RIAS Phase II
11.5.10 Upgrade

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RIAS Upgrade

As a first step in the migration to the RIAS General Ledger, the RIAS application will be upgraded to version 11.5.10 on Wednesday, December 12, 2007 through Sunday, December 16, 2007. This upgrade will simplify the procurement screens and make it easier to order, track, and receive goods and services. Some of the benefits include:

• Creating a requisition with three screens instead of the six we use today.
• Simplifying steps to indicate when merchandise has been received and easy editing of a rejected requisition.
• Providing more detailed information about related purchase order, invoice and payment activity from the requisition status.

Listed below are some of the new features and capabilities with the 11.5.10 upgrade. Although the look and feel of some of the P2P screens has changed, the basic functionality remains the same. To help ease the transition to the upgraded system, this edition of the newsletter will explain some of the changes and provide related screen shots for your reference. For more detailed “How To” instructions, visit the RIAS website http://rias.rutgers.edu and follow the link to the 11.5.10 upgrade.

P2P New Features

Home Page – Copy (See Screen shot #1)

• This feature allows you to add items from a selected requisition to your existing shopping cart or create a new cart by clicking on the copy icon .
• When you copy a requisition, make sure to change your requisition description, otherwise it will keep the description of the copied requisition.
• You can save the requisition you copied and complete it at a later date. The saved requisition will have a new requisition number and will appear as incomplete in your worklist.
• When you create a requisition either by copying or creating new, you will still have use of department activity one and department activity two fields.
Home Page – Receive (See Screen shot #2)

- Once your requisition has been approved and items physically received, instead of going to the Requisition tab and then the Receiving tab to update the order status, you can now Double click on the new Receive icon from the home page.
- This will display the Receive Items: Select Items screen. You can indicate items received on this screen.

Search (See Screen shot #3)

- Search boxes have the icon. Currently you can click on the icon to do a search.
- With the upgrade, there is another search function. You can put the first letter or a small part of what you’re looking for in a search box and press the tab key. This new capability will find items similar to what you typed in the search box.

Edit Lines (See Screen shot #4)

- You can edit a previously rejected requisition.
- From your Internet Procurement Home page, you can click on the requisition number that was returned. Then select Edit Lines to change the Requisition Line Description or any other line information.

Attachment Tab (See Screen shot #5)

An attachment can be added by selecting the Attachment tab. You can now do attachments at the line level rather than the old way where an attachment was added to every line of the requisition. Below are the attachment methods you can use. It is preferred that ALL attachments are added at the appropriate requisition line using the Requisition Line Attachment method.

- **Requisition Line Attachments**: This method will add an attachment to that line only.
- **Requisition Attachments**: Adding attachments in this section will add the same attachment to all requisition lines. This method takes up a lot of database space and is not the preferred method.

- You will see the Document Attachment icon indicating something is attached to the requisition.

Approvers

We strongly recommend that you take action on all requisitions prior to the upgrade as the system will be down during that time.

Steps to take before the upgrade

It is strongly recommended that you clear all “Cookies” (cache) and “Temporary Internet Files” from your system to avoid old stored (cached) screens from appearing after the upgrade is applied or if you do not see the new Log In screen. (See page 3 of the newsletter). A detailed explanation of this procedure can be found on the RIAS 11.5.10 upgrade link: [http://rias.rutgers.edu/11510/](http://rias.rutgers.edu/11510/)

iProcurement Preferences (See Screen shot #6)

A new feature on the preferences screen is the ability to change the number of search results. For best performance of the system, it is recommended that you set your search results no higher than 100.
Screen Changes

Log In Screen (See Screen shot #7)

The Log In screen has changed to the Rutgers Central Authentication Service screen with the 11.5.10 upgrade. You will still use your NetID and Password to log into the application.

Requisition View Screen (See Screen shot #8)

- The requisition screen will now have the purchase order number displayed once a requisition has been approved.
- You can click on the PO and drill down to view detailed information about the PO such as:
  - PO attachments added by a Buyer
  - Payments and invoices made against a PO
  - Supplier’s name and address
  - Items ordered
  - The Bill-To and Ship-To addresses

Worklist Screen (See Screen shot #9)

- The worklist screen has a more robust sorting capability.
- You can sort your requisitions by the Next 5, Previous 5 or obtain a full list of all you requisitions.
- Items can be sorted by Who Sent The Notification, Subject, Date Sent and Type.
- You have the option to change your view notifications by:
  - Viewing All Your Notifications
  - FYI Notifications
  - Only Notifications Sent By You
  - Open Notifications
  - To Do Notifications

Coming Events

Please read your emails and check the RIAS website: http://rias.rutgers.edu for more information on the 11.5.10 upgrade. Over the next couple weeks, announcements will be made on the implementation, more screen shots will be provided and detailed instructions on using P2P with the new changes.
To review detailed materials on the changes related to the 11.5.10 upgrade go to the RIAS website [http://rias.rutgers.edu](http://rias.rutgers.edu) and follow the link to the 11.5.10 upgrade.
**Search and Select Screen (Screen shot #3)**

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the “Go” button.

**Edit Lines (Screen shot #4)**

**Attachment Tab (Screen shot #5)**
iProcurement Preferences Screen (Screen shot #6)

Log In Screen (Screen shot #7)
Requisitions View Screen (Screen shot #8 - part a)

View a PO (Screen shot #8 - part b)

View a Buyer Attachment (Screen shot #8 - part c)
View Invoices and Payments (Screen shot #8 - part d)

Worklist Screen –Next 5 (Screen shot #9 - part a)
Worklist Screen – Full List
(Screen shot #9 - part b)