# Quick Guide to Changes between Spectrum 8.9 and 9.2

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# Introduction

The differences between Spectrum 8.9 and 9.2 are about adding ease and convenience to the system. The functionality is the same, but additional features have been added to make it easier to find and use information.

This quick guide is an overview of the changes from Spectrum 8.9 to 9.2. For additional help, please see the training videos on the Spectrum website or email the Spectrum office at: spectrum_team@gsu.edu
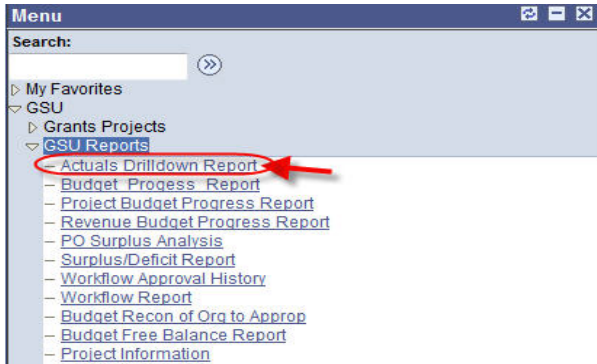
# Navigation

Navigation in Spectrum 9.2 is the same as in 8.9, but additional features have been added to make navigation easier.
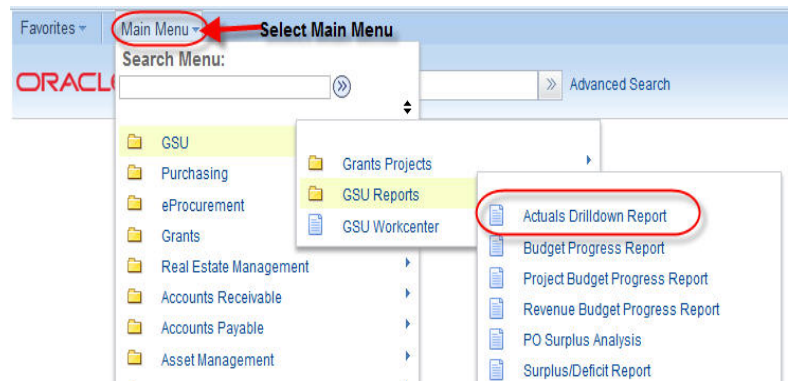
## 1. Navigation:

In 9.2, the Main Menu is located on top of page. Select Main Menu for drop down options.

### Navigation in 8.9 (Menu on Left)          Navigation in 9.2 (Menu on Top)
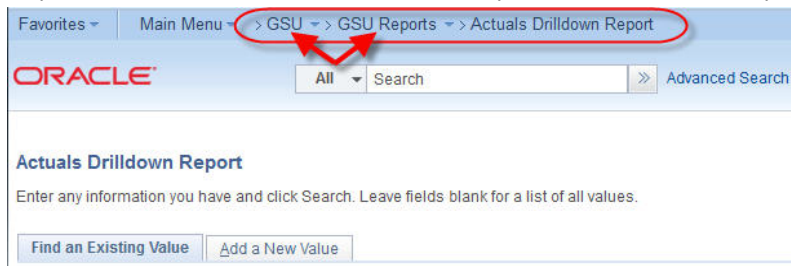


## 2. Breadcrumbs:

Breadcrumb navigation shows your current target page along with each intermediate menu selection in a convenient, one-line format. Some advantages are:

- Return to an intermediate menu without having to start navigation from the beginning.
- Removes menus from target pages, providing more screen space
- Easier identification of current location

Example: While on the Actuals Drilldown Report, return to GSU Reports and select another report.
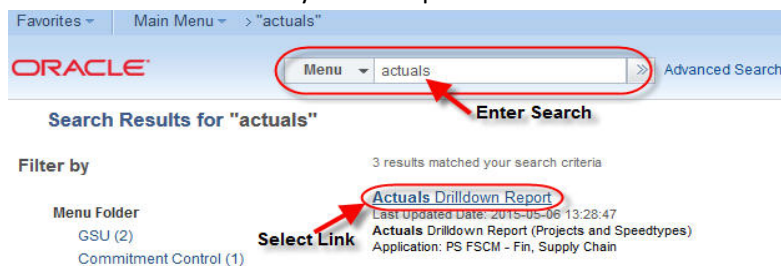


## 3. Search:

Find menu options, purchase orders, and requisitions without having to navigate through the system. There are two options for searching: All and Menu.

A. **Menu search:** Access menu choices without having to navigate. Select Menu and enter search term.
   Example: To reach the Actuals Drilldown Report, select Menu and enter "actuals" in the search box. Select the link to be taken directly to the report.



B. **All:** Search the system for purchase orders, journals, and vouchers using name of

requestor, vendor or entering PO#. Select All and enter search term.

Example: Selecting All and entering an employee's name will bring up all records in Spectrum associated with the person.
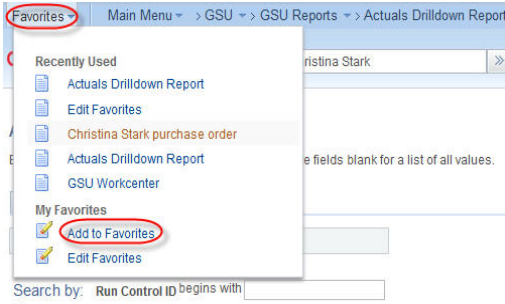


C. **Filters**: Filters are available on the left side of the page to limit search results.

Example: In the picture above, selecting Purchase Orders on the left will expand to additional filters on search results.
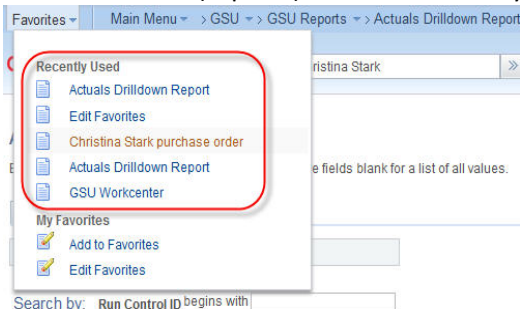
## 4. Favorites:

Favorites provides two easy ways to return to a desired location.

