

# Chapter 1 – General Conventions

*Note: To advance from slide to slide press your **Page Down** key  
Or the right button on your mouse*

# Topics

- Logging in
- Layout & Navigation
  - ▶ General Screen Layout
    - FrontPage
    - Logo Panel
    - Menu Panel
  - ▶ Entry Screens
- General Conventions / Data Entry
- Getting Help
- Inbox Management
- Personal Settings



# v7 Overview > Login

## Login

In order to access the system you need to provide a

- Login ID
- Password
- Subscriber ID

**Note that both Login ID and Password are case sensitive**

**Forgot Password?**

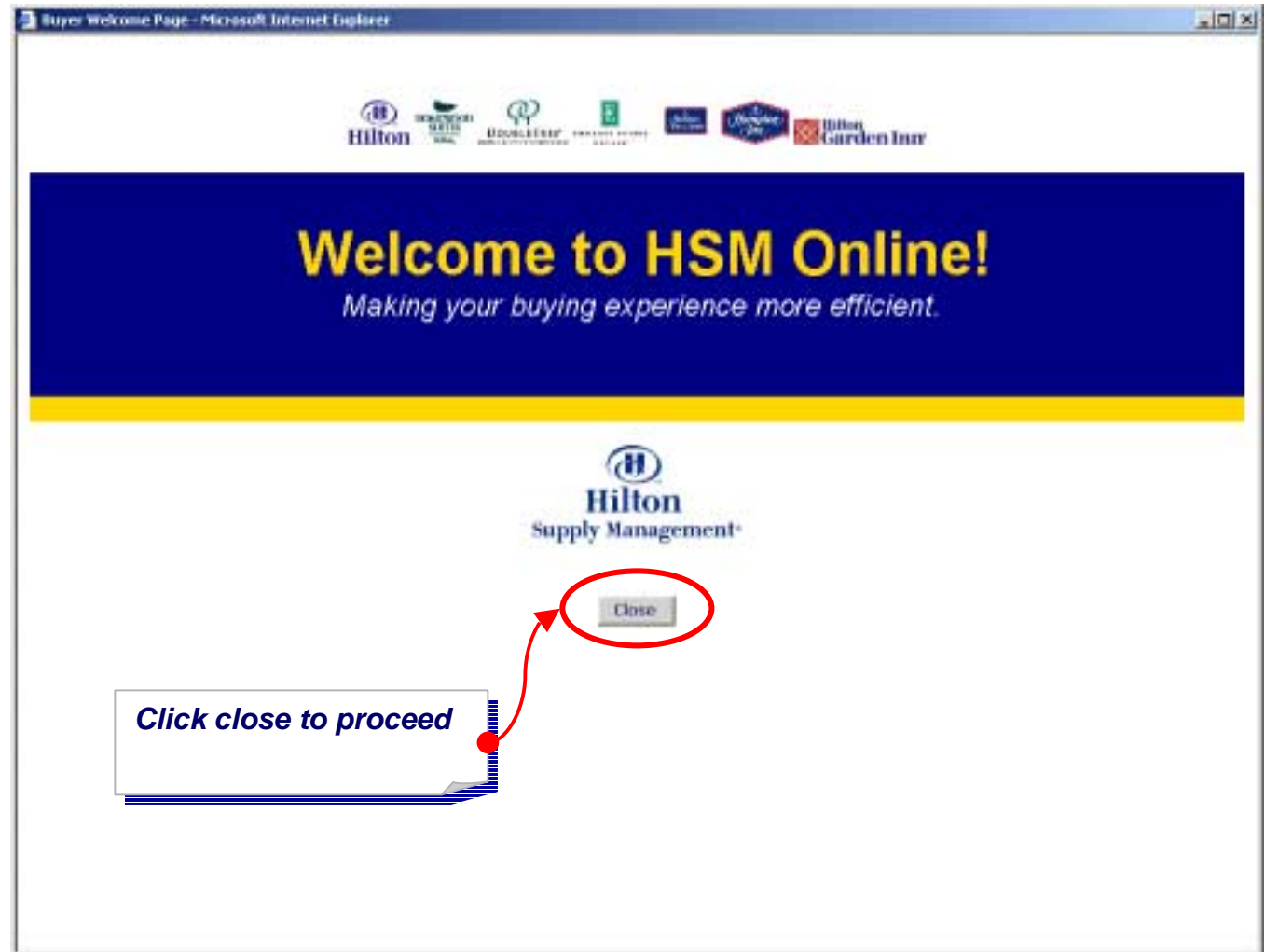
Login ID: AliceV  
Password:   
Subscriber ID: 65

Sign in

## Forgot Password

Click this link in case you do not remember your password. You will be asked to provide your Login ID and an email address. The password will then be sent to you.

# v7 Overview > Login > Welcome Page



# v7 Overview > Layout & Navigation

## **The Logo Panel**

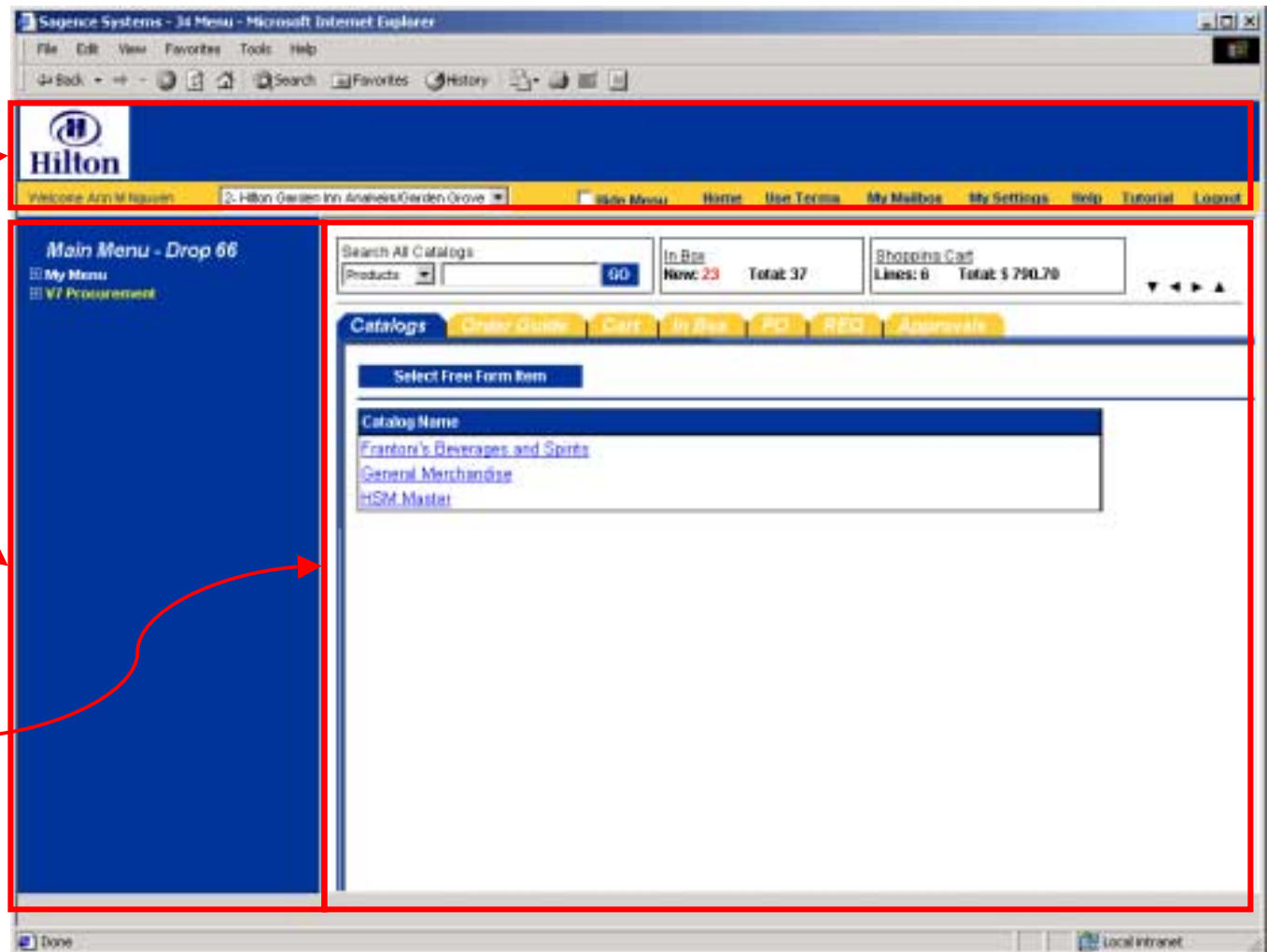
Appears at the top of all application screens. It is used to display universal information and controls that should remain available to the user at all times

