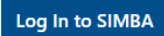




Getting Started with SIMBA

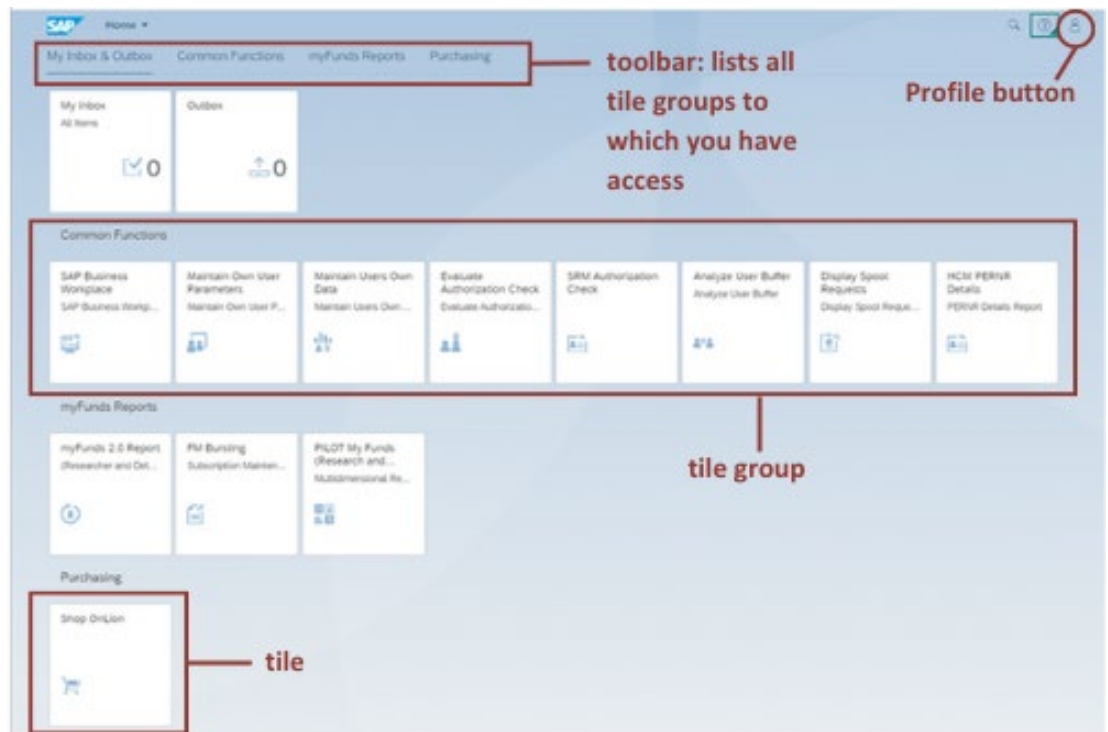
Accessing SIMBA

1. If you are logging in remotely, connect to the GlobalProtect VPN. (Learn how in [KB0013431](#).)
2. Enable pop-ups in your browser. (Learn how in [KB0016733](#).)
3. To log in to SIMBA, go to simbasupport.psu.edu and click the **Log In to SIMBA** button .
 - a. If you are prompted to provide login credentials, click the **Refresh** button  in the browser navigation bar to bypass this request.
 - b. In the Please Read Notice window, click the **OK** button  to acknowledge confidentiality.




Using the Fiori Launchpad

After logging in to SIMBA, your Fiori launchpad opens. The launchpad is SIMBA's home page, displaying application tiles that correspond to the duties of your assigned roles.

Your Financial Officer assigns roles to determine what you can see and do in SIMBA.





