

Research Corporation of the  
University of Hawai'i  
Financial Portal 2.0 Release Notes  
2024

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## General Information

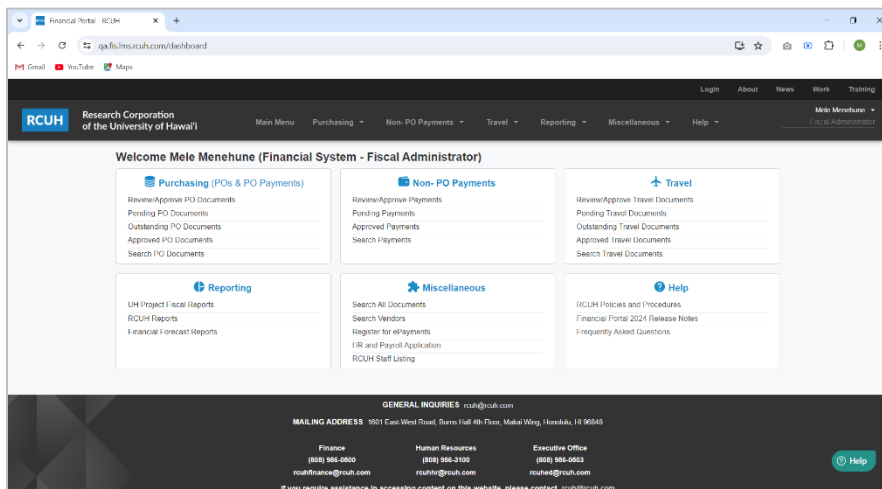
The existing “Legacy” Financial Portal has been updated with new features and functionality.

### New Features

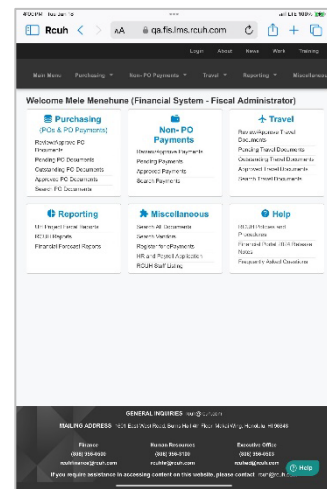
- Scale-to-fit Screen Responsiveness
- Help Widget
- Enhanced search functionality in Search PO Documents, Search Payments, Search Travel Documents, and Search Vendors
- Preview PDF Files
- Drag and Drop File Attachments
- Entering a Zip Code will autofill City and State
- Entering a Date

### Scale-to-Fit Screen Responsiveness

To provide a better user experience, displays will auto-adjust to fit the size of the device screen.

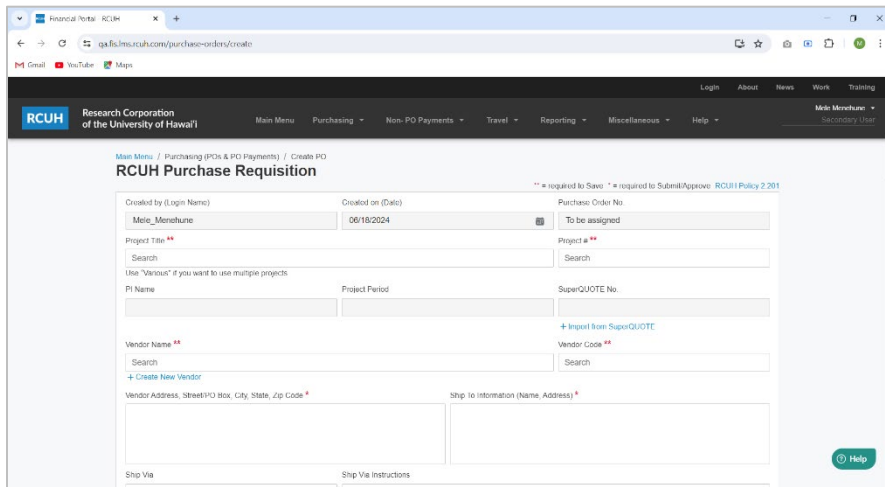


Example of the Main Menu dashboard view on a desktop computer.

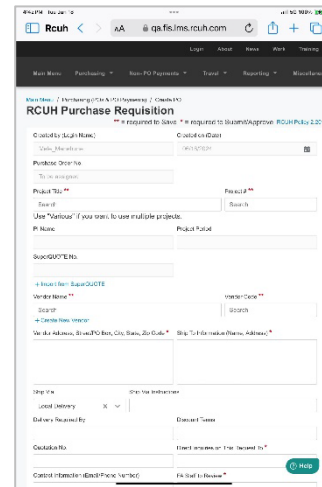


Example of the Main Menu dashboard view on a tablet device.

# RCUH Financial Portal 2.0 Release Notes 2024



Example of a Purchase Requisition form on a desktop computer.



Example of a Purchase Requisition form on a tablet device.

## Help Widget

Use our new Help Widget to search the knowledge base or to submit Help Desk tickets. To access the Help widget, click on the **? Help** icon on the bottom right of any page once you are logged in.

