

UniFi Upgrade 2010 - Changes & New Features

Updated: November 2010 *

This document contains information on changes and new features in the upgraded UniFi system. Where applicable, screenshots are provided (refer to the Figure list for all screenshots).

* Information and screenshots provided in this document may change or be slightly altered in the upgraded UniFi system when it is launched. At the time of publication, this information is current.

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Changes / New Features in...

Look & Feel

Self Service UniFi

This is the new look for Self Service UniFi (main menu)



Figure 1: New look Self Service UniFi

UniFi Plus

The main change to the look & feel of UniFi Plus is that required fields are now highlighted.

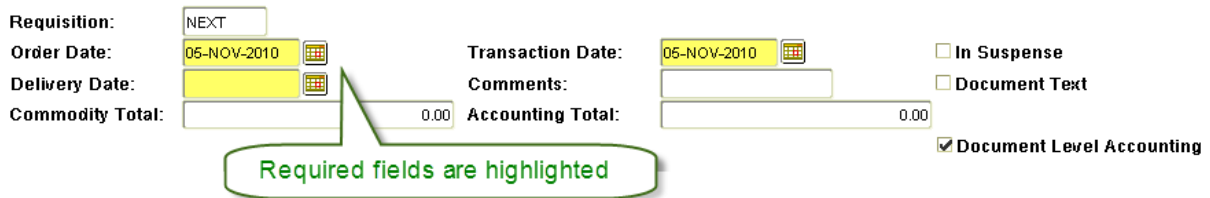


Figure 2: Required fields are highlighted

Functions

Self Service UniFi

The changes in Self Service UniFi include:

- “Vendor on Hold” feature for the Requisition form – See [Appendix A](#)
- Journal Voucher / Budget Transfer form (2 lines) removed – See [Appendix B](#)
- [Delete Finance Template](#) & [Approve Document](#) functions have been added – See Appendix C & D

UniFi Plus

The only change in UniFi Plus is the addition of Vendor on Hold for the Requisition form (FPAREQN). See [Appendix A](#).

No Changes to...

No changes were made to the following functions as part of this upgrade:

Self Service

- PCard Reconciliation
- Encumbrance Query
- View Document
- Budget Development
- FAST Queries

UniFi Plus

- No changes for all forms in UniFi Plus – Requisition, Receiving, Journal Vouchers, Query forms etc will all remain the same. This may not apply to internal forms used by Financial Services Division (FSD) staff.

Browser Recommendation

During our testing, the following browsers worked best:

Self Service UniFi

- Internet Explorer (IE) 8.0.6, Firefox 3.6 and Safari 5.0.2 for both Windows and Mac operating systems

UniFi Plus

- IE 8.0.6 for Windows
- Safari 5.0.2, Firefox 3.6 for Mac

UniFi Training

There will be no changes to the UniFi training classes. Curriculum will be tweaked to include new features introduced but overall, the types of classes on offer remain unchanged. To view available classes, please visit [the ITS Training](#) website and click on UniFi.

UniFi Manual

The information in the current [UniFi Manual](#) will still apply to the upgraded system. The manual is currently being updated, mainly with formatting changes. These changes will be applied gradually, after the upgrade.

Known Issues

Self Service UniFi

- The Browse button that was showcased at our demo sessions did not make the final cut. This button will not appear in the upgraded Self Service UniFi
- The Budget Development drop down menu will not appear unless the page is refreshed by clicking on the Finance button.

Multiple Line Journal Voucher Form

- For saved templates, the JV Type value and debit & credit indicators are reverting back to the form's default settings. CFOAPAL information is saved correctly. Users retrieving their templates for use should double check the form before submitting their JV.

View Document

- For some documents, printing options require manual adjustments (i.e. select a different % view option in Print Preview) in order for it to print properly.

