



# Bull Marketplace – ePro

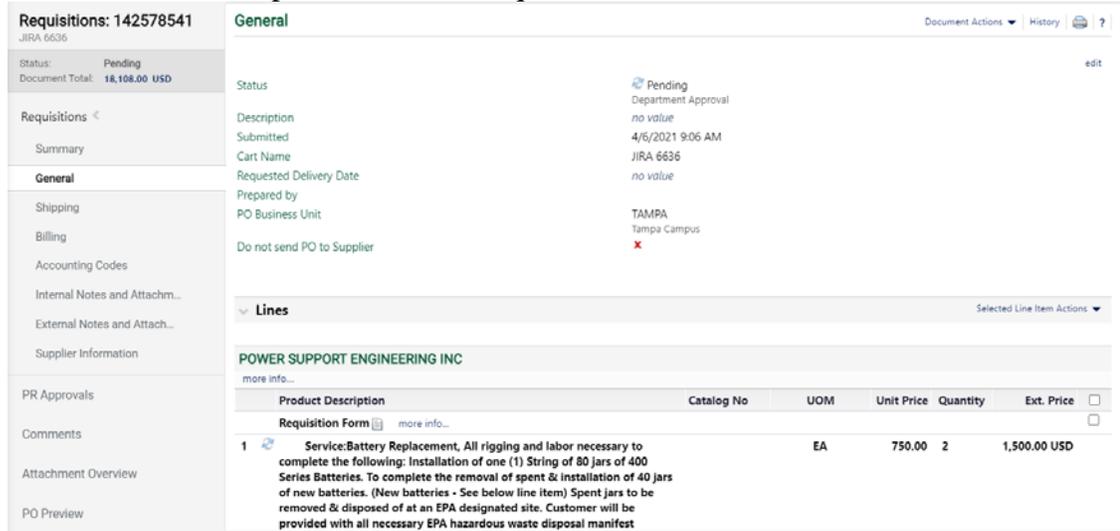
## The User Experience (UX) Update

|                    |   |
|--------------------|---|
| <b>Purpose:</b>    | Jaggaer set out a new User Experience (UX) format on 4/12/21. This guide is intended to guide users through the new UX layout for their non-Punch Out requisitions, change requests, and purchase orders.   |
| <b>Navigation:</b> | Shop > Shopping > Shopping Home   |
| <b>Notes:</b>      | The new UX is a <b>required</b> change; there will not be the ability to return to previous UI after the update has gone live. The update will primarily affect requisitions, change requests, and purchase orders. Searches and the form requests such as the requisition form or UTBS form will remain mostly the same as before. |

| Steps | Section Header   |
|-------|--|
| 1     | <p style="text-align: center;"><b>General Information</b></p> <p>1.1 <del>Until the new UX goes live, users will have a toggle button available to switch between the “Classic Experience” and the “New shopping experience.” The toggle is available on the Shopping dashboard and within every requisition.</del></p> <div data-bbox="344 856 867 1104" data-label="Image"> </div> <p>1.2 <b>April update: with the new UX now live, the toggle option is not longer available.</b></p> <p>1.3 There are some minor changes on the Shopping dashboard, mostly involving the links to Favorites and Forms and the “Shop at the Top” search bar:</p> <p>Old:</p> <div data-bbox="344 1329 1312 1444" data-label="Image"> </div> <p>New:</p> <div data-bbox="344 1482 1312 1623" data-label="Image"> </div> <p>1.4 All functionality remains the same as before; the location of fields has simply changed.</p> |
| 2     | <p style="text-align: center;"><b>Requisition Changes</b></p> <p>The requisition document is undergoing the most changes. We will break down each part below.</p>  |

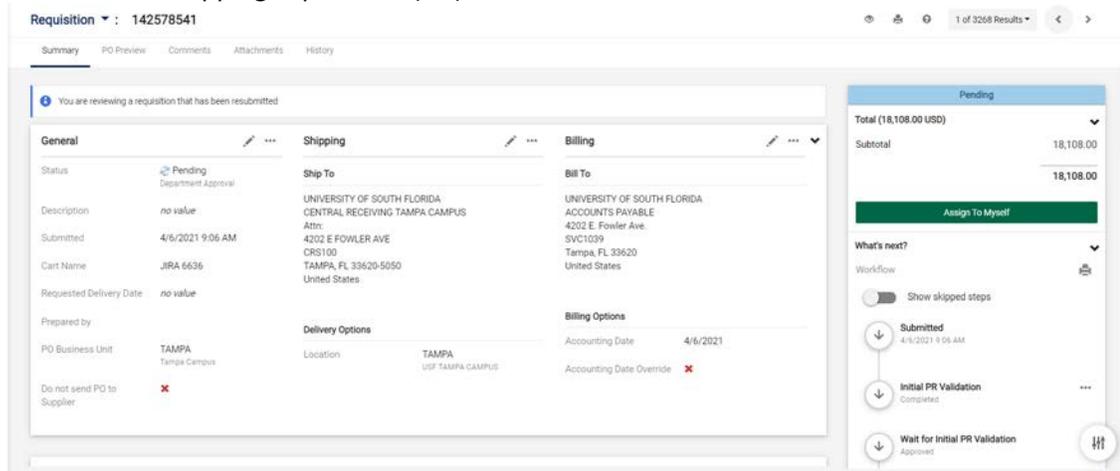
**Steps** **Section Header**

2.1 In the Classic Experience UI, the requisition document looks like this:



The sections of the requisition document are listed on the left-hand side in grey; clicking each will open the section on the right.

2.2 The new shopping experience (UX) will look like this:



Each of the sections previously in the grey bar on the left-hand side are now shown in one general Summary screen on the left (you can scroll down to see more). On the right-hand side, the workflow status is shown by default, rather than needing to navigate to “PR Approvals”

