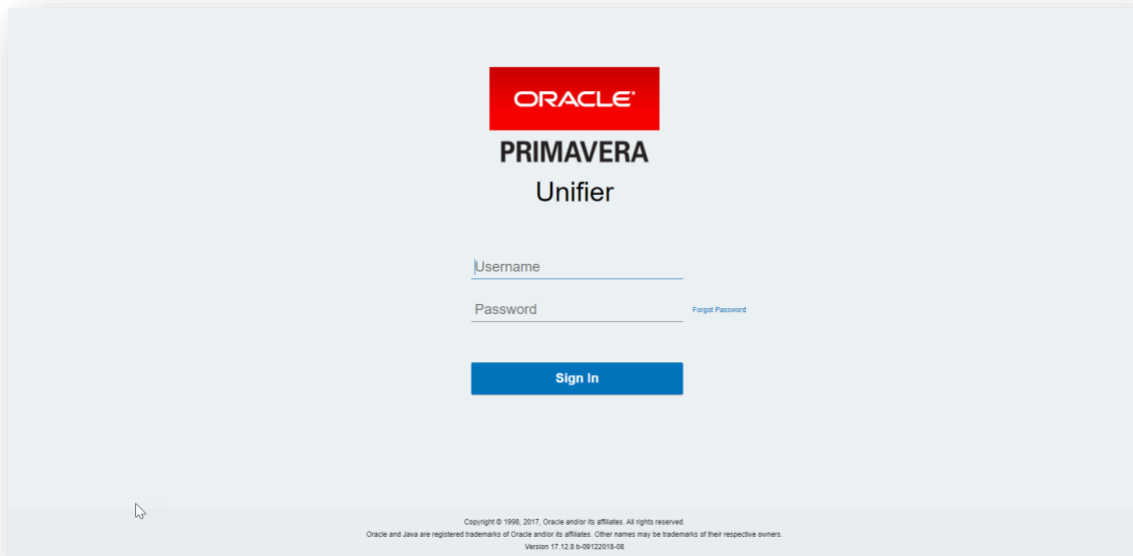NOTE: All updates to Unifier have been visual/layout upgrades to improve user navigation. The core of how business processes flow and how we conduct business in the system is remaining the same.
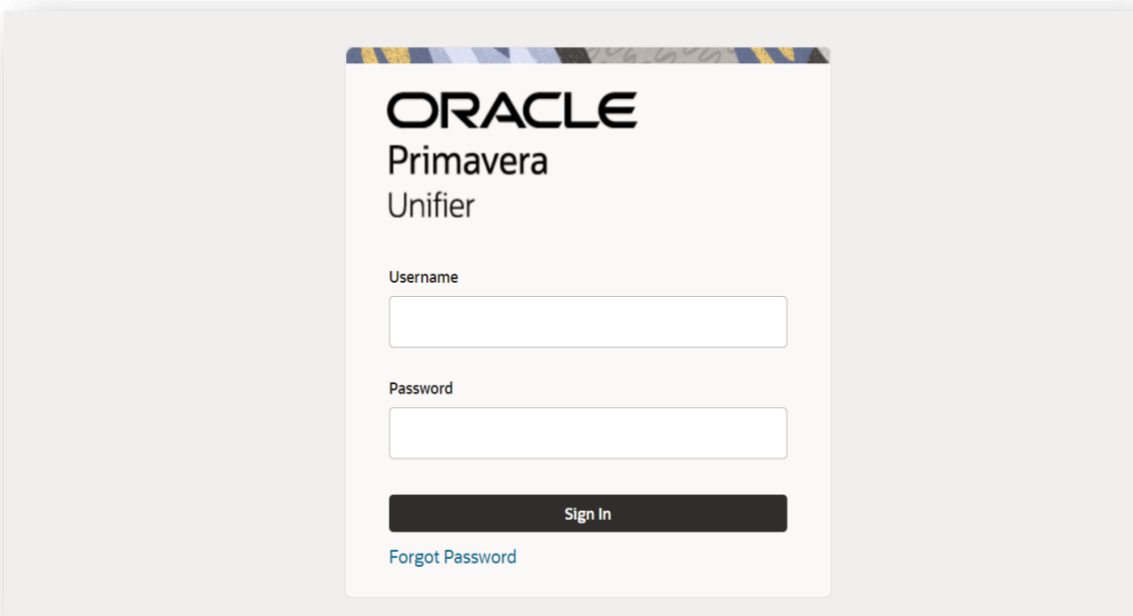
1. The login screen has slightly changed