Contact

All questions and feedback can be directed to:

Siu-ChingFong, UniFi Training and Support Officer

unifisupport@usask.ca

Ph: 966 X8783

Monday –Friday, 8am –4.30pm

Appendix A – Vendor on Hold (applicable to both UniFi Plus and Self Service UniFi Requisition)

A vendor may be put on hold by Purchasing or Payment Services, due to contract performance issues, bankruptcy, or ongoing balance outstanding issues etc.

If the vendor that you want to use is on hold, please select another Vendor or contact Purchasing Services to discuss your options.

If you choose to continue or did not notice that the vendor is on hold, you will still be able to submit a Requisition form. When Purchasing Services receives your requisition, they will be in contact with you to discuss your options.

It is highly recommended, especially for purchases \$5000 and over, that users involve [Purchasing Services](#) in their purchasing decision. Purchasing Services can help with price and payment option negotiations and provide information regarding University purchasing guidelines, among other things.

[Purchasing Services](#) can be contacted via purchasing.services@usask.ca or call 966-6704

How to tell if a vendor is on hold:

In Self Service UniFi – Requisition

1. On the Requisition form, scroll to the bottom of the page to the Code Look Up section and use this to search for your vendor and their vendor ID

Code Lookup

| | |
|-------------------------------|--------------------|
| Chart of Accounts Code | 1 |
| Type | vendor |
| Code Criteria | |
| Title Criteria | PartialVendorName% |
| Maximum rows to return | 10 |
| Execute Query | |

Figure 3: Self Service UniFi Requisition - using Code Lookup to search for Vendor

2. Search results will be displayed at the top of the requisition form. A vendor that is on hold is indicated by a “Yes” in the Hold column.

Code lookup results

| Hold | Vendor ID | Name |
|------|-----------|-----------------|
| No | 11093677 | Fong, Siu-Ching |
| No | 11093677 | Fong, Siu-Ching |
| Yes | 11093677 | Fong, Siu-Ching |

Figure 4: Self Service Example of Vendor on Hold

- Do not continue your requisition using this Vendor. Select a new vendor to proceed or contact Purchasing Services to discuss

In UniFi Plus – FPAREQN (Requisition Form)

- On the Requisition (FPAREQN) form’s Vendor tab, use the Search arrow to search for a vendor

The screenshot shows the 'Vendor Information' tab of the requisition form. It includes a 'Vendor' dropdown menu with a search arrow icon, a 'Vendor Hold' checkbox, an 'Address Type' dropdown, a 'Sequence' dropdown, a 'Discount' dropdown, and a 'Tax Group' dropdown set to 'UII' with a 'GST INCL' checkbox. A yellow 'Search' button is highlighted below the vendor dropdown.

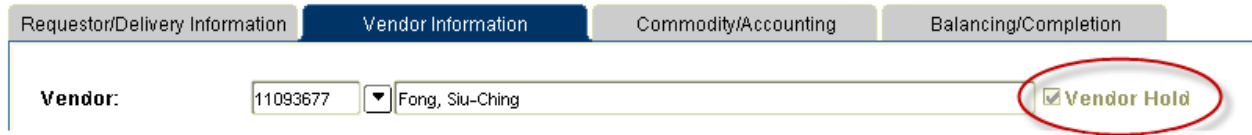
Figure 5: UniFi Plus Requisition - Search for Vendor

- If the selected Vendor is on hold, a warning box will pop up and...

This screenshot shows the same 'Vendor Information' tab as Figure 5, but with a 'Banner' dialog box overlaid. The banner contains a red warning icon and the text '*WARNING* Vendor is on hold', with an 'OK' button at the bottom right. The background form fields are partially obscured by the banner.

Figure 6: UniFi Plus' Notification of Vendor on Hold

3. ... the Vendor Hold box will be checked off as well



The screenshot shows a software interface with four tabs: 'Requestor/Delivery Information', 'Vendor Information' (selected), 'Commodity/Accounting', and 'Balancing/Completion'. Below the tabs, there is a 'Vendor:' label followed by a text input field containing '11093677', a dropdown arrow, and a text field containing 'Fong, Siu-Ching'. To the right of these fields is a checkbox labeled 'Vendor Hold', which is checked and circled in red.

