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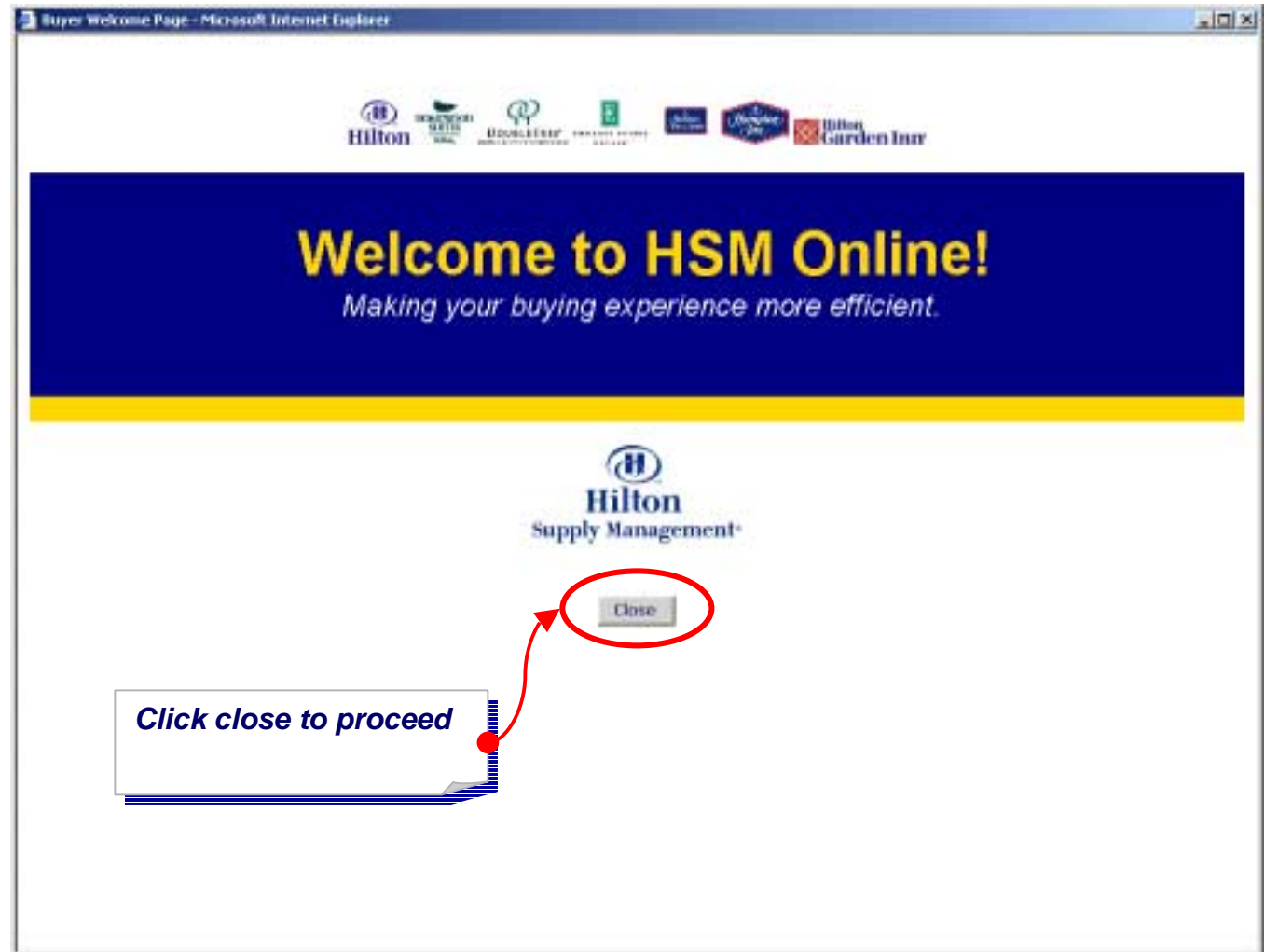
Forgot Password
Click this link in case you do not remember your password. You will be asked to provide your Login ID and an email address. The password will then be sent to you.

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v7 Overview > Login > Welcome Page