PRIOR:

NEW:

2. Home Tab

PRIOR:

NEW: Dashboard layout with metric driven widgets

3. New Location for Announcements

PRIOR: Located on home tab front and center
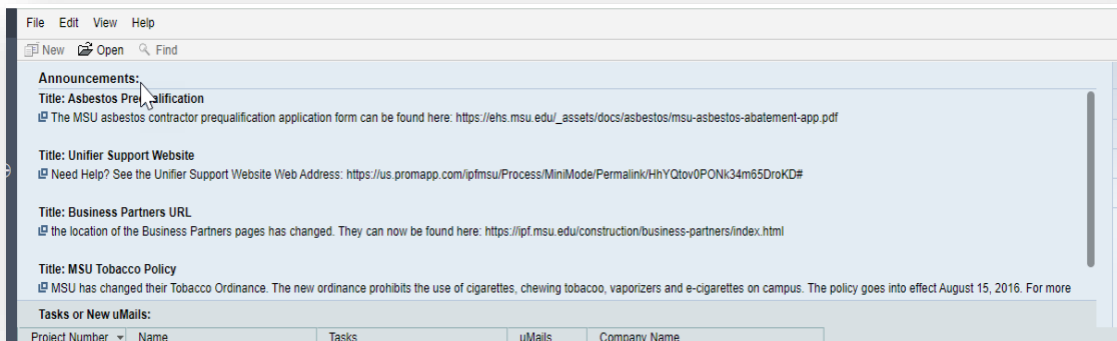
NEW: Located in upper right corner under the megaphone. It will turn red with a number if there are new announcements. When opened initially, they show up in a list. Double click on one to open full details.
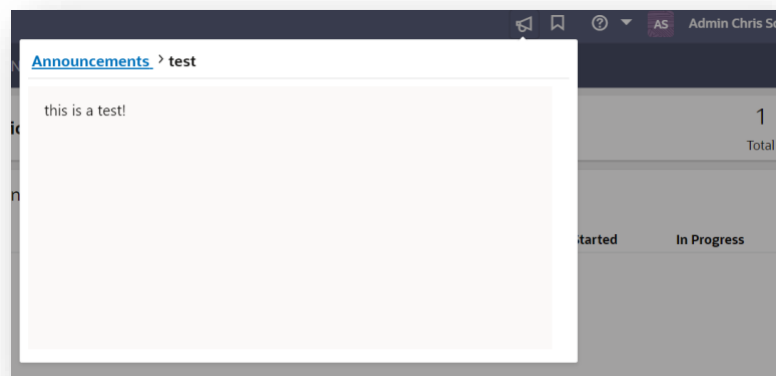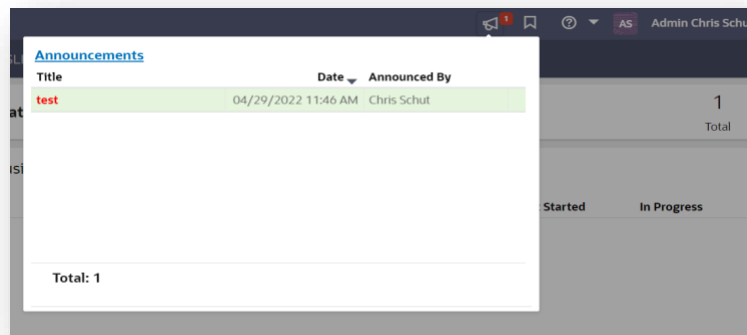
4. Hitting '+' to create new project tab has slight visual changes