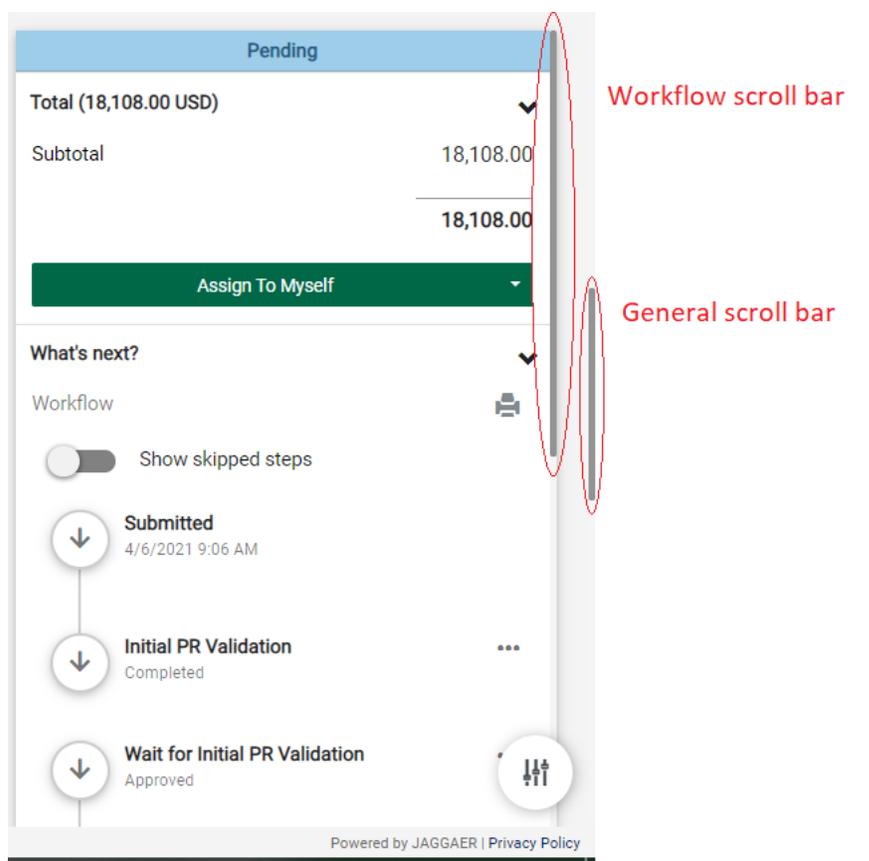
2.3 The “Document Actions” area on the old PO is now a drop-down arrow next to the requisition number at the top of the screen:



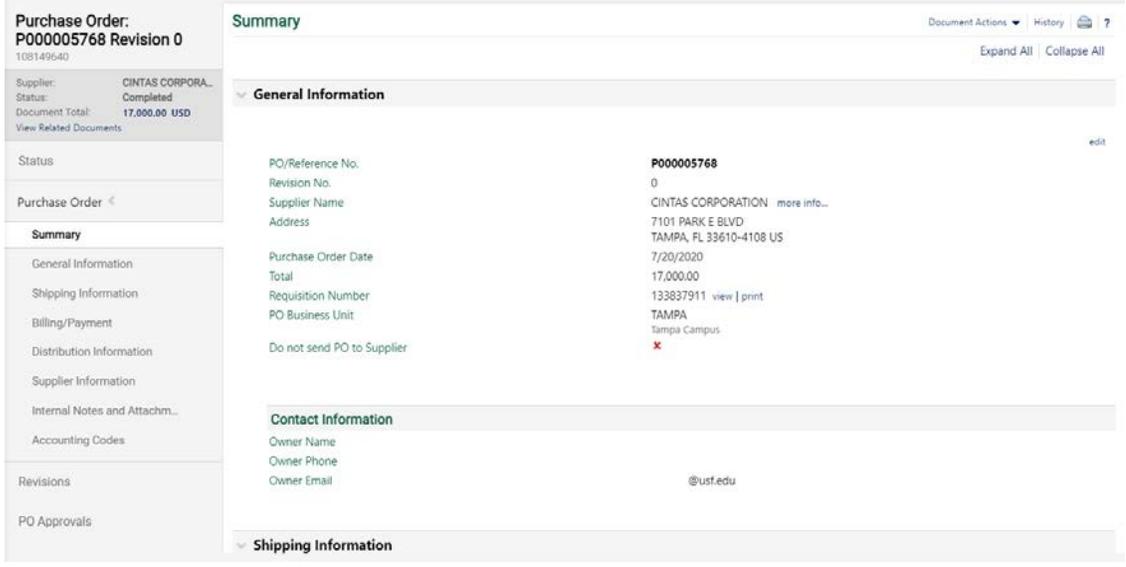
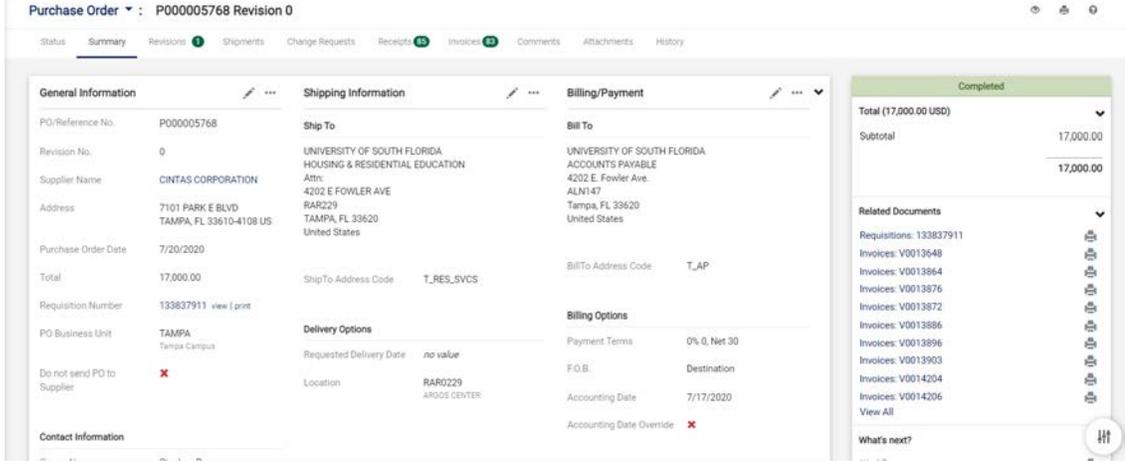
| Steps | Section Header  |
|-------|---|
|       | <p>This is also where Approvers will see the options to approve the requisition. Or if they assign it to themselves, the option to Reject or Return the requisition to the submitter.</p> <p>2.4 Below the requisition number are the following page tabs:</p> <div data-bbox="407 432 1305 516" style="border: 1px solid #ccc; padding: 5px; text-align: center; margin: 10px 0;"> <span>Summary</span>   <span>PO Preview</span>   <span>Comments</span>   <span>Attachments</span>   <span>History</span> </div> <p>All of these tabs formerly were in the grey box on the left of the old UI except for History, which was a hyperlink in the upper-left hand corner.</p> <p>2.5 In the upper-right hand corner of the requisition you will see the following:</p> <div data-bbox="532 730 1182 827" style="border: 1px solid #ccc; padding: 5px; text-align: center; margin: 10px 0;"> <span>👁️</span>   <span>🖨️</span>   <span>🔍</span>   <span>1 of 3268 Results ▾</span>   <span>⏪</span>   <span>⏩</span> </div> <ul style="list-style-type: none"> <li>• <span>👁️</span> allows the user filter the view of the Summary tab:           <div data-bbox="394 898 740 1079" style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p>FILTER VIEW</p> <p>✓ View All</p> <p>View Line Items Only</p> <p>View Accounting Codes Only</p> </div> </li> <li>• <span>🖨️</span> allows the user to print a copy of their requisition</li> <li>• <span>🔍</span> brings up a general glossary of terms</li> <li>• The results tab allows the user to navigate between recent requisitions, or return to their search page:           <div data-bbox="394 1255 730 1461" style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p>1 of 3268 Results ▾   <span>⏪</span>   <span>⏩</span></p> <p><a href="#">Back to Results</a></p> <p>142578541</p> <p>142580593</p> </div> </li> </ul> <p>2.6 The General, Shipping, and Billing sections of the Summary page all function similarly:</p> <div data-bbox="300 1535 1390 1598" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <span>General</span>   <span>✎️ ⋮</span>   <span>Shipping</span>   <span>✎️ ⋮</span>   <span>Billing</span>   <span>✎️ ⋮ ▾</span> </div> <p>Each has the same type of icons:</p> <p><span>✎️</span> is the edit icon, allowing the user to update the information in the section (provided they have the appropriate permissions to do so). Clicking this icon will pop up an edit section. For the General tab, for example, the user will see:</p> |