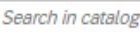



Configuring Launchpad Settings

1. Click the **Profile** button  and select **Settings** from the menu.
2. Configure the following in the Settings window, then click the **Save** button .
 - Appearance tab: Click **Theme** and select a background color for your launchpad.
 - Home Page tab: Choose how you want to display the Fiori tiles on your launchpad.
 - **Show all content:** Display all tiles (apps) assigned to you based on your job function or role. (When all tiles are shown, you can quickly access the tiles in one group by clicking the group name on the launchpad toolbar; the Home page scrolls to move that group to the top of the launchpad.)
 - **Show one group at a time:** Display only tiles for the group that is selected on the toolbar.
 - User Activities tab: Set the **Track my recent activity and frequently used apps** option to **YES**. The SIMBA team suggests that you do *not* clear your history. To view your recent activity and frequently used apps, click the **Profile** button  and select **Recent Activities** or **Frequently Used** from the menu.

Creating Your My Home Tile Group


Your Fiori launchpad includes all tiles (apps) that have been assigned to you based on your job function or role. You can create a custom My Home tile group for easy access to your most commonly used tiles. Think of the My Home group as your “favorites.”

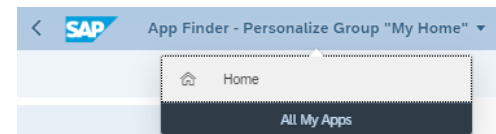
1. Click the **Profile** button  and select **Edit Home Page** from the menu.
2. Explore the Edit Home Page screen to locate a tile you want to add to your My Home group. Make note of the desired tile name.







3. In the My Home section, click the **Open App Finder** button  to open the App Finder screen.
4. In the **Search in catalog** field  , enter the name of the tile you identified in Step 2 and click the **magnifying glass**  button to search.
5. In the results list, click the **Pin** button  for the app you want to add to your My Home tile group.

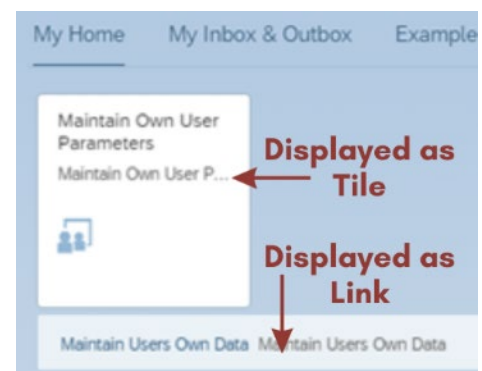
Note: The App Finder screen includes apps to which you have not been granted access. Using an app to which you do not have access creates an authorization error. Be sure to search for an app based on the tile name shown on your launchpad.

6. Repeat steps 3-5 for each additional tile you want in your My Home group.

7. To return to the Edit Home Page screen, click the **back arrow**  in the toolbar or click the **App Finder** drop-down arrow and select **Home**.




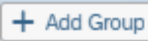
8. (Optional) In the My Home section, you can perform the following tasks for your new My Home group.
 - Reorder the tiles: Click on the center of a tile and drag it to the desired location within the My Home row of tiles. Continue until all tiles are in the desired order.
 - Remove a tile: Click the **X** button  in the corner of a tile to remove the app from your My Home group. The app remains available in its default group.
 - Edit a tile's name and description: Click the **three dots**  on a tile and select **Edit Tile Information**. Edit desired details in the Tile Information window and click the **OK** button.
 - Move a tile to a user created group: Click the **three dots**  on a tile and select **Move**. In the Move to Group window, select only a user created group. Do *not* move a tile to another default group. (See [Creating a Custom Tile Group](#).)
 - Change a tile to be displayed as a link: Click the **three dots**  on a tile and select **Convert to Link** or click and drag a tile into the section labeled Drag apps here to create links.
9. When you are finished modifying your My Home group, click the **Close** button  at the bottom of the screen or click the **Profile** button  and select **Exit Edit Mode** from the menu.







SIMBA Support Recommendations: Make changes only to your My Home group or user created groups; do not modify default group names or tiles in default groups. When adding tiles to your My Home group or user created groups, follow the pinning procedure rather than dragging and dropping tiles between groups.