PRIOR:
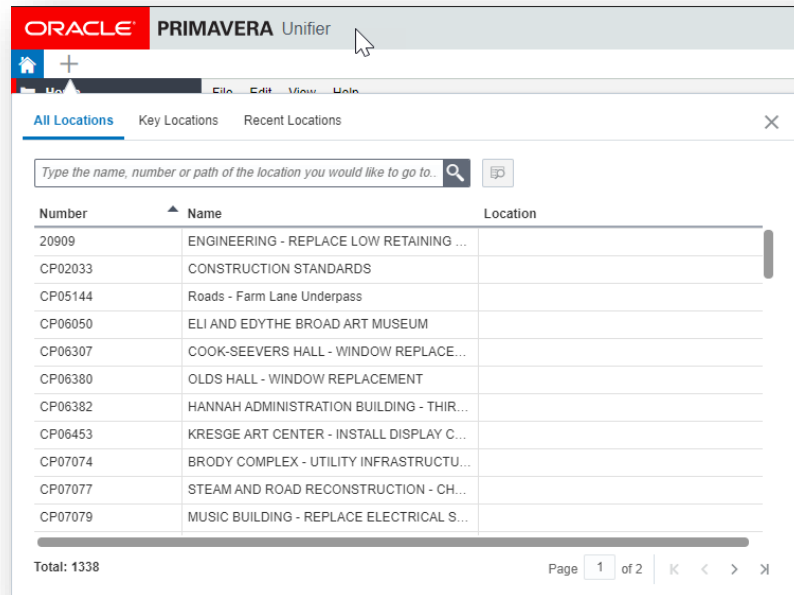
NEW: Brings up a screen that looks slightly different but functions the same way as before. If you prefer the old list style rather than typing in the project name or number, select the branching icon located on the right side of the search box.

5. Task Log Updates
   5.1. Task Status in Task Log

PRIOR: We didn't have the check box; tasks were either red (overdue) or black (normal) text.
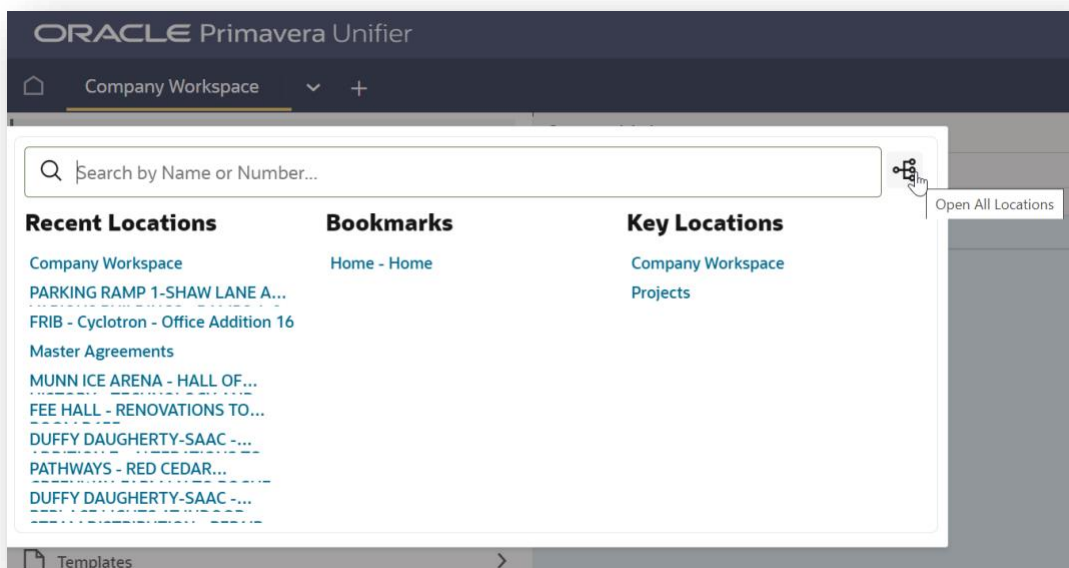

NEW: Task Status column added as first column on task list. You can accept or undo accept task by clicking on the checkmark on the left of the record from the task list screen.

Red = overdue, blue = normal, white fill = not accepted, color fill = accepted

5.2. Views in Task Log

PRIOR: In 'Classic View' you didn't have the option to modify your view.

