The purpose of this quick reference guide is to enable a user to quickly action items on their To Do List and view items on their Watch List. For an in-depth guide on using this application, please view the LSU BPM Introduction User Guide on the Financial Systems Services training web page:

http://www.fas.lsu.edu/fss/training.html

1. The LSU BPM portal is accessible via a link located at the top left corner of the myLSU desktop positioned above the Search box. Once a user clicks the LSU BPM link, they will enter the main workspace area of the LSU BPM portal.

2. The “To Do List” contains all requests for which the user needs to action with either an approval or disapproval decision. Click on “Process Request” in the last column of the section in order to view and approve or disapprove the request. The “Watch List” contains all requests for which the user has either originally initiated, previously approved, or been added to for viewing purposes. These requests can be clicked on in order to view their progress if still in process or to view the final details if the request is completed or cancelled.

3. In order to search for requests containing specific text, use the filtering feature built in to the page. Click a specific field to search in the dropdown next to “Quick Search” and then type the text to search for in the next box to the right. After clicking the green refresh icon, only those requests containing the text searched for will be listed.

4. The column name of any column on the page can be clicked to sort the column. Clicking the column name multiple times will switch back and forth between ascending and descending order.

5. Items will stay on the To Do List until they are processed (approved or disapproved by the user), and a reminder email will be sent once each business day. Items will stay on the Watch List of a user for 90 days with no reminder emails being sent for those items.

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