## **Menu Panel**

Contains a menu tree that links to a variety of configuration and data entry screens

## **Front Page Tabs**

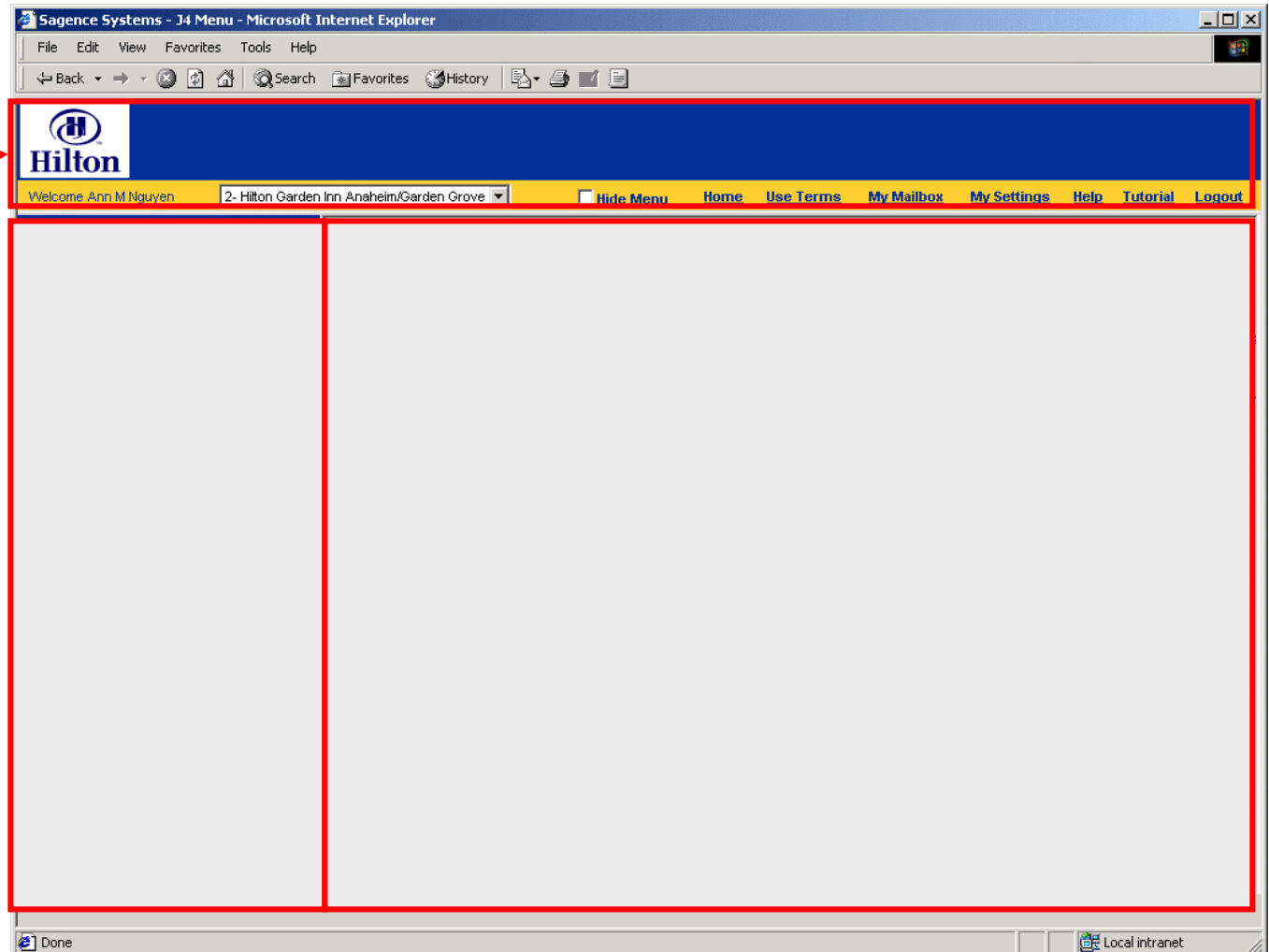
Area where the day to day procurement routines are managed.