Figure 7: UniFi Plus' Indication of Vendor on Hold

4. Do not continue with your Requisition using this vendor. Select a different vendor to proceed or contact Purchasing Services to discuss

Appendix B – Removal of the Journal Vouchers / Budget Transfer Form (Self Service UniFi)

With this removal, users will have only one JV form to use in Self Service UniFi, the Multiple Line Journal Voucher/ Budget Transfer form.

The Multiple Line (ML) form is very similar, but much better designed, than the JV (2 lines) form. For example:

- the Multiple Line form does not have the confusing 'From' and 'To' field. The From and To fields in the removed Journal Voucher form causes a high error rate as these fields are **not** used to determine where the fund should be transferred from and to. It is the debit and credit indicators that determine where the fund is being moved to and from
- The Multiple Line form has 5 lines for transactions instead of just 2

The implication of this removal is that all templates saved under Journal Vouchers / Budget Transfer form will be lost. If you have any templates saved, please retrieve your template prior to UniFi being taken down and print them off for future reference. The next time you submit a JV using the Multiple Line JV form, you can copy the information off your printed sheet and save it as a template under the Multiple Line JV form.

If possible, Financial Services Division (FSD) encourages user to use UniFi Plus to submit their Journal Vouchers.

Appendix C – Approve Document (available in Self Service UniFi only)

Approve Document allows users to disapprove Journal Vouchers (JVs) that they have submitted. This will be useful for JV users who have submitted JVs and then realised that further changes are required to the JV, i.e. used the wrong CFOAPALs etc.

Approve Document will only show JV documents that the user can disapprove. The criteria are:

- JV was completed and submitted by the user
- JV has not yet been approved (posted) or disapproved by Financial Reporting

Once a JV is disapproved using Approve Document, the user can then log into UniFi Plus to edit or delete this JV. **A disapproved JV is not deleted and will remain in UniFi until it is submitted again or deleted.**