Click close to proceed

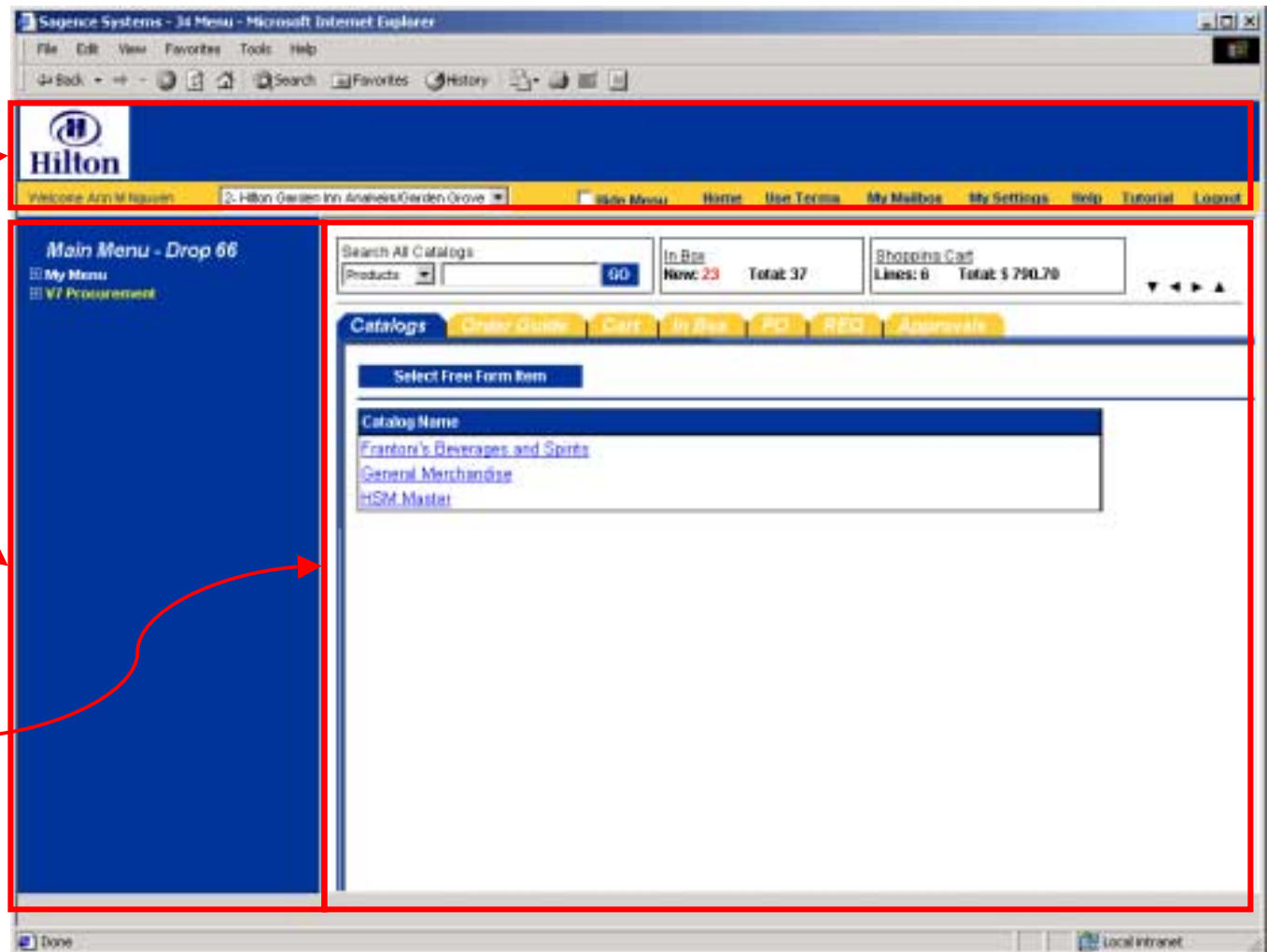# v7 Overview > Layout & Navigation

