

# E-Procurement Upgrade to 11.3



Pace University

## SIGN IN

Please enter your user name and password below to access the application.  
These fields are case-sensitive.

\* \* \* \* \*

User Name

\* \* \* \* \*

Password

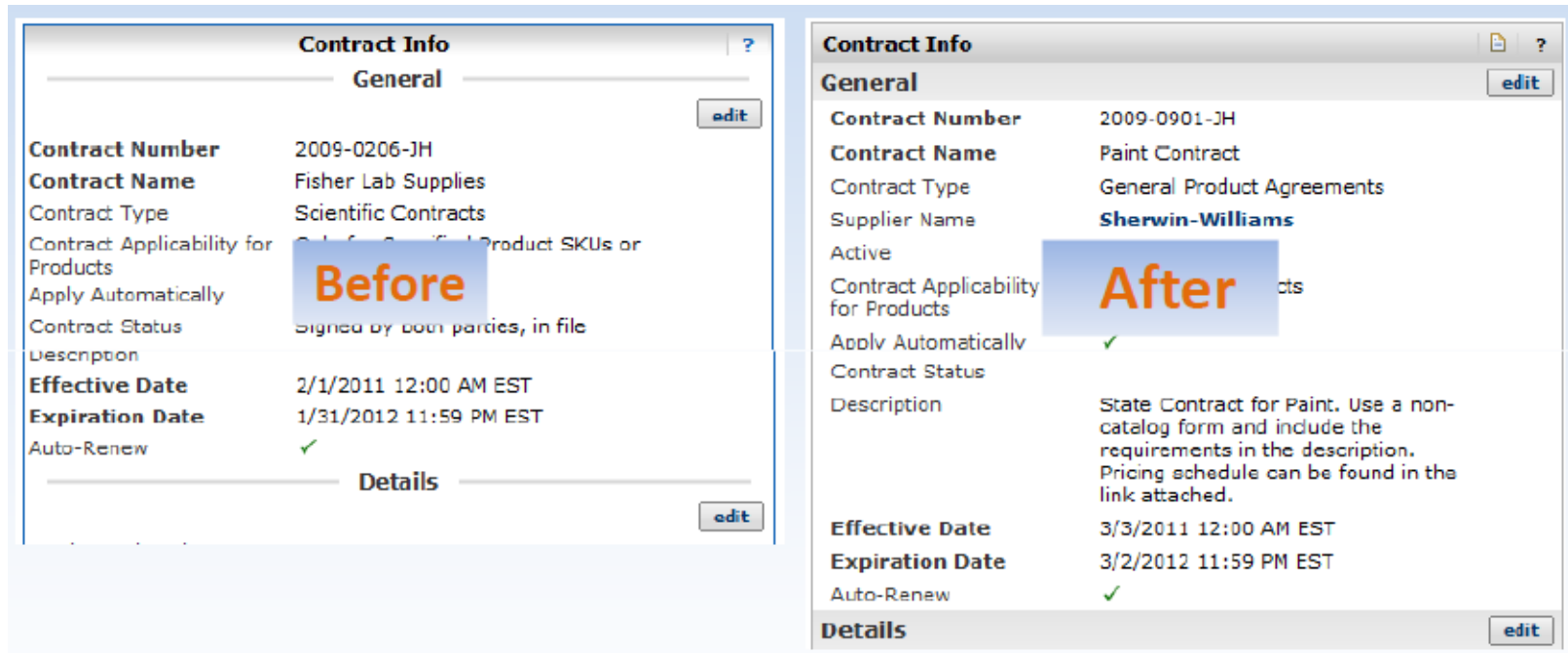
[Forgot your Password?](#)

**SIGN IN**

# Examples of cosmetic changes to expect

Many of these changes will be transparent, but the benefits are significant.