Creating a Custom Tile Group


Your launchpad includes all tiles (apps) assigned to you based on your job function or role. In addition to creating a My Home tile group to organize your favorites, you can also create a custom tile group to organize tiles to suit your workflow or particular job tasks. A custom tile group is called a user created group.

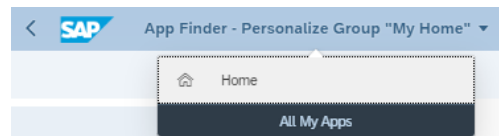
1. Click the **Profile** button  and select **Edit Home Page** from the menu.
2. On the Edit Home Page screen, click the **Add Group** button  where you would like the new group to appear on the launchpad.
3. In the **Enter group name** field, enter the custom name for this new user created tile group. To save the name, press the Enter key or click outside the name field.
4. Explore the Edit Home Page screen to locate a tile you want to add to your new custom group. Make note of the desired tile name.







5. In the new user created group section, click the **Open App Finder** button  to open the App Finder screen.
6. In the **Search in catalog** field , enter the name of the tile you identified in Step 4 and click the **magnifying glass**  button to search.
7. In the results list, click the **Pin** button  for the app you want to add to your user created group.

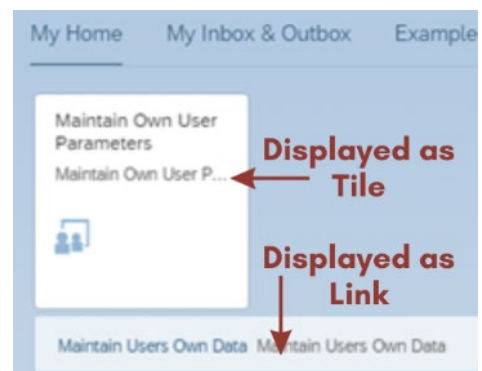
Note: The App Finder screen includes apps to which you have not been granted access. Using an app to which you do not have access creates an authorization error. Be sure to search for an app based on the tile name shown on your launchpad.

8. Repeat steps 5-7 for each additional tile you want in your user created group.

9. To return to the Edit Home Page screen, click the **back arrow**  in the toolbar or click the **App Finder** drop-down arrow and select **Home**.



10. (Optional) In the new user created group section, you can perform the following tasks for your new tile group.
 - Reorder the tiles: Click on the center of a tile and drag it to the desired location within the My Home row of tiles. Continue until all tiles are in the desired order.
 - Remove a tile: Click the **X** button  in the corner of a tile to remove the app from your My Home group. The app remains available in its default group.
 - Edit a tile's name and description: Click the **three dots**  on a tile and select **Edit Tile Information**. Edit desired details in the Tile Information window and click the **OK** button.
 - Move a tile to a user created group: Click the **three dots**  on a tile and select **Move**. In the Move to Group window, select only a user created group or the My Home group. Do *not* move a tile to another default group.
 - Change a tile to be displayed as a link: Click the **three dots**  on a tile and select **Convert to Link** or click and drag a tile into the section labeled Drag apps here to create links.
11. When you are finished modifying your new custom group, click the **Close** button  at the bottom of the screen or click the **Profile** button  and select **Exit Edit Mode** from the menu.



Managing Workflow with My Inbox

SIMBA workflow refers to the automation of the business process that includes a sequence of steps (tasks or events), with each step identified as either required or conditional (required only if it meets specified criteria). Each business process has a predetermined workflow based on user roles that must review or approve the process before final posting. Learn more about these user roles in [KB0016515](#), and access each unique process workflow document on the [SIMBA Support website](#).