| Steps | Section Header   |
|-------|--|
|       | <div data-bbox="483 210 1230 1155"><p><b>Edit General</b> <span>✕</span></p><hr/><p><b>General</b></p><hr/><p>Status <span>🔄 Pending</span><br/>Department Approval</p><p>Description <input type="text"/></p><p>Submitted 4/6/2021 9:06 AM</p><p>Cart Name <input type="text" value="JIRA 6636"/></p><p>Requested Delivery Date <input type="text"/><br/>mm/dd/yyyy <span>📅</span></p><p>Prepared by</p><p>PO Business Unit <input type="text" value="TAMPA"/> <span>📌</span></p><p>Do not send PO to Supplier <input type="checkbox"/></p><p><span>Save Changes</span> <span>Close</span></p></div> <p data-bbox="300 1192 617 1228">... allows for two options:</p> <ul data-bbox="332 1249 544 1333" style="list-style-type: none"><li><a href="#">Hide optional fields</a></li><li><a href="#">Help</a></li></ul> <p data-bbox="300 1360 1364 1428">Hide optional fields will simply hide everything in the section. Help is a general glossary of terms.</p> <p data-bbox="300 1470 1388 1575">At the edge of the tabs is the <span>▼</span> icon. This simply collapses the three tabs, hiding the information so the user can shorten the page they're reviewing. Press the <span>▶</span> icon to restore the tabs to full length.</p> <p data-bbox="300 1617 1404 1753">2.7 Accounting Codes (Header level) are displayed next. This is your Chartfield information at the header level, meaning it would apply to all lines of your requisition. If your chartfield varies by line or has multiple distributions, this section will be empty and individual chartfield strings will be listed further below:</p> <div data-bbox="300 1764 1412 1858"><p>Accounting Codes <span>...</span> <span>▼</span></p><hr/><p><small>ⓘ Values vary by line.</small></p></div> |