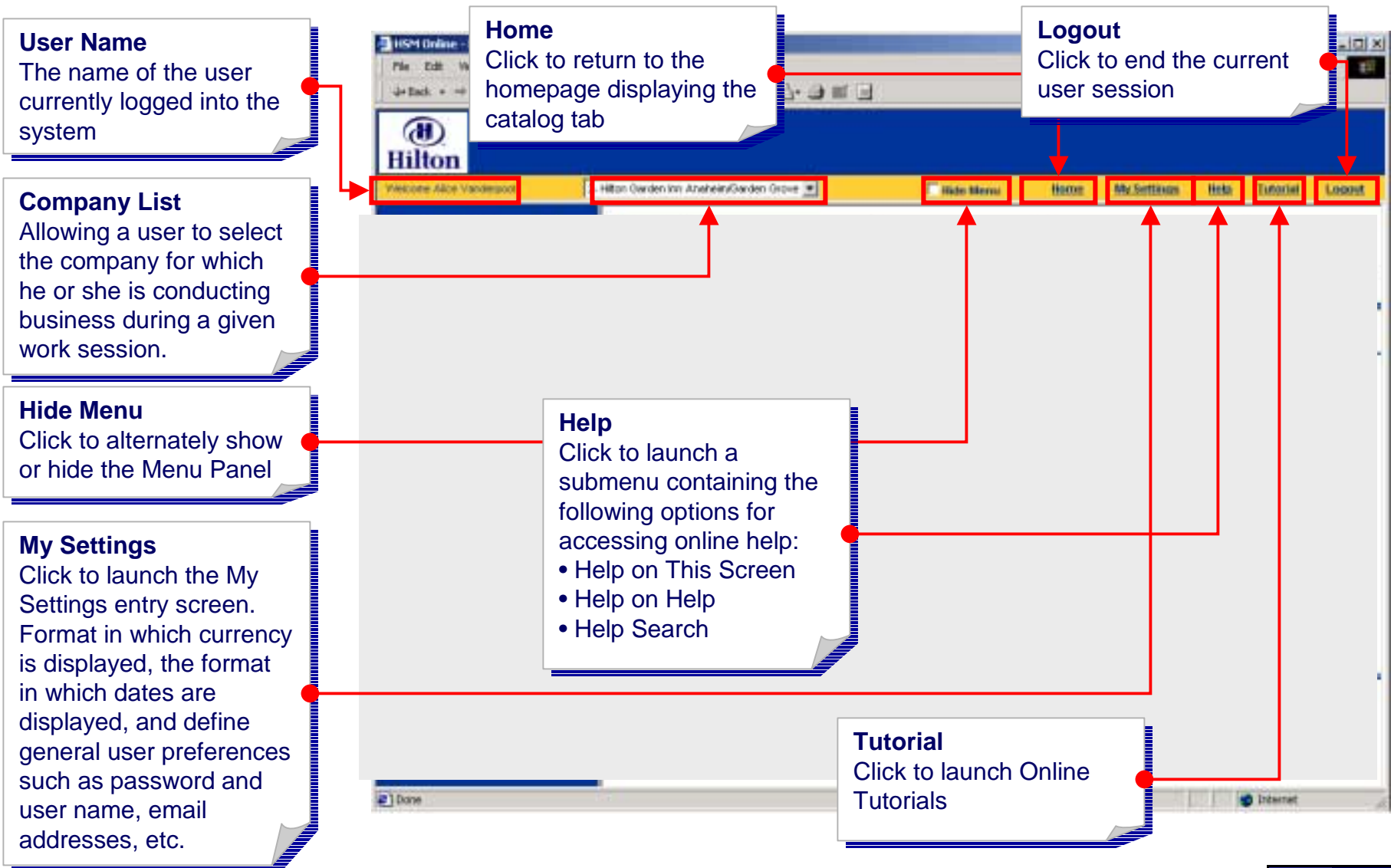
# v7 Overview > Layout & Navigation > Logo Panel

## **The Logo Panel**

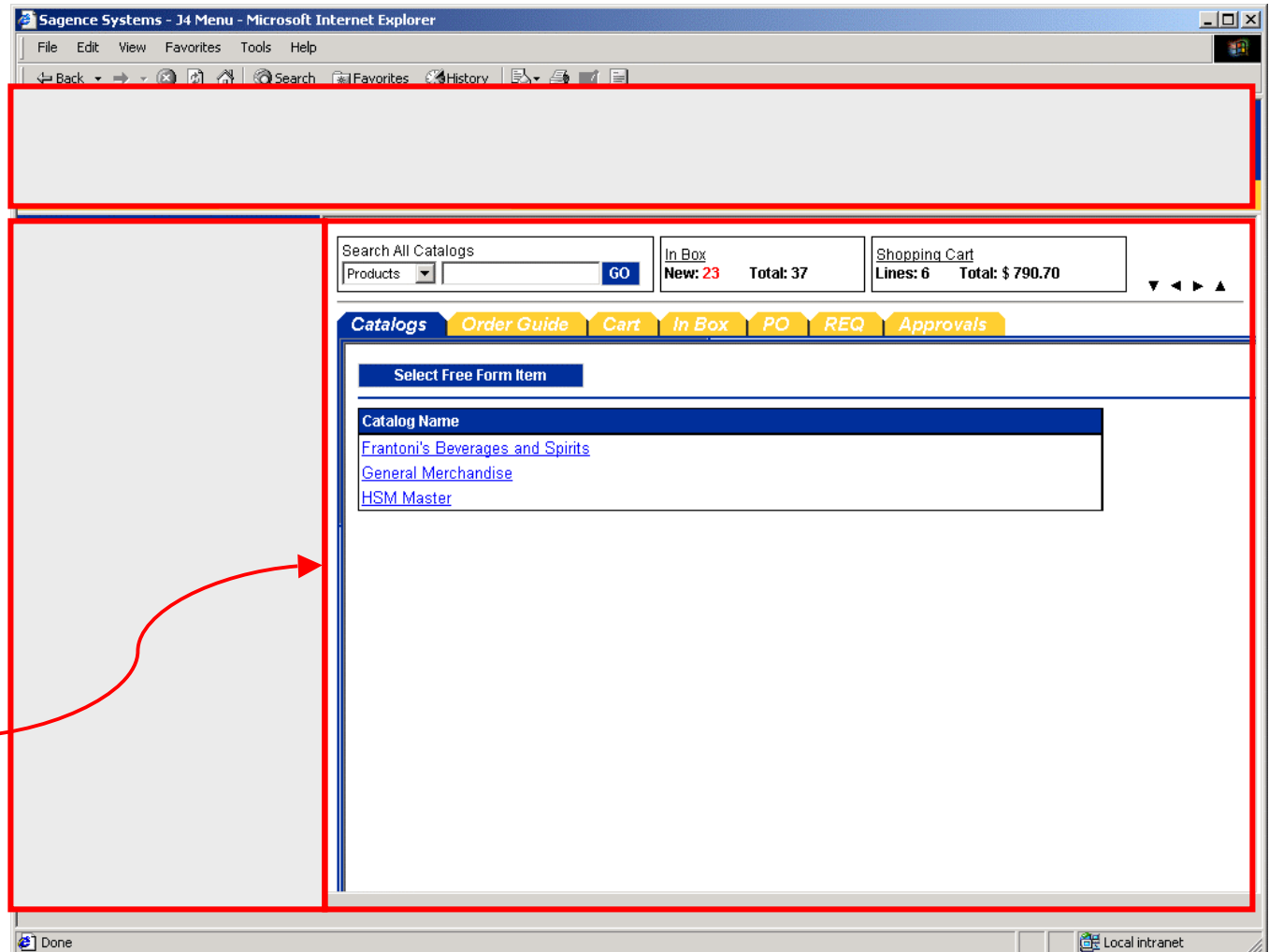
Appears at the top of all application screens. It is used to display universal information and controls that should remain available to the user at all times



# v7 Overview > Layout & Navigation > Logo Panel



# v7 Overview > Layout & Navigation > FrontPage



## **Front Page**

Area where the day to day procurement routines are managed.