**Purchasing (POs & PO Payments)**

- Create PO
- Create PO Change Form
- Create PO Payment
- Pending PO Document
- Approved PO Documents
- Search PO Documents

**Non- PO Payments**

- Create Non-PO Payment
- Pending Payments
- Approved Payments
- Search Payments

**Travel**

- Create Travel Request
- Create Travel Completion Without Travel Request
- Create Travel Completion With Travel Request
- Pending Travel Documents
- Approved Travel Documents
- Search Travel Documents

**Reporting**

- UH Project Fiscal Reports
- RCUH Reports
- Financial Forecast Reports

**Miscellaneous**

- Search All Documents
- Search Vendors
- Register for ePayments
- HR and Payroll Application
- RCUH Staff Listing

**Help**

- RCUH Policies and Procedures
- Modernized Financial Portal User Guide

GENERAL INQUIRIES [rcuh@rcuh.com](mailto:rcuh@rcuh.com)

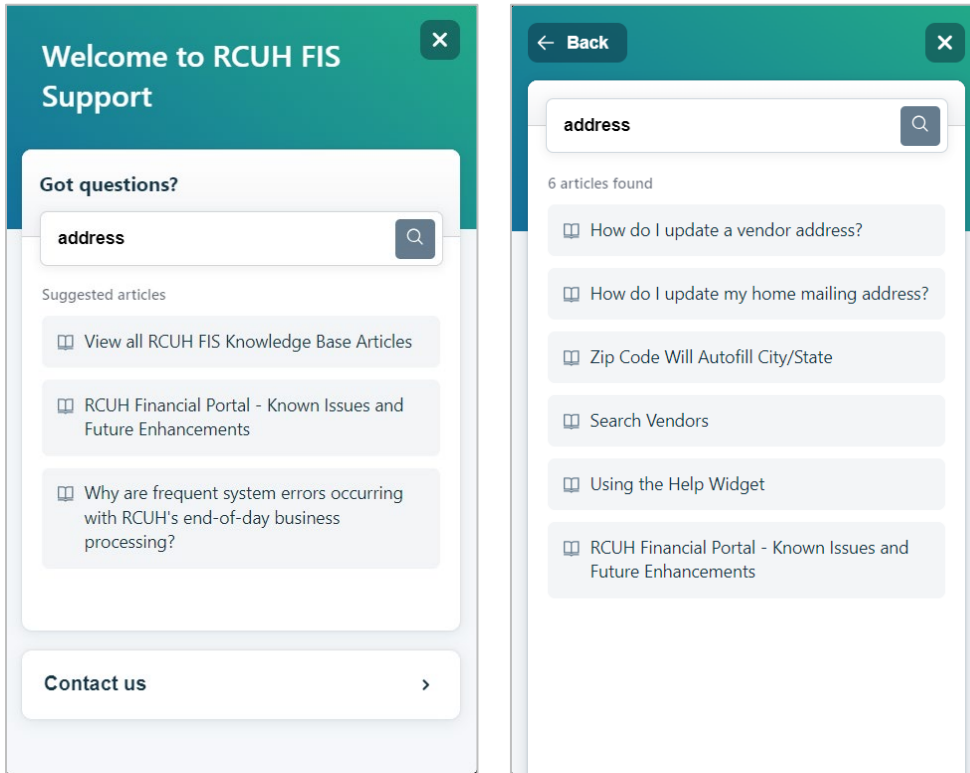
MAILING ADDRESS 1601 East-West Road, Burns Hall 4th Floor, Makai Wing, Honolulu, HI 96848

Finance (808) 956-0500 <a href="mailto:rcuhfinance@rcuh.com">rcuhfinance@rcuh.com</a>	Human Resources (808) 956-3100 <a href="mailto:rcuhhr@rcuh.com">rcuhhr@rcuh.com</a>	Executive Office (808) 956-0503 <a href="mailto:rcuhed@rcuh.com">rcuhed@rcuh.com</a>
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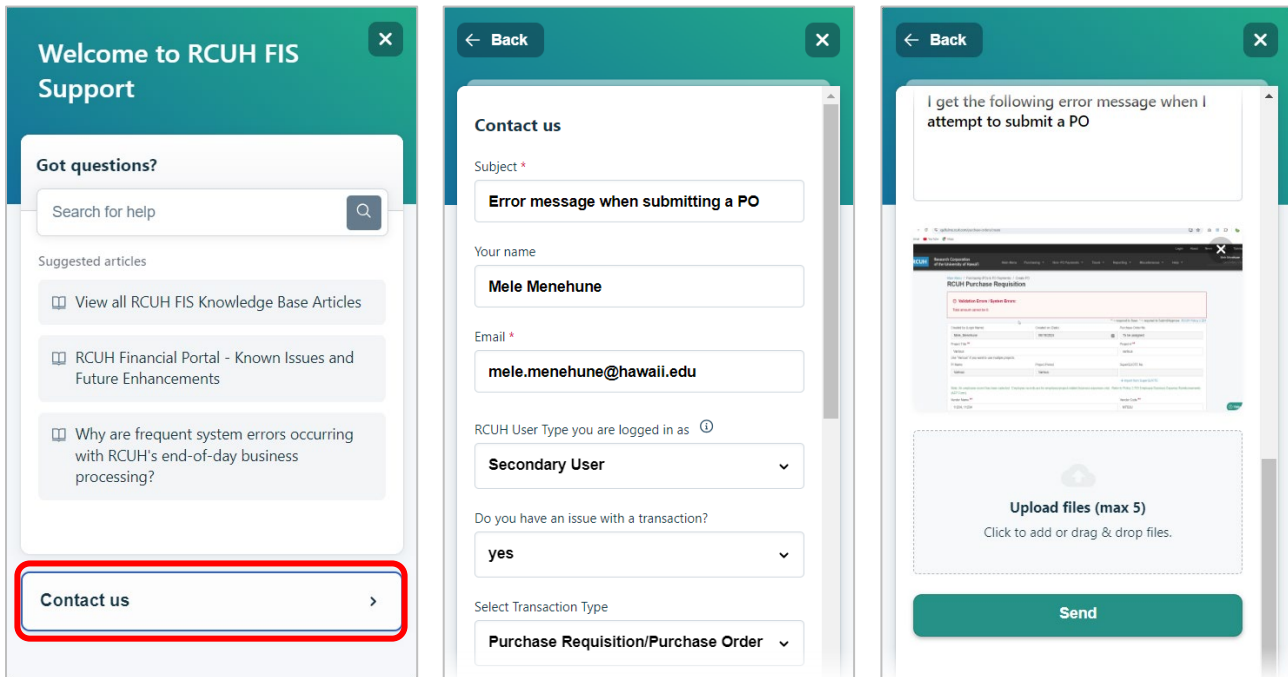
If you require assistance in accessing content on this website, please contact [rcuh@rcuh.com](mailto:rcuh@rcuh.com)