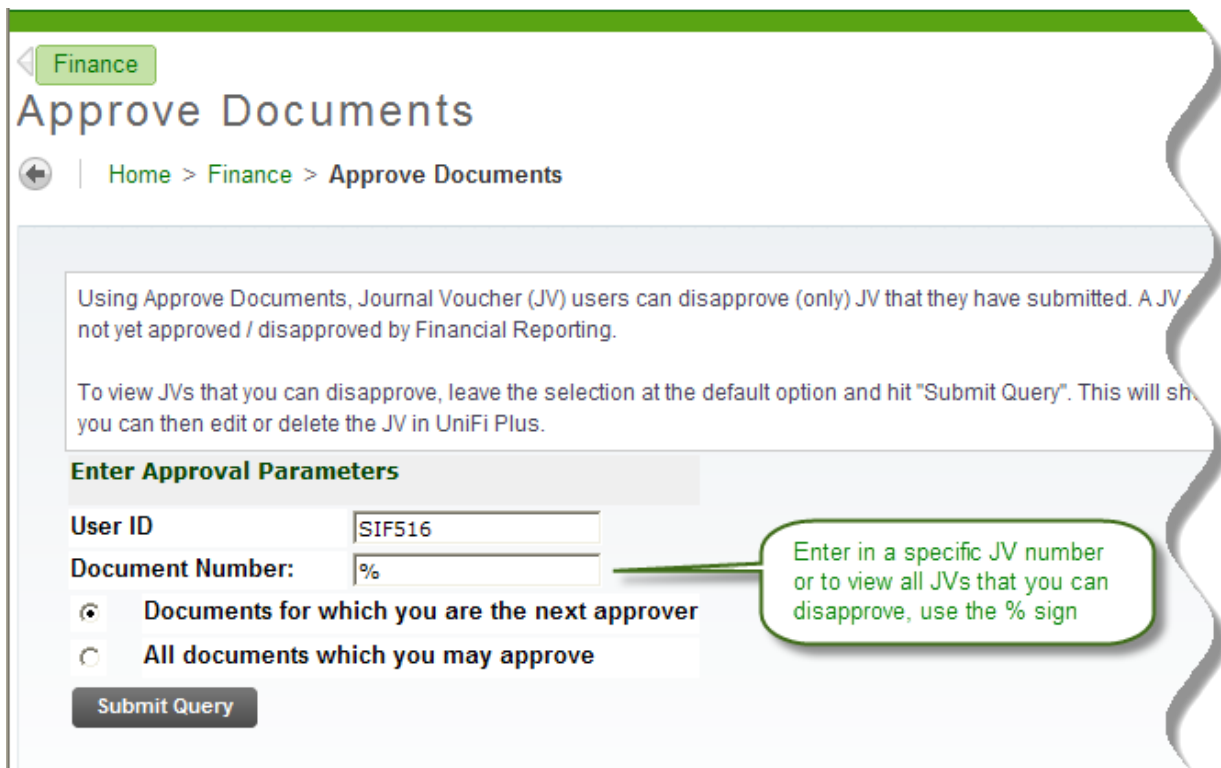


Figure 8: Approve Document in Self Service UniFi

Approve Documents

Select the Document Number link to display the details of a document. Select the History link to display the approval history of the document. Select the Approve link, if enabled, to approve the document. Select the Disapprove link, if enabled, to disapprove the document.

Queried Parameters

| | | |
|------------------|---------------|-----------------|
| User ID | SIF516 | Fong, Siu-Ching |
| Document Number: | % | |
| Documents Shown: | Next Approver | |

Approve Documents List

| Next Approver | Type | NSF | Change Seq# | Sub# | Originating User | Amount | Queue Type | Document | History | Approve | Disapprove |
|---------------|------|-----|-------------|------|------------------|------------|------------|--------------------------|-------------------------|---------|----------------------------|
| | JV | | | 0 | SIF516 | 2,800.00 | DOC | J0149674 | History | Approve | Disapprove |
| | JV | | | 0 | SIF516 | 36,960.00 | DOC | J0149709 | History | Approve | Disapprove |
| | JV | | | 0 | SIF516 | 368,832.54 | DOC | J0149712 | History | Approve | Disapprove |
| | JV | | | 0 | SIF516 | 200.00 | DOC | J0149781 | History | Approve | Disapprove |

Figure 9: Query Results for Approve Document showing all JVs that can be disapproved

In Figure 9: Clicking on the JV number will show you the details for the JV. Fund/ org security is applied so user will only see funds / orgs that they have access to. To disapprove, click "Disapprove".

Appendix D – Delete Finance Template (available in Self Service UniFi only)

Self Service UniFi allows users to save some of their UniFi forms as templates (Requisition, Multiple Line Journal Voucher and Budget Development Query).

Using Delete Finance Template, users will be able to delete their own **personal** templates. This does not apply to shared templates.

