

## 11.3 Release Upgrades – User Information

General availability – Noon on Sunday, November 6th, 2011

### Updates to Supported Browsers/OS

- **Removing Support for** –Firefox 3.0, Chrome browsers prior to version 8.0, and Safari browsers prior to 4.0

### General Enhancements

1. Cosmetic changes to user interface – users will experience a more visually appealing user interface. Many changes will be transparent. These changes are 508 compliant and they make the application more useable by individuals with disabilities.

The image shows two side-by-side screenshots of a 'Contract Info' window, labeled 'Before' and 'After'.

**Before:** The window has a title bar 'Contract Info' with a help icon. Below is a tabbed interface with 'General' selected. The 'General' tab contains fields: Contract Number (2009-0206-JH), Contract Name (Fisher Lab Supplies), Contract Type (Scientific Contracts), Contract Applicability for Products (Only for Specified Product SKUs or Products), Apply Automatically (checkbox), Contract Status (Signed by both parties, in file), Description, Effective Date (2/1/2011 12:00 AM EST), Expiration Date (1/31/2012 11:59 PM EST), and Auto-Renew (checkbox with a green checkmark). There is an 'edit' button at the bottom right.

**After:** The window has a title bar 'Contract Info' with a help icon and a close button. Below is a tabbed interface with 'General' selected. The 'General' tab contains fields: Contract Number (2009-0901-JH), Contract Name (Paint Contract), Contract Type (General Product Agreements), Supplier Name (Sherwin-Williams), Active (checkbox), Contract Applicability for Products (checkbox), Apply Automatically (checkbox with a green checkmark), Contract Status, and Description (State Contract for Paint. Use a non-catalog form and include the requirements in the description. Pricing schedule can be found in the link attached.). There are Effective Date (3/3/2011 12:00 AM EST) and Expiration Date (3/2/2012 11:59 PM EST) fields, and an Auto-Renew (checkbox with a green checkmark). There is an 'edit' button at the bottom right.

2. User Search will begin with Last Name since this is the preferred field to search upon.

The image shows two side-by-side screenshots of a 'User Search' window, labeled 'Before' and 'After'.

**Before:** The window has a title bar 'User Search' with a help icon. Below is a form with fields: First Name, Last Name (containing 'Hartman'), User Name, Email, Business Unit, Department (dropdown), Position (dropdown), and Results per page (10). There is a 'Search' button at the bottom.

**After:** The window has a title bar 'User Search' with a help icon and a close button. Below is a form with fields: Last Name (containing 'Hartman'), First Name, User Name, Email, Business Unit, Department (dropdown), Position (dropdown), and Results per page (10). There is a 'Search' button at the bottom.

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- Document Search – new user interface to search requisitions, purchase orders, and invoices. *This feature will replace the History tab in the 12.1 Release (March 2012).* Functionality includes new ways to search: a) Single Simple Search Textbox, b) Relative Date Ranges, c) Post Filter Options, and d) Saving Search Results.

The screenshot displays the Document Search interface. At the top, there is a search bar with a dropdown menu set to 'All Documents' and a search term 'water'. Below the search bar, there are links for 'Go to: my requisitions | my purchase orders' and 'Browse: saved searches | recent searches'. The interface shows 'Showing 1 - 20 of 212 results'. On the left, there are filters for 'Date Range' (set to 'Everything'), 'By Type' (Requisition (118), Purchase Order (75), Invoice (19)), 'By Department' (Accounting (31), Product Management (1), QA (10), Testing Department (2)), 'By Supplier' (Alltech Associates Inc. (126), Aviation Supplies (1), Carolina Shoe Company (1), CD International (1), Charter Oak Consulting Group (1)), and 'By User' (Aileen Approver (1), Aileen Busi (2), Brian Admin (5), Brian Little (21), Brian Shopper (6)). The main table lists search results with columns: Document Number, Document Type, Document Owner, Document Date, Supplier(s), Document Total, and Related Documents. The table shows 20 results, including requisitions and purchase orders from various suppliers like Alltech Associates Inc., VWR International, and Sigma-Aldrich.

Document Number	Document Type	Document Owner	Document Date	Supplier(s)	Document Total	Related Documents
294990	Requisition	Derrick Admin	9/1/2011	Alltech Associates Inc. Derrick's Fish	19.68 USD	
294606	Requisition	Derrick Admin	8/31/2011	Spectrum Chemicals & Laboratory Products Staples Advantage (formerly Corporate Express) VWR International	156.78 USD	
294568	Requisition	Derrick Admin	8/31/2011	VWR International	63.94 USD	
293471	Requisition	Derrick Admin	8/29/2011	VWR International	31.97 USD	
281824	Requisition	Derrick Admin	7/28/2011	VWR International	31.97 USD	
276612	Requisition	Brian Little	7/14/2011	Alltech Associates Inc. Derrick's Fish	19.68 USD	
P0766	Purchase Order	Derrick Admin	7/22/2011	Sigma-Aldrich	66.39 USD	
279420	Requisition	Derrick Admin	7/22/2011	Sigma-Aldrich	66.39 USD	
P0765	Purchase Order	Derrick Admin	7/21/2011	Sigma-Aldrich	4,157,529.32 USD	
279063	Requisition	Derrick Admin	7/21/2011	Sigma-Aldrich	4,157,529.32 USD	
P0764	Purchase Order	Derrick Admin	7/21/2011	Sigma-Aldrich	66.39 USD	
279062	Requisition	Derrick Admin	7/21/2011	Sigma-Aldrich	66.39 USD	
P0762	Purchase Order	Brian Little	7/19/2011	Alltech Associates Inc.	19.68 USD	
278140	Requisition	Brian Little	7/19/2011	Alltech Associates Inc. Derrick's Fish	19.68 USD	
P0761	Purchase Order	Derrick Admin	7/14/2011	Sigma-Aldrich	66.39 USD	
276641	Requisition	Derrick Admin	7/14/2011	Sigma-Aldrich	66.39 USD	
P0758	Purchase Order	Brian Little	7/14/2011	Alltech Associates Inc.	19.68 USD	