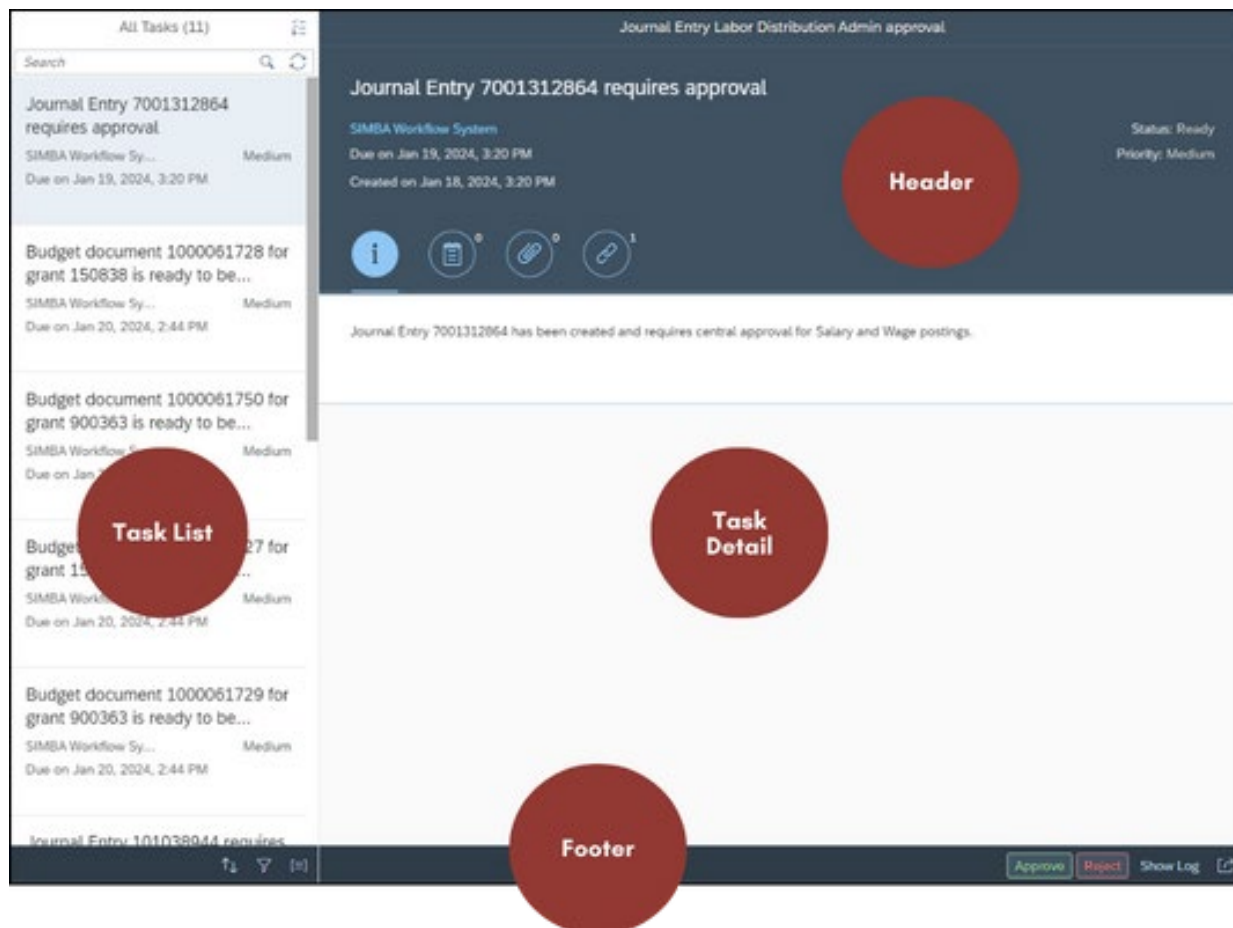
Accessing Your Workflow Tasks

SIMBA (not procurement/Shop OnLion or reimbursement/SAP Concur) workflow tasks assigned to you based on your approval roles appear in your Inbox. To access the Inbox, click the **My Inbox** tile on the Fiori launchpad. The number on the My Inbox tile indicates the number of incomplete tasks currently assigned to you. When a task is assigned to you in workflow, the system also automatically sends you an email notifying you of the new task.



