

## RCUH Financial Portal – Release 1.44

### New Features

1. Security updates, including password expiration and automated logout.
2. User Profile updates, including a new field for Fiscal Administrator (FA) email in the Send Invoice In Duplicate To section, and an enhanced Delegate Account Access section.
3. Form enhancements, including the ability to add file attachments to a document after final approval, and a hidden Audit Information section.
4. Report enhancement for My Current User Assignments.

### Security Updates

#### Password Expiration

To strengthen security and be in line with industry best practices, passwords for the Financial Portal will expire every six (6) months, and users will be prompted to change their password.

Change Password for Pat PI (userpi)

Please change your password before continuing. Passwords expire after 6 months.

<p>Current Password</p> <input style="width: 95%; height: 25px;" type="password"/>	<p><b>New Password</b> <a href="#">Help</a></p> <p>Your password must be at least 8 characters long, have at least one alpha, one number and one special character (? , ! , @ , # , \$ , % , &amp; , etc ...)</p> <input style="width: 95%; height: 25px;" type="password"/>	<p><b>Confirm New Password</b></p> <input style="width: 95%; height: 25px;" type="password"/>
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Current passwords do NOT need to be changed at the time of this release in January 2019 unless you opt to do so.

#### Automated Lockout

To protect the Financial Portal from brute force attacks, a user account will be disabled if there are too many failed login attempts. Users will be able to change their passwords using “Forgot your password?”, or may contact RCUH Accounting for assistance. The password reset process is done via email, so please review your information in “Edit My Profile” to ensure that your email address is accurate.

The Research Corporation of the University of Hawaii

### Financial System Login

Too many failed login attempts. Please use 'Forgot your password?' to reset your password.

Username:

Password:

[Forgot your password?](#)

[Need Access?](#)

## User Profile Updates

### Send Invoice in Duplicate To (for Fiscal Administrators)

A new field for FA email address has been added to the Send Invoice In Duplicate To section. This information appears on the Purchase Requisition and Purchase Order – Vendor Copy.

**Send Invoice In Duplicate To** (Click Here to Collapse)

Name Mele Menehune	Department University of Hawaii	<b>FA Email</b> m.menehune@hawaii.edu
Address (number, street, and apt. or suite no.) 1234 Campus Road	City Honolulu	State HI
	Zipcode 96822	Country
<b>Default Remittance Information</b>		
Remittance Advice Name Mele Menehune	Remittance Advice Phone Number 808 956-5555	

### Delegate Account Access

The Delegate Account Access feature has been enhanced with the ability to delegate account access for a specified time period by entering a Start Date and/or End Date.

**Delegate Account Access** (Click Here to Collapse)

**Give Delegate Account Access to Another User(s)**

Existing User Account (FA/FAM Users Only)  Start Date  End Date  **Add**

Users Who Have Been Granted Access to This Account

Username	Full Name	User Type	Email	Start	End
Mele_Menehune	Mele Menehune	Fiscal Administrator Manager	m.menehune@hawaii.edu		01/31/2019

**Remove**

To delegate account access for an unlimited time period, leave the Start Date and End Date blank.

**Delegate Account Access** (Click Here to Collapse)

**Give Delegate Account Access to Another User(s)**

Existing User Account (FA/FAM Users Only)  Start Date  End Date  **Add**

Users Who Have Been Granted Access to This Account

Username	Full Name	User Type	Email	Start	End
Mele_Menehune	Mele Menehune	Fiscal Administrator Manager	m.menehune@hawaii.edu		

**Remove**

The Delegate Account Access feature has also been enhanced with a new section labeled Received Delegate Account Access from User(s), to provide additional information on users that have delegated their account access to you.

Received Delegate Account Access from User(s)					
Username	Full Name	User Type	Email	Start	End
Kainoa_Wright	Kainoa Wright	Principal Investigator	k.wright@hawaii.edu	02/01/2019	02/28/2019

## Form Enhancements

### File Attachments

Users now have the ability to upload and add file attachments to an approved document after final approval. File attachments added after final approval can also be removed. File attachments added before final approval cannot be removed.

**File Attachments:** (Click Here to Collapse)

Choose File Description

Send w/ePmt	File Attachment Name	Description	Upload Date	Size	
<input type="checkbox"/>	<a href="#">RCUH003.jpg</a>		12/05/2018 11:08 AM	180.24 KB	<input type="button" value="Remove"/>
<input type="checkbox"/>	<a href="#">RCUH020.jpg</a>		12/05/2018 11:08 AM	28.65 KB	<input type="button" value="Remove"/>
<input type="checkbox"/>	<a href="#">RCUH058.jpg</a>		12/05/2018 1:48 PM	115.32 KB	<input type="button" value="Remove"/>

**Audit Information:** (Click Here to Collapse)

Date/Time	User	User Type	Action
12/05/2018 11:03 AM	Pat PI	Principal Investigator	saved
12/05/2018 11:08 AM	Pat PI	Principal Investigator	File attachment added.
12/05/2018 11:08 AM	Pat PI	Principal Investigator	File attachment added.
12/05/2018 11:09 AM	Pat PI	Principal Investigator	submitted
12/05/2018 11:13 AM	Fred FA	Fiscal Administrator	approved
12/05/2018 11:19 AM	Lindy Higa	Central User	approved
12/05/2018 1:48 PM	Pat PI	Principal Investigator	File attachment added.
12/05/2018 1:50 PM	Pat PI	Principal Investigator	File attachment deleted.