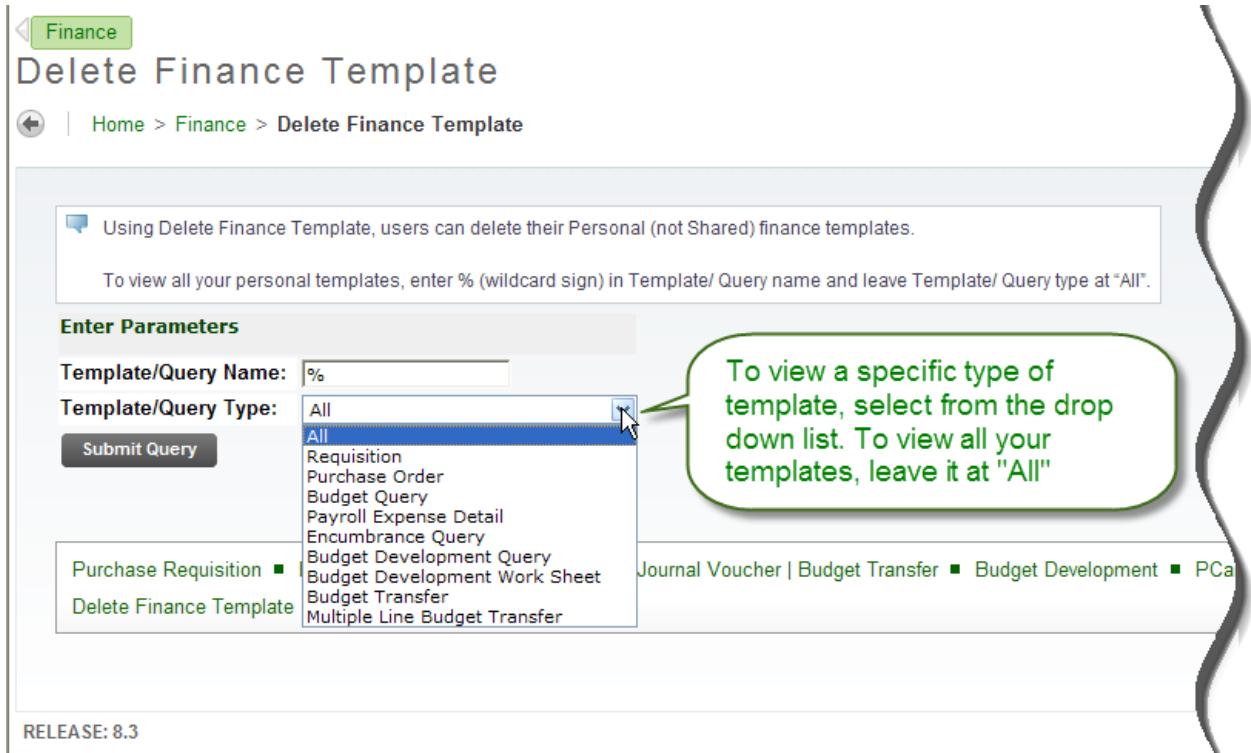


Figure 10: Delete Finance Template in Self Service UniFi

Finance

Delete Finance Template

Home > Finance > Delete Finance Template

Check the Delete checkbox for all templates/queries you wish to delete. Use the Select All button to mark all listed templates/queries.

Parameters

| | |
|---------------------|--------|
| User ID | SIF516 |
| Template/Query Name | % |
| Template/Query Type | All |
| Shared | N |

To delete a template, check off the Delete box for the template and hit "Delete"

Stored Template/Query List

| Count | USER ID | Template/Query Name | Template/Query Type | Shared | Date | Delete |
|-------|---------|-------------------------|-------------------------------|--------|-----------|--------------------------|
| 1 | SIF516 | sif516_JV_Test3 | Multiple Line Budget Transfer | N | 25-OCT-10 | <input type="checkbox"/> |
| 2 | SIF516 | sif_516_JV_Test1 | Multiple Line Budget Transfer | N | 20-OCT-10 | <input type="checkbox"/> |
| 3 | SIF516 | testing | Multiple Line Budget Transfer | N | 25-OCT-10 | <input type="checkbox"/> |
| 4 | SIF516 | sif516_test_req_Oct20 | Requisition | N | 20-OCT-10 | <input type="checkbox"/> |
| 5 | SIF516 | sif516_Encumbrance_test | Encumbrance Query | N | 20-OCT-10 | <input type="checkbox"/> |

Select All Delete Another Query

Figure 11: Query Results for Delete Finance Template (All Template Types)

~End of Document~