When you complete a task, it is cleared from the Inbox and moved to the Outbox for reference. The number on the Outbox tile is the number of tasks you have completed since you have been assigned an approval role.

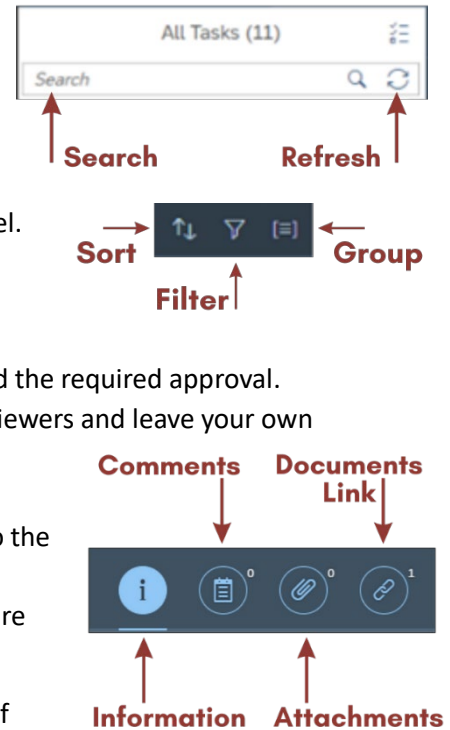
Learn more about using My Inbox in [KB0015807](#).




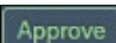


Reviewing, Approving, and Rejecting Tasks

1. Locate the desired task in the **All Tasks** list.
 - Click the **Refresh** button if the Inbox was opened before the task was assigned to you.
 - Use the **Search** field at the top of the panel.
 - Use the **Sort**, **Filter**, or **Group** buttons at the bottom of the panel.
2. Click the desired task in the **All Tasks** list to display the task details.
3. In the Inbox header, use the following buttons to manage the selected task.
 - Click the **Information** button to view the document number and the required approval.
 - Click the **Comments** button to view comments left by other reviewers and leave your own comments.
 - Click the **Attachments** button to view existing attachments and attach additional documents. Attachments can also be added to the document at any point after it is posted.
 - Click the **Link** button to display the actual documents that require review or approval.

Note: The small number next to each icon represents the number of corresponding items. In the illustration, the selected task has 0 comments and attachments and 1 linked document.



4. (Optional) If you need someone who is not an assigned approver to review a document, that user can view the document outside of the workflow process: you can ask the user to use the Display Parked Documents feature, or you can click the **Send E-Mail** button  in the footer.
5. (Optional) To view a log of all activity for the assigned task, click **Show Log**  in the footer.
6. If the document is not ready for approval, click the **Reject** button  in the footer. The initiator of the document is notified of the rejection via email and the document is returned to that user's Inbox.
7. To approve the task and move it along in workflow, click the **Approve** button  in the Inbox footer.

Note: When Accounting Operations approves a document, the SIMBA system will post the document, which updates the status to Posted.

Understanding Master Data

Master data represents the people, places, and things that comprise Penn State as an organization; and this data is shared across Penn State in the SIMBA system. Master data is consistent and uniform across all ledgers (see **Ledgers** below), all SIMBA applications (Shop OnLion, Budgeting, Concur), and all Penn State campuses.

The following table identifies key terms for understanding master data.

SIMBA Data Name	Master Data Details
Fiscal Year	Penn State's fiscal year: July 1 - June 30. Fiscal periods are based on complete calendar months, chronologically through the fiscal year: i.e., Period 1 = July 1-31, Period 12 = June 1-30. Fiscal period 0 = budget or roll-over transactions. Fiscal periods 13-16 = specific periods during closing of fiscal year.
Funds	Fund types: Educational & General Funds, Sponsored Awards, Endowments & Gifts, Unrestricted Funds. (Refer to KB0016890 for a list of fund types and ranges.)
Sources of Funding	Person or entity providing funds to Penn State with spending expectations: students, parents, faculty, staff, alumni, donors, taxpayers, sponsors, federal agencies, legislators, the State.
Functional Area	Categorizes operating expenses by functions of the University: Instructional, Research, Public Service, Academic Support, Student Services, Institutional Support, Auxiliary Enterprise, Physical Plant, Student Aid.
Business Area	Individual areas of operations or responsibilities at Penn State: campuses, colleges, administrative units.
Cost Center	The business area responsible for paying for the accounting transaction. See Funding Structures and Common Number Types below for more information.