NEW: Click on the View dropdown to see available views, create new, and manage existing. Default is set to all tasks, but Unifier will remember what view you are using for a specific BP or section across sessions and projects.
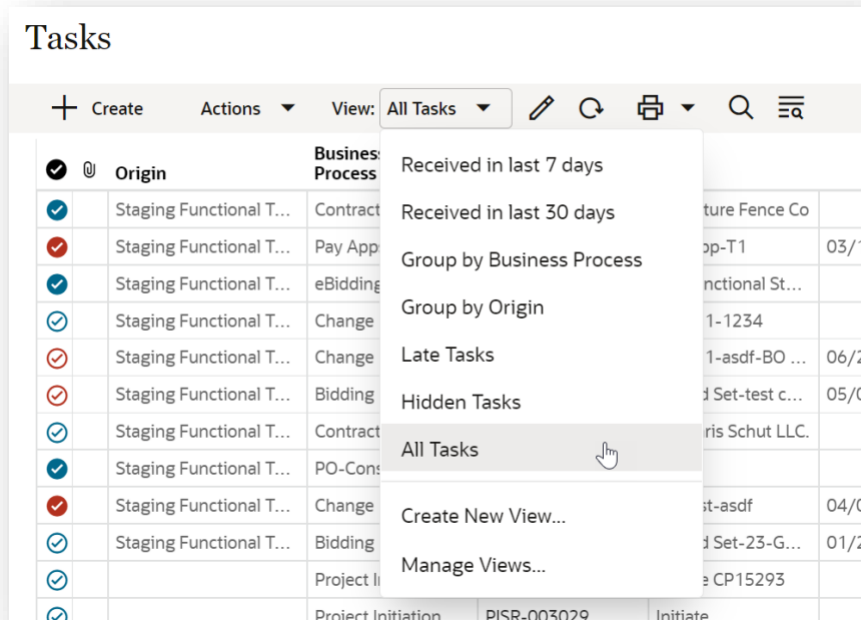
Modifying Views: Click on pencil icon to modify existing view. If a view has been modified but not saved it will show as (modified) viewName.
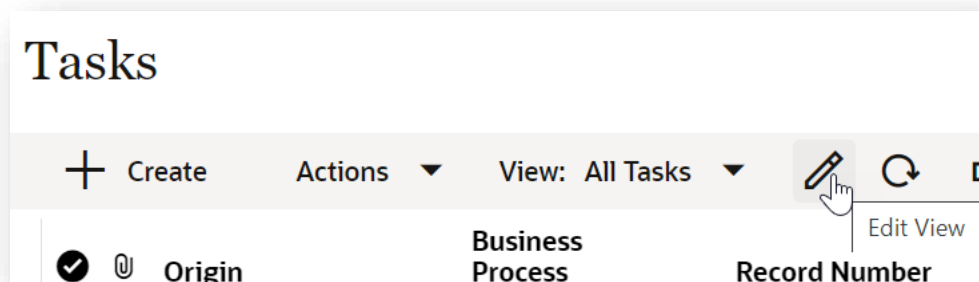
Edit View

View Name   All Tasks

Cancel   **Apply**   **Save As**

Columns   Filters   Group By   Sort By

Available Columns

Project Number

Selected Columns ⑦

Origin

Business Process

Record Number

Title

Record Due

From

Sent for

Task Due

Received

Lock after selected Column

None ▼

Number of Records per Page

1000 ▼

- Columns – can change which columns are visible and in what order they appear
- Filters – lots of options, restricts which data gets through to the log
- Group by – puts a top level on the log (group by vendor name for example) – click on gear icon to left to add additional
- Sort by – changes order in which records appear – use gear for additional layers (ex. Received descending, due ascending)

6. Preview Pane

NEW: Clicking once on a record in your task list will bring up a task preview alongside your task list. This preview will show you three different tabs: Record Details, Workflow Progress, and Attachments. To return to your full task list without the preview, click on 'Tasks' in the upper left corner home menu.