# v7 Overview > Layout & Navigation > FrontPage

## Global Search

Select the search category from the drop-down list. Enter the text corresponding to the selection and click Go to perform the search. The search results will be listed below. The search options are:

- Products
- Categories
- Suppliers

## InBox

Displays Number of new and total messages. (access your Inbox by clicking on the InBox Tab)

## Shopping Cart Summary

Number of items (if any) and current value of your shopping cart.

Sagence Systems - J4 Menu - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites History

Search All Catalogs  
Products  GO

In Box  
New: 23 Total: 37

Shopping Cart  
Lines: 6 Total: \$ 790.70

Catalogs Order Guide Cart In Box PO REQ Approvals

Select Free Form Item

Catalog Name
<a href="#">Frantoni's Beverages and Spirits</a>
<a href="#">General Merchandise</a>
<a href="#">HSM Master</a>

Done Local intranet

# v7 Overview > Layout & Navigation > FrontPage Tabs

## Catalogs

Lists all available catalogs. Drill down into specific catalogs and search for products here.

## Order Guide

Define frequently purchased products and place them here for quick access. This is your 'favorite folder'

## Cart

Move items you want to purchase to your cart as you go through the product lists.

## InBox

System and document status notifications arrive here.

## PO

Edit, Print and submit from here.

## REQ

Submit your Requisitions or convert them into purchase orders

## Approval

Review and approve purchase orders and requisitions.

The screenshot shows a web browser window titled "Sagece Systems - 11 Menu - Microsoft Internet Explorer". The browser's address bar and menu bar are visible. The main content area features a navigation bar with several tabs: "Catalogs", "Order Guide", "Cart", "In Box", "PO", "REQ", and "Approval". Each tab is highlighted with a red circle. Below the navigation bar, there is a search bar labeled "Search All Catalogs" and a "GO" button. To the right of the search bar, there are two boxes: "In Box" showing "New: 23" and "Total: 37", and "Shopping Cart" showing "Lines: 0" and "Total: \$ 790.70". Below the search bar, there is a table with the following content:

Catalog Name
<a href="#">Fronton's Beverages and Spirits</a>
<a href="#">General Merchandise</a>
<a href="#">HSM Master</a>

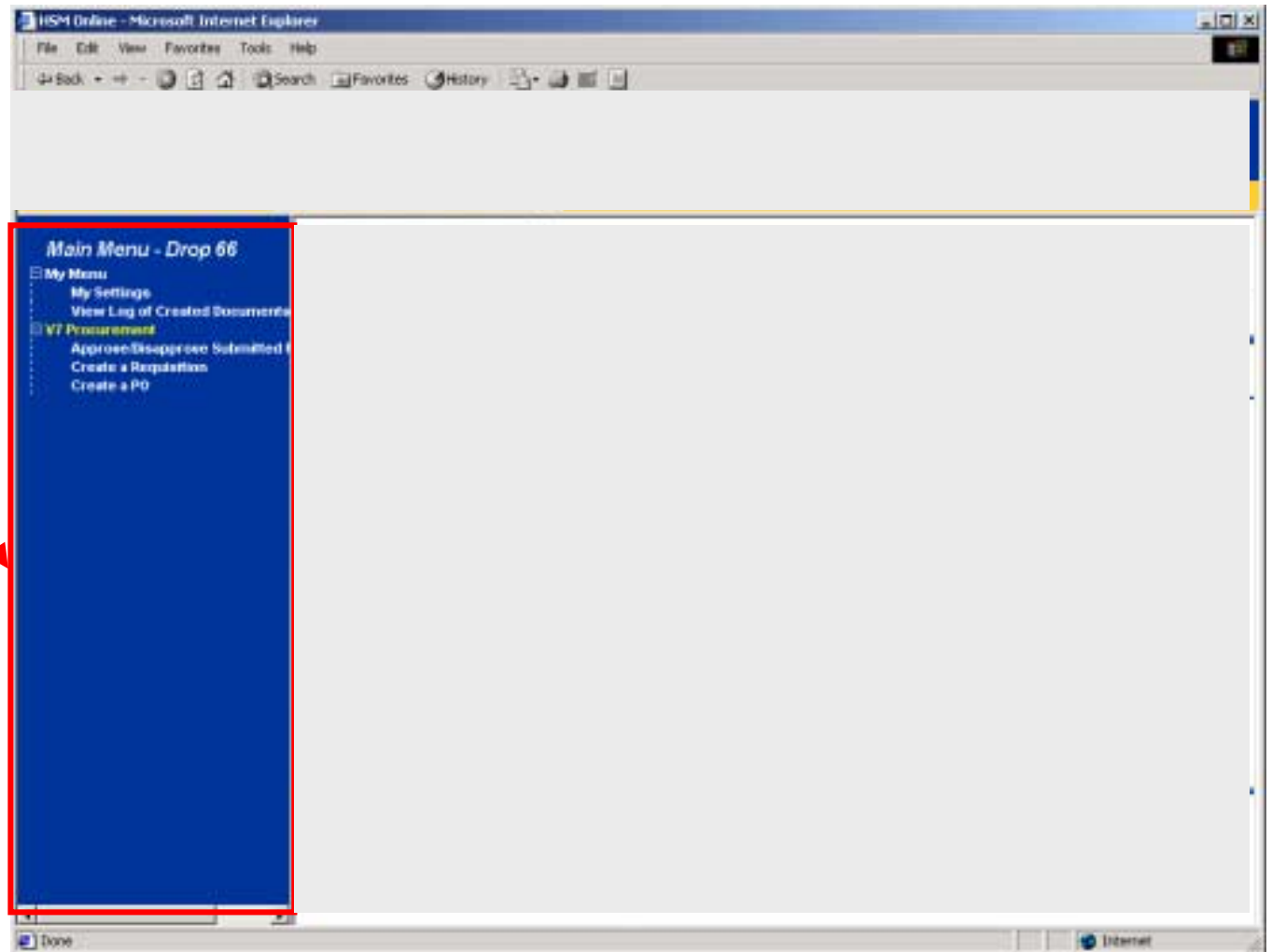
Red arrows point from the text boxes on the left to the corresponding tabs in the navigation bar. For example, an arrow points from the "Catalogs" text box to the "Catalogs" tab, and another points from the "Approval" text box to the "Approval" tab.

# v7 Overview > Layout & Navigation > Menu Panel

## **Menu Panel**

Contains a menu tree that links to a variety of entry screens and configuration data. Depending on the user privileges, the menu tree might differ.