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Search the knowledge base by entering a key word in the Got Questions? Search bar



To submit a Help Desk ticket, click on **Contact us** and complete all applicable fields with as much detail as possible and include screen shots so that our Help Desk agents can best assist you.



Help Desk ticket fields to complete:

- **Subject:** Brief description of the issue
- Your **Name** and **Email Address**
- **RCUH User Type:** Use the drop-down list to choose the user type you are logged in as.
- **Do you have an issue with a transaction?**
  - Choose Yes or No
  - If Yes, enter information into the corresponding fields that dynamically appear.
    - Transaction Type
    - Document Number OR Vendor Name and \$ amount
- **Do you have an issue with a report?**
  - Choose Yes or No
  - If Yes, enter information into the corresponding fields that dynamically appear.
    - Report Type
    - Project Account Number
- **Describe your question or issue in detail:** Enter a detailed description of your issue.
- **Take screenshot:** Use the screenshot feature to include an image of your issue.
- **Upload files:** Use the upload feature to include files of your issue if applicable.
- Click on **Send**

## Search PO Documents, Search Payments, Search Travel Documents, Search Vendors

Search PO Documents, Search Payments, Search Travel Documents and Search Vendors have been enhanced with additional search functionality which are covered in their respective sections in these Release Notes. The Search listing screens will default to display all transaction documents or vendors prior to inputting any search criteria.

Req No	Doc No	Type	Project #	Vendor Name	Amount	Status	Modified date	FA Staff	PI Name
169988	-	Auth For Premit	611262	FIRST HAWAIIAN BANK BANKCARD CENTER	\$766.99	Final	04/25/2024 11:40 AM	Charles Luk	Salaha, Mchan
1701524	LFF-489	Non Emp Exp	611088	SIM, SHI	\$1,125.00	Final	04/24/2024 03:32 PM	HK	Nguyen, Thuong
1701384	-	Auth For Premit	4502866	ABC CORPORATION	\$1.00	Pending - Additional Info Requested	04/05/2024 04:46 PM	Glenn Yee	Nguyen, Thuong
1700784	-	Auth For Premit	6112617	COHEN, HYAGUHA R	\$2,000.00	Pending FA Approval	03/26/2024 12:54 AM	Thuong@gmail.com	Nguyen, Thuong
1700730	-	Patsy Cash	4506004	DRURY, CRAWFORD R	\$20.00	Pending PI Submittal	03/22/2024 03:00 PM	Glenn Yee	Nguyen, Thuong
1700728	-	Piers Auto	4506004	TURANO, HELEN	\$10.00	Pending PI Submittal	03/21/2024 06:20 PM	Aaa	Nguyen, Thuong
1700728	-	Non Emp Exp	4505067	RAINBOW MARKETING	\$312.50	Pending - Additional Info Requested	03/21/2024 04:44 PM	Aaa	Nguyen, Thuong
1700699	-	Auth For Premit	4505827	CASTILLO, JAKE H	\$20.00	Pending PI Submittal	03/13/2024 09:28 PM	Phi Thuong	Lock, Theresa
1700642	-	Auth For Premit	4505468	BIG CITY DINER	\$1.00	Pending PI Submittal	03/05/2024 02:02 PM	Glenn Yee	Nguyen, Thuong
1700699	-	Auth For Premit	6115000	NGUYEN, THUONG	\$10.00	Pending PI Submittal	02/15/2024 09:50 PM	Phi Thuong	Nguyen, Thuong
1700624	-	Piers Auto	6112757	THOMAS, DONALD M	\$34,060.00	Pending - Additional Info Requested by RCUH	11/20/2023 10:22 AM	Mele Menehune	BrooksPI, Male
1700623	M011351	Piers Auto	6112757	DUDLEY, MELANIE L	\$32,750.00	Pending RCUH Approval	11/20/2023 10:21 AM	Mele Menehune	BrooksPI, Male
1700622	M042880	Piers Auto	4506245	ANDERSON TASARINO, KELLEY L	\$21.62	Pending - Additional Info Requested	11/20/2023 10:12 AM	Mele Menehune	BrooksPI, Male
1700621	-	Auth For Premit	4506236	FEDEX	\$7.18	Pending FA Approval	11/17/2023 04:30 PM	JANICE KAM	BrooksPI, Male
1700616	-	Auth For Premit	6108706	OCEANIC TIME WARNER CABLE LLC	\$25,000.01	Pending RCUH Approval	11/17/2023 03:28 PM	Mele Menehune	BrooksPI, Male
1700616	-	Auth For Premit	4506828	CASTILLO, JAKE	\$10.00	Pending FA Approval	10/26/2023 11:56 PM	Thuong	Lock, Theresa
1700615	-	Auth For Premit	4506828	CASTILLO, JAKE	\$20.00	Pending FA Approval	10/26/2023 11:51 PM	Thuong	Lock, Theresa
1700326	-	Auth For Premit	4506783	VERIZON WIRELESS	\$452.82	Final	07/19/2023 12:41 PM	JANICE KAM	HONARVAR, SHAYA
1700328	-	Auth For Premit	4506677	VERIZON WIRELESS	\$599.39	Final	07/19/2023 12:41 PM	JANICE KAM	HONARVAR, SHAYA
1700331	-	Auth For Premit	4506236	HE RETAIL LLC	\$313.71	Final	07/19/2023 12:41 PM	JANICE KAM	HONARVAR, SHAYA

Example of the Search Payments listing screen.

