

# System Updates at a Glance – July 25, 2021

# Notable Changes for Admins, AP, Purchasing:

On July 26,2021, a new release of ShopUW+ will include the following changes:

1. All Roles: Checkout, Assign and Approve buttons move to top right of screen.. 1

<u>2.</u>	All Roles: Dashboard navigation from Shopping Home changes to tabs from a
	drop-down3
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- 6. All Roles: Parallel Steps for Requisition validation workflow will be visible ...... 4

## 1. <u>All Roles: Checkout, Assign and Approve buttons move to top right of screen</u>

The *Checkout*, *Assign*, *Approve* and other buttons used by all roles in creating and processing ShopUW+ Requisitions and approving transactions move to the top right of the page. There is **NO process change**, just the on-screen location of the buttons changes.

For Shoppers: Assign Cart, Proceed to Checkout and Withdraw Entire Requisition buttons move to the top of the screen and are no longer shown under the total on the right side of the screen.

<b>☆</b>	Shop UW+	All 👻 Search (Alt+Q)	500.00 USD 👻 🗢 🏴 🌲 👤
1	Shopping Cart • 3286131 👻	= 🖶	Assign Cart Proceed To Checkout
6	Simple Advanced		Details ~
<b>Q</b>	Search for products, suppliers, forms, part number, etc.	Q	For Sydney Shopper
血	1 Item		Name 2021-07-02 SydneyShopper2 01
<u>.</u>	CDW GOVERNMENT · 1 Item · 500.00 USD	… 🗆	
<b>%</b>	SUPPLIER DETAILS ACH : 75 REMITTANCE DR STE 1515, CHICAGO, Illin 💌		Estimate (500.00 USD)         ~           Total:         500.00

For Requesters: Assign Cart, Return Cart, Proceed to Checkout, Place Order, Withdraw Entire Requisition and Submit Request buttons move to the top of the screen and are no longer shown under the total on the right side of the screen.

合	Shop <b>um+</b>			All 👻	Search (Alt+Q)			1,00	00.00 USD 📜	♡  ■	<b>™</b>
1	Requisition •	3285976 -			=	۲	•	3	Assign Cart	Place	Order
í d	Summary P	PO Preview Con	nments Attachments 1 Hist	ory							
<u>o</u>	General	<i>"</i>	Purchasing Use 💉 ···	Shipping & Billin		~			Draft		
一 血	Cart Name 2021-07-02 Rola	andoRequester2	Buyer ID no value	Ship To			Tota	al (1,00	0.00 USD)		~
	01		PO Clauses	Attn: Rolando Requ Suite/Rm:	iester		Sub	total		1	,000.00
72	Description		no clause	1 GIFFORD PINCH						1	,000.00

For Approvers: Assign, Approve, Approve & Next and Reject buttons move to the top of the screen and are no longer shown under the total on the right side of the screen when reviewing and approving transactions.

<b>^</b>	Shop <b>un+</b>	All 👻	Search (Alt+Q)	2,335.50 USD 崔	♡  • ↓ ↓
1	Invoice • X0003459 👻			🖶 🕐 Reject	Approve 🔻
í.	Summary Matching Supplier Message	es Comments Attachments 🚺 H	istory		•
<b>9</b>	A The invoice contains one or more non-PO in	voice lines. They are excluded from the matching	<b>j.</b> ?	<b>at's next?</b> kflow	
血	General ··· Addres	ses ··· Note/Attachm	nents ··· · ·	Show skipped steps	
兆	Invoice Type Remit To Invoice	External Note	(	Submitted 6/29/2021 12:45 PM Rolando Requester	

#### 2. <u>All Roles: Dashboard navigation from Shopping Home changes to tabs from a</u> <u>drop-down</u>

There is **NO process change**, only the way users choose which Dashboard to view changes.

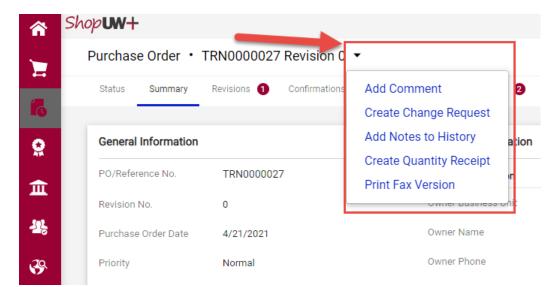
For All Roles: Users navigate to all Dashboards they can access by clicking on the tabs near the top of the Shopping Home screen instead of using a drop-down menu. The chosen tab is displayed and highlighted with a blue underline.

<b>^</b>	Shop <b>um+</b>		All 👻	Search (Alt+Q)	Q 2,335.50 US	sd 👻 🗢 🏴 🛔 🗴
1	Dashboards • Shopping Home					
	Accounts Payable Dashboard Approver Dashbo	ard Facility Supplies Help Dasi	shboard IT Supplies	Lab Supplies Legacy View	Office Supplies Sho	opping Home
<b>e</b>	Organization Message		··· Guide	ed Buying		

3. <u>All Roles: Drop-down to act on a transaction moved to right of transaction</u> <u>number for all transaction types (Shopping Cart/Requisition/Purchase</u> <u>Order/Invoice)</u>

There is **NO process change**, only the position of the drop-down moving to the right of the transaction number changes.

For All Roles: For all transactions, including the Shopping Cart, Requisition, Purchase Order and Invoice; users now click the down arrow next to the transaction number to access the drop-down menu. This menu was previously between the transaction type and transaction number.



#### 4. <u>Shopper, Requester: Shopping Cart Prepared For and Cart Name in Details on</u> <u>Proceed to Checkout screen move</u>

When navigating to your Shopping Cart prior to proceeding to checkout, the Prepared For (shown on screen as "For") and Cart Name (shown on screen as "Name") now appear in the Details box at the right of the screen above the total. There is **NO process change**, only the on-screen location of the information changes.

â <sup>9</sup>	shopum+	All  Search (Alt+Q)	500.00 USD 📜 🜣 🏴 🛂
1	Shopping Cart • 3286131 •	🗮 🖶 Return Cart	Assign Cart Proceed To Checkout
6	Simple Advanced		Details ~
<u> 9</u>	Search for products, suppliers, forms, part number, etc.	Q	For Rolando Requester
血	1 Item	· ·	Name 2021-07-02 Sydney Shopper Test Order
<u> 18</u>	CDW GOVERNMENT · 1 Item · 500.00 USD	… 🗆	
<b>3</b>	SUPPLIER DETAILS ACH : 75 REMITTANCE DR STE 1515, CHICAGO, Illin 👻		Estimate (500.00 USD) ~ Total: 500.00

#### 5. <u>Requester, Purchasing: Ability to create additional Change Requests for</u> <u>Purchase Orders with draft or returned Change Requests</u>

ShopUW+ will no longer stop a second Change Request from being completed when a draft or returned Change Request currently exists for that Purchase Order. Users will now be able to submit another Change Request for a Purchase Order in that state. For example, if a Change Request was returned to the Requester and that individual has left or is on leave, another Change Request can now be submitted for that Purchase Order.

## 6. All Roles: Parallel Steps for Requisition validation workflow will be visible

All workflow steps will be visible in the "What's next for my order" section at the right side of the screen. Workflow steps previously listed as "Parallel Steps" for Requisition validation in the workflow summary at the right of the screen will now be shown automatically and users no longer need to click to see parallel steps occurring in Requisition workflow.