| Steps   | Section Header  |   |  |          |                 |             |                 |                    |                  |  |   |                                  |  |  |  |  |       |   |   |   |        |   |          |     |         |           |      |         |      |         |            |             |                    |                  |       |     |       |       |  |        |  |                 |                 |                 |     |       |                 |                                |  |                 |  |  |  |  |
|---|---|---|--|----------|-----------------|-------------|-----------------|--------------------|------------------|--|---|----------------------------------|--|--|--|--|-------|---|---|---|--------|---|----------|-----|---------|-----------|------|---------|------|---------|------------|-------------|--------------------|------------------|-------|-----|-------|-------|--|--------|--|-----------------|-----------------|-----------------|-----|-------|-----------------|--------------------------------|--|-----------------|--|--|--|--|
|   | <p data-bbox="297 212 1382 243"><b>2.8 Internal and External Attachments are grouped together like some of the previous tabs:</b></p> <div data-bbox="297 243 1414 489" style="border: 1px solid #ccc; padding: 5px;"> <table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; border-right: 1px solid #ccc; padding: 5px;"> <p><b>Internal Notes and Attachments</b> <span style="float: right;">✎ ...</span></p> <p>Close/Cancel the PO <span style="color: red;">✘</span></p> <p>Internal Note: JIRA ISSUE: 6636 REQUESTED BY: RICHARD MEANA</p> <p>Internal Attachments: <a href="#">Add</a></p> </td> <td style="width: 50%; padding: 5px;"> <p><b>External Notes and Attachments</b> <span style="float: right;">✎ ... ▾</span></p> <p>Note to all Suppliers: VENDOR: PLEASE SEND COPY OF INVOICE TO: USF INFORMATION TECHNOLOGY ATTN: FINANCIAL... <a href="#">Show more  </a></p> <p>Attachments for all suppliers: <a href="#">Add</a></p> <p>PO Clauses: <a href="#">1 Edit   View details</a></p> </td> </tr> </table> </div> <p data-bbox="297 506 1414 575">Like with previous tabs, the  icon allows you to edit these sections. There also Add buttons for attachments.</p> <p data-bbox="297 615 1414 753">Please note Internal Notes and Comments are NOT the same. An Internal Note will not show up in the Comments section at the top, and vice-versa. Internal Notes should typically be used for review by Approvers, while Comments are used for workflow discussions or to bring attention to something.</p> <p data-bbox="297 793 1414 863"><b>2.9</b> Next is the requisition form and line information sections. The first section has a link to the requisition form request:</p> <div data-bbox="297 863 1414 1209" style="border: 1px solid #ccc; padding: 5px;"> <p><b>83 Items</b> <span style="float: right;">☐ ▾</span></p> <p><b>POWER SUPPORT ENGINEERING INC</b> · 83 Items · 18,108.00 USD <span style="float: right;">☐</span></p> <p>▲ SUPPLIER DETAILS</p> <p>Contract: <i>no value</i>      PO Number: To Be Assigned</p> <p>PO Clauses: <a href="#">Add</a></p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <thead> <tr> <th>Status</th> <th>Item</th> <th>Catalog No.</th> <th>Unit Price</th> <th>Quantity</th> <th>Ext. Price</th> <th></th> </tr> </thead> <tbody> <tr> <td></td> <td><a href="#">Requisition Form</a></td> <td></td> <td></td> <td></td> <td></td> <td>... ☐</td> </tr> </tbody> </table> <p>Contract: <i>no value</i></p> </div> <p data-bbox="297 1213 1117 1245">The items listed at the top refers to the total quantity across all lines.</p> <p data-bbox="297 1285 1349 1388">The Requisition Form hyperlink will take the user to the requisition form request used to create the line information. Note that the requisition form request will still maintain the “Classic experience” style.</p> <p data-bbox="297 1428 902 1459">Below this we have the individual line information:</p> <div data-bbox="297 1459 1414 1879" style="border: 1px solid #ccc; padding: 5px;"> <table border="1" style="width: 100%; border-collapse: collapse; margin-bottom: 5px;"> <tr> <td style="width: 5%;">1</td> <td style="width: 5%;"></td> <td style="width: 60%;">Service:Battery Replacement, All rigging and labor necessary to complete the following: Installation...</td> <td style="width: 10%;">750.00</td> <td style="width: 10%;">2</td> <td style="width: 10%;">1,500.00</td> <td style="width: 5%;">...</td> </tr> </table> <p>▲ ITEM DETAILS <span style="float: right;">✎</span></p> <p>Commodity Code: 1211000000 / Hardware Maintenance &amp; Support      Tag Number: <i>no value</i></p> <p>External Note: <i>no value</i>      Internal Note: <i>no value</i></p> <p>Internal Attachments: <a href="#">Add</a></p> <p>PO Clauses: <a href="#">Add</a></p> <p>▲ ACCOUNTING CODES <span style="float: right;">Values have been overridden for this line   </span></p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <thead> <tr> <th>GL Unit</th> <th>Oper Unit</th> <th>Fund</th> <th>Account</th> <th>Dept</th> <th>Product</th> <th>Initiative</th> <th>PC Bus Unit</th> <th>Project / Activity</th> <th>Budget Reference</th> </tr> </thead> <tbody> <tr> <td>USF01</td> <td>TPA</td> <td>10000</td> <td>54110</td> <td></td> <td>000000</td> <td></td> <td><i>no value</i></td> <td><i>no value</i></td> <td><i>no value</i></td> </tr> <tr> <td>USF</td> <td>TAMPA</td> <td>GENERAL REVENUE</td> <td>REPAIR &amp; MAINT COMPTR CONTRACT</td> <td></td> <td>DEFAULT PRODUCT</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> </div> | <p><b>Internal Notes and Attachments</b> <span style="float: right;">✎ ...</span></p> <p>Close/Cancel the PO <span style="color: red;">✘</span></p> <p>Internal Note: JIRA ISSUE: 6636 REQUESTED BY: RICHARD MEANA</p> <p>Internal Attachments: <a href="#">Add</a></p> | <p><b>External Notes and Attachments</b> <span style="float: right;">✎ ... ▾</span></p> <p>Note to all Suppliers: VENDOR: PLEASE SEND COPY OF INVOICE TO: USF INFORMATION TECHNOLOGY ATTN: FINANCIAL... <a href="#">Show more  </a></p> <p>Attachments for all suppliers: <a href="#">Add</a></p> <p>PO Clauses: <a href="#">1 Edit   View details</a></p> | Status   | Item            | Catalog No. | Unit Price      | Quantity           | Ext. Price       |  |  | <a href="#">Requisition Form</a> |  |  |  |  | ... ☐ | 1 |  | Service:Battery Replacement, All rigging and labor necessary to complete the following: Installation... | 750.00 | 2 | 1,500.00 | ... | GL Unit | Oper Unit | Fund | Account | Dept | Product | Initiative | PC Bus Unit | Project / Activity | Budget Reference | USF01 | TPA | 10000 | 54110 |  | 000000 |  | <i>no value</i> | <i>no value</i> | <i>no value</i> | USF | TAMPA | GENERAL REVENUE | REPAIR & MAINT COMPTR CONTRACT |  | DEFAULT PRODUCT |  |  |  |  |
| <p><b>Internal Notes and Attachments</b> <span style="float: right;">✎ ...</span></p> <p>Close/Cancel the PO <span style="color: red;">✘</span></p> <p>Internal Note: JIRA ISSUE: 6636 REQUESTED BY: RICHARD MEANA</p> <p>Internal Attachments: <a href="#">Add</a></p> | <p><b>External Notes and Attachments</b> <span style="float: right;">✎ ... ▾</span></p> <p>Note to all Suppliers: VENDOR: PLEASE SEND COPY OF INVOICE TO: USF INFORMATION TECHNOLOGY ATTN: FINANCIAL... <a href="#">Show more  </a></p> <p>Attachments for all suppliers: <a href="#">Add</a></p> <p>PO Clauses: <a href="#">1 Edit   View details</a></p>  |   |  |          |                 |             |                 |                    |                  |  |   |                                  |  |  |  |  |       |   |   |   |        |   |          |     |         |           |      |         |      |         |            |             |                    |                  |       |     |       |       |  |        |  |                 |                 |                 |     |       |                 |                                |  |                 |  |  |  |  |
| Status  | Item  | Catalog No.   | Unit Price   | Quantity | Ext. Price      |             |                 |                    |                  |  |   |                                  |  |  |  |  |       |   |   |   |        |   |          |     |         |           |      |         |      |         |            |             |                    |                  |       |     |       |       |  |        |  |                 |                 |                 |     |       |                 |                                |  |                 |  |  |  |  |
|    | <a href="#">Requisition Form</a>  |   |  |          |                 | ... ☐       |                 |                    |                  |  |   |                                  |  |  |  |  |       |   |   |   |        |   |          |     |         |           |      |         |      |         |            |             |                    |                  |       |     |       |       |  |        |  |                 |                 |                 |     |       |                 |                                |  |                 |  |  |  |  |
| 1   |    | Service:Battery Replacement, All rigging and labor necessary to complete the following: Installation...   | 750.00   | 2        | 1,500.00        | ...         |                 |                    |                  |  |   |                                  |  |  |  |  |       |   |   |   |        |   |          |     |         |           |      |         |      |         |            |             |                    |                  |       |     |       |       |  |        |  |                 |                 |                 |     |       |                 |                                |  |                 |  |  |  |  |
| GL Unit   | Oper Unit   | Fund  | Account  | Dept     | Product         | Initiative  | PC Bus Unit     | Project / Activity | Budget Reference |  |   |                                  |  |  |  |  |       |   |   |   |        |   |          |     |         |           |      |         |      |         |            |             |                    |                  |       |     |       |       |  |        |  |                 |                 |                 |     |       |                 |                                |  |                 |  |  |  |  |
| USF01   | TPA   | 10000   | 54110  |          | 000000          |             | <i>no value</i> | <i>no value</i>    | <i>no value</i>  |  |   |                                  |  |  |  |  |       |   |   |   |        |   |          |     |         |           |      |         |      |         |            |             |                    |                  |       |     |       |       |  |        |  |                 |                 |                 |     |       |                 |                                |  |                 |  |  |  |  |
| USF   | TAMPA   | GENERAL REVENUE   | REPAIR & MAINT COMPTR CONTRACT   |          | DEFAULT PRODUCT |             |                 |                    |                  |  |   |                                  |  |  |  |  |       |   |   |   |        |   |          |     |         |           |      |         |      |         |            |             |                    |                  |       |     |       |       |  |        |  |                 |                 |                 |     |       |                 |                                |  |                 |  |  |  |  |