## Preview PDF Files

Users may now preview PDF files in the Financial Portal before downloading the file. In the Approved listing screens, when you click **View** in the PDF column, a pop up of the PDF file will be displayed. You can then use the icons on the upper border of the PDF preview tool, to navigate the pages, zoom in and out, rotate, or download the file. This functionality also exists with PDF files in the File Attachment section.

The screenshot displays a PDF preview of a purchase order from RCUH. The document includes a header with the RCUH logo and name, followed by a table of line items. The table has columns for Line, Sub Proj., B/C, Sub B/C, Description, Qty., Unit, Unit Price, and Extension. The first line item is for a 'test' with a quantity of 1 and a unit price of \$100.00. The document also includes a 'Subtotal' of \$100.00, a 'Tax Rate' section, and an 'Estimated Shipping' of \$0.00. The total amount is \$100.00. The PDF viewer interface includes navigation icons at the top right and a page indicator '1 of 20' at the top center.

Example of preview PDF functionality in the Financial Portal.



## Drag and Drop File Attachments

The File Attachments section has been enhanced with the ability to drag and drop file attachments onto the transaction form. Only one file at a time can be dragged and dropped into this section. After dropping the file, click on the **Upload** button to attach the file.

The screenshot shows the 'File Attachments' section with a collapse arrow and the text 'Click here to Collapse'. Below is a dashed box with a cloud icon and the text 'Drop files to attach or Browse'. A table below contains one row with the following data:

File Attachments Name	Description	Upload Date	Size	
<a href="#">Test Document - Demo.docx</a>		05/28/2024 10:38 AM	13 KB	<input type="button" value="Upload"/> <input type="button" value="Remove"/>

Below the table is the text: 'Please click Upload to save your document.'

A description for the file attachment can be entered after the file has been dropped or uploaded into the File Attachment section.

The screenshot shows the 'File Attachments' section with a collapse arrow and the text 'Click here to Collapse'. Below is a dashed box with a cloud icon and the text 'Drop files to attach or Browse'. A table below contains one row with the following data:

File Attachments Name	Description	Upload Date	Size	
<a href="#">test_document__demo.docx</a>	Enter description text here after dropping or loading file	06/19/2024 10:53 AM	12 KB	<input type="button" value="Remove"/>

Below the table is the text: 'Please click Upload to save your document.'

## Entering a Zip Code Will Autofill City and State

When entering an address on a Vendor Registration or on the User Profile (for default Purchase Requisition/Payment Information/Default Ship To), as you input the Zip Code, the City and State fields will autofill according to the Zip Code entered. Please make sure to check the City and State fields after you have input the Zip Code to confirm the values are correct. You are able to change and manually update the City, State values if needed.

**Default Ship To Information**

Name  Department  FA Email

Address (number, street, and apt. or suite no.)

City  State  Zipcode  Country

## Entering a Date

When entering a date value into a transaction form, you can use the Calendar tool to select a date or manually enter a date in a MM/DD/YYYY format.

The image shows a date selection interface. At the top, there is a text input field containing "06/30/2024" and a calendar icon. Below this is a calendar grid for June 2024. The calendar has a header with navigation arrows, the month "June", and the year "2024". The days of the week are abbreviated as Su, Mo, Tu, We, Th, Fr, Sa. The dates are arranged in a grid. The date "30" is highlighted with a blue background, indicating it is the selected date.

June 2024						
Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

## Edit My Profile

### New Features

- Updating Your Password
- Resetting Your Password

### Updating Your Password

When updating your password, you will now be asked to enter your current password *and* new password. When inputting your new password, you'll be prompted to follow the password requirements.

The screenshot shows the 'Edit My Profile' page with the following fields and information:

- First Name \***: [Input field]
- Last Name \***: [Input field]
- MI**: [Input field]
- Username \***: [Input field]
- Email \***: [Input field]
- Default User Type \***: [Dropdown menu showing 'Central User']
- Current Password**: [Input field with masked characters]
- New Password**: [Input field with masked characters and a red border]
- Password Changed**: [Text box showing '03/25/2024 07:52 AM']
- Last Login**: [Text box showing '05/06/2024 10:19 PM']

Below the 'New Password' field, the following requirements are listed:

- ✓ Must have at least 8 characters
- ✓ Must have at least 1 lowercase
- ✗ Must have at least 1 uppercase
- ✗ Must have at least 1 number
- ✗ Must have at least 1 special characters !, @, #, \$, %, ^, &, or \*

### Resetting Your Password

If you have forgotten your password or need to reset your password, click on the **Forgot Password?** link on the login screen. Enter your username and click on **Send Reset Link**.

The screenshot shows the 'Financial Portal Login' page with the following content:

Research Corporation of the University of Hawai'i

## Financial Portal Login

Enter your Username and we'll send you instructions to reset your password.