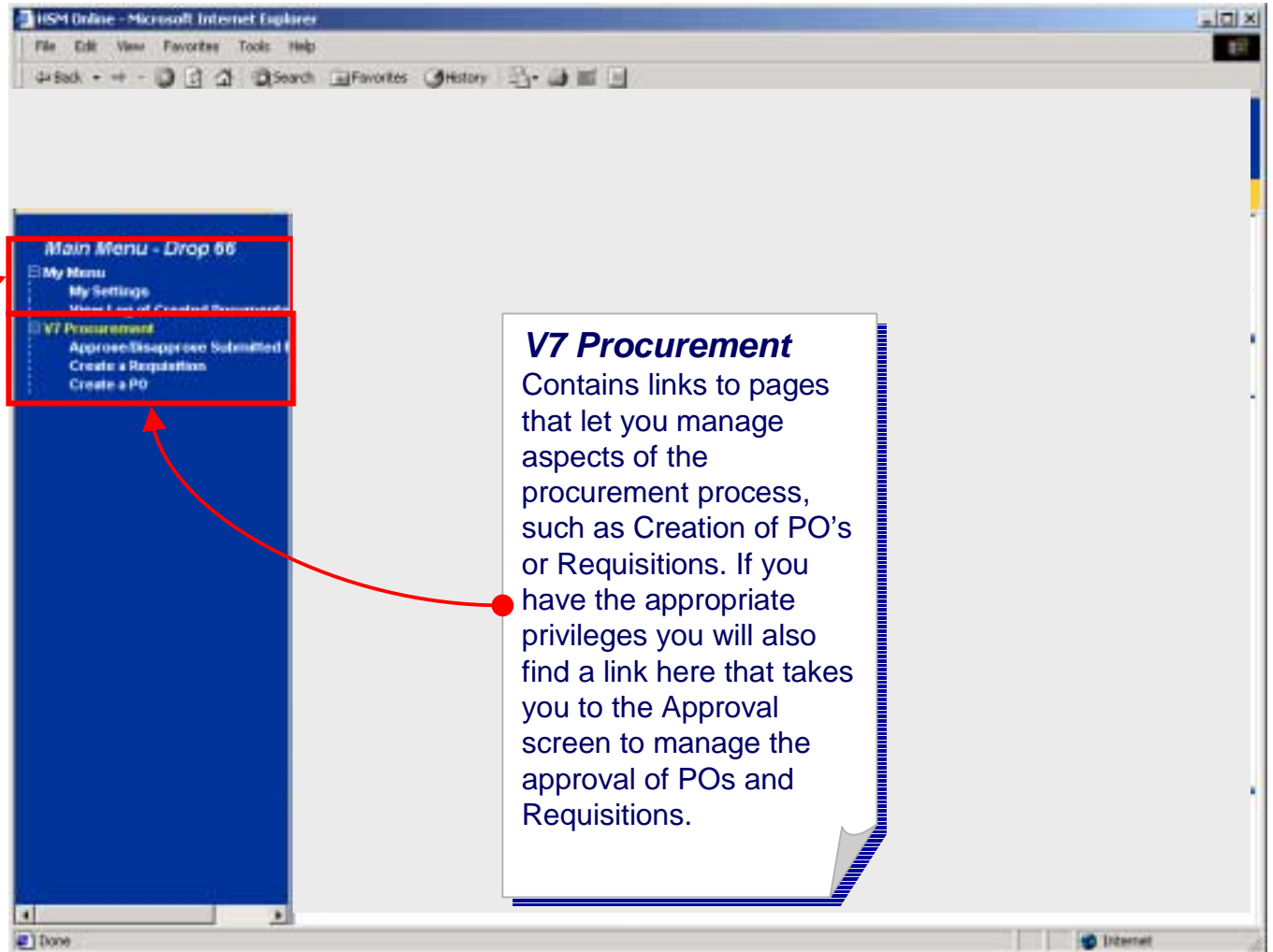
By clicking on the '+' sign next to the menu header you can expand the menu.



# v7 Overview > Layout & Navigation > Menu Panel

## My Menu

- My Settings  
Opens a screen that let's you manage your user profile (explained later on)
- View Log  
Open a screen that shows all documents you have created.



**V7 Procurement**  
Contains links to pages that let you manage aspects of the procurement process, such as Creation of PO's or Requisitions. If you have the appropriate privileges you will also find a link here that takes you to the Approval screen to manage the approval of POs and Requisitions.

# v7 Overview > Layout & Navigation > Entry Screens

Entry Screens are available for Purchase Orders Requisitions Receiving and Personal Settings. They can be accessed via

- The Menu Panel
- The Logo Panel or
- From within the FrontPage Tabs

The screenshot displays the Hilton v7 online procurement system interface. The interface includes a navigation menu on the left, a search bar at the top, and a main content area with a table of Purchase Orders (POs). Red boxes highlight the 'My Settings' link in the top navigation bar, the 'Main Menu - Drop 66' panel on the left, the 'PO' tab in the front-page tabs, and the 'Edit' buttons in the PO table. Red arrows point from the text box on the left to these highlighted elements.

#	PO number	PO Status	Subject	Inv code	PO
	0000000000000152	New	Subject: PO Co Sub Supplier: Excellent Hotelers	SNAGG	120
	0000000000000151	New	Subject: Lamp Test PO Supplier: Hilton Supply Management	SNAGG	120

# v7 Overview > Layout & Navigation > Entry Screens

**We will use the Purchase Order Entry Screen to illustrate the Layout**

**Action Buttons**  
Depending on the type of screen, choose from a variety of actions

**Data Entry Section**  
Data is captured on a variety of screens divided in different Tabs

**Logo Panel**  
The Logo Panel menu is extended with sever viewing options  
Click on 'Hide Logo' ...

# v7 Overview > Layout & Navigation > Entry Screens

Note that the Logo Panel has been reduced to the Menu bar. Bring back the full logo by clicking the 'Show Logo' Link

Activate the 'List' radio button...

# v7 Overview > Layout & Navigation > Entry Screens

As opposed to a single record, the list view displays a table of all available records (Purchase Orders in this case) which can be filtered, searched and sorted (explained in the corresponding tutorials)

Activate the 'Vertical' radio button...