## Example: Contract Popup Window



- Gradient or shadowing changes, such as borders
- Titles now left-aligned (previously centered)
- Edit buttons in line with heading



# Examples of cosmetic changes to expect...cont

## Cart Assignee sub-tab in Profile

The image displays two screenshots of the 'Cart Assignees' sub-tab in a profile, illustrating cosmetic changes. The top screenshot, labeled 'Before', shows a table with columns 'Name', 'Preferred', and 'Delete'. The bottom screenshot, labeled 'After', shows a table with columns 'Name' and 'Action'.

**Before State:**

Name	Preferred	Delete
Derrick Graham	<input type="radio"/>	Delete
Ashlee Hartman	<input checked="" type="radio"/>	Delete

**After State:**

Name	Action
Ashlee Hartman (Preferred Assignee)	Remove
Derrick Graham	Set as Preferred Remove

- As before, gradient and alignment changes
- Radio buttons replaced with buttons
- NOTE: Changes for Financial Approvers sub-tab in profile will be the same

# Examples of cosmetic changes to expect...cont

User Search (for approvers, history search, etc)

The image displays four screenshots of a 'User Search' interface, arranged in a 2x2 grid. The top row shows the search form 'Before' and 'After' changes. The bottom row shows the search results table 'Before' and 'After' changes. Orange arrows point from the top row to the bottom row.

**Before (Top Left):** Search form with fields for First Name, Last Name (Hartman), User Name, Email, Business Unit, Department, Position, and Results per page (10). A 'Search' button is at the bottom.

**After (Top Right):** Search form with fields for Last Name (Hartman), First Name, User Name, Email, Business Unit, Department, Position, and Results per page (10). A 'Search' button is at the bottom.

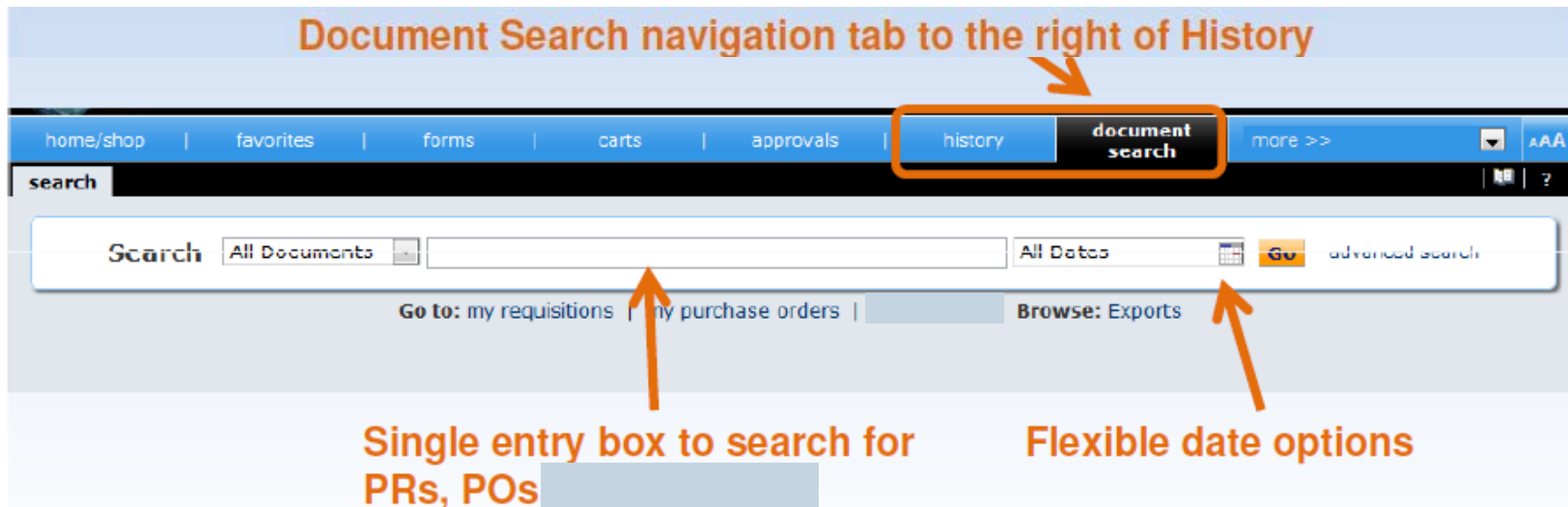
**Before (Bottom Left):** Search results table with columns: Select, Name, User Name, Email, Phone. One result is shown: Hartman, Ashlee, \_sq\_ahartman, ahartman@SciQuest.com. A 'Choose Selected User' button is at the bottom.