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
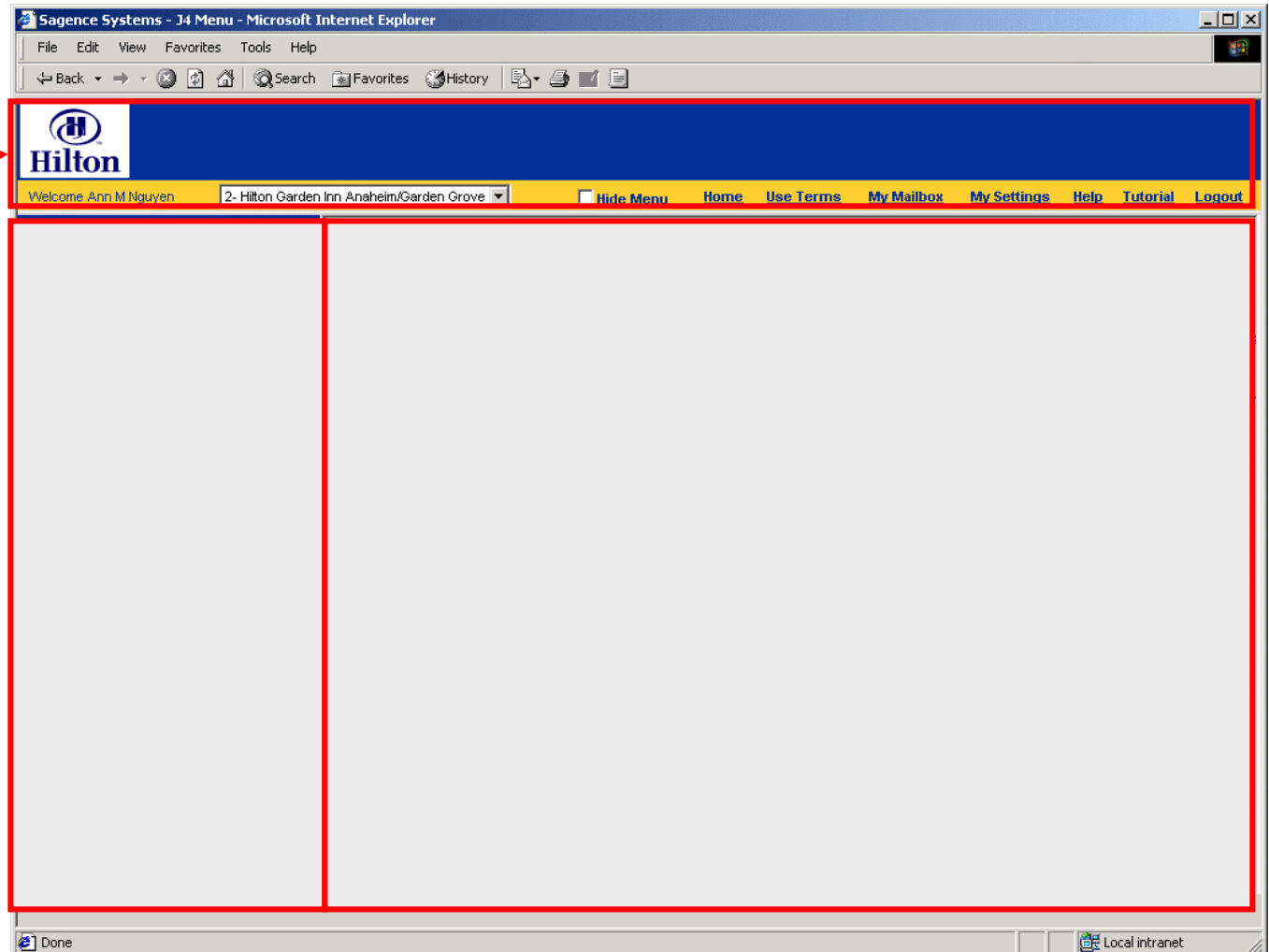
Front Page Tabs
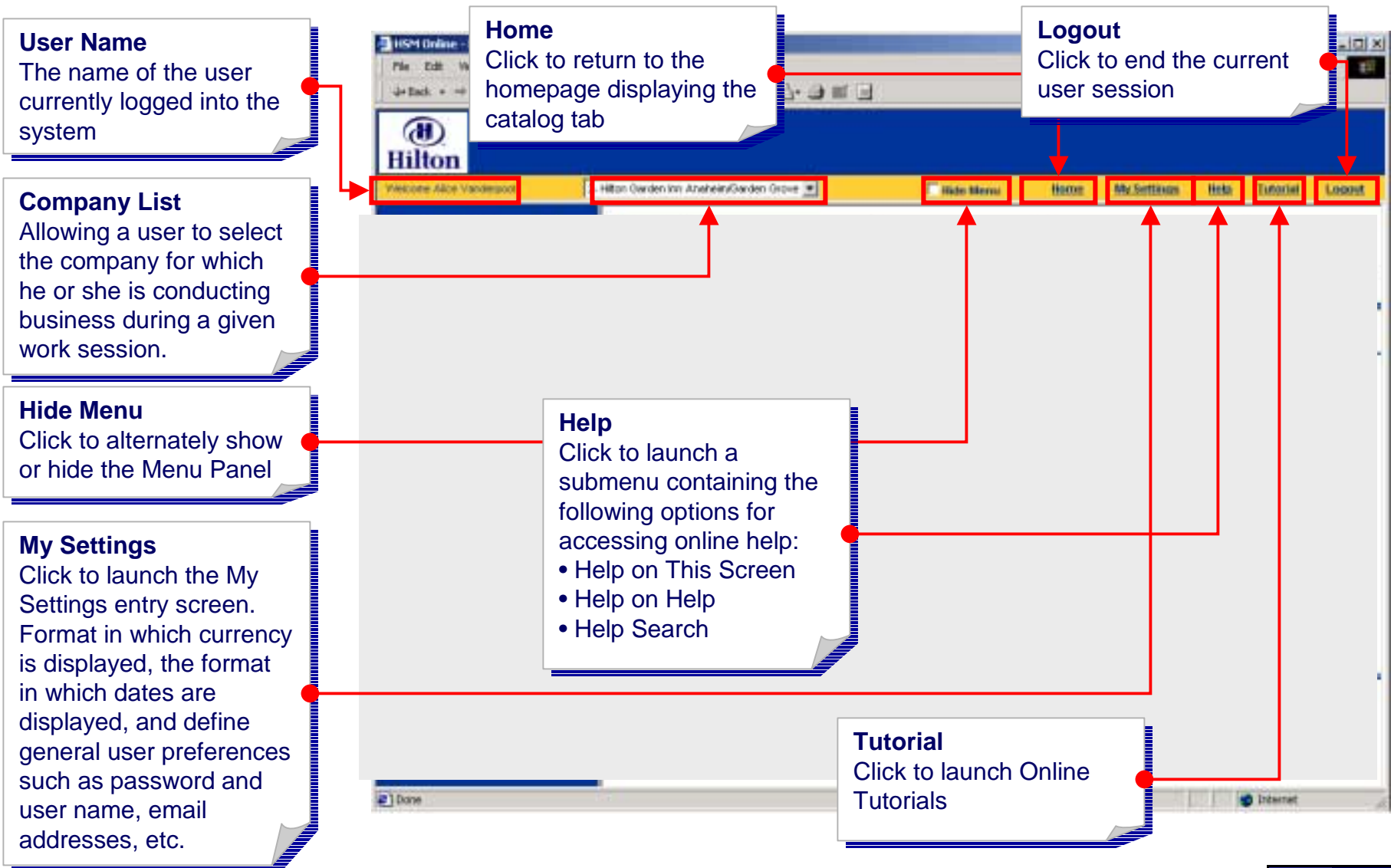