Username \*

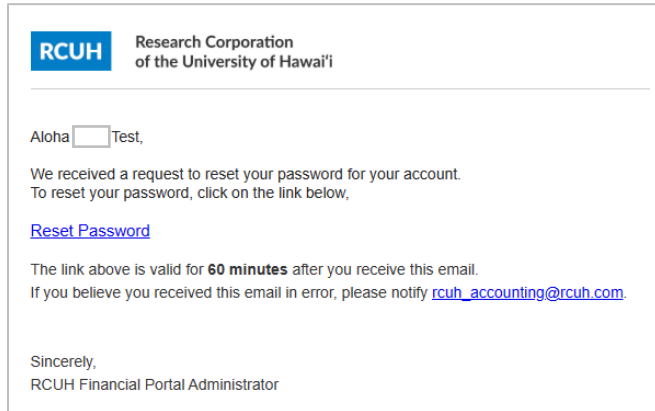
Demo\_User

**Send Reset Link**

[Return to Login Page](#)

Don't have an account? [Learn more](#)

You will receive an email from the RCUH Financial Portal Administrator with a link to reset your password.



## Purchase Requisitions, PO Payments, and PO Changes

The Purchasing menu allows users to create, submit, and approve Purchase Orders, PO changes, and PO Payments. The transaction forms will look similar to the existing Legacy Financial Portal with a few new features.

### New Features

- Enhanced search functionality with additional search options
- Validation messages appear as user is filling out forms
- Terms and Conditions included on the PO Vendor Copy
- PO Change – Original Order section will default to be collapsed
- PO Payment - Equipment Inventory section has been expanded to 20 items

### Search PO Documents

Search PO Documents has been enhanced with additional search functionality. On any of the PO listing screens, click on **Search** to display the search options. Users now have the ability to search for specific values in the column heading, including PO Number, Project #, Vendor Name, FA Staff, PI Name, or Modified Date. Users also have the ability to filter by Document Type and/or Status. In the Approved PO Documents listing screen, users have the ability to search by Check Date or Check Number, or filter by Payment Type.

Main Menu / Purchasing (POs & PO Payments) / PO Documents

Workflow View  
All PO Documents

Search

**Search**

Search by PO Number      Search by Project #      Search by Vendor Name

Search      Search      Search

Search by FA Staff      Search by PI Name      Modified Date

Search      Search      From - To

Document Type

PO       PO Change Form       PO Payment

Status

Pending PI Submittal       Pending FA Approval       Pending RCUH Approval       Disapproved

Pending - Additional Info Requested       Pending - Additional Info Requested by RCUH       Final

Clear      Apply

## Validation Messages

The Financial Portal will flag fields that are required as the user is filling out the form instead of after the user clicks Save or Submit. When the user clicks within a field and does not input the required information, a validation message will display as soon as the user clicks out of the field.

Main Menu / Purchasing (POs & PO Payments) / Create PO

### RCUH Purchase Requisition

**\*\* = required to Save \* = required to Submit/Approve RCUH Policy 2.201**

Created by (Login Name)      Created on (Date)      Purchase Order No.

June\_Smith      05/06/2024      To be assigned

Project Title \*\*      Project # \*\*

Search      Search

Use "Various" if you want to use multiple projects.      This field is required

This field is required

PI Name      Project Period      SuperQUOTE No.

          + Import from SuperQUOTE

Vendor Name \*\*      Vendor Code \*\*

Search      Search

+ Create New Vendor      This field is required

This field is required

Vendor Address, Street/PO Box, City, State, Zip Code \*      Ship To Information (Name, Address) \*

     HI

## Terms and Conditions Included on the PO Vendor Copy

The following RCUH Terms and Conditions will now be included on the Purchase Order Vendor Copy.

- Attachment 31, General Terms and Conditions Applicable to All Purchase Orders
- Attachment 32a, Terms and Conditions Applicable to Contract/Subcontracts/Purchase Orders (Under Federal Grants)
- Attachment 32b, Federal Provisions Government Subcontract Provisions Incorporated in all Subcontracts/Purchase Orders (Under Federal Prime Contracts)
- Attachment 32c, Federal Provisions Applicable When Subcontractor (Commercial Entity) is in Possession of Government Property Government Subcontract Provisions Incorporated in All Subcontracts/Purchase Orders (Under Cost-Type Prime Cost Reimbursable Contracts)
- Attachment 32d, Federal Provisions Applicable When Subcontractor (Education or Nonprofit) is in Possession of Government Property Government Subcontract Provisions Incorporated in All Subcontracts/Purchase Orders (Under Cost-Type Prime Cost Reimbursable Contracts)

**RCUH Research Corporation of the University of Hawaii**

Date: 05/21/2024 | **IMPORTANT** OUR PURCHASE ORDER NUMBER MUST APPEAR ON ALL INVOICES AND PACKAGES | PURCHASE ORDER NO.: Z10207321

**VENDOR:** 1320 AUTOMOTIVE LLC  
785 LOWER MAIN ST  
WAILUKU, HI 96793

**SHIP ITEMS TO:** John  
13h  
245H  
Lot AP 12345 US

Line	Sub Prg	B/C	Sub B/C	Description	Qty	Unit	Unit Price	Extension	
1			4550	test	1		\$100.00	\$100.00	
								<b>Subtotal</b>	\$100.00
								<b>Tax Rate</b>	%
								<b>Tax</b>	\$0.00
								<b>Estimated Shipping</b>	\$0.00
								<b>TOTAL</b>	\$100.00

**SPECIAL INSTRUCTIONS:**  
SEND INVOICE DUPLICATE TO:  
A  
Dr2  
aj@gmail.com  
29 HD  
LA AK 12345  
US

**TO AVOID LATE PAYMENT:**  
Indicate Purchase Order No. and your Federal TAX ID NO. (SSN/EN) on invoice.  
Project No: 455695  
P.O. Initiated by: ly\_nguyen

