
WFS UPGRADE – What’s New?

Since the primary purpose of the upgrade is related to infrastructure security, the system will function primarily the same as the previous version. Smart Doc processing and Financial Reporting will remain the same.

Some minor differences and new features are as follows:

Menu Related Items:

- **Main Menu:** The menu is now located across the top of the page. When you first login you will see a box that highlights menu changes. Once you are familiar with these changes you can remove the box by clicking the drop down in the upper right corner and clicking “Remove”. You can then customize the remaining boxes on the screen by moving them around to fill in the space:

Top Menu Features Description

Our menu has changed!

The menu is now located across the top of the page. Click on **Main Menu** to get started.

Highlights

Recently Used pages now appear under the Favorites menu, located at the top left.

Breadcrumbs visually display your navigation path and give you access to the contents of subfolders.

Menu Search, located under the Main Menu, now supports type ahead which makes finding pages much faster.

- **Favorites** – All your favorites will remain the same. However, the system will also add “recently viewed panels” to provide efficient navigation to common panels
- **Smart Doc Menu Icons** – Various menu items that were previously a drop down item on the “Save” and “Copy” buttons are now separate buttons as shown here:



- **Templates** – Templates can now be deleted using the “Settings” icon.



- **Personalize** – Customize is now labeled Personalize. Another name change.

Other Items/Features:

- **Type Ahead** – In various fields where there is a magnifying lookup glass, the system will now provide a feature that lists valid options based on what is being typed. You are able to click on the valid option once it appears and it will populate the field.
- **Suppliers** – Vendors are now labeled Suppliers. This is simply a name change.
- **Smart Doc Attachments** – Adding and deleting an attachment is now a button rather than a “+” and “-”.
- **Bypass** – There is a new Budget Check status labeled “Bypass” which can be ignored.
- **Assign Proxy** – While still on the home page as “Assign Proxy User”, the menu navigation has changed to Main Menu>Smart Solutions>Smart Workflow>User Preferences>Assign Proxy User. In addition, the user is now able to assign proxy by individual Smart Doc.
- **Journal Deletion** – In the past, once a journal was deleted it was completely removed from the system. In this version of WFS, a deleted

journal can still be retrieved via the Smart Doc. However, it will have a "Journal Header Status" of "Deleted" as noted below and it will no longer be reflected in Inquiry reports:

Document Sequence Number	Journal Header Status	Budget Checking Header Status	Source	Currency Code
blank)	Deleted	Not Chk'd	ONL	USD
blank)	Deleted	Not Chk'd	ONL	USD

Create Journal Entries

Journal Information			
Journal ID:	0000100910	Journal Date:	01/28/2016
Source:	ONL	Date Posted:	
Journal Status:	Deleted	Workflow Status:	No Request