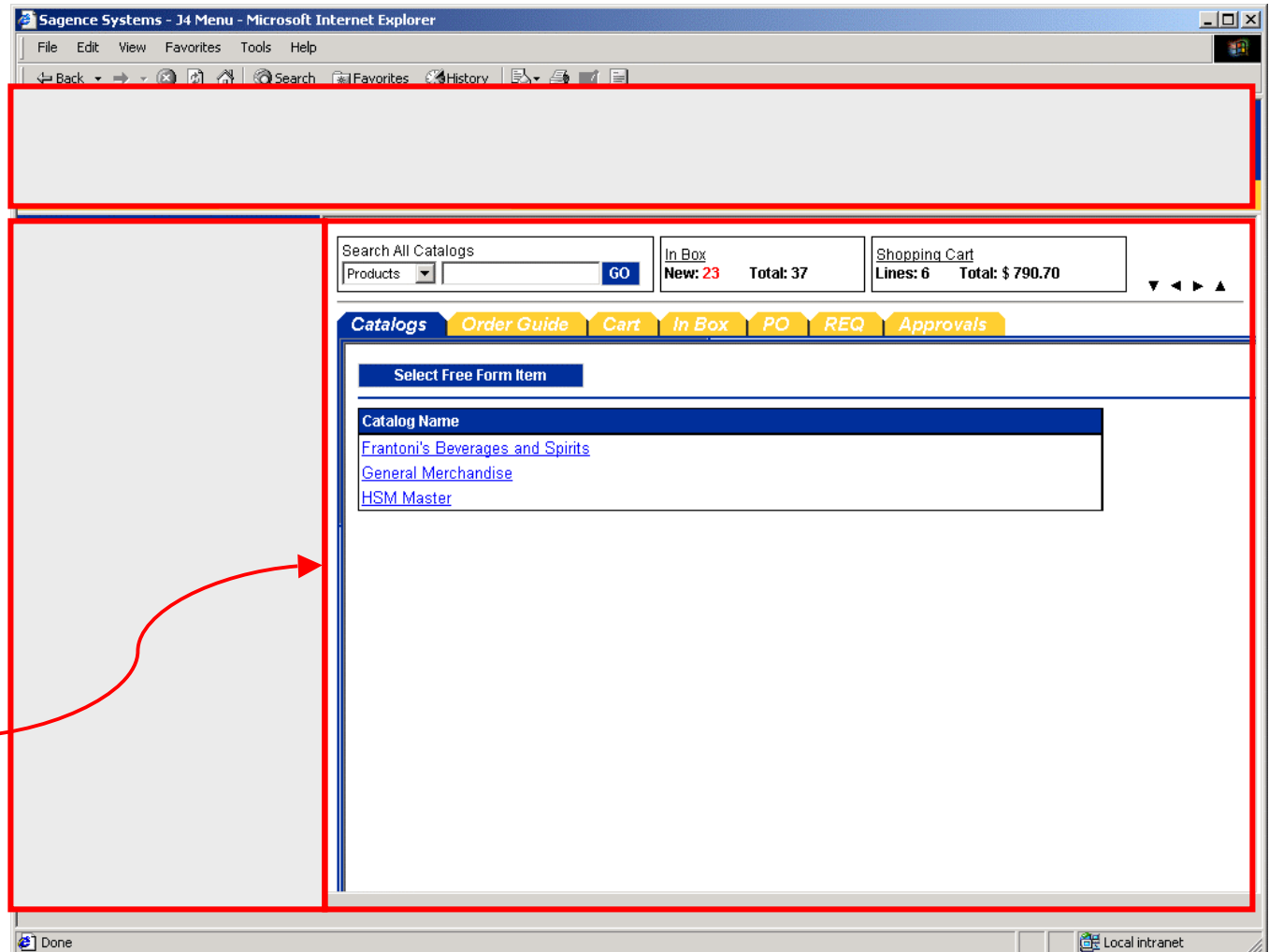Area where the day to day procurement routines are managed.