6.1 Record Details – shows the form and data
      Blocks are collapsible by clicking on triangle arrow next to each block header
6.2 Workflow Progress – see 7.7
6.3 Attachments – see 7.3

7. Working on a task in a pop-up window/form
   7.1. New Form Layout

PRIOR: Had three stacked panes or folder tabs: '*TASK* AF', 'Action Details', and 'Line Items'

NEW: Two pane view with tabs across the top - form on left and details on the right. Details has different sections depending on the task / business process type but for general purposes, layout is the same.
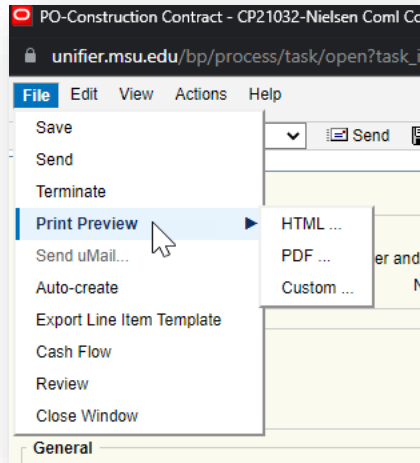
7.2. Toolbar options (File, Edit, View, Actions, Help) have relocated

PRIOR: Located only in the pop-up task window/form under the File, Edit, View, Actions, and Help drop-down menus.