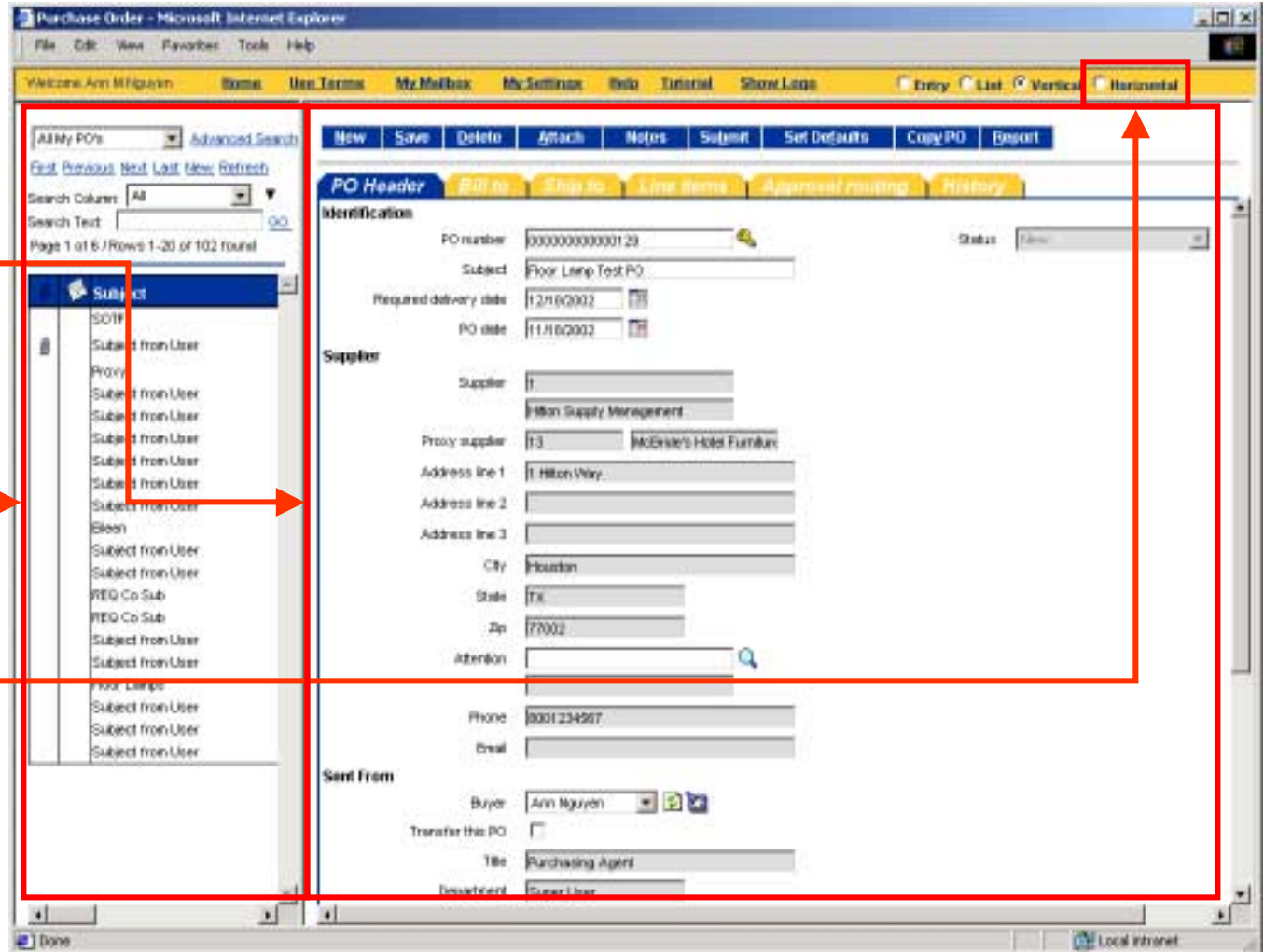
Subject	PO number	PO Status	PO date	Department
SOFP	000000000000004	Partial accepted	11/05/2002	01
Subject from User	000000000000005	Approved	11/05/2002	01
Proxy	000000000000006	Viewed by supplier	11/05/2002	01
Subject from User	000000000000007	Viewed by supplier	11/05/2002	01
Subject from User	000000000000008	Viewed by supplier	11/05/2002	01
Subject from User	000000000000009	Viewed by supplier	11/05/2002	01
Subject from User	000000000000010	Viewed by supplier	11/06/2002	01
Subject from User	000000000000011	New	11/07/2002	01
Subject from User	000000000000012	New	11/07/2002	01
Subject from User	000000000000013	New	11/07/2002	01
Eileen	000000000000014	New	11/07/2002	01
Subject from User	000000000000015	Receiving Complete	11/07/2002	01
Subject from User	000000000000016	New	11/08/2002	01
REG Co Sub	000000000000017	Accepted by supplier	11/08/2002	01
REG Co Sub	000000000000018	New	11/08/2002	01
Subject from User	000000000000019	New	11/08/2002	01
Subject from User	000000000000020	Approval denied	11/08/2002	01
Floor Lamps	000000000000021	Viewed by supplier	11/08/2002	01
Subject from User	000000000000022	Submitted	11/08/2002	01
Subject from User	000000000000023	New	11/08/2002	01
Subject from User	000000000000024	Viewed by supplier	11/08/2002	01



# v7 Overview > Layout & Navigation > Entry Screens

The Vertical view combines list and entry view with a vertical split

Activate the 'Horizontal' radio button...



# v7 Overview > Layout & Navigation > Entry Screens

The Horizontal view combines list and entry view with a horizontal split

The screenshot displays the 'Purchase Order' application in Microsoft Internet Explorer. The interface is divided into two main sections, both highlighted with red boxes. The top section shows a search results table with columns for Subject, PO number, PO Status, PO date, and Department. The bottom section shows the 'PO Header' entry form with tabs for Identification, Supplier, Line Items, Approval routing, and History. The form includes fields for PO number, Subject, Required delivery date, PO date, Supplier, and Address lines.

Subject	PO number	PO Status	PO date	Department
PO#	0000000000000004	Partial accepted	11/05/2002	01
Subject from User	0000000000000005	Approved	11/05/2002	01
Proxy	0000000000000006	Viewed by supplier	11/05/2002	01
Subject from User	0000000000000007	Viewed by supplier	11/05/2002	01
Subject from User	0000000000000009	Viewed by supplier	11/05/2002	01

**PO Header**

**Identification**

PO number: 0000000000000020  
Subject: Floor Lamp Test PO  
Required delivery date: 11/18/2002  
PO date: 11/18/2002

**Supplier**

Supplier: Hilton Supply Management  
Proxy supplier: 13 Adlyne's Hotel Furniture  
Address line 1: 1 Hilton Way  
Address line 2:  
Address line 3:  
City: Phoenix

# v7 Overview > Conventions and Data Entry > Fields

If you click on the exclamation mark icon a message will display that tells you why the data is invalid

## Date Shortcuts

The following shortcuts can be used to type dates:

t Today  
 +# today + # days  
 +#m today + # months  
 +#y today + # years

Where # stands for any natural number.

## Refresh

Click this button to refresh the list, e.g. when you expect an entry you just made to show up in the list.