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

User Name
The name of the user currently logged into the system

Company List
Allowing a user to select the company for which he or she is conducting business during a given work session.

Hide Menu
Click to alternately show or hide the Menu Panel

My Settings
Click to launch the My Settings entry screen. Format in which currency is displayed, the format in which dates are displayed, and define general user preferences such as password and user name, email addresses, etc.

Home
Click to return to the homepage displaying the catalog tab

Help
Click to launch a submenu containing the following options for accessing online help:
• Help on This Screen
• Help on Help
• Help Search

Tutorial
Click to launch Online Tutorials

Logout
Click to end the current user session

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   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
Frantoni's Beverages and Spirits
General Merchandise
HSM Master

Done   Local intranet

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.

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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.
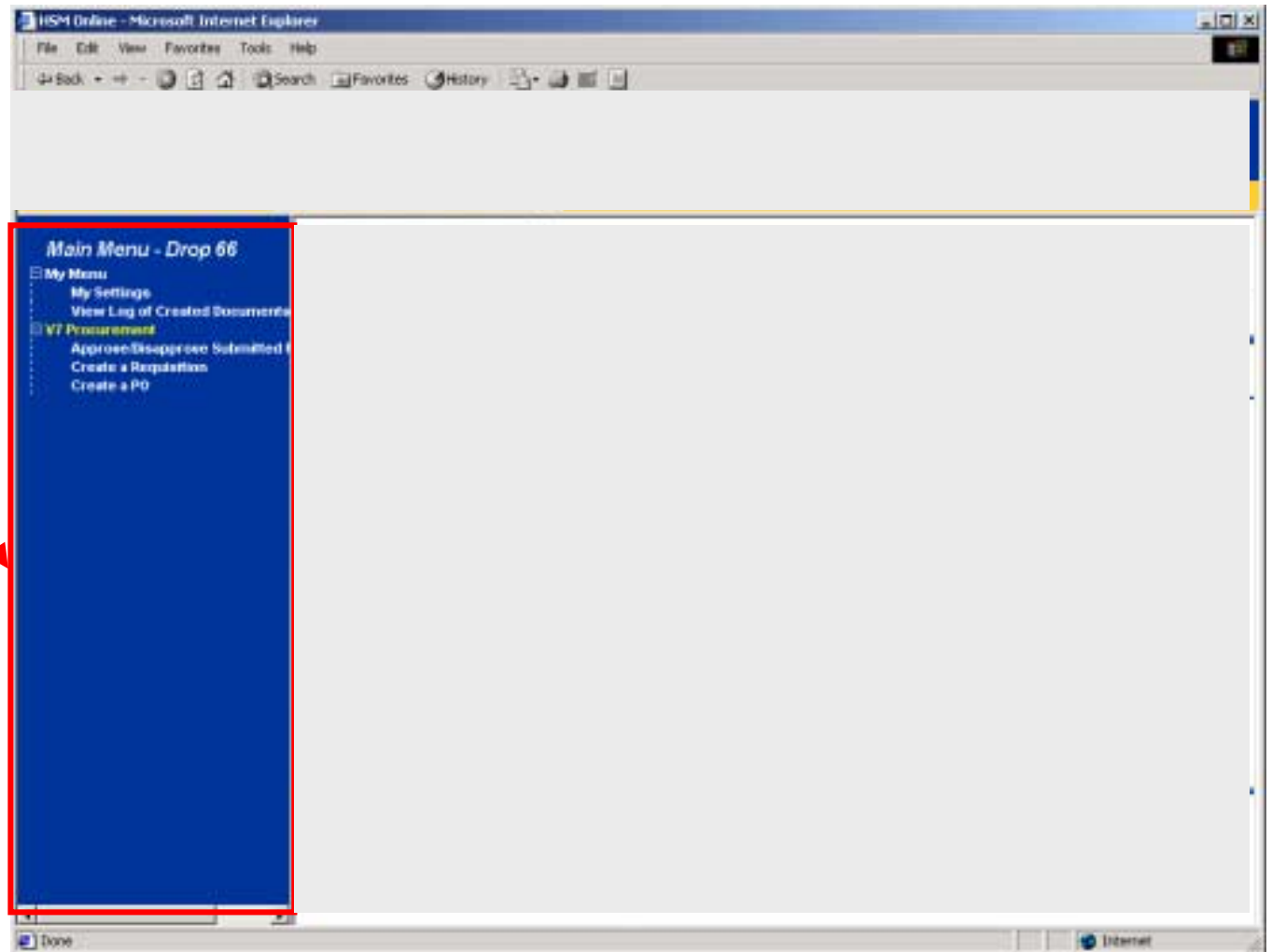
v7 Overview > Layout & Navigation > Menu Panel