- Next and Previous links in Quick View allows users to browse documents easier.

The screenshot displays the Document Navigator Display for a Purchase Order (PO) Summary. The PO Reference No. is PO768, and the Supplier is Nova Office Supplies. The summary includes sections for General Information, Shipping Information, and Billing/Payment. The General Information section lists details like PO Reference No., Priority, Supplier Name, Address, Purchase Order Date, Total, Requisition Number, A/P status, POWF, Workflow Trigger, and Room. The Shipping Information section lists Ship To, Ship To Address Code, Delivery Options, and Ship Via. The Billing/Payment section lists Bill To, Bill To Address Code, Internal Note, Internal Attachments, Billing Options, Accounting Date, Payment Terms, and F.O.B.

General Information that is really long. General Information that is really long. General Information that is really long.		Shipping Information		Billing/Payment	
PO/Reference No.	PO768	Ship To	Contact Line 1 Derrick Graham 24500 Sunny Blvd San Diego, NC 92101 United States	Bill To	Contact: Accounts Payable 6501 Weston Pkwy Cary, NC 27513 United States
Supplier	Nova Office Supplies	ShipTo Address Code	NC01	BillTo Address Code	AP Headquarters
Purchase Order Date	7/28/2011	Delivery Options	Expedite X	Internal Note	no note
Total	615.00 USD	Ship Via	UPS-Ground	Internal Attachments	
Requisition Number	280423	Req Delivery	7/25/2011	Billing Options	
A/P status	Open	Delivery Options values vary by line		Accounting Date	
POWF	no value			Payment Terms	1% 2, Net 3
Workflow Trigger	Admin Room 1			F.O.B.	N/A
Room	First Room on Floor				
Contact Information					
Owner Name	Derrick Graham				
Owner Phone	+1 (919) 659-2180				
Owner Email	dgraham@scisquest.com				

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5. New Document Quick Views for Invoices – the quick view icon will be available throughout the application for invoices. This feature reduces navigation required to view invoices. Invoices can be reviewed on approval screens.

### Invoice Approvals

My Invoice Approvals

Results per page 10

Invoice No.	State	Supplier
104026	Active	
PO No. 270972		
Invoice Name 2011-08-25		
Invoice Source: Manual		
No. of Lines: 2		

### Invoice History

Results per page 20

Workflow Status	Invoice No.	Supplier Invoice No.
✓	93826	1023311311

6. Assign Substitute for all Approval Folders – allows user to apply substitute to all folders at once.

home/shop | favorites | forms | ca

requisition | purchase order | invoice | sales order fulfillment | requisition outbox

### My Approvals

[Assign substitute to all folders...](#) [End substitution for all folders](#)

[Click to filter requisitions](#)

Hide requisition details

[Assign substitute to this folder...](#)

### My PR Approvals

Results per page 10

Requisition No.	State
273280	Active
Cart Name: 2011-08-08 epastoor 01	
Cart Description:	
No. of line items: 1	
273220	Notification
Cart Name: 2011-08-08 fuller 01	

New Buttons for substituting all folders at once

Existing link for individual assignment still available

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7. Remember User Sorting on Approval Screens – user's sorting preference will be remembered on approval screens and will not have to be reapplied upon reentry to a specific screen.

Sorting is remembered by user  
and document type (e.g. PR,  
PO, Invoice, Sales Order)

Invoice approval  
example: Sorted by  
Due Date



The screenshot shows a table titled '- Matching Exceptions'. Above the table, it says 'Results per page 200' and 'BuyerInvoices Found: 28'. The table has columns: Invoice No., Approver, State, Supplier Invoice No., Supplier Name, Invoice date, Type, Amount, Due Date, Discount Date, Action, and Select. Two rows of data are visible. An orange arrow points to the 'Due Date' column header.

Invoice No. ^	Approver ^	State ^	Supplier Invoice No. ^	Supplier Name ^	Invoice date ^	Type ^	Amount ^	Due Date ▼	Discount Date ^	Action	Select
I-000244 <a href="#">view</a>	Ryan Nolan	Assigned	PE20110621-1	PerkinElmer Life and Analytical Sciences	6/21/2011	Invoice	252.91 USD	7/21/2011	7/6/2011		<input type="checkbox"/>
I-000245 <a href="#">view</a>		Not Assigned	AD-20110621-1	A.Daigger	6/21/2011	Invoice	125.10 USD	7/21/2011	7/6/2011	<a href="#">Assign</a>	<input type="checkbox"/>