### Audit Information

To save paper when forms are printed, the Audit Information section will default hidden (or collapsed). The Audit Information section can be expanded by clicking on it. By design, the Audit Information section will be included on the PDF version of the approved document.

### Remittance Information

In the Remittance Information section for all payment forms, if the vendor payment method is ACH or Card, the override address section will be hidden.

Vendor preferred payment type <b>ACH</b> as of <b>11/27/2017 11:25 AM</b>	<b>Questions on Remittance? - Call</b>
<input type="checkbox"/> Override vendor preferred payment type and return this check and remittance advice to fiscal office instead. <a href="#">What's This?</a>	Name <input type="text"/>
	Phone Number <input type="text"/>

To make the override address visible, select the checkbox for "Override vendor preferred payment type".

Vendor preferred payment type <b>ACH</b> as of <b>11/27/2017 11:25 AM</b>	<b>Questions on Remittance? - Call</b>
<input checked="" type="checkbox"/> Override vendor preferred payment type and return this check and remittance advice to fiscal office instead. <a href="#">What's This?</a>	Name <input type="text"/>
	Phone Number <input type="text"/>
The check will be mailed to this address:	To use a different address, fill out the fields below:
Name <b>UNIVERSITY OF HAWAII AT MANOA BOOKSTORE</b>	Name <b>UNIVERSITY OF HAWAII AT MANOA BOOKSTORE</b>
Address <b>2465 CAMPUS RD HONOLULU, HI 96822</b>	Attn. <input type="text"/>
	Street <b>1234 Campus Road</b>
	City <b>Honolulu</b> State <b>HI</b>
	Zip Code <b>96822</b> - <input type="text"/>

### Send Invoice in Duplicate To (for Fiscal Administrators)

A new section has been added to the Purchase Requisition form for Send Invoice in Duplicate To. This section is visible to all users, but can only be edited by FAs. This section will auto fill with information from the profile of the first FA who opens the document. To clear the information from this section, select the checkbox for "Leave Blank".

<b>Internal Special Instructions (Not printed on PO)</b>		<b>External Special Instructions (Printed on PO)</b>	
<b>A. Record of Competition <a href="#">explain</a></b> <input type="radio"/> Verbal Quotations <input type="radio"/> Written Quotations (Forward to FA Office) <input checked="" type="radio"/> Not Applicable		<input type="radio"/> Travel Agency Refund Notice <input type="radio"/> Other (Specify)	
<b>B. Confirming Purchase Order <a href="#">explain</a></b> (Provide Justification)		<b>Send Invoice In Duplicate To (Printed on PO)</b> <input type="checkbox"/> Leave Blank Name <b>Mele Menehune</b> Dept. <b>University of Hawaii</b> FA Email <b>m.menehune@hawaii.edu</b> Address <b>1234 Campus Road</b> City <b>Honolulu</b> State <b>HI</b> Zip Code <b>96822</b> - <input type="text"/> Country <input type="text"/>	
<b>C. Other Information</b> (Initial PI comments to FA)			



This information appears on the Purchase Order – Vendor Copy.

<p>This order is subject to the terms and conditions attached.</p> <p>Acceptance of this Purchase Order by Vendor, whether by written confirmation, shipping or otherwise initiating an action to provide goods or services ordered, is an acknowledgement and acceptance by Vendor that the attached terms and conditions are controlling over this Purchase order. Any and all other terms and conditions of Vendor shall not apply to this Purchase Order, unless the terms and conditions are agreed to by both RCUH and Vendor in writing, prior to Vendor's acceptance of this Purchase Order.</p>	<b>Subtotal</b>	\$1.00
	<b>Tax Rate</b>	%
	<b>Tax</b>	\$0.00
	<b>Estimated Shipping</b>	\$0.00
	<b>TOTAL</b>	\$1.00

**SPECIAL INSTRUCTIONS:**

<p><b>SEND INVOICE IN DUPLICATE TO</b>  Mele Menehune  University of Hawaii  m.menehune@hawaii.edu  1234 Campus Road  Honolulu HI 96822</p>	<p>_____</p> <p><b>FISCAL AUTHORIZED SIGNATURE</b></p>
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## Report Enhancements

### My Current User Assignments

This report has been updated to reflect all users who have access to the project account, including delegated users and secondary users with access to unlinked projects.