**After (Bottom Right):** Search results table with columns: Name, User Name, Email, Phone, Action. One result is shown: Hartman, Ashlee, \_sq\_ahartman, ahartman@SciQuest.com, [select].

- User Search starts with Last Name (most popular search)
- Radio buttons on Left and “Choose” button replaced with [select] action
- Previous and Next (triangle) links updated to buttons

# NEW Order History Search (Document Search)

A new functionality, named Document Search, will eventually replace the current History search functionality.



- Single Simple Search Textbox – A single box in which you can enter in multiple points of data. (Ex. PR, PO, cart name, catalog number, supplier, & contract number).
- Relative Date Ranges – You can now select ranges such as last 30, 60, 90 days, month-to-date, year-to-date etc.
- Filter Options post search – Narrow down your search results by selecting filters. (Ex. Workflow step, User, Department, Supplier, Status, etc.)
- Advanced Search – Narrow down your search results by pre-selecting what you wish to search.

# Next & Previous Links in Quick View

## Feature Overview

Next & Previous Links

Document Navigator Display

<Previous 4 of 20 Next>

**PO Summary - [PO768](#)**

PO/Reference No. PO768  
Supplier Nova Office Supplies

General Information that is really long. General Information that is really long. General Information		Shipping Information		Billing/Payment	
PO/Reference No.	<b>PO768</b>	<b>Ship To</b>	Contact Line 1 Derrick Graham 24500 Sunny Blvd San Diego, NC 92101 United States	<b>Bill To</b>	Contact: Accounts Payable 6501 Weston Pkwy Cary, NC 27513 United States
Priority	Normal	ShipTo Address Code	NC01	BillTo Address Code	AP Headquarters
Supplier Name	Nova Office Supplies	<b>Delivery Options</b>	Expedite <b>X</b>	Internal Note	no note
Address		Ship via	UPS-Ground	Internal Attachments	
Purchase Order Date	7/28/2011	Req Delivery	7/25/2011	<b>Billing Options</b>	
Total	615.00 USD	Delivery Options values vary by line		Accounting Date	
Requisition Number	280423			Payment Terms	1% 2, Net 3
A/P status	Open			F.O.B.	N/A
PCWF	no value				
Workflow Trigger	no value				
Room	Admin Room 1 First Room on floor				
<b>Contact Information</b>					
Owner Name	Derrick Graham				
Owner Phone	+1 (919) 659-2180				
Owner Email	dgraham@sciquest.com				
<b>Distribution Methods</b>		<b>Supplier Information</b>		<b>Supplier Information</b>	
Workflow	Pending Multi-Line Form Review	Contract	no value		
The system will distribute purchase orders using the method(s) indicated below:		Account Code			
Email (F15in Text)	dgraham@sciquest.com	Pricing Code			
Email (HTML Body)		Quote number			
Email (HTML Attachment)		Note to Supplier	no note		
cXML (Electronic Integration)		Attachments for supplier			
Manual		<b>PO Clauses</b>			
<b>Distribution Options</b>			no clause		

Close

➤ The quick view will now contain a next & previous link when accessed via the document search tab.

➤ This allows you to scroll through document search results without having to navigate back to the actual results.