| Steps  | Section Header   |          |   |          |   |  |  |
|--------|--|----------|---|----------|---|--|--|
|        | <p>Like with other section tabs, the  icon allows editing of the Item Details and Account Codes areas. Some of these values can also be edited within the Requisition Form request itself.</p> <p><b>Note:</b> if the full item description cannot be seen, the user may need to hover over the  icon on the <u>right-hand side</u> of the Item Details section. A box will show the full description:</p> <div data-bbox="292 451 1421 682" style="border: 1px solid #ccc; padding: 5px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20%;">750.00</td> <td style="width: 10%;">2</td> <td style="width: 20%;">1,500.00</td> <td style="width: 10%; text-align: center;"><span style="border: 2px solid red; padding: 2px;">...</span></td> <td style="width: 30%;"></td> <td style="width: 10%;"></td> </tr> </table> <p>Line Item Actions ( Service:Battery Replacement, All rigging and labor necessary to complete the following: Installation of one (1) String of 80 jars of 400 Series Batteries. To complete the removal of spent &amp; installation of 40 jars of new batteries. (New batteries - See below line item) Spent jars to be removed &amp; disposed of at an EPA designated site. Customer will be provided with all necessary EPA hazardous waste disposal manifest paperwork when completed Work to be performed during normal business hours. (Monday - Friday - 7:30AM to 5PM) )</p> </div> <p>The full description can also be seen in the requisition form request.</p> <p>2.10 Finally, ever-present on the right-hand side of the screen is the requisition workflow. Please note that it has a separate scroll bar on its right-hand side:</p> <div data-bbox="430 871 1299 1732" style="border: 1px solid #ccc; padding: 10px;">  </div> <p>Users can also navigate with their keyboard arrows if they click within the Workflow section.</p> | 750.00   | 2   | 1,500.00 | <span style="border: 2px solid red; padding: 2px;">...</span> |  |  |
| 750.00 | 2  | 1,500.00 | <span style="border: 2px solid red; padding: 2px;">...</span> |          |   |  |  |

| Steps                        | Section Header   |                              |   |          |           |  |           |
|------------------------------|--|------------------------------|---|----------|-----------|--|-----------|
|                              | <p>If a workflow step Approver has been assigned, their name will appear below the step. If the step is active but not yet assigned, clicking on the step will show a list of potential Approvers:</p> <div data-bbox="617 304 1128 798" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <div style="display: flex; align-items: center; justify-content: space-between;"> <div style="text-align: center;">  </div> <div> <p><b>Project/Grant Approval</b> <span style="float: right;">...</span></p> <p>Active</p> <p>Project / Activity: 5830160800-BUDGET<br/>(National Center on Early Child-BUDGET): (All Values)</p> <hr/> <p><b>Mark Richards</b><br/>markr16@usf.edu</p> <p><b>Paul Cleveland</b><br/>pacleveland@usf.edu<br/>+1 813-974-2486</p> <p><b>Victoria Oprisko</b><br/>mvoprisko@usf.edu<br/>+1 813-974-5728</p> </div> </div> </div> <p>Once the requisition has been approved, the Purchase order and any change requests or invoices will be viewable as links in this area:</p> <div data-bbox="576 966 1136 1690" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <div style="background-color: #e0f0e0; padding: 5px; text-align: center; font-weight: bold;">Completed</div> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;"><b>Total (17,000.00 USD)</b></td> <td style="text-align: right;">▼</td> </tr> <tr> <td>Subtotal</td> <td style="text-align: right;">17,000.00</td> </tr> <tr> <td></td> <td style="text-align: right; border-top: 1px solid black;">17,000.00</td> </tr> </table> <hr/> <p><b>Related Documents</b> ▼</p> <ul style="list-style-type: none"> <li>Purchase Order: P000005768 </li> <li>Invoices: V0013648 </li> <li>Invoices: V0013864 </li> <li>Invoices: V0013876 </li> <li>Invoices: V0013872 </li> <li>Invoices: V0013886 </li> <li>Invoices: V0013896 </li> <li>Invoices: V0013903 </li> <li>Invoices: V0014204 </li> <li>Invoices: V0014206 </li> <li><a href="#">View All</a></li> </ul> </div> | <b>Total (17,000.00 USD)</b> | ▼ | Subtotal | 17,000.00 |  | 17,000.00 |
| <b>Total (17,000.00 USD)</b> | ▼  |                              |   |          |           |  |           |
| Subtotal                     | 17,000.00  |                              |   |          |           |  |           |
|                              | 17,000.00  |                              |   |          |           |  |           |

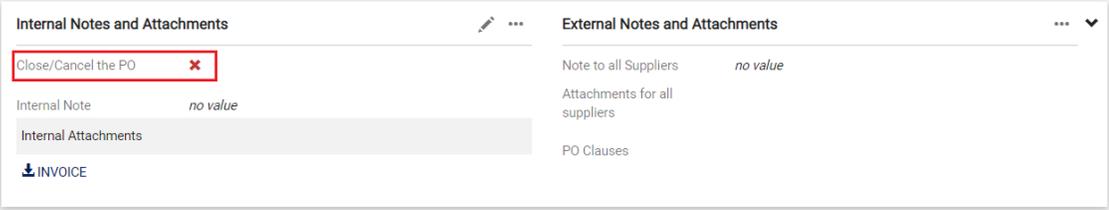
| Steps | Section Header   |
|-------|--|
| 3     | <p data-bbox="695 210 1016 247" style="text-align: center;"><b>Purchase Order Changes</b></p> <p data-bbox="295 283 1170 321">3.1 In the classic user experience, the PO document looked like this:</p> <div data-bbox="295 325 1421 892" style="border: 1px solid #ccc; padding: 10px;">  </div> <p data-bbox="295 924 1016 961">In the new PO experience, the document now looks like this:</p> <div data-bbox="295 966 1421 1428" style="border: 1px solid #ccc; padding: 10px;">  </div> <p data-bbox="295 1459 1421 1570">Each of the sections previously in the grey bar on the left-hand side are now shown in one general Summary screen on the left (you can scroll down to see more). On the right-hand side, the related documents and PO workflow status are shown by default.</p> <p data-bbox="295 1606 1421 1675">3.2 The “Document Actions” area on the Classic Experience PO has been replaced with a drop-down next to the PO number:</p> |

