

March 24, 2023

# Vroozi March 2023 Release Notes

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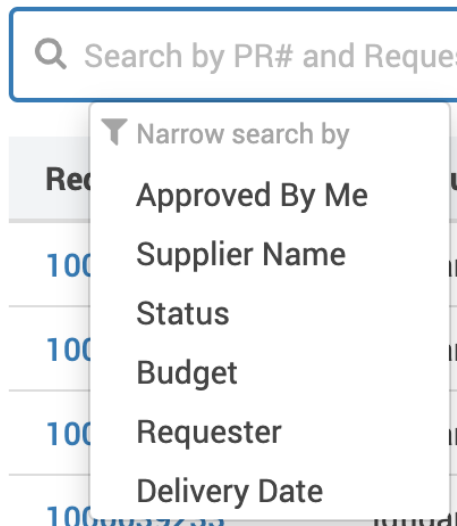
# Vroozi Purchase (Approvers)

## UNIFIED TASK DISPLAY FOR ALL PURCHASING APPROVALS

All Sourcing Review, Financial Review, and Budget Review tasks have been unified in one screen “Approve Requests”. In addition, approvers can now use a search bar in that screen to quickly search and filter for specific approval tasks.

Request #	Requester	Created Date	Request Name	Budgets	Status	Total Amount
1000000437	Shay Ilahi	03/22/2023	Shay Ilahi 1000000437	OPEX	Budget Review	\$795,000.00
1000000436	Shay Ilahi	03/22/2023	Shay Ilahi 1000000436	OPEX	Budget Review	\$22,300.00
1000000435	Shay Ilahi	03/22/2023	Shay Ilahi 1000000435	OPEX	Budget Review	\$100,000.00
1000000434	Shay Ilahi	03/22/2023	Shay Ilahi 1000000434	OPEX	Financial Review	\$15,000.00
1000000433	Shay Ilahi	03/22/2023	Shay Ilahi 1000000433	OPEX	Financial Review	\$22,300.00
1000000432	Shay Ilahi	03/22/2023	Shay Ilahi 1000000432	OPEX	Financial Review	\$6,000.00
1000000431	Shay Ilahi	03/22/2023	Shay Ilahi 1000000431	OPEX	Financial Review	\$100,000.00
1000000430	Shay Ilahi	03/22/2023	Shay Ilahi 1000000430	OPEX	Approved	\$795,000.00
1000000428	Shay Ilahi	03/22/2023	Shay Ilahi 1000000428	OPEX	Sourcing Review	\$20,000.00
1000000426	Muhammad Requetser	02/23/2023	Muhammad Requetser 1000000412	N/A	Sourcing Review	\$120.00

The user can apply a filter (filters are in screenshot below) on the search bar to find the desired Purchase Request.

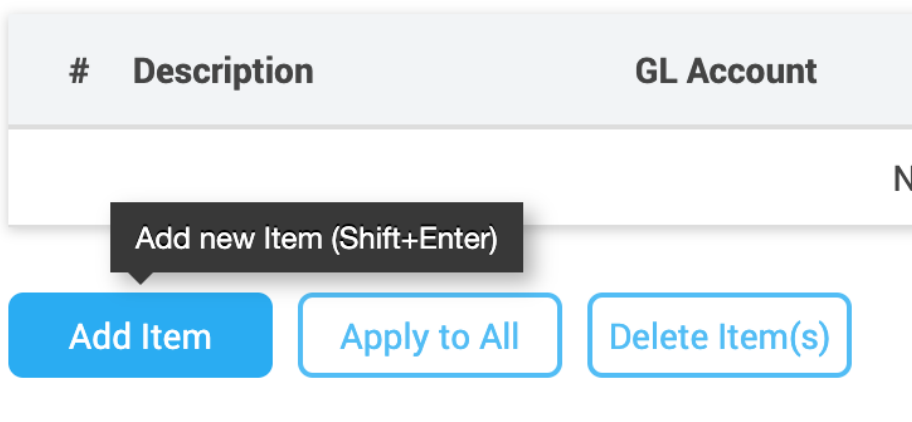


# Vrooz Invoice (AP Processors, AP Managers)

## INTRODUCING KEYBOARD SHORTCUTS

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AP Users can now use keyboard shortcuts to perform quick actions. Hovering a mouse over the buttons will display the keyboard shortcuts in tooltips.



Pressing [Shift]+[?] displays all relevant shortcuts on screen.

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### Keyboard shortcuts

#### Document actions

Submit current document	 
Delete current document	 
Close current document	
Add a new item	 

The list of all shortcuts:

- **Global shortcuts**
  - Create invoice [shift]+[i]
  - Create memo [shift]+[m]

- **Document actions**
  - View all Shortcuts relevant to the document [shift]+[?]
  - Submit current document [shift]+[s]
  - Delete current document [shift]+[d]
  - Close document [esc]
    - Note: only available if document is opened as the modal dialog
  - Add item [shift]+[enter]
  - Search items [/]
  - Navigate to the next document [j]
  - Navigate to the previous document [k]
- **Document Item actions** (if item editing)
  - View all Shortcuts relevant to the document [shift]+[?]
  - Save item [shift] [enter]
  - Close item [esc]
  - Next item tab [shift]+[j]
  - Previous item tab [shift]+[k]
  - *Note: Document shortcuts should be overridden or disabled*
- **Document Item actions** (if item viewing)
  - Close [esc]
  - Next item tab [shift]+[j]
  - Previous item tab [shift]+[k]
  - *Note: Document shortcuts should be overridden or disabled*
- **Document Inbox actions**
  - Create invoice [shift]+[i]
  - Create memo [shift]+[m]
  - Navigate to the next document [j]
  - Navigate to the previous document [k]

Note: global shortcuts to create invoice and memos are only available to the roles that have access to create the documents.

## **READ-ONLY ACCESS TO INVOICES FOR AUTHORIZED AP PROCESSORS**

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Admins can now not only give edit access, but also give read-only access to AP Processors for Invoices using the AP Settings (Admin Panel => AP Settings => Inbox). The access settings defined under “Structured Document Submission Access Rules” will grant AP users access to specific invoices based on company code, plant, and cost centers. “Structured Document Submission Access Rules” apply to invoices from integrated suppliers, such as cXML and Supplier Portal invoices.

One AP user named in the Access Rule can edit and take action on the invoice. The other AP user(s) named in the Access Rule will be granted access to view (but not edit) the invoice.

Structured Document Submission Access Rule

Access Rule Name \*

Demo Flow

Access Rule Description \*

Demo workflow

Company Codes \*

10001 - Corporate

Plants \*

10001 - Corporate

Cost Centers \*

1001 - Executive

AP Users \*

Amy Processor

Andy Procter

Cancel

Save

# Resolutions

- Invoice performance improvements on the PO drop down to create an invoice from a PO.
- Improve PO identification and matching for companies using Doc Parser for OCR.
- For companies that use the Purchase Request (PR) scheduler, the system will no longer submit a PR with blank lines.
- SSO users can now view an Advance Ship Notice directly after clicking the View ASN button link in the email. Previously, this button was taking SSO users to a login page.
- Prevent the system from showing browser autocomplete for inputs like date picker, currency and typeahead.
- The status of a cXML PO will be updated to canceled if all items have been canceled by the user. Previously the status did not update appropriately.
- Budget Management
  - The system will release the budget on line item cancellation
  - An assigned approver should see a Purchase Request (PR) in read-only mode in the case when an alternate approver approves it.