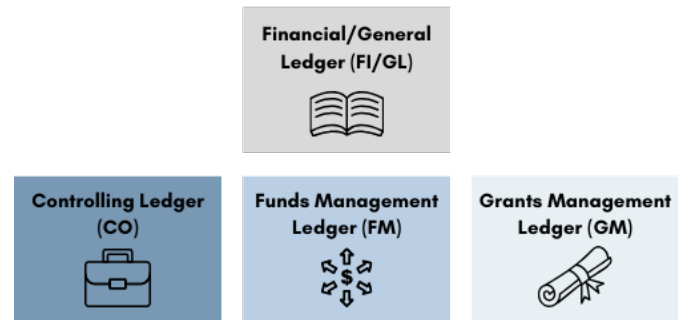
Data Organization

SIMBA organizes financial information into hierarchies and categories. Some hierarchies, such as ledgers and funding structures, function in the background to organize transactions across the University. Other hierarchies, such as number types, are visible within transactions to help users identify account transactions.

Ledgers

Accounting transactions are organized into and managed by four ledgers, which are tied together through a universal journal.

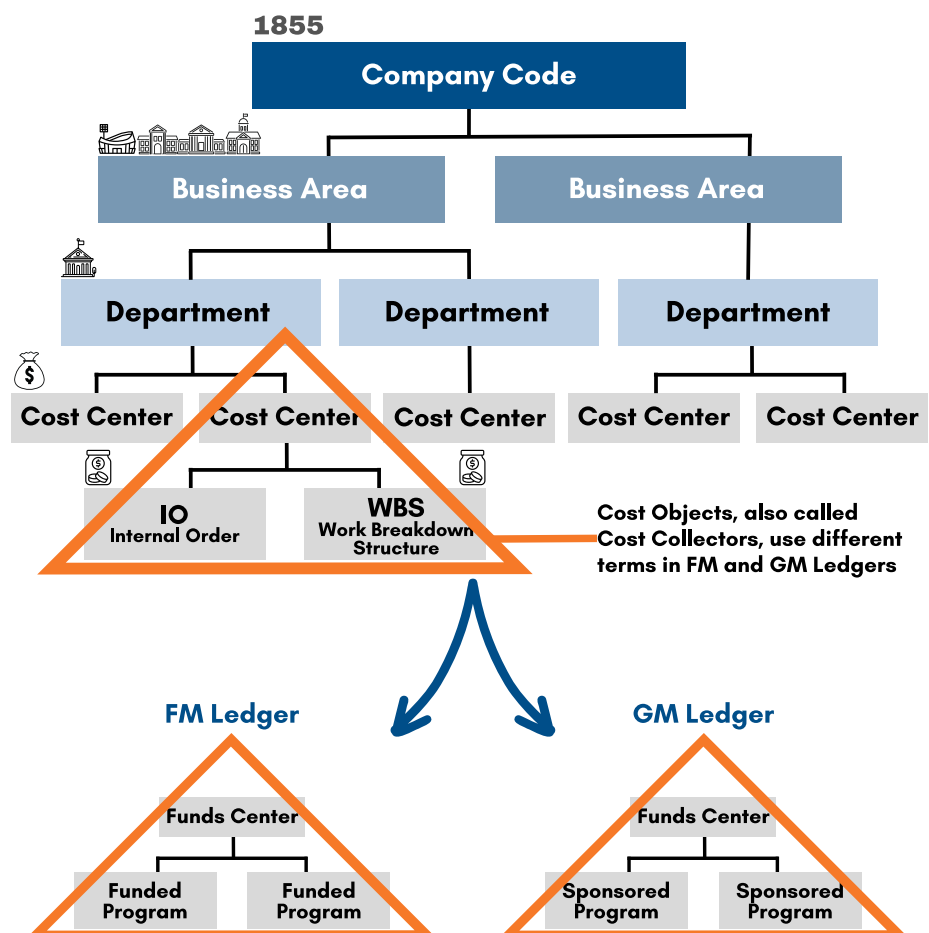
- **Finance/General Ledger (FI/GL):** Used for financial statements and for managing payables and receivables. All transactions begin in FI/GL and are then passed to the other three ledgers.
- **Controlling Ledger (CO):** Intended for cost allocation, but used by SIMBA to pass financial data from FI to FM.
- **Funds Management Ledger (FM):** Allows for comparison of actual and committed revenues and expenditures with budgeted amounts.
- **Grants Management Ledger (GM):** Manages sponsored awards. GM shares data with FI and FM ledgers.