NEW: Can now access from your main task list as well as the actual task pop-up window/form in a new location. Hover over record on your task list to show gear icon and then click the gear, which allows you to Open, Accept, Decline, Undo or Print in various formats, or go to the project associated with that task (Go to Origin). In the task pop-up window/form itself, click the menu options button in upper right to find similar options.
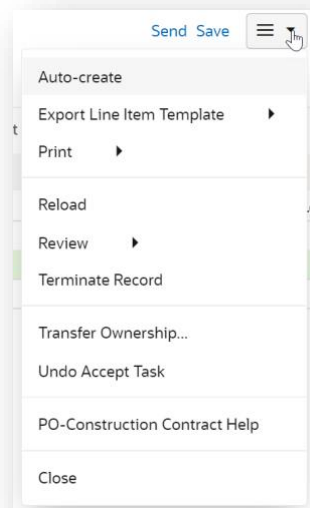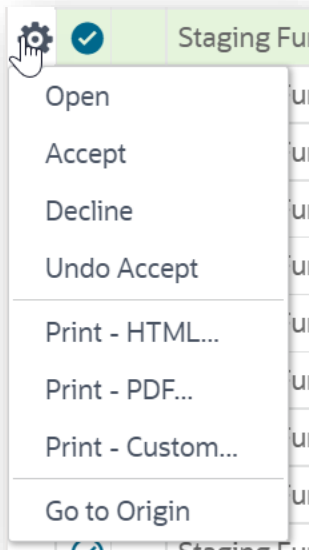
7.3. Attachments – New Location to view and add attachments
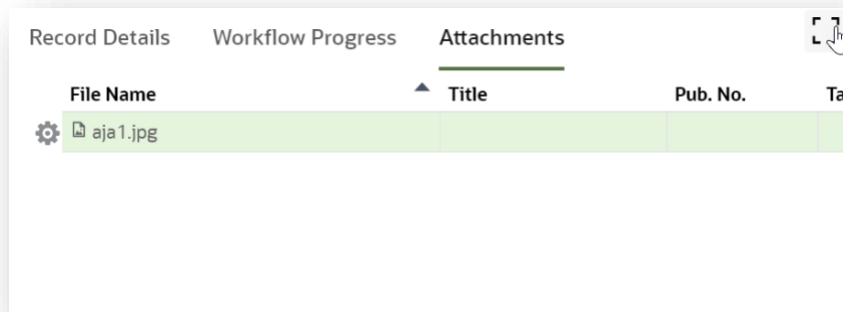
PRIOR: Located on the bottom left corner of the task pop-up window/form.
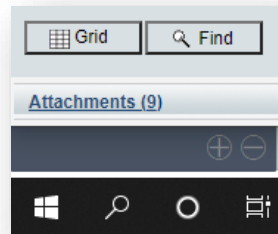
NEW: Located on the upper right side of the task pop-up window/form. Appears as a tab. Shows a paperclip if there are attachments linked to the task. Double-click to open an attachment – OR – Use the gear to the left of the document to open or download.
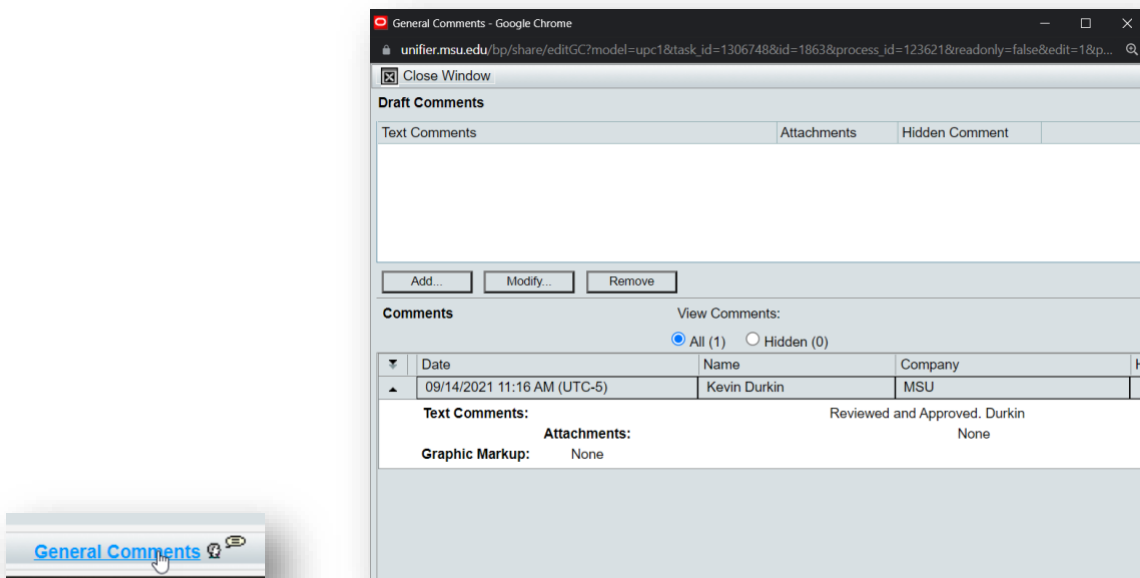
Clicking on the 'maximize' button in the upper right hand corner switches to full screen attachments section with a revisions and preview pane.
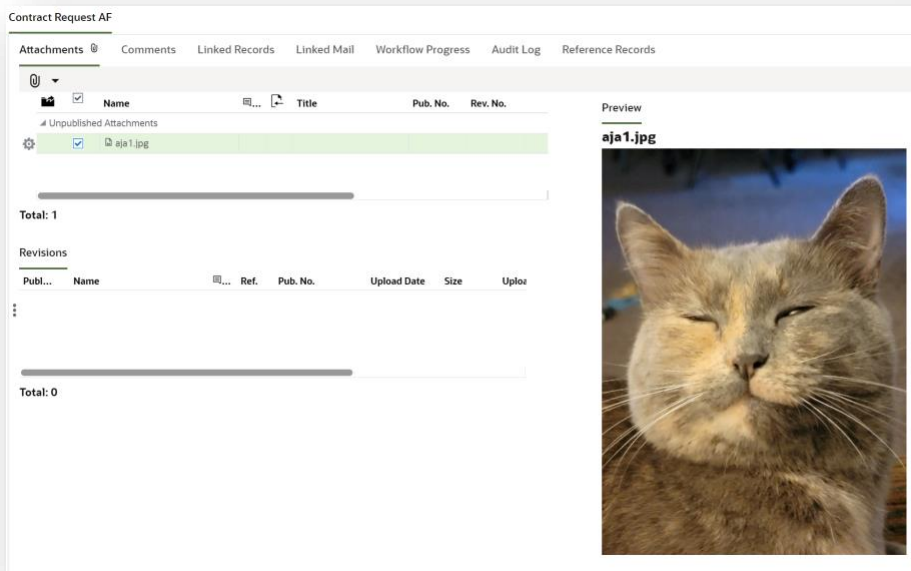
7.4. Comments – view and add attachments

PRIOR: Was located at bottom of screen as a link.