**GENERAL TERMS AND CONDITIONS Applicable to All Purchase Orders**

- INVOICES must be rendered in duplicate not later than the day following shipment in accordance with Sections 16047, 16050 of the IRS Code. Vendor shall provide the Research Corporation of the University of Hawaii (RCUH) with its Federal Taxpayer Identification Number and its (a) Hawaii General Excise/Use Identification Number, or (b) its Social Security Number on the invoice.
- EXTRA CHARGES: No additional charges of any kind, including charges for boxing, packing, cartage, or other extras will be allowed unless specifically agreed to in writing, in advance by RCUH.
- PAYMENT: C.O.D. shipments will not be accepted. Drafts will not be honored. In accordance with Section 103-10, Hawaii Revised Statutes, payment to vendors shall be made no later than thirty (30) calendar days following receipt of invoice or satisfactory receipt of goods and services, whichever is later.
- PRICE: If price is not stated in this order, it is agreed that goods shall be billed at the price last quoted, or billed at the prevailing market price, whichever is lower. This order must not be filled at a higher price than last quoted or charged without RCUH's specific authorization.
- APPLICABLE LAWS: Vendor represents that the merchandise covered by this order was not manufactured, and is not being sold or priced, in violation of any federal, state, or local law.
- FAIR LABOR STANDARDS ACT: Vendor agrees that goods shipped to RCUH under this order will be produced in compliance with the Fair Labor Standards Act.
- WARRANTY SPECIFICATIONS: Vendor expressly warrants that all materials and articles covered by this order or other description or specification furnished by RCUH will be in exact accordance with such order, description, or specification, free from defects in material and/or workmanship, and merchantable.
- CANCELLATION: RCUH reserves the right to cancel all or any part of the undelivered portion of this order if Vendor does not make deliveries as specified, time being of the essence for this order, or if Vendor breaches any of the terms hereof including, without limitation, the warranties of Vendor.
- ACCEPTANCE: The items or services covered by this order shall be furnished by Vendor subject to all the terms and conditions set forth in this order. Vendor, in accepting this order, agrees to be bound by and to comply with all particulars and no other terms or conditions shall be binding upon the parties unless hereafter accepted by them in writing. Written acceptance or shipment of all or any portion of the items or services covered by this order shall constitute unqualified acceptance of all its terms and conditions. The terms of any proposal referred to in this order are included and made part of the order only to the extent of specifying items, the nature of the items, the services ordered, the price thereof and delivery date, and then only to the extent that such terms are
- endanger performance, and does not cure such failure within a reasonable period of time, or fails to make deliveries of the items or services or perform the services within the time specified or any written extension thereof. In such event, the RCUH may purchase or otherwise secure items or services and, except as otherwise provided herein, Vendor shall be liable to the RCUH for any excess cost incurred by the RCUH. If, after notice of termination for default, the RCUH determines that Vendor was not in default or that the failure to perform this order is due to causes beyond the control and without the fault or negligence of Vendor (including, but not restricted to, acts of God or the public enemy, acts of the RCUH, acts of Government, fires, floods, epidemics, quarantine restrictions, strikes, freight embargoes, unusually severe weather, and delays of subcontractor or supplier due to such causes and without the fault or negligence of the subcontractor or supplier), termination shall be deemed for the convenience of the RCUH, unless the RCUH shall determine that the items or services covered by this order were obtainable from other sources in sufficient time to meet the required delivery schedule. If the RCUH determines that Vendor has been delayed in the work due to causes beyond the control, and without the fault or negligence, of Vendor, the RCUH may extend the time for completion of the work called for by this order, when promptly applied for in writing by Vendor, and if such delay is due to failure of the RCUH, not caused or contributed to by Vendor, to perform services or deliver property in accordance with the terms of the order, the time and price of the order shall be subject to change under the Changes article. Sole remedy of Vendor in event of delay by failure of the RCUH to perform shall, however, be limited to any money actually and necessarily expended in the work during the period of delay, solely by reason of delay. No allowance will be made for anticipated profits. The rights and remedies of the RCUH provided in this article shall not be exclusive and are in addition to any other rights and/or remedies provided by law or under this order. As used in this article, the word "Vendor" includes Vendor and Vendor's subcontractors at any tier.
- LIABILITY FOR RCUH FURNISHED PROPERTY: Vendor assumes complete liability for any tools, articles or material furnished by the RCUH to Vendor in connection with this order, and Vendor agrees to pay for all such tools, articles, or materials spoiled by Vendor, or not otherwise accounted for to the RCUH's satisfaction. The furnishing to Vendor of any tools, articles, or materials in connection with this order shall not, unless otherwise expressly provided, be construed to vest title with Vendor.
- EQUAL OPPORTUNITY AND AFFIRMATIVE ACTION CERTIFICATION: Vendor agrees that the equal opportunity clause, which prohibits discrimination on the basis of race, color, religion, sex, or national origin, and the affirmative action requirements of Executive Order 11246, as amended, and implementing regulations at 41 CFR 60, are incorporated by reference in each non-exempt

Example of a Purchase Order Vendor Copy with General Terms and Conditions

## PO Change – Original Order Section Default to Collapsed

When viewing a Purchase Order Change Form, the Original Order section will be collapsed by default. Click on the Original Order header to expand the section.