Organizational Funding Structures

When a transaction is posted, it is automatically assigned the Penn State company code (1855). When a user assigns a department's cost center to identify the source of funding, it is categorized into a business area. The number of cost centers per department varies. A cost center is like a bank, holding funds for particular purposes within a department.

If a department needs to provide more accounting details, a transaction's assigned cost center can be assigned an internal order (IO) or a work breakdown structure (WBS) element. Cost centers, IOs, and WBS elements are all cost objects, which communicate the rationale for an accounting transaction and identify the fund that supports a transaction.



Common Number Types

Number Type	Description	More Information
General Ledger Account Number	8 digits Categorizes accounting transactions according to classification and purpose.	Refer to SIMBA GL Accounts Formulation to learn how GL account numbers are organized. Refer to the Procurement Search Tool to look up GL account numbers.
Cost Center Number	10 digits Identifies the business area and department responsible for paying for the accounting transaction.	Refer to the SIMBA Chart of Accounts for more information on cost center codes.
Internal Order (IO) & Work Breakdown Structure (WBS) Element Numbers	12 digits Allow departments to be more detailed with their recording and reporting. WBS element numbers relate to federal contracts and sponsored awards administered by ARL.	Refer to KB0016888 to determine the type of internal order used. An IO/WBS element assigned to cost center in: <ul style="list-style-type: none"> FM Ledger is called Funded Program GM Ledger is called Sponsored Program

