

# ERP 23.10 Set up Instruction

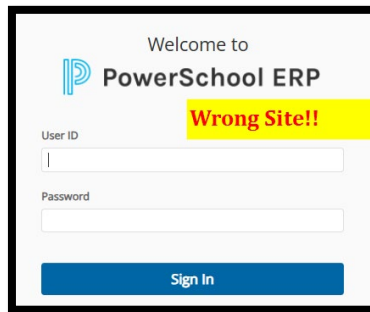
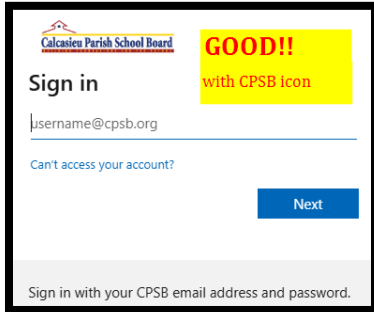
1. You can use LaunchPad to get to ERP 23.10.


OR you can access it through this [link](#).

OR type <https://erpapp.cpsb.org> in the web browser address bar.

ERP 23.10 uses CPSB windows authentication to log in. If you have logged in to CPSB windows account, it will automatically log you in. If not, simply follow the screen to log in to your CPSB account.

You should see CPSB icon if it prompts you to sign in. You should not see the log in page on the right.

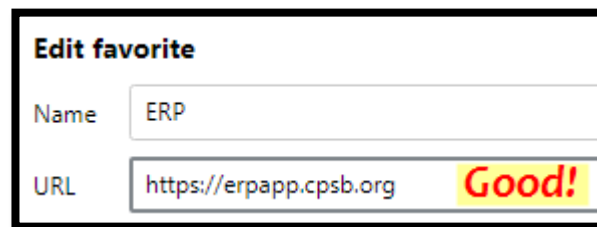
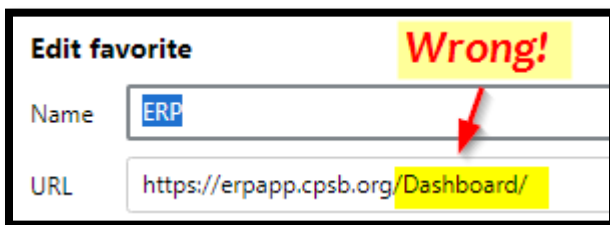


2. **Bookmark/Favorite:** click STAR  icon on the right side of the address bar for future easy access.

**Important** → Make sure the URL is correct by going to your ERP **bookmark**, **right-click**, **EDIT**.

URL needs to be <https://erpapp.cpsb.org>.

If your URL has “/Dashboard/”, it will not work.

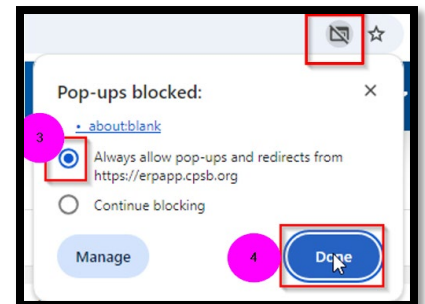
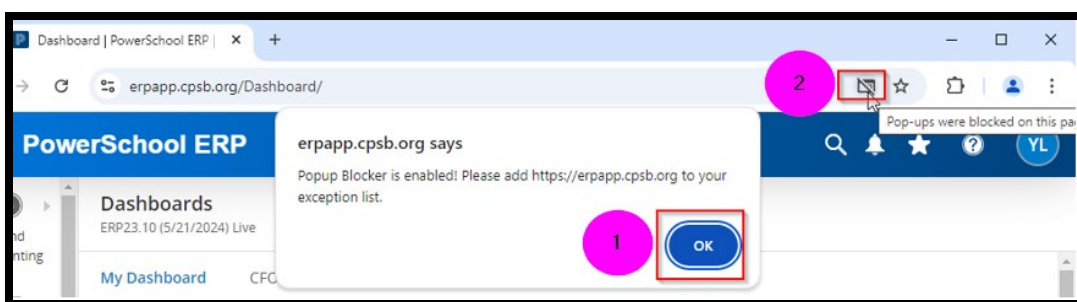



3. Set Environment: If this screen shows, Profile “Live” should be the default.

4. When you first access ERP on this computer, you will need to “Always allow pop-ups”.

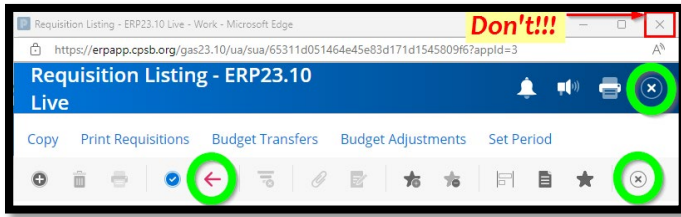
See below picture for the number instruction:

1. First time log in, click OK on the message.
2. Then click the Pop-Ups icon on the address bar.
3. Change the setting to “Always allow pop-ups”.
4. Click Done to exit.



5. When you are done with a program, please exit out using either of these 3 **green** icons pictured below. If not sure, using the red arrow  is always good.

Do not click the X on the top right corner of the page to close it. It is not good practice on the web browsing where you log in to an account. We should always exit/log out the page properly/securely.



6. **IMPORTANT!!!** You should not have someone else use your computer while you are logged in as yourself. This is a violation of the Acceptable Usage Policy (AUP). It is important that you **always lock or sign out of Windows when you leave your desk**. If not, someone else can access finance or employee information as you. Ways to do so:
  - a. If you just want to lock your computer press **Win Key + L**.
  - b. If you want to Sign out press **Ctrl + Alt + Del** and click on **Sign out**.

If you need assistance, please contact Jenny Lee at [jenny.lee@cpsb.org](mailto:jenny.lee@cpsb.org) or (337)217-4180 # 2506.

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### Creating Favorites in ERP

1. Navigate to any application/process within ERP that you want to mark as a favorite.
2. Click on the white star with a '+' sign
3. A window will open asking you to define the favorite name and group name.
4. Define your 'Favorite Name' and 'Group Name'  
Select 'Create Group' and name the group, if you don't already have a group or want to create a new one.
5. Select ok
6. Go back to home screen
7. Click 'add Panel' if you don't already have one.
8. Select the favorite type option from the activity drop down.

You may add a favorite by clicking the '+' icon on the bottom left of the panel to add a new favorite to the list. You may also remove a favorite by clicking the '-' icon on the bottom left of the panel to remove a favorite from the list.

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### Accessing Cognos Report (for Payroll attendance clerk or bookkeeper)

1. ERP > e-Forms & Tools > Tools – Cognos Reporting
2. IBM Cognos Analytics page will open.
3. (Left side)  menu > Content > (middle) Team Content > (scroll down to find) Shared reports from FINPLUS for schools and departments > Payroll Reports (folder)