Main Menu / Purchasing (POs & PO Payments) / Create PO Change Form

### RCUH Purchase Order Change Form(Increase/Decrease Balance)

\*\* = required to Save \* = required to Submit/Approve RCUH Policy 2.01

Created on (Date) 02/25/2024	Purchase Order No. (Original) [ ]	Purchase Order No. (New) [ ]
Project Title ** [ ]	Project # ** [ ]	
PI Name [ ]	Project Period 04/01/2020 - 02/28/2025	SuperQUOTE No. [ ]
Vendor Name ** CHEESEBURGER IN PARADISE WAIKIKI LP	Vendor Code ** M6CSA	
Vendor Address, Street/PO Box, City, State, Zip Code * 73875 HWY 70 PORTOLA, CA 96122	Ship To Information (Name, Address) * d	
Ship Via Local Delivery	Ship Via Instructions [ ]	
Delivery Required By [ ]	Discount Terms [ ]	Quotation No. [ ]
Direct Inquiries on This Request To * dd	Contact Information (Email/Phone Number) [ ]	FA Staff to Review * dd

Original Order Click here to Expand

Change Order to Read

## Equipment Inventory Section

For PO Payments, the Equipment Inventory section has been enhanced to allow the input of up to 20 items. Select the desired number of items in the drop-down list.

Equipment Inventory: Click here to Collapse

Number of Items  
15

	Item #2	Item #3	Item #4	Item #5
5				
10				
15				
20				
2. BRAND NAME & MODEL NUMBER - If none, state NONE				
3. SERIAL NUMBER - If none, state NONE				

## Non-PO Payments

The Non-PO Payments menu allows users to create, submit, and approve Authorization for Payment Forms, Non-Employee Expense Payment Forms, Personal Auto Mileage Vouchers, and Petty Cash Summary Sheets. The transaction forms will look similar to the existing Legacy Financial Portal with a few new features.

### New Features

- Enhanced search functionality with additional search options
- Validation messages appear as user is filling out forms
- Authorization for Payment Form - Equipment Inventory section has been expanded to 20 items

### Search Payment Documents

Search Payment Documents has been enhanced with additional search functionality. On any of the Non-PO Payments listing screens, click on **Search** to display the search options. Users now have the ability to search for specific values in the column heading, including Request Number, Document Number, Vendor Name, Project Number, FA Staff, PI Name, or Modified Date. Users also have the ability to filter by Document Type and/or Status. In the Approved Payments listing screen, users have the ability to search by Check Number, Check Date, or filter by Payment Method.

The screenshot displays the 'Non-PO Payments' search interface. At the top, there is a breadcrumb 'Main Menu / Non-PO Payments' and a 'Workflow View' dropdown menu currently set to 'Pending Payments'. Below this is a 'Search' button with a magnifying glass icon. The main search area is titled 'Search' and contains several filter sections:

- Search by Request Number:** A text input field with the placeholder 'Search'.
- Search by Document Number:** A text input field with the placeholder 'Search'.
- Search by Vendor Name:** A text input field with the placeholder 'Search'.
- Search by Project Number:** A text input field with the placeholder 'Search'.
- Search by FA Staff:** A text input field with the placeholder 'Search'.
- Search by PI Name:** A text input field with the placeholder 'Search'.
- Modified Date:** A date range selector with 'From - To' and a calendar icon.

Below the search fields are two sections of checkboxes:

- Document Type:**
  - Non Emp Expense
  - Auth For Payment
  - Pers Auto
  - Petty Cash
- Status:**
  - Pending PI Submittal
  - Pending FA Approval
  - Pending RCUH Approval
  - Disapproved
  - Pending - Additional Info Requested
  - Pending - Additional Info Requested by RCUH
  - Final

At the bottom right of the search area, there are two buttons: 'Clear' and 'Apply'.



## Validation Messages

The Financial Portal will flag fields that are required as the user is filling out the form instead of after the user clicks Save or Submit. When the user clicks within a field and does not input the required information, a validation message will display as soon as the user clicks out of the field.

Main Menu / Non-PO Payments / Create Non-PO Payments

Research Corporation of the University of Hawaii

### Authorization for Payment Form

**\*\* = required to Save \* = required to Submit**

Created by (Login Name) June_Smith	Created on (Date) 05/06/2024	Payment Req. No. To be assigned
Payee's Name ** Search <a href="#">+ Create New Vendor</a> <b>This field is required</b>	Vendor Code ** Search <b>This field is required</b>	Document Number
Payee's Permanent Address, Street/PO Box, City, State, Zip		

## Equipment Inventory Section

For Authorization for Payment Forms, the Equipment Inventory section has been enhanced to allow the input of up to 20 items. Select the desired number of items in the drop-down list.

Equipment Inventory: [Click here to Collapse](#)

Number of Items  
15

	Item #2	Item #3	Item #4	Item #5
2. BRAND NAME & MODEL NUMBER - If none, state NONE				
3. SERIAL NUMBER - If none, state NONE				

## Travel Request and Travel Completion

The Travel menu allows users to create, submit, and approve Travel Requests, Travel Completions without Travel Requests, and Travel Completions with Travel Requests. The transaction forms will look similar to the existing Legacy Financial Portal with a few new features.

### New Features

- Enhanced search functionality with additional search options.
- Validation messages appear as user is filling out forms
- Entering Departure and Arrival Dates and Times

### Search Travel Documents

Search Travel Documents has been enhanced with additional search functionality. On any of the Travel document listing screens, click on **Search** to display the search options. Users now have the ability to search for specific values in the column heading, including Req/Doc No, Document Number, Project #, Traveler Name, Departure Date, Return Date, FA Staff, PI Name, or Modified Date. Users also have the ability to filter by Document Type and/or Status. In the Approved Travel Documents listing screen, users have the ability to search by Check Number, Check Date, or filter by Payment Type.