	<b>Required</b> - Indicates a field that must be populated with data before the document may be saved.
	<b>Invalid Data</b> - Indicates a field containing data that has failed one or more validation tests tied to that field. A document containing one or more of these indicators may not be saved.
	<b>Check Box</b> - Used to indicate a yes or no (true or false) response.
	<b>Date Box</b> - Used to select or enter a calendar date. The specific date format may be defined via My Settings.
	<b>Drop-down from Company Data List</b> - Used to limit the values available for entry. The user must select a predefined value from the list of available options. The values present are those contained within another database table. Click on the rightmost icon to display data related to the selected value
	<b>Lookup</b> - A lookup enables the user to locate and retrieve the data that will be inserted into the specified field of the current document. Manual input is possible, however, any value entered by the user is validated against the contents of the foreign table.
	<b>Primary Key</b> - The key icon serves as a button to initiate the Quick Load function. Type the value in the pop up box to retrieve the corresponding record.

# v7 Overview > Getting Help

## **Tutorial**

Links to classroom and online training material

## **Help Link**

Content sensitive help will allow the user to receive help about the screen currently displayed.

The application is equipped with an extensive array of online help functionality

## **Field Help**

Right click in a field and select 'Show Field Help' from the menu to display information about a specific field

The screenshot displays the 'Purchase Order' form in Microsoft Internet Explorer. The form includes a header with the Hilton logo and a summary of costs: Subtotal (\$1,181.00), Tax (\$12.00), and Grand Total (\$1,193.00). Below the header is a navigation bar with 'Home', 'User Terms', 'My Modules', 'My Settings', 'Help', 'Tutorial', and 'Hide Links'. A secondary navigation bar contains 'New', 'Save', 'Details', 'Attach', 'Notes', 'Submit', 'Email', 'Print', 'Set Defaults', and 'Copy PO'. The main form area is divided into sections: 'PO Header', 'Identification', and 'Supplier'. The 'Identification' section contains fields for PO number (0000000000000034), Subject (SO/F), Required delivery date (11/10/2002), and PO date (11/05/2002). A context menu is open over the PO number field, with 'Show Field Help' highlighted. The 'Supplier' section includes fields for Supplier name (OnTheFlySupplier Pete's Hardware Store), Proxy supplier (Hilton Supply Management), and address fields. A 'Web Page Status' dialog box is open, displaying the PO number and instructions: 'Enter the purchase order number or accept the auto-generated PO number. When this PO is saved, the number will automatically be assigned by the system.'

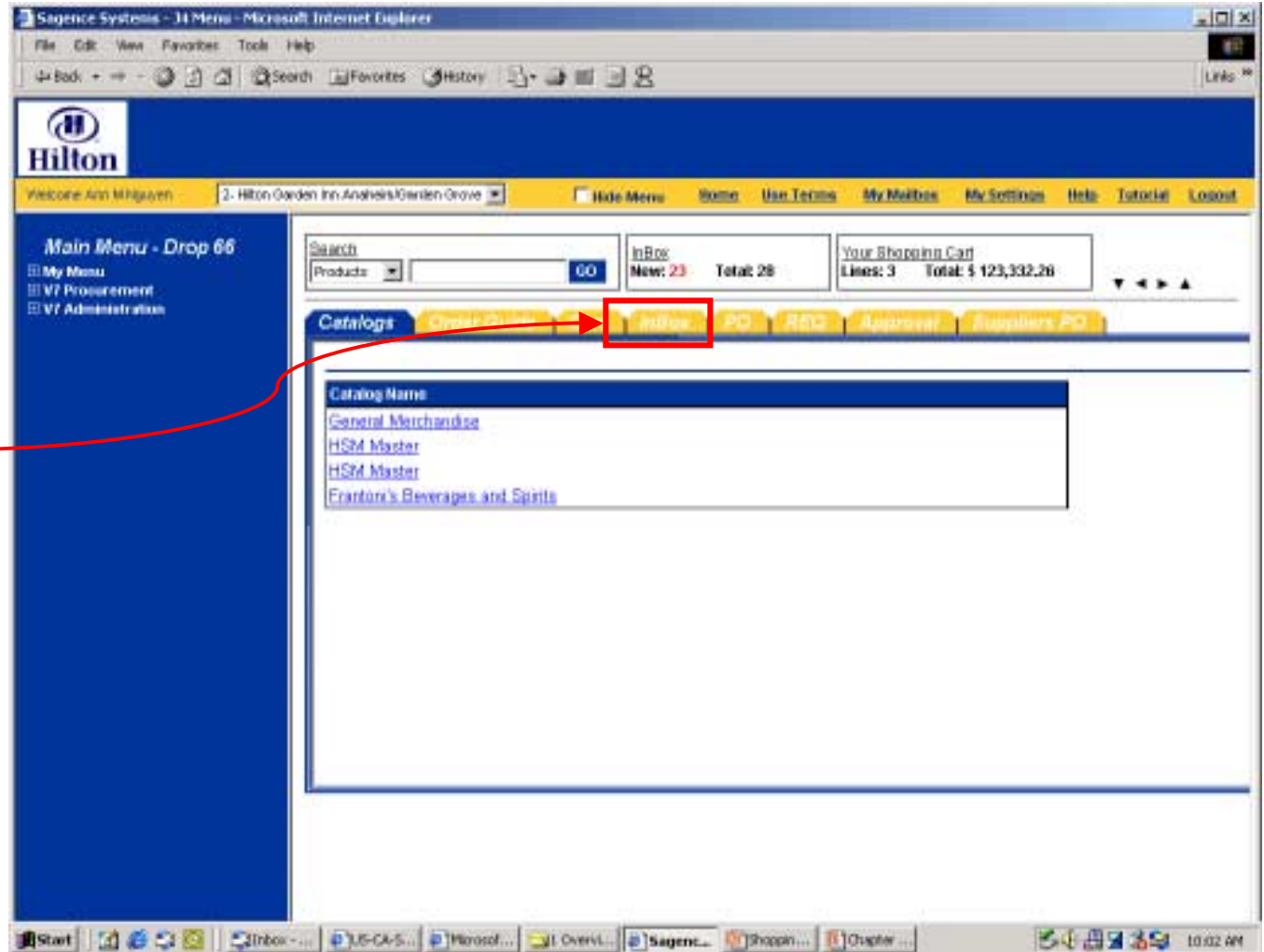
# v7 Overview > InBox Management

## **InBox**

All notifications related to the system and document status can be viewed on the InBox screen.

## **Access via Tab**

To access your InBox click on the corresponding Tab. This will launch the InBox in the FronPage view.



# v7 Overview > InBox Management

The Inbox Tab contains a table of all your messages.