| Steps | Section Header   |
|-------|--|
|       | <p data-bbox="576 220 1128 252"><b>Purchase Order</b> ▾ : P000005768 Revision 0</p> <div data-bbox="576 262 901 735"> <ul style="list-style-type: none"> <li>Add Comment</li> <li>Create Change Request</li> <li>Add Notes to History</li> <li>Cancel PO</li> <li>Finalize Revision</li> <li>Print Fax Version</li> <li>Soft Close PO</li> <li>Close PO</li> <li>Resend to Supplier</li> </ul> </div> <div data-bbox="901 273 1153 735"> <p>1 Shipments Cha</p> <p>005768</p> <p>S CORPORATION</p> <p>PARK E BLVD</p> <p>A, FL 33610-4108 US</p> <p>2020</p> </div> <p data-bbox="300 745 1404 808">(Note that this screenshot is from a Spend Administrator account; Requestors and Approvers will not see all of these options).</p> <p data-bbox="300 850 950 882">3.3 Below the PO Number are the following page tabs:</p> <div data-bbox="300 913 1421 966"> <p>Status Summary Revisions 1 Confirmations Shipments Change Requests Receipts Invoices Comments Attachments History</p> </div> <p data-bbox="300 1008 1404 1113">All of these were formerly found in the grey side bar area of the PO, although Confirmations was included in the Shipments area. History was found as its own hyperlink in the upper-right hand corner of the screen.</p> <p data-bbox="300 1155 1404 1218">Change Requests and Receipts can be added either through the drop-down menu mentioned above, or by going to the relevant tab and pushing the + button:</p> <div data-bbox="300 1270 1421 1480"> <p>Status Summary Revisions 1 Shipments <b>Change Requests</b> Receipts 85 Invoices 83 Comments Attachments History</p> <p>Records found: 0 <span style="border: 1px solid red; padding: 2px;">+</span></p> <p><i>No change requests have been created</i></p> </div> <p data-bbox="300 1522 1291 1554">3.4 In the upper-right hand corner of the PO screen you will see the following icons:</p> <div data-bbox="625 1585 1096 1648"> <p>👁️ 🖨️ 🔄 1 of 1 Results ▾ ⏪ ⏩</p> </div> <p data-bbox="300 1690 1404 1753">As with the requisition screen, the icons work the same way. Please see section 2.5 for more information</p> <p data-bbox="300 1795 1339 1858">3.5 The next section groups together General, Shipping, and Billing/Payment, with their associated subsections as well.</p> |

| Steps     | Section Header   |                 |                 |                 |                 |                    |                 |                    |                  |                    |                  |       |     |                 |                 |                 |                 |         |                 |                 |                 |     |           |  |  |  |  |                    |  |  |  |        |      |             |            |          |            |  |                                  |  |  |  |  |           |  |                 |  |  |  |
|-----------|--|-----------------|-----------------|-----------------|-----------------|--------------------|-----------------|--------------------|------------------|--------------------|------------------|-------|-----|-----------------|-----------------|-----------------|-----------------|---------|-----------------|-----------------|-----------------|-----|-----------|--|--|--|--|--------------------|--|--|--|--------|------|-------------|------------|----------|------------|--|----------------------------------|--|--|--|--|-----------|--|-----------------|--|--|--|
|           | <div data-bbox="300 220 1412 262" style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <span>General Information</span> <span>✎ ...</span> <span>Shipping Information</span> <span>✎ ...</span> <span>Billing/Payment</span> <span>✎ ...</span> <span>▼</span> </div> <p data-bbox="300 304 1356 430">Unlike with requisitions, Requestors and Approvers do NOT have the option to edit these sections with the  icon. Only Procurement Agents may do, after processing a Change Request first.</p> <p data-bbox="300 462 1421 535"><b>3.6</b> The new section groups Distribution Information, Supplier Information, and Internal Notes &amp; Attachments, with their associated subsections as well.</p> <div data-bbox="300 567 1412 619" style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <span>Distribution Information</span> <span>✎ ...</span> <span>Supplier Information</span> <span>✎ ...</span> <span>Internal Notes and Attachments</span> <span>✎ ...</span> <span>▼</span> </div> <p data-bbox="300 661 1421 735">Again, any changes here can be done only by Procurement Agents, and must be submitted via a Change Request first.</p> <p data-bbox="300 766 1421 913"><b>3.7</b> Accounting Codes (Header level) are displayed next. This is your Chartfield information at the header level, meaning it would apply to all lines of your Purchase Order. If your chartfield varies by line or has multiple distributions, this section will only show default values (or be empty) and individual chartfield strings will be listed further below:</p> <div data-bbox="300 945 1412 1144" style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p><b>Accounting Codes</b> <span>✎ ...</span> <span>▼</span></p> <p><small>⊕ Values vary by line.</small></p> <table border="1" data-bbox="316 1018 1380 1134"> <thead> <tr> <th>GL Unit</th> <th>Oper Unit</th> <th>Fund</th> <th>Account</th> <th>Dept</th> <th>Product</th> <th>Initiative</th> <th>PC Bus Unit</th> <th>Project / Activity</th> <th>Budget Reference</th> </tr> </thead> <tbody> <tr> <td>USF01</td> <td>TPA</td> <td><i>no value</i></td> <td><i>no value</i></td> <td><i>no value</i></td> <td><i>no value</i></td> <td>0000000</td> <td><i>no value</i></td> <td><i>no value</i></td> <td><i>no value</i></td> </tr> <tr> <td>USF</td> <td>USF TAMPA</td> <td></td> <td></td> <td></td> <td></td> <td>DEFAULT INITIATIVE</td> <td></td> <td></td> <td></td> </tr> </tbody> </table> </div> <p data-bbox="300 1218 1380 1333"><b>3.8</b> Below the Accounting Codes section is the PO information and Lines section. The PO information contains a link to the original Requisition Form Request, which can be viewed (but not edited):</p> <div data-bbox="300 1365 1412 1564" style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p><b>1 Item</b> <span>☐</span> <span>▼</span></p> <table border="1" data-bbox="316 1417 1396 1554"> <thead> <tr> <th>Status</th> <th>Item</th> <th>Catalog No.</th> <th>Unit Price</th> <th>Quantity</th> <th>Ext. Price</th> </tr> </thead> <tbody> <tr> <td></td> <td><a href="#">Requisition Form</a></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td colspan="2">Contract:</td> <td colspan="4"><i>no value</i></td> </tr> </tbody> </table> </div> <p data-bbox="300 1606 1396 1680">Below this are the PO Lines. There is another link to the Requisition Form, as well as the line detail information</p> | GL Unit         | Oper Unit       | Fund            | Account         | Dept               | Product         | Initiative         | PC Bus Unit      | Project / Activity | Budget Reference | USF01 | TPA | <i>no value</i> | <i>no value</i> | <i>no value</i> | <i>no value</i> | 0000000 | <i>no value</i> | <i>no value</i> | <i>no value</i> | USF | USF TAMPA |  |  |  |  | DEFAULT INITIATIVE |  |  |  | Status | Item | Catalog No. | Unit Price | Quantity | Ext. Price |  | <a href="#">Requisition Form</a> |  |  |  |  | Contract: |  | <i>no value</i> |  |  |  |
| GL Unit   | Oper Unit  | Fund            | Account         | Dept            | Product         | Initiative         | PC Bus Unit     | Project / Activity | Budget Reference |                    |                  |       |     |                 |                 |                 |                 |         |                 |                 |                 |     |           |  |  |  |  |                    |  |  |  |        |      |             |            |          |            |  |                                  |  |  |  |  |           |  |                 |  |  |  |
| USF01     | TPA  | <i>no value</i> | <i>no value</i> | <i>no value</i> | <i>no value</i> | 0000000            | <i>no value</i> | <i>no value</i>    | <i>no value</i>  |                    |                  |       |     |                 |                 |                 |                 |         |                 |                 |                 |     |           |  |  |  |  |                    |  |  |  |        |      |             |            |          |            |  |                                  |  |  |  |  |           |  |                 |  |  |  |
| USF       | USF TAMPA  |                 |                 |                 |                 | DEFAULT INITIATIVE |                 |                    |                  |                    |                  |       |     |                 |                 |                 |                 |         |                 |                 |                 |     |           |  |  |  |  |                    |  |  |  |        |      |             |            |          |            |  |                                  |  |  |  |  |           |  |                 |  |  |  |
| Status    | Item   | Catalog No.     | Unit Price      | Quantity        | Ext. Price      |                    |                 |                    |                  |                    |                  |       |     |                 |                 |                 |                 |         |                 |                 |                 |     |           |  |  |  |  |                    |  |  |  |        |      |             |            |          |            |  |                                  |  |  |  |  |           |  |                 |  |  |  |
|           | <a href="#">Requisition Form</a>   |                 |                 |                 |                 |                    |                 |                    |                  |                    |                  |       |     |                 |                 |                 |                 |         |                 |                 |                 |     |           |  |  |  |  |                    |  |  |  |        |      |             |            |          |            |  |                                  |  |  |  |  |           |  |                 |  |  |  |
| Contract: |  | <i>no value</i> |                 |                 |                 |                    |                 |                    |                  |                    |                  |       |     |                 |                 |                 |                 |         |                 |                 |                 |     |           |  |  |  |  |                    |  |  |  |        |      |             |            |          |            |  |                                  |  |  |  |  |           |  |                 |  |  |  |