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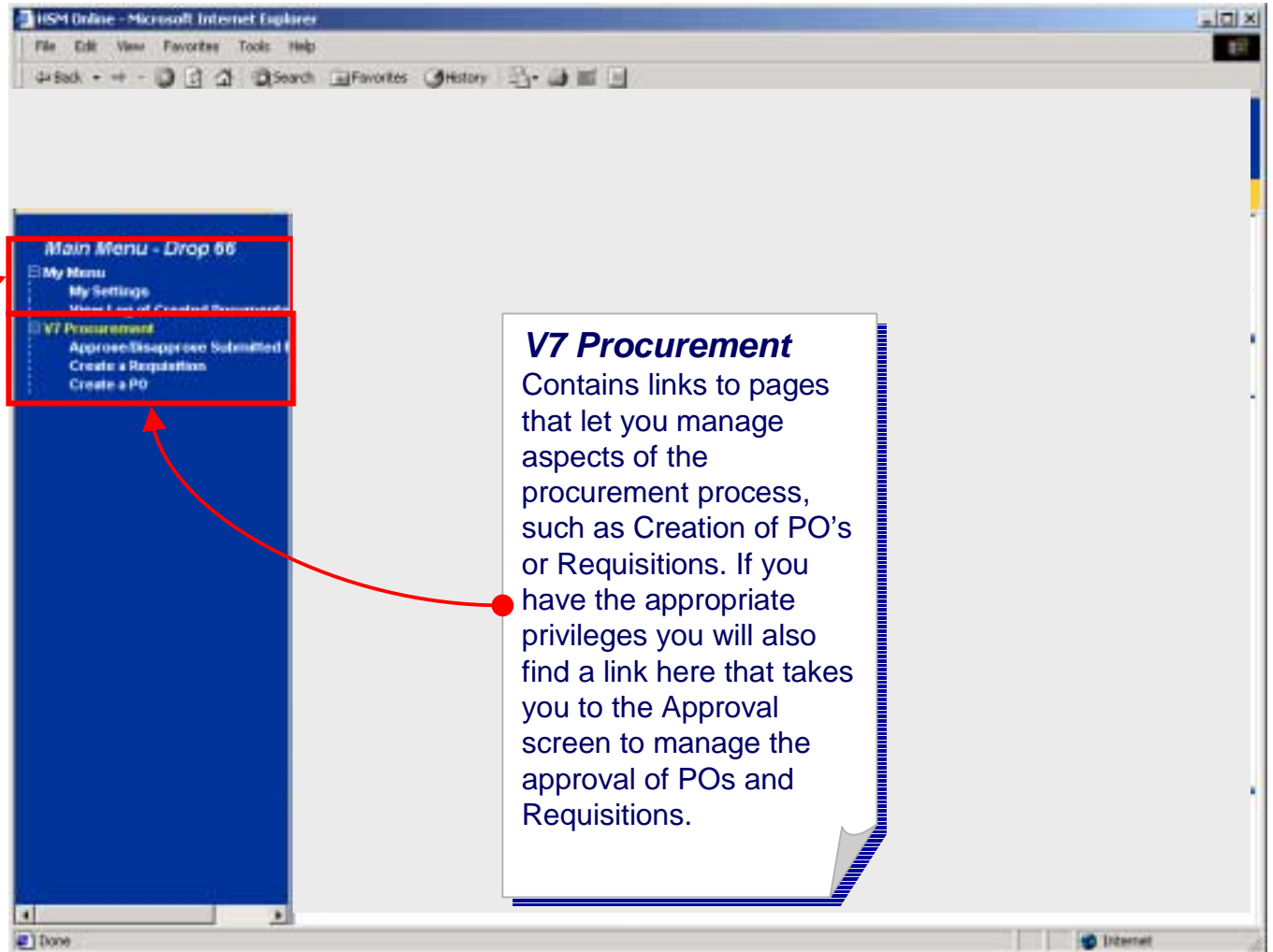
V7 Procurement
Contains links to pages that let you manage aspects of the procurement process, such as Creation of PO's or Requisitions. If you have the appropriate privileges you will also find a link here that takes you to the Approval screen to manage the approval of POs and Requisitions.

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

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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' …

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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…

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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…

v7 Overview > Layout & Navigation > Entry Screens

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

Activate the 'Horizontal' radio button…
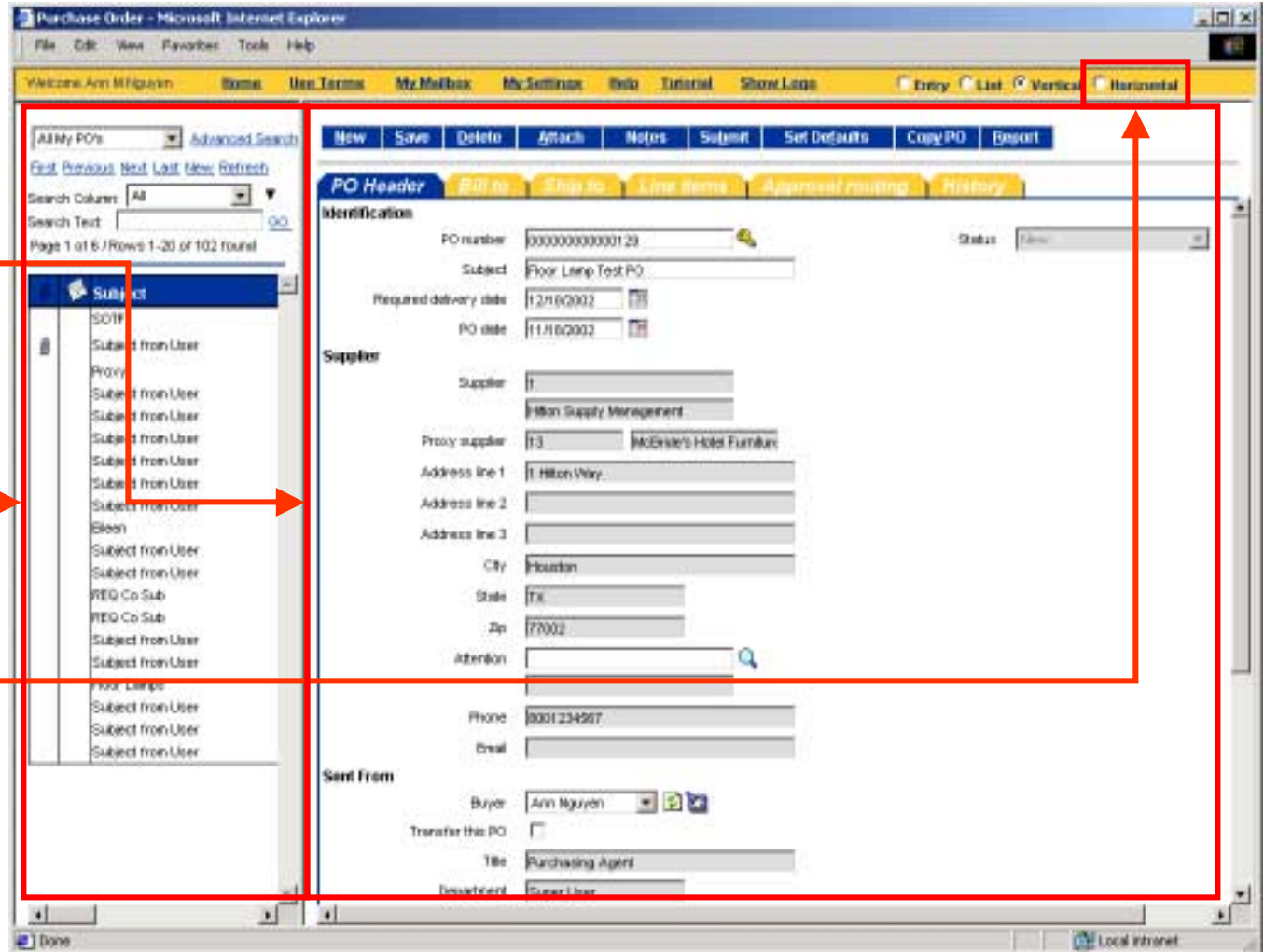
v7 Overview > Layout & Navigation > Entry Screens