Master Data by Ledger

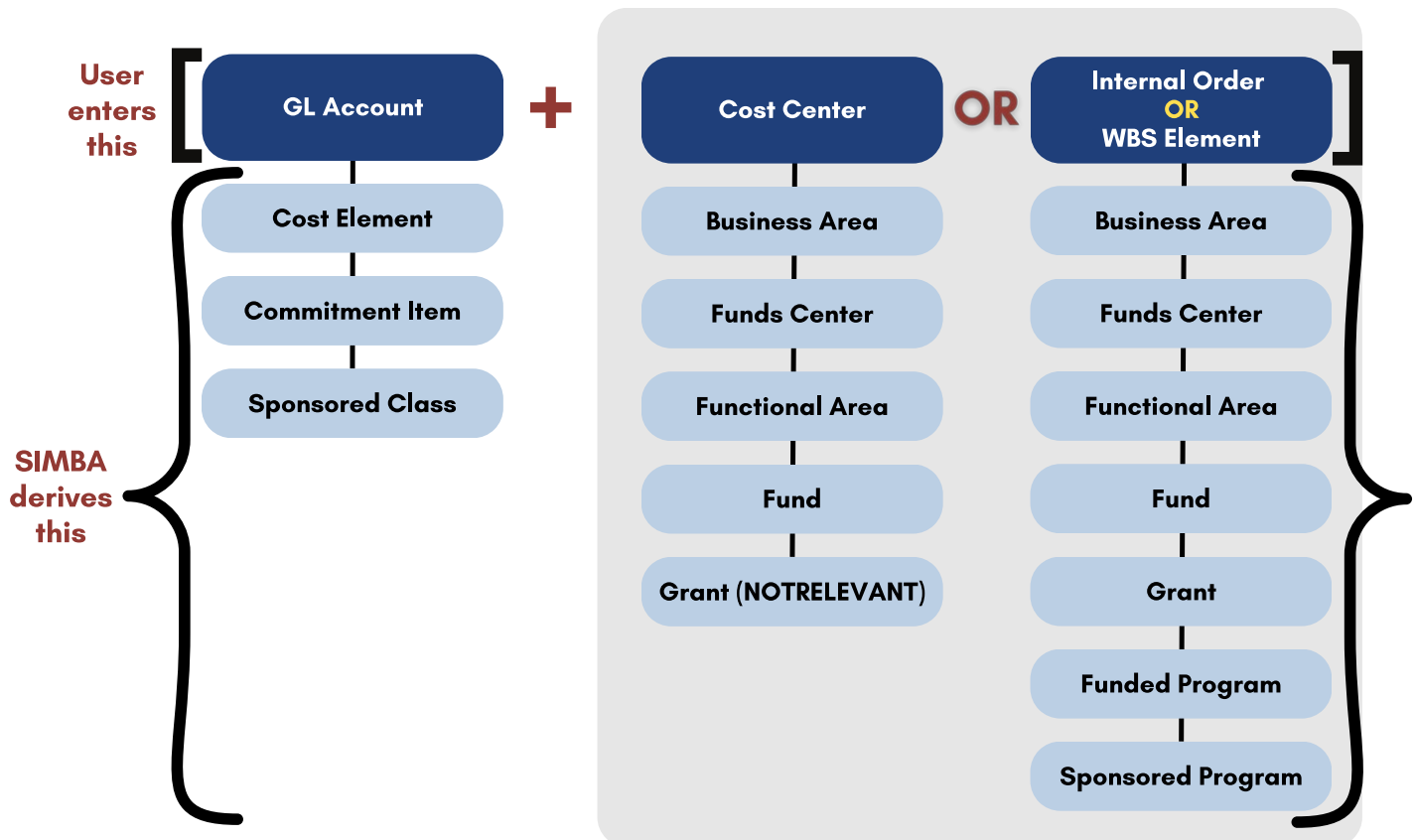
Each ledger contains master data objects. SIMBA uses consistent numbering across the ledgers, but the data objects are separate and often have different names. Understanding the names is important for reporting so that you can identify the ledger.

	FI	CO	FM	GM
Reporting Entity	Company Code	Controlling Area	Funds Management Area	Company Code
Funding Source	Fund	Fund	Fund	Fund
Financial Classification	GL Account	Cost Element	Commitment Item	Sponsored Class
Function	Functional Area	Functional Area	Functional Area	Functional Area
Organizational Unit Revenue and Cost Collector	Business Area Cost Center	Business Area Cost Center	Business Area Funds Center	Business Area Funds Center
Program/Project Revenue and Cost Collector	Internal Order WBS Element	Internal Order WBS Element	Funded Program	Sponsored Program
Grant Funding Source	Grant	Grant	Grant	Grant

Master Data Derivation: Revenue and Expenditure

Master data derivation is SIMBA's ability to automatically fill in sections of an accounting transaction based on supplied data. Derivation reduces the need for data entry and improves overall data accuracy.

When a user creates an accounting transaction (such as a journal), SIMBA assigns the company code and the user selects the document type. When the user enters the GL account number and cost object, SIMBA derives several data elements, as illustrated in the following graphic.



SIMBA Support Resources

For more information on using and understanding SIMBA, go to simbasupport.psu.edu.