# Assign Substitute for All Approval Folders

- Approvers can now assign a substitute and end substitution for ALL approvals folders at once. For example, if a user is responsible for approving a range of 20 account codes, the user can assign a substitute for all folders when he is on vacation.

The screenshot shows a web application interface for 'My Approvals'. At the top, there are navigation tabs for 'requisition', 'purchase order', 'sales order fulfillment', 'requisition outbox', and 'purchase order outbox'. Below the tabs, the 'My Approvals' section contains two buttons: 'Assign substitute to all folders...' and 'End substitution for all folders'. A status message indicates 'Substitute assigned to 3 folders ( 5 total folders )'. Below this is a '+ Click to filter requisitions' button and a 'Hide requisition details' link. A 'Assign substitute to this folder...' button is also present. The main content area is titled 'My PR Approvals' and includes a 'Results per page' dropdown set to '10'. A table lists requisition details:

Requisition No.	State
256813	Notification
Cart Name:	2011-05-27 fuller 01
Cart Description:	
No. of line items:	2
254164	Notification
Cart Name:	2011-05-19 tritnadmin 01

Three callout boxes with orange borders and arrows point to specific features:

- New Buttons for substituting all folders at once**: Points to the 'Assign substitute to all folders...' button.
- Confirmation of folders assigned and total folders**: Points to the status message 'Substitute assigned to 3 folders ( 5 total folders )'.
- Ability to assign individually still available**: Points to the 'Assign substitute to this folder...' button.

# Assigned Cart Reminder Notifications

- New email notification allows organizations or business units to send reminders for unprocessed draft shopping carts.
  - Emails sent to assignees, shoppers, or both.
- Initial and repeat reminders are configurable.
- Summary email reminder of all applicable draft shopping carts.
- Settings cannot be changed for specific users – all users with qualifying draft shopping carts will receive reminders.

## Sample Assignee Email Contents

### Assigned Shopping Carts Requiring Attention

Dear Robin Dunaway,

Users have assigned shopping carts to you that you have not processed. The list of pending shopping carts is listed below.

#### Assigned on 10/5/2011

Cart Number: 290520  
Shopping Cart Name: 2011-09-20 zhester2 01  
For: Sheli Hester  
Vendor Name(s): Boise Office Solutions, Parade Art & Office Supply (TEST)  
Cart Total: 3,738.98 USD

#### Assigned on 10/11/2011

Cart Number: 303624  
Shopping Cart Name: 2011-10-11 fuller 01  
For: Frank Fuller  
Vendor Name(s): Boise Office Solutions, CDW  
Cart Total: 1,710.37 USD

Please process as soon as possible.

[Click here to view the shopping carts assigned to you in your organization's site.](#)

If you have questions, please contact your SelectSite Support Team.

Summary by day; includes key information

Link to organization's site, if applicable

## Sample Shopper Email Contents

### Shopping Carts Awaiting Action From Others

Dear Frank Fuller,

You have shopping carts assigned to other users that have not been processed. The list of pending shopping carts is listed below.

#### Assigned on 10/11/2011

Cart Number: 303624  
Shopping Cart Name: 2011-10-11 fuller 01  
Assigned To: Triton Admin  
Vendor Name(s): Boise Office Solutions, CDW  
Cart Total: 1,710.37 USD

[Click here to view the shopping carts you assigned to others in your organization's site.](#)

If you have questions, please contact your SelectSite Support Team.

Support Team Contact Information:  
+1 (503) 333-3333  
[it@support@triton.com](mailto:it@support@triton.com)

Thank you,  
TritonProcure

Is this email difficult to read? You may choose to receive plain text emails instead by logging into your organization's site and updating your preferred email format on the User Identification tab under User Settings in your profile.

Summary by day; includes key information

Link to organization's site, if applicable





If you have any questions, please  
contact the Purchasing Department  
at Ext. 22642 or  
email [purchasing@pace.edu](mailto:purchasing@pace.edu)

