a new screen.

Changing your password

Your initial password would have been supplied by the Systems department and it is recommended that you change the password to a password of your choice when you first log in, or whenever the Systems department have reset your password on your behalf.
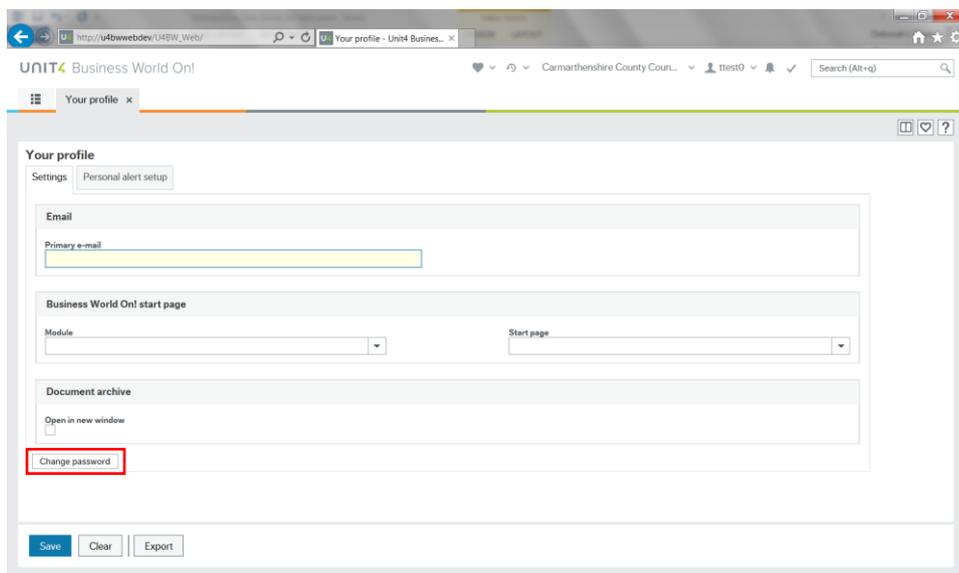
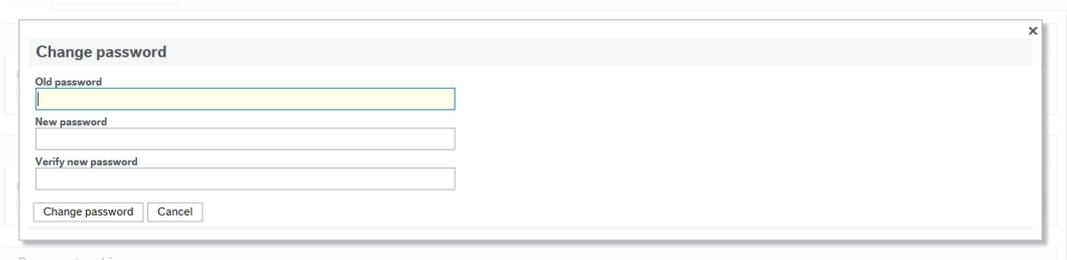1. In the top section of the screen, you will see your username followed by a drop down arrow.
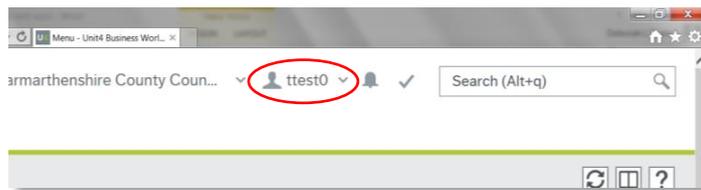
Select the drop down arrow and the following list appears;
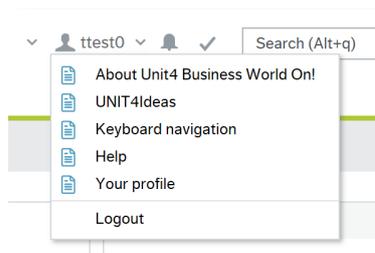
2. Select the **Your profile** option.

3. The **Your profile** tab now opens, and the **Change password** button appears towards the bottom of the page;
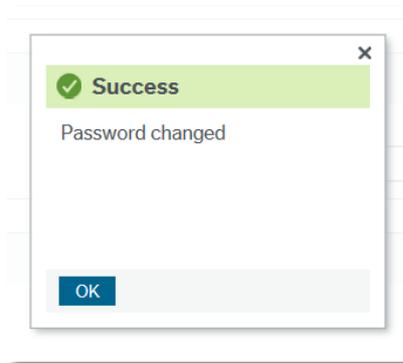
4. Select the **Change Password** button.
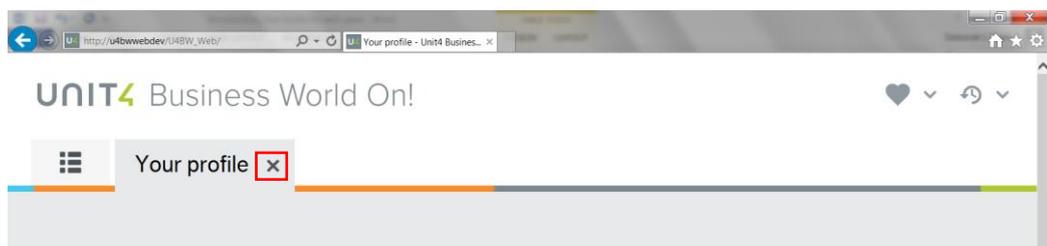
5. The following popup screen appears;

Your current password should be entered in the first cell, and the new password in the two other cells. Once all details have been entered correctly, press the **Change password** button.