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

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.

	Required - Indicates a field that must be populated with data before the document may be saved.
	Invalid Data - 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.
	Check Box - Used to indicate a yes or no (true or false) response.
	Date Box - Used to select or enter a calendar date. The specific date format may be defined via My Settings.
Select Entry	**Drop-down from Company Data List -** 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
	Lookup - 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.
[New]	**Primary Key -** 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.

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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

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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.

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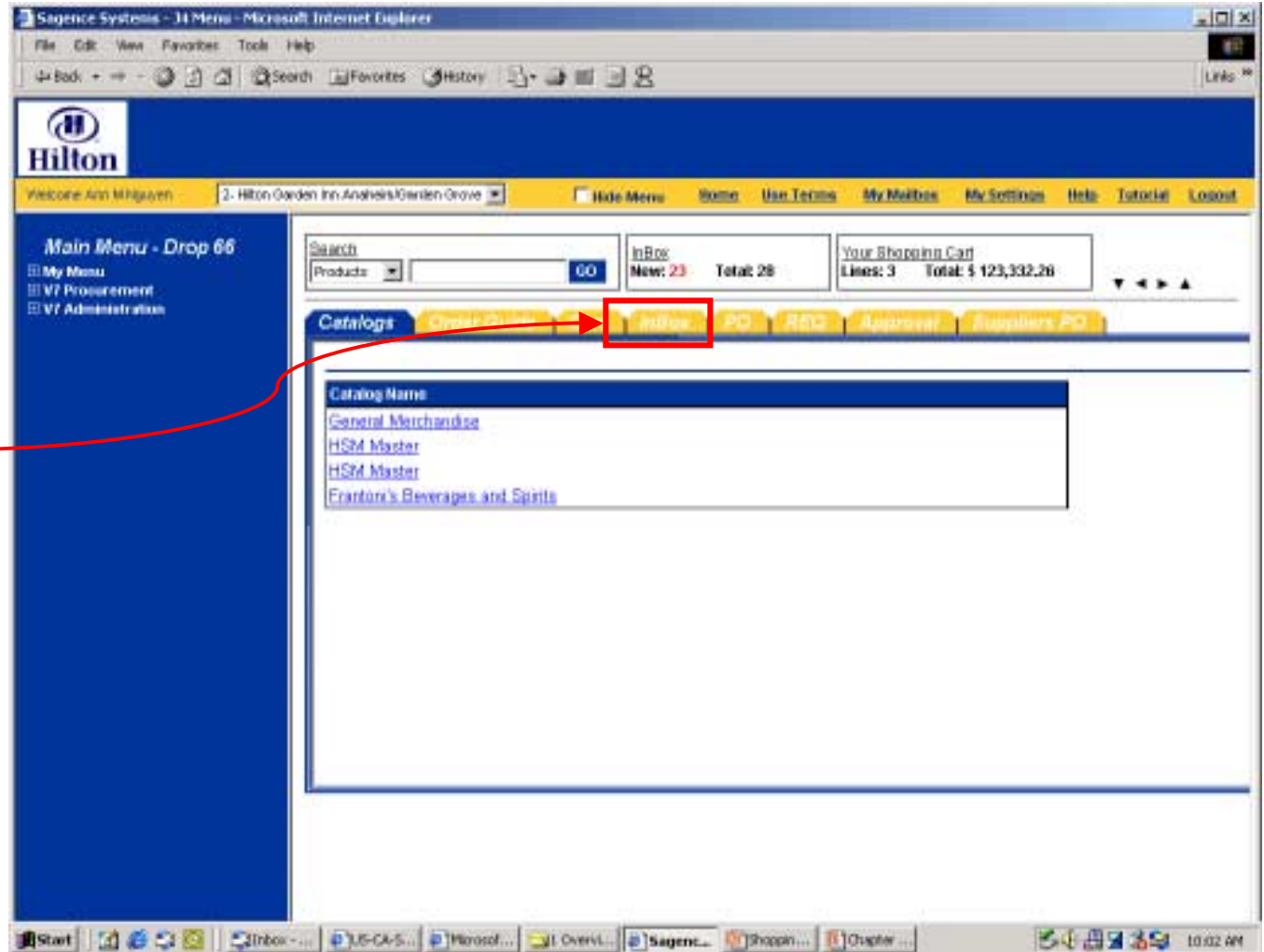
v7 Overview > InBox Management

