

Hot Sheet



Topic	Req/PO Summary Page Item Information Section display
Document Types Involved	Bid <input type="checkbox"/> Requisition <input checked="" type="checkbox"/> PO <input checked="" type="checkbox"/> Receipt <input type="checkbox"/> Invoice <input type="checkbox"/> Credit Memo <input type="checkbox"/> Report <input type="checkbox"/> Vendor <input type="checkbox"/> User Profile <input type="checkbox"/> Agency Setup <input type="checkbox"/> Other <input type="checkbox"/>
Reason for Publication	<p>The ProcureAZ Fix Pack that was deployed on March 12, 2016 added new functionality to the way items on the Requisition and Purchase Order Summary tabs are presented.</p> <p>NOTE: This Hot Sheet will provide the Purchase Order example, but the Requisition functionality is the same.</p>
Steps Resulting in Scenario	<p>1. Agency searches/opens an existing Requisition or PO and is placed on the Summary tab. OR</p> <p>1. Agency is creating a New Requisition or PO and moves to the Summary tab to review/submit the document</p> <p>It may appear that the Item Information is missing due to the new collapse/uncollapse functionality of this Summary Page section.</p>
Recommended Strategy	<ul style="list-style-type: none"> ❖ Periscope established this new collapsed Item Information functionality to increase the page load time when accessing ProcureAZ Requisitions and Purchase Orders. <ul style="list-style-type: none"> ➤ Periscope stated the benefit is that when the Item Information section is collapsed, the Summary tab will load faster/the user will not wait as long before they can complete their next step. ❖ The Item Information section on the NEXT Purchase Order Summary page that you access will be in the same state as when you left your last Purchase Order. <ul style="list-style-type: none"> ➤ If the Item Information section is collapsed when you leave your current Purchase Order Summary tab, the Item Information section will be collapsed when you access your next Purchase Order Summary tab within the same session. ❖ This functionality also provides the user with the ability to see all of the items on their ProcureAZ Requisition and/or Purchase Order, rather than having to view them only 5 at a time.

Screenshots

1) You have arrived at the Purchase Order Summary tab either as the last step in document creation or as the result of searching for/accessing a Purchase Order.

- a) The first time you access a Purchase Order Summary tab, it may appear that the Item information is missing.
- b) We call this a 'collapsed' Item Information section.

Alternate Id: P0001

Receipt Information						
Receipt #	Status	Description	Dept/Loc	Receipt Owner	Entered Date	
0437823	SCA - Approved for Invoice	Receive all	ADOA/ADGA	Eli Balstad	02/08/2016	

Invoice Information						
Invoice #	Status	Description	Vendor Group	Invoice Amount	Vendor	Invoice Date
IA3_INV1	4IA - Approved for Payment	Partial Pay items	01	\$168.44	9000004230	02/08/2016

Item Information +

Approval Path:

There are no approval paths found for this purchase order.

Print Print Vendor Copy

2) Click the "+" to the right of the Item Information label to display the Item details for this Purchase Order.

Item Information +

Approval Path:

Continued on Next Page

Screenshots

- a) Clicking the '+' will 'uncollapse' the Item Information section and display up to 25 items on the Summary tab of the Purchase Order.

Item Information

Show 25 entries

Item Information												
Item # 1 : TESTING - Commodity/Good - Receive by Quantity - No Discount - No Tax						3PCR - Complete Receipt						
NIGP Class: <u>425-06</u> Chairs, Metal												
Child Req # / Child Req Item #: <u>ADSP016-00316122</u> / 1												
Blanket/Contract #/Line #	Receipt Method	Qty	Minimum Order Quantity	Unit Cost	Net Unit Cost	UOM	Discount %	Total Discount Amt.	Tax Rate	Tax Amount	Freight	Total Cost
<u>ADSP013-045242 / 7</u>	Quantity	3.0000	0.0000	\$10.3500	\$10.3500	EA - Each	0.00%	\$0.00	0.00%	\$0.00	\$0.00	\$31.04
Account Code											Amount	
2016--ALLOC00007--3ADM--AD4230--AD00001-7599---600000-610000----3A0600-----ADA											\$10.86	
2016--ASET321000--3200--AD4230--AD00001-7599---600000-610000----321000-----ADA											\$20.18	

- b) Clicking the now displayed '-' will collapse the Item Information display.

3) If you wish to view less than 25 items on this Purchase Order Summary tab you can use the Show Entries drop down to select to display either 5 or 10 items.

Item Information

Show 25 entries

25
5
10
25
50
100
All

1 :
Class:

- a) Changing this drop-down only impacts the Summary tab you are currently viewing.
- b) The 25 item display default has been preset by Periscope and will be the default selection when you initially access any Requisition and/or Purchase order and display the Item Information section.

Screenshots	<p>4) When you leave this Purchase Order Summary tab with the Item Information displayed, the next time you access a Purchase Order Summary tab within that same session, the Item Information section will be displayed.</p> <ul style="list-style-type: none">a) This impact is tied to the document type. For example, your selection on a Purchase Order does not impact how your Requisition document Summary tab will be displayed.b) Periscope stated that an uncollapsed Item Information section will take longer to complete the initial load of the Summary tab than when that section is collapsed/not visible. <p>5) The next time you Log In to ProcureAZ, the Summary Page on the Requisition and/or Purchase Order document will display a collapsed Item Information section until you uncollapse the Item Information section and leave the Summary tab without recollapsing it.</p>
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