| Steps   | Section Header  |  |               |  |      |        |      |     |   |  |  |  |  |  |  |           |          |                    |         |              |  |  |         |   |            |          |  |  |  |                |                                    |  |               |          |  |  |  |  |                          |     |  |  |  |
|---|---|--|---------------|--|------|--------|------|-----|---|--|--|--|--|--|--|-----------|----------|--------------------|---------|--------------|--|--|---------|---|------------|----------|--|--|--|----------------|------------------------------------|--|---------------|----------|--|--|--|--|--------------------------|-----|--|--|--|
|   | <div data-bbox="298 212 1416 541"> <table border="1"> <tr> <td data-bbox="331 243 347 264">1</td> <td data-bbox="380 243 396 264">✓</td> <td data-bbox="428 243 899 289">                     AI: Test Item 1<br/> <span style="border: 1px solid red; padding: 2px;">Procurement Request: Requisition Form</span> </td> <td data-bbox="948 243 997 264">1.00</td> <td data-bbox="1078 243 1127 264">Qty: 1</td> <td data-bbox="1224 243 1273 264">1.00</td> <td data-bbox="1321 243 1338 264">...</td> </tr> <tr> <td colspan="7" data-bbox="363 310 477 331">^ ITEM DETAILS <span style="float: right;">✎</span></td> </tr> <tr> <td data-bbox="380 352 461 373">Contract:</td> <td data-bbox="542 352 607 373">no value</td> <td data-bbox="899 352 1045 373">Requisition Number</td> <td data-bbox="1062 352 1208 373">3231798</td> <td colspan="3" data-bbox="1127 352 1208 373">view   print</td> </tr> <tr> <td data-bbox="380 401 444 422">Taxable</td> <td data-bbox="542 401 558 422">✗</td> <td data-bbox="899 401 997 422">Tag Number</td> <td colspan="4" data-bbox="1062 401 1127 422">no value</td> </tr> <tr> <td data-bbox="380 449 509 470">Commodity Code</td> <td colspan="2" data-bbox="542 449 802 470">2313210000 / Other Office Supplies</td> <td data-bbox="899 449 997 470">External Note</td> <td colspan="3" data-bbox="1062 449 1127 470">no value</td> </tr> <tr> <td></td> <td></td> <td data-bbox="899 485 1029 527">Attachments for supplier</td> <td colspan="4" data-bbox="1062 485 1094 506">Add</td> </tr> </table> </div> | 1  | ✓             | AI: Test Item 1<br><span style="border: 1px solid red; padding: 2px;">Procurement Request: Requisition Form</span> | 1.00 | Qty: 1 | 1.00 | ... | ^ ITEM DETAILS <span style="float: right;">✎</span> |  |  |  |  |  |  | Contract: | no value | Requisition Number | 3231798 | view   print |  |  | Taxable | ✗ | Tag Number | no value |  |  |  | Commodity Code | 2313210000 / Other Office Supplies |  | External Note | no value |  |  |  |  | Attachments for supplier | Add |  |  |  |
| 1   | ✓   | AI: Test Item 1<br><span style="border: 1px solid red; padding: 2px;">Procurement Request: Requisition Form</span> | 1.00          | Qty: 1   | 1.00 | ...    |      |     |   |  |  |  |  |  |  |           |          |                    |         |              |  |  |         |   |            |          |  |  |  |                |                                    |  |               |          |  |  |  |  |                          |     |  |  |  |
| ^ ITEM DETAILS <span style="float: right;">✎</span> |   |  |               |  |      |        |      |     |   |  |  |  |  |  |  |           |          |                    |         |              |  |  |         |   |            |          |  |  |  |                |                                    |  |               |          |  |  |  |  |                          |     |  |  |  |
| Contract:   | no value  | Requisition Number   | 3231798       | view   print   |      |        |      |     |   |  |  |  |  |  |  |           |          |                    |         |              |  |  |         |   |            |          |  |  |  |                |                                    |  |               |          |  |  |  |  |                          |     |  |  |  |
| Taxable   | ✗   | Tag Number   | no value      |  |      |        |      |     |   |  |  |  |  |  |  |           |          |                    |         |              |  |  |         |   |            |          |  |  |  |                |                                    |  |               |          |  |  |  |  |                          |     |  |  |  |
| Commodity Code                                      | 2313210000 / Other Office Supplies  |  | External Note | no value   |      |        |      |     |   |  |  |  |  |  |  |           |          |                    |         |              |  |  |         |   |            |          |  |  |  |                |                                    |  |               |          |  |  |  |  |                          |     |  |  |  |
|   |   | Attachments for supplier   | Add           |  |      |        |      |     |   |  |  |  |  |  |  |           |          |                    |         |              |  |  |         |   |            |          |  |  |  |                |                                    |  |               |          |  |  |  |  |                          |     |  |  |  |
|   | <p>External attachments can also be added at the line level if needed, though a Procurement Agent needs to be the one to do so. Requestors and Approvers should not have permission to edit this area; any changes should be submitted via a Change Request.</p>  |  |               |  |      |        |      |     |   |  |  |  |  |  |  |           |          |                    |         |              |  |  |         |   |            |          |  |  |  |                |                                    |  |               |          |  |  |  |  |                          |     |  |  |  |
|   | <p>3.9 Finally, there is a static area on the right-hand side of the screen that houses the Related Documents and Workflow Status of the PO. This area has its own separate scroll bar:</p>   |  |               |  |      |        |      |     |   |  |  |  |  |  |  |           |          |                    |         |              |  |  |         |   |            |          |  |  |  |                |                                    |  |               |          |  |  |  |  |                          |     |  |  |  |
|   | <div data-bbox="418 821 1300 1682"> <p>The screenshot shows a vertical panel with a green header 'Completed'. It contains sections for 'Total (1.00 USD)', 'Subtotal', 'Related Documents', and 'What's next?'. The 'What's next?' section includes a 'Workflow' status and a 'Submitted' timestamp. Two vertical scroll bars are highlighted with red ovals and labels: 'Workflow Scroll' on the right side of the 'What's next?' section and 'PO Document Scroll' on the right side of the bottom section.</p> </div>   |  |               |  |      |        |      |     |   |  |  |  |  |  |  |           |          |                    |         |              |  |  |         |   |            |          |  |  |  |                |                                    |  |               |          |  |  |  |  |                          |     |  |  |  |
|   | <p>PO workflow is very abbreviated compared to requisition workflow, usually consisting only of automated revision, distribution, and export to FAST for steps (Punch Out orders also have a 60 day Delay Closure step to allow time for reconciliation). If you have a question on the PO workflow, please contact <a href="mailto:eProHelp@usf.edu">eProHelp@usf.edu</a>.</p>   |  |               |  |      |        |      |     |   |  |  |  |  |  |  |           |          |                    |         |              |  |  |         |   |            |          |  |  |  |                |                                    |  |               |          |  |  |  |  |                          |     |  |  |  |