NEW: New location in the tabs (speech bubble icon if comments are present)

7.5. Linked Records – not used

7.6. Linked Mail – not used

7.7. Workflow Progress – shows what has been done so far and who did it. Same content as before, just new location.
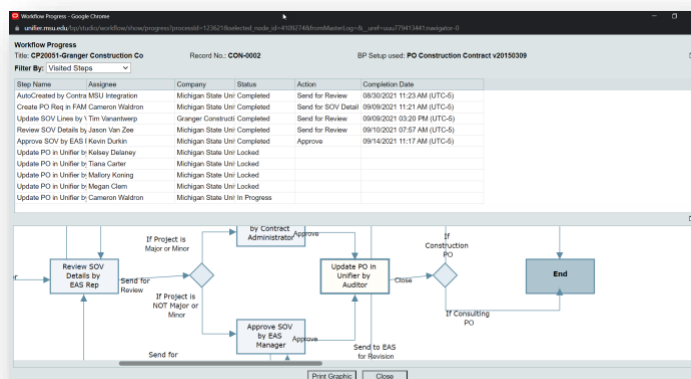
PRIOR:

NEW: Click view graphic to see workflow progress – graphic (same graphic as before).

7.8. Audit Log – new location in the tabs. Same information as prior.

PRIOR:

NEW:

7.9. Reference Records – shows all records referencing or referenced by this record (same functionality as before).

PRIOR:
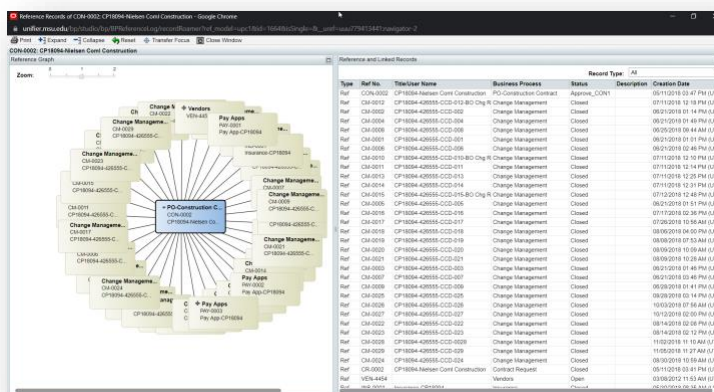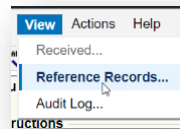
NEW: New location in tabs that first shows the list. Select 'View Graphic…' to get the graphic version.

7.10. Action Form Tab *'Task Name* AF' (as before, the tab is named by the type of task you are working on followed by the letters 'AF', short for Action Form) – this is where you fill in the form with information.

PRIOR:

NEW: Located as a tab in the left pane of the task window. Same format as before depending upon the task being performed. Fill out the fields as usual.

Blocks are collapsible/expandable by clicking the arrow n the upper left of each block

Pick lists such as vendor ref support smart text so you can start typing the field shown in the empty field if you know the format being asked for:

You can also use the picker icon on far-right side of the field to bring up a picker list as before. You still highlight the item you want on the list and then click the 'Select' button in the bottom right corner.

7.11. 'Line Items' tab – same concept as before, new look and location.
PRIOR:

NEW: Now located as the second tab in the upper left. New 'View' options. Two methods – Form View (3 lines icon, default) and Grid View (spreadsheet icon). Grid View eliminates the 'Line Item Details' pane on the right, however it allows you to type data directly into the spreadsheet and use the gear to copy or delete line items. DON'T CLOSE FROM LINE ITEMS FORM IF EDITING! Make sure you click the 'Save' button before moving away from the Line Items tab.

7.12. Workflow Actions

PRIOR: Was located in upper left of window. The 'To' field was in the 'Action Details' section.
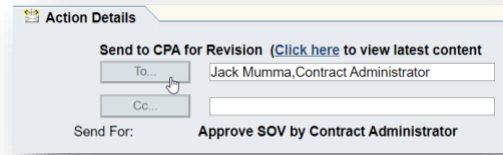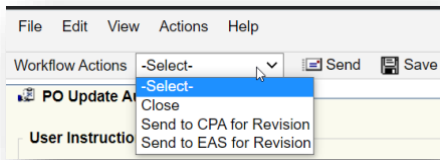
NEW: New location in upper right of window. Select 'Save' to save a draft or select 'Send' to open the workflow action details to pass the task onto the next user. Use the drop-down menu to select your action.