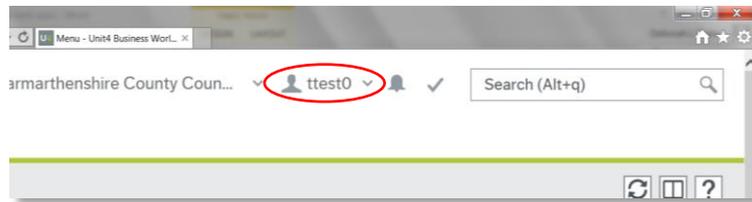6. The following message appears if you have been successful;

7. To close the tab and return to the main menu screen, select the cross in the tab header.
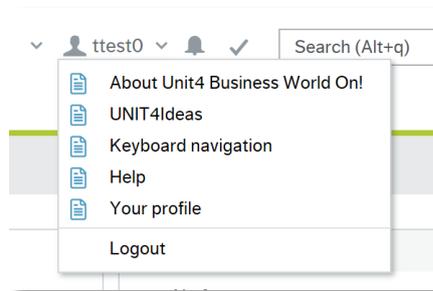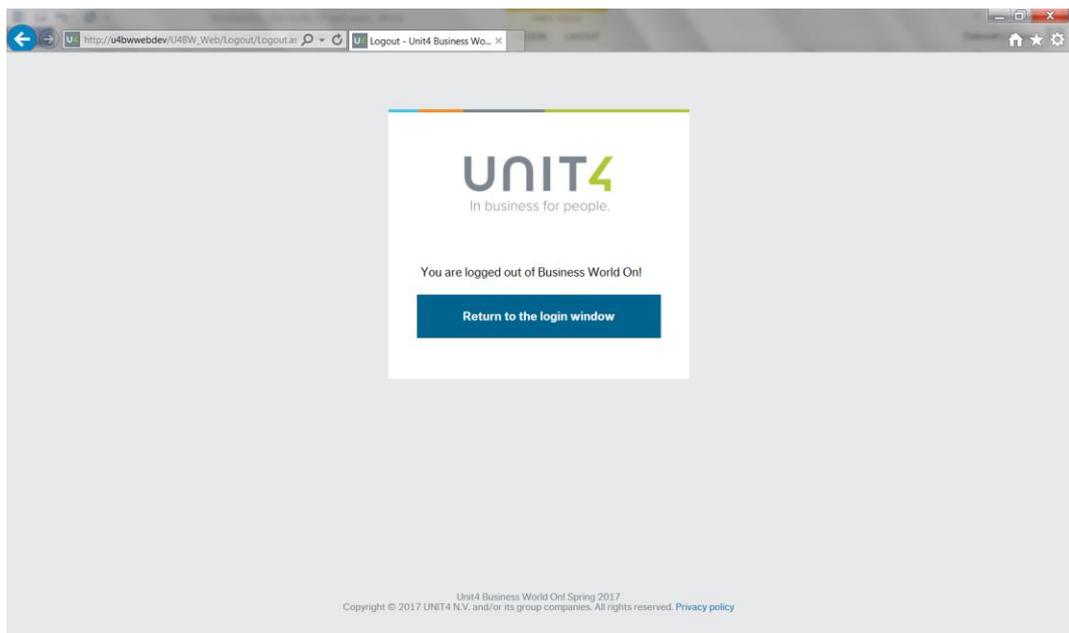
Logging out of the system

1. In the top section of the screen, you will see your username followed by a drop down arrow.

    Select the drop down arrow and the following list appears;

2. Select the **Logout** option.

3. The following page will appear to confirm you have successfully logged out of the system;

Training video

The content of this guide has been covered in training video *U4BW (1) Introduction to the system (Web)* now available on Learning Curve. You may find the [Accessing U4BW training videos on Learning Curve](#) document useful.

Did you know?

We have an intranet section dedicated to Unit 4 Business World On! on the intranet and can be accessed using the following link;

http://intranet/our-people/finance-payments/financial-management-system-u4bw/

The section has been designed with the user in mind, ensuring that information can be retrieved as effortlessly as possible. Answers to frequently asked questions, resources and contacts can be found easily and will be updated on a regular basis.

Contact

Please contact CRFinanceSystems@carmarthenshire.gov.uk or Debbie Evans, Assistant Accountant on ext. 4478 for any issues regarding this document or training videos.