The screenshot displays the 'Search' interface for 'Pending Travel Documents'. At the top, there is a breadcrumb 'Main Menu / Travel' and a 'Workflow View' dropdown menu set to 'Pending Travel Documents'. Below this is a 'Search' button with a magnifying glass icon. The main search area is titled 'Search' and contains several filter sections:

- Search by Req/Doc No**: A text input field with a 'Search' button.
- Search by Document Number**: A text input field with a 'Search' button.
- Search by Project Number**: A text input field with a 'Search' button.
- Search by Traveler Name**: A text input field with a 'Search' button.
- Search by FA Staff**: A text input field with a 'Search' button.
- Search by PI Name**: A text input field with a 'Search' button.
- Departure Date**: A date range selector with 'From - To' and a calendar icon.
- Return Date**: A date range selector with 'From - To' and a calendar icon.
- Modified Date**: A date range selector with 'From - To' and a calendar icon.
- Document Type**: Two radio buttons labeled 'Comp' and 'Req'.
- Status**: A grid of checkboxes for various statuses: 'Pending PI Submittal', 'Pending - Additional Info Requested', 'Pending FA Approval', 'Pending - Additional Info Requested by RCUH', 'Pending RCUH Approval', 'Final', and 'Disapproved'.

At the bottom right of the search area, there are two buttons: 'Clear' and 'Apply'.

## Validation Messages

The Financial Portal will flag fields that are required as the user is filling out the form instead of after the user clicks Save or Submit. When the user clicks within a field and does not input the required information, a validation message will display as soon as the user clicks out of the field.

The screenshot shows the 'Travel Request and Advance Form' interface. At the top, it says 'Main Menu / Travel / Create Travel Request and Advance Form' and 'Research Corporation of the University of Hawaii'. The form title is 'Travel Request and Advance Form'. Below the title, there are three fields: 'Created by (Login Name)' with the value 'June\_Smith', 'Created on (Date)' with the value '05/06/2024', and 'Document Number' with the value 'To be assigned'. Below these are two search fields: 'Employee Name \*\*' and 'Vendor Code \*\*'. Both search fields have a red border and a red message below them that says 'This field is required'. There is also a '+ Create New Vendor' link under the Employee Name field. A legend at the top right indicates that '\*\* = required to Save' and '\* = required to Submit'.

## Departure and Arrival Time Options

In the Trip Itinerary section, users can use the Calendar tool to select Departure and Arrival dates and times, or manually enter a date and time. Dates must be entered in a MM/DD/YYYY format. Presently, the calendar tool offers time periods in 10-minute intervals. Users have the flexibility to enter the precise time and disregard the time options available on the right side of the calendar.

The screenshot shows the 'PROPOSED TRIP ITINERARY' section. It features a table with columns: Leg, Destination \*, Arrival/Departure Date and Time \*, Calc Days, Minus Days, Bus Days, Fed. Allow Rate, Estimated Rate, Excess Amount, Days Claim, and Cost. The first row shows a departure from Honolulu, HI on 06/30/2024 at 12:00 AM. Below this, there is a calendar tool for selecting dates and times. The calendar is for June 2024 and shows a grid of dates from 26 to 30. The time options are listed on the right side of the calendar, ranging from 2:40 PM to 3:50 PM in 10-minute intervals. The calendar tool is currently open, showing the date 19 and 30 highlighted. Below the calendar, there are fields for 'M&IE' and 'Lodging', and a 'TOTALS' field showing '\$0.00'. At the bottom, there is an 'EXPENDITURES' section with a table for tracking expenses.

## Search Vendors

The Search Vendors feature in the Miscellaneous menu provides users the ability to search RCUH vendor records. Search vendors will look similar to the existing Legacy Financial Portal with a few new features.

## New Features

- Enhanced search functionality with additional search options
- Refresh button

## Search Vendors

On the Search Vendor listing screen, click on **Search** to display the search options. In addition to searching by Vendor Name or Code, you can now search by Additional Info, Address, ST, T/C or filter by Payment Type.

The screenshot shows the 'Search' form for vendors. It includes search fields for Code, Vendor Name, Additional Info, and Address. There are also dropdown menus for 'Search by ST' and 'Search by T/C'. Below these are radio buttons for 'Payment Type' with options: Check, ACH, Card, and TBD. 'Clear' and 'Apply' buttons are at the bottom right.

## Refresh Button

There is now a Refresh button on the vendor listing screen to easily refresh the listing with newly added vendors.

The screenshot shows the vendor listing screen with a table of vendors. A red box highlights a 'Refresh' button in the top right corner of the listing area. The table has columns for Code, Vendor Name, Additional Info, Address, ST, T/C, and Pmt Type.

Code	Vendor Name	Additional Info	Address	ST	T/C	Pmt Type
M74YG	WORKSTAR INJURY RECOVERY CENTER		PO BOX 30460 HONOLULU, HI 96820 0460	W9	R	TBP
M74YF	KILA, JOSIAH K		45-1116 MAKAMAE ST KANEHOE, HI 96744		U	TBD
M74YE	YUNU, INC		1605 MONTVALE GRANT WAY CARY, NC 27519		C	TBP
M74YD	ANITEMA, KALESITA T		405 ANI ST Apt 9 KAHULUI, HI 96732	W9	S	TBP
M74YC	ALOHA BACKFLOW SERVICES LLC		P.O. BOX 1295 PUUNENE, HI 96784		C	TBD
M74YB	MCPHERSON, LIAH L		108 POLOKE PLACE HONOLULU, HI 96822		O	TBD
M74YA	JUDD, LAAKEA		2467 Kinoole Ave HILO, HI 96720		U	TBD
M74Y9	INDIVIDUAL		aaaa LOS ANGELES, CA 90002			TBD