## Filter

Use the drop down list to filter your messages. These are your options:

- Unread
- Read
- Outbox
- Recycle Bin

The screenshot shows the Hilton v7 InBox Management interface. The main content area displays a table of messages with the following data:

View	Message Content	Priority	Date	Status
<a href="#">View</a>	Your Buyer PO has been disapproved. PO_NUMBER: 000000000000013	High	11/06/2002	Normal
<a href="#">View</a>	Your REQ has been approved. REQ_NUMBER: 000000000000025	High	11/06/2002	Normal
<a href="#">View</a>	Your Buyer PO has been approved. PO_NUMBER: 000000000000035	High	11/07/2002	Normal
<a href="#">View</a>	Your Buyer PO has been approved. PO_NUMBER: 000000000000037	High	11/07/2002	Normal
<a href="#">View</a>	Your Buyer PO has been approved. PO_NUMBER: 000000000000039	High	11/07/2002	Normal
<a href="#">View</a>	Your Buyer PO has been approved. PO_NUMBER: 000000000000033	High	11/02/2002	Normal
<a href="#">View</a>	Your Buyer PO has been approved. PO_NUMBER: 000000000000038	High	10/10/2002	Normal
<a href="#">View</a>	Your Buyer PO has been disapproved. PO_NUMBER: 000000000000019	High	08/09/2002	Normal

# v7 Overview > InBox Management

The Inbox Tab contains a table of all your messages.

**View**  
Click the 'View' button to display the message.

The screenshot shows the Hilton v7 InBox Management interface. The main window displays a table of messages with the following content:

View	Your Buyer PO has b
View	Your POQ has been i
View	Your Buyer PO has b
View	Your Buyer PO has b
View	Your Buyer PO has b
View	Your Buyer PO has b
View	Your Buyer PO has b
View	Your Buyer PO has b

The 'Message Box' window displays the following details:

**Link**

**Subject:** A PO is pending approval. DOCUMENT\_NUMBER: 00000000000103

Please open the document awaiting your approval. DOCUMENT\_TITLE: 00000000000103

**Message:**

**OK**

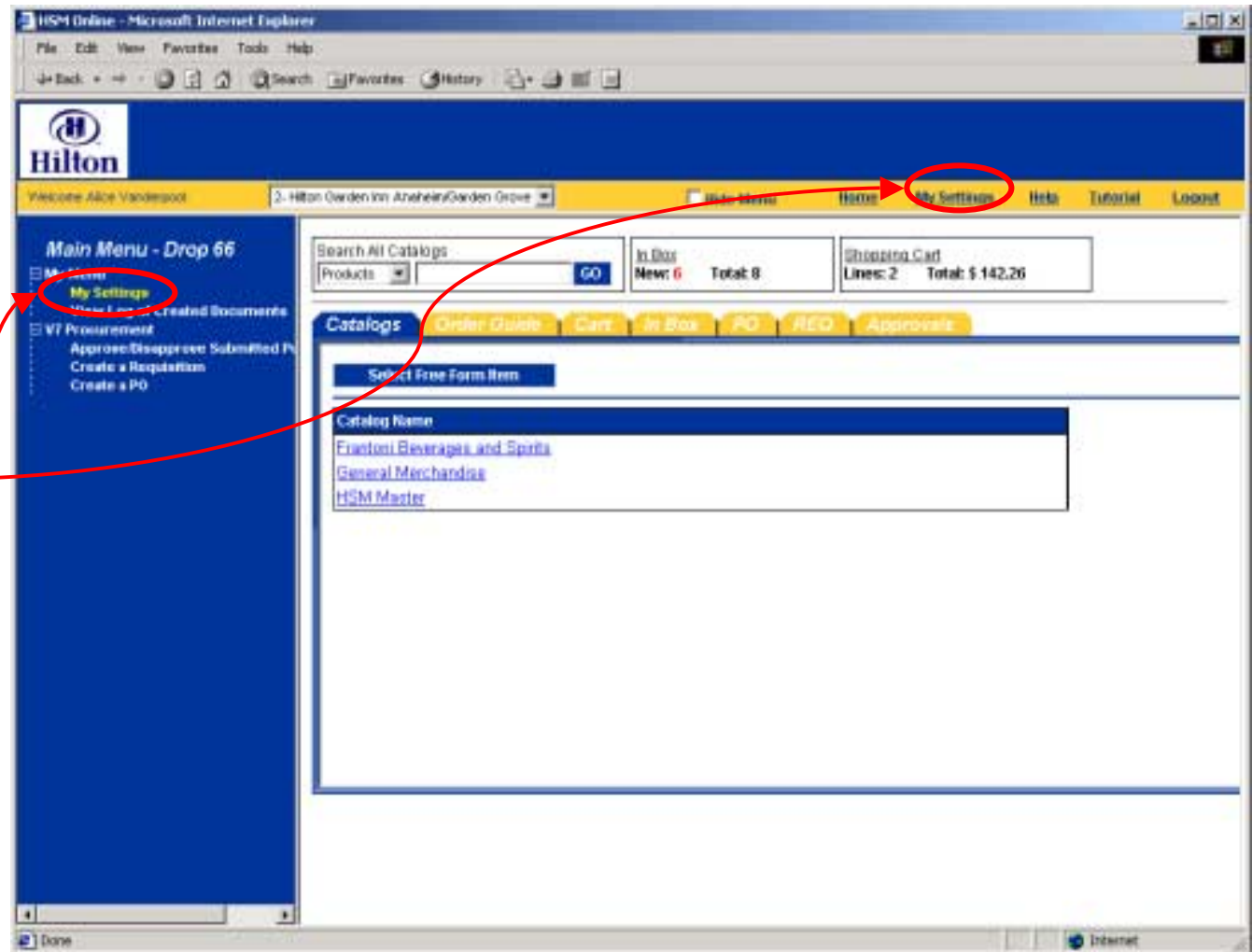
# v7 Overview > Personal Settings

## Personal Settings

The My Settings section is used to maintain user related information such as username and password.

## Access

To access your personal settings either click the link in the logo panel menu or in the menu panel. The my settings screen will launch in a new browser window.





# v7 Overview > Personal Settings

**Apply:**  
Click here to save your changes. You must click this button before you close the My Settings window for the changes to take effect.

**Print:**  
Print a copy of your current settings.

**Exiting**  
When you're done editing your personal settings, close the browser window to return to the prior screen

My Settings - Microsoft Internet Explorer

Hilton

Welcome Ann M Nguyen | Home | Use Terms | My Mailbox | My Settings | Help | Tutorial | Hide Logo

Apply Print

**My settings**

User ID	<input type="text" value="7"/>	Last login date	<input type="text" value="11/15/2002 12:39:47"/>
Login name	<input type="text" value="AnnM"/>	Password last changed	<input type="text" value="11/14/2002 13:17:05"/>
Password	<input type="password" value="*****"/>	Save copy of sent messages	<input checked="" type="checkbox"/>
Verify password	<input type="password" value=""/>	Display this many rows in the grid before paging	<input type="text" value="50"/>
First name	<input type="text" value="Ann"/>		
Middle initial	<input type="text" value="M"/>		
Last name	<input type="text" value="Nguyen"/>		
Full name	<input type="text" value="Ann M Nguyen"/>		

Under construction