| Steps | Section Header   |
|-------|--|
| 4     | <p data-bbox="695 214 1019 247" style="text-align: center;"><b>Change Request Changes</b></p> <p data-bbox="297 285 1406 394">4.1 The Change Request document is also updated, but it follows the same mold as the Requisition document's new shopping experience. The only big difference is an additional section in the Summary tab for External Communication Options:</p> <div data-bbox="297 436 1419 886" style="border: 1px solid #ccc; padding: 10px;"><p data-bbox="313 443 639 470">Change Requests ▾ : 3218582 <span style="float: right;">👁</span></p><p data-bbox="331 495 849 516">Summary PO Preview Comments <span style="background-color: #0070c0; color: white; border-radius: 50%; padding: 2px 5px;">1</span> Attachments History</p><div data-bbox="313 533 1403 821" style="border: 1px solid #ccc; padding: 5px;"><p data-bbox="331 579 597 600"><b>External Communication Options</b> <span style="float: right;">✎ ▾</span></p><p data-bbox="331 632 711 653">Resend to Suppliers on Change Request <span style="margin-left: 20px;">true</span></p><p data-bbox="331 680 711 722">Resend to ERP System Connections on Change Request <span style="margin-left: 20px;">true</span></p><p data-bbox="331 749 748 770">Resend to... <span style="margin-left: 20px;">POExport</span></p></div><p data-bbox="331 842 1386 863">General <span style="margin-left: 100px;">✎ ...</span> Shipping <span style="margin-left: 100px;">✎ ...</span> Billing <span style="margin-left: 100px;">✎ ... ▾</span></p></div> <p data-bbox="297 936 1227 970">Much like with the other sections, these can be edited with the  icon:</p> <div data-bbox="297 1005 1341 1583" style="border: 1px solid #ccc; padding: 10px;"><div data-bbox="297 1005 1341 1083" style="background-color: #0070c0; color: white; padding: 5px;"><b>External Communication Options</b> <span style="float: right;">✕</span></div><p data-bbox="318 1140 875 1192">Resend to Suppliers on Change Request <span style="margin-left: 20px;">true ▾</span></p><p data-bbox="318 1255 875 1308">Resend to ERP System Connections on Change Request <span style="margin-left: 20px;">true ▾</span></p><p data-bbox="318 1371 789 1402">Resend to... <span style="margin-left: 20px;">✓ POExport</span></p><div data-bbox="1073 1535 1321 1583" style="text-align: right; margin-top: 20px;"><span style="background-color: #0070c0; color: white; padding: 5px 15px; border-radius: 3px;">Save</span> <span style="background-color: #f0f0f0; padding: 5px 15px; border-radius: 3px; margin-left: 10px;">Cancel</span></div></div> <p data-bbox="297 1640 1422 1780">Generally this area will be edited by a Procurement Agent in case they don't want an updated copy of the PO to go to the supplier (eg, an After the Fact PO, or a replacement PO), or if they don't want the data to go to FAST (eg, a close request, which they manually process from the PO page after approving the Change Request).</p> |

| Steps | Section Header  |
|-------|---|
|       | <p>4.2 One additional small difference is in the Internal Notes &amp; Attachments section, where there is now a check-box in case the Change Request submitter wants to close the PO:</p>  <p>This should be flipped to on (a green check mark) if the PO should be closed. The box is used to flag a specific value in FAST to update the account date; a requirement for AP. If the user doesn't check the box, a Procurement Agent should do so.</p> |
| 5     | <p style="text-align: center;">Additional support?</p> <p>For any questions, please contact <a href="mailto:eProHelp@usf.edu">eProHelp@usf.edu</a>, or reach out to one of our Procurement Agents (<a href="https://www.usf.edu/business-finance/purchasing/contact-us/index.aspx">https://www.usf.edu/business-finance/purchasing/contact-us/index.aspx</a>).</p> <p>Thank you!</p>  |