The 'To' field will now appear. Start typing a name of a user or select the icon on the right to open the 'User and Group Picker.' Highli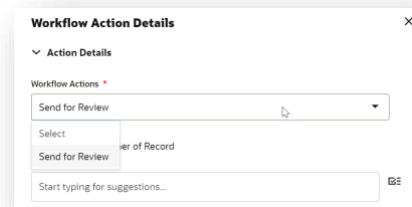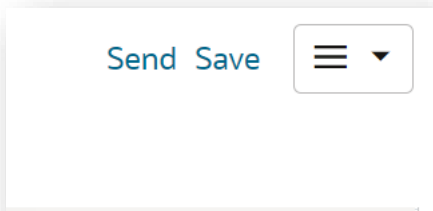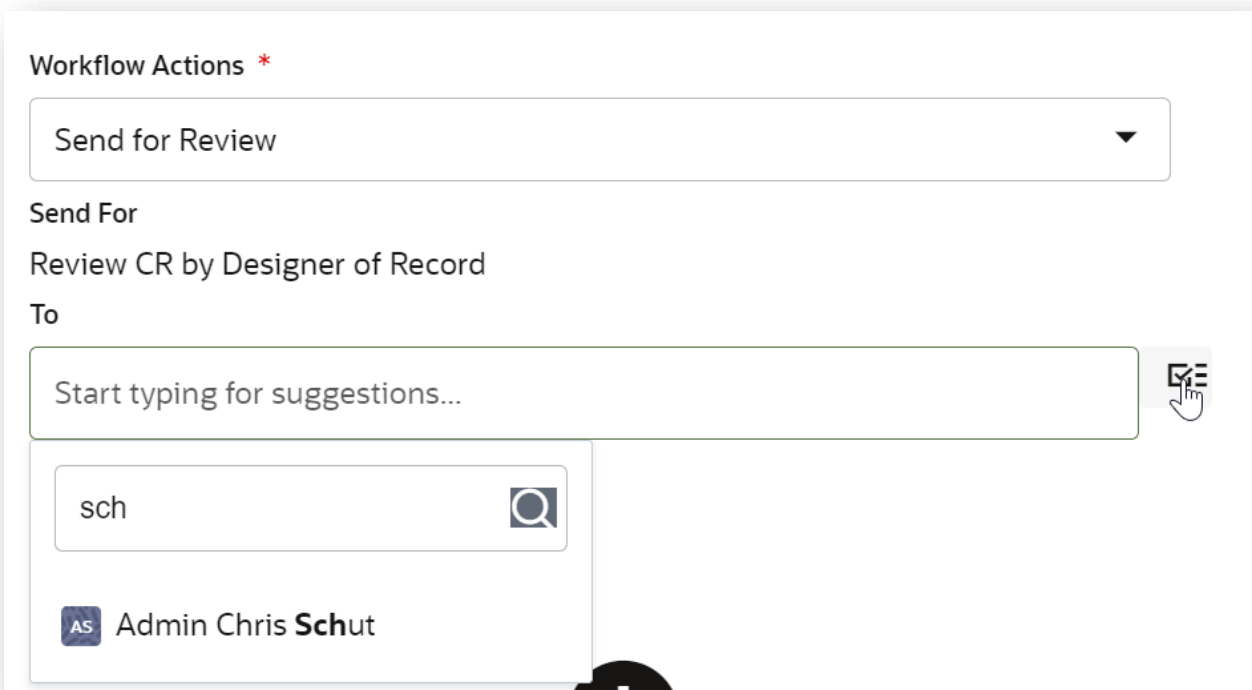ght the user(s) you want to send the record to and then use the '>' (add selection) button to move the user(s) to the 'Selected Items' section. Then select 'Done' in the bottom right.

This will populate the user back into the original 'Workflow Action Details' screen. Select 'Send' in the bottom right to send the record forward. Hitting this final 'Send' without filling in the required fields will highlight those required fields in red and give a list of errors and warnings showing unfilled fields.