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

v7 Overview > InBox Management

The Inbox Tab contains a table of all your messages.

View
Click the 'View' button to display the messge.
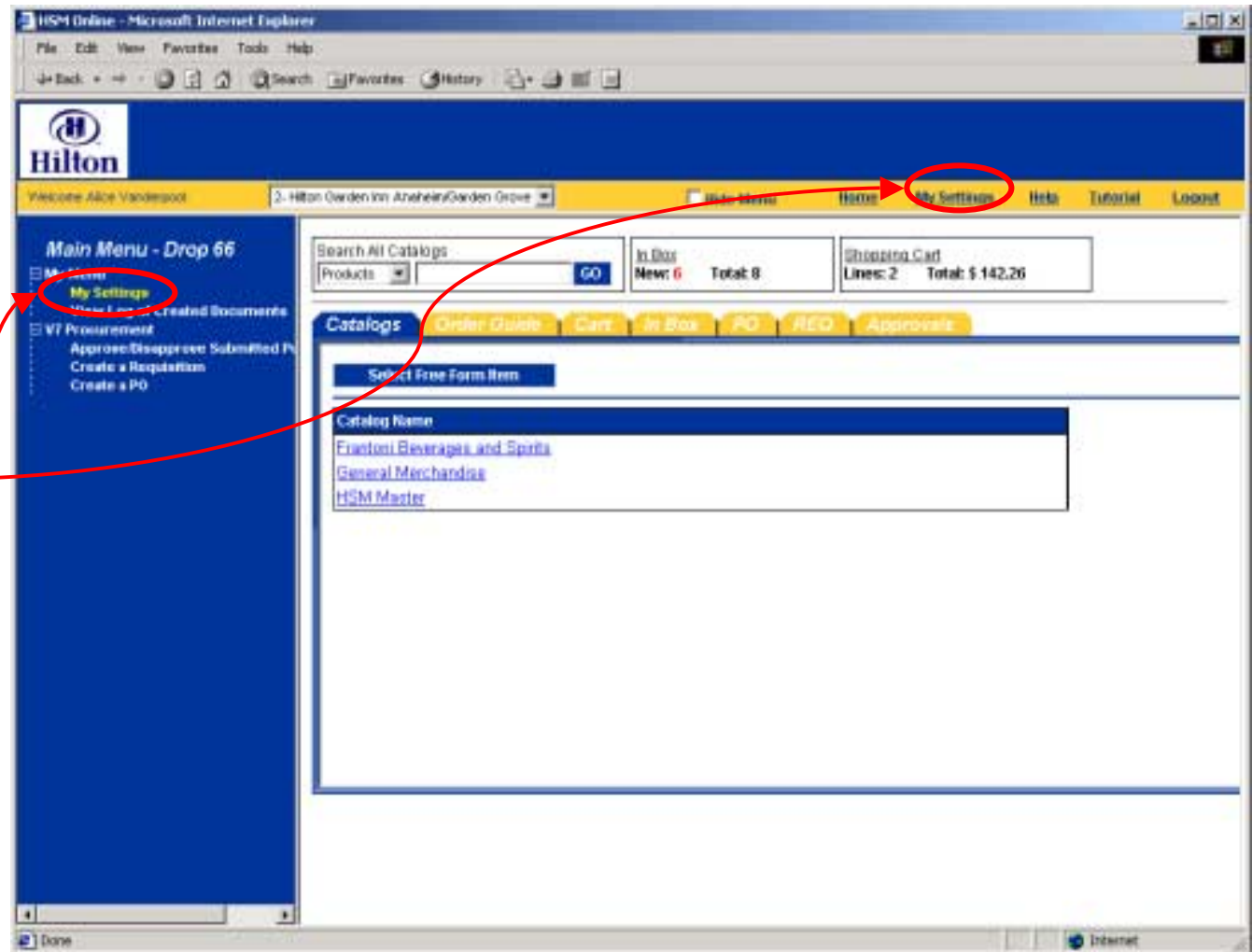
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v7 Overview > Personal Settings

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

Under Construction