A. **Add to Favorites**: While on the desired page, select Favorites (top left) and then Add to Favorites.



B. **Recently Used-** Automatically saves the last 5 pages to easily return to previous work.

Select Favorites (top left) and then Recently Used.
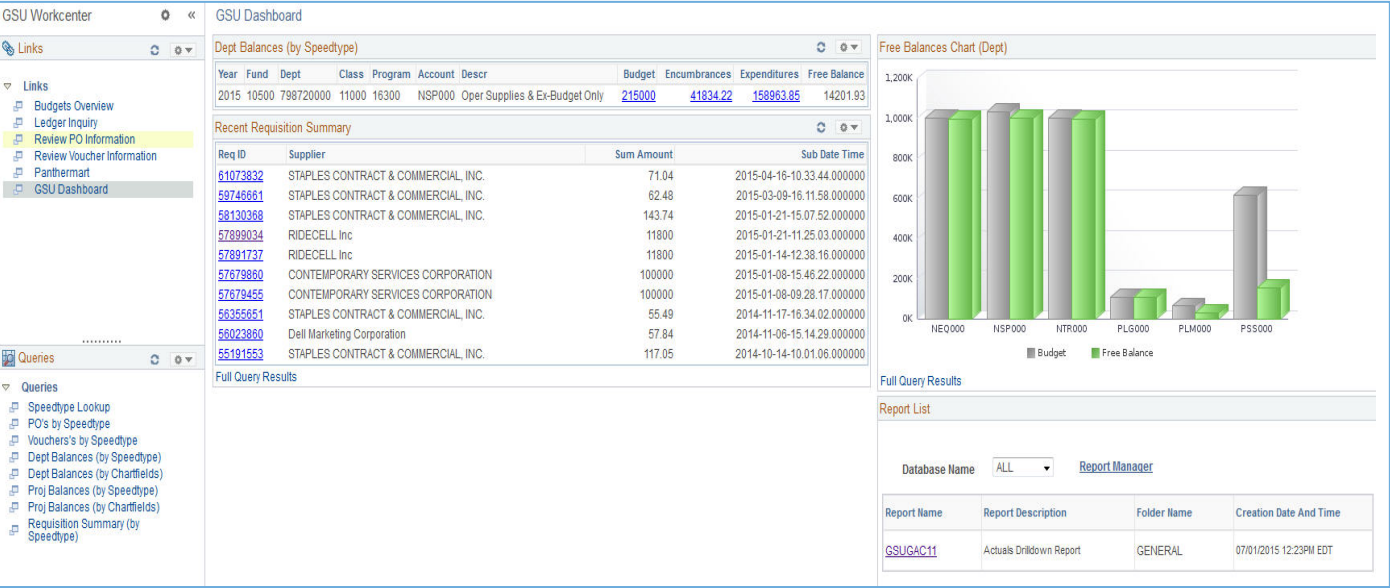


## 5. My Personalization:

Provides customizable options for viewing and navigating.

Select Main Menu > My Personalization > Navigation Personalization

Example: To view Menu in alphabetical order, select Main Menu > My Personalization > Navigation Personalization> Drop Down Menu Sort Order and choose Ascending or Descending for drop down menu sort order.
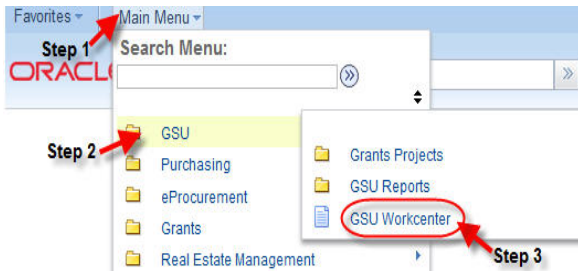
# Workcenter

Workcenter is a new feature in Spectrum 9.2 that provides access to some of the mostly commonly used features in one place. Workcenter will be delivered with queries, reports and links that are commonly used but can be easily customized to fit individual needs.
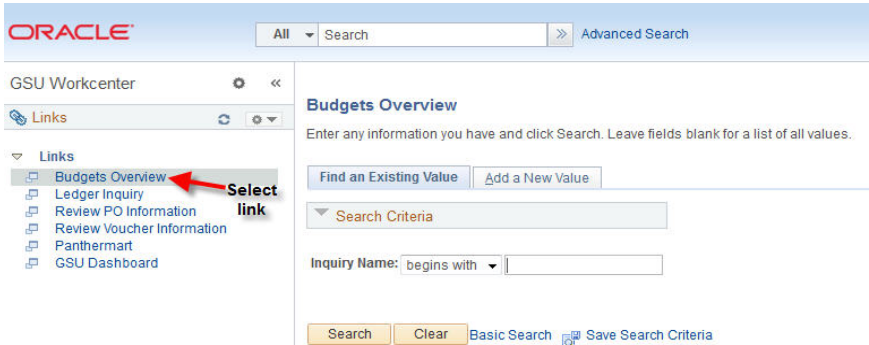


- **How to access and navigate Workcenter**
  - **Access:** Select Main Menu > GSU > GSU Workcenter



  - **Layout:** The left side of the Workcenter has links to queries, reports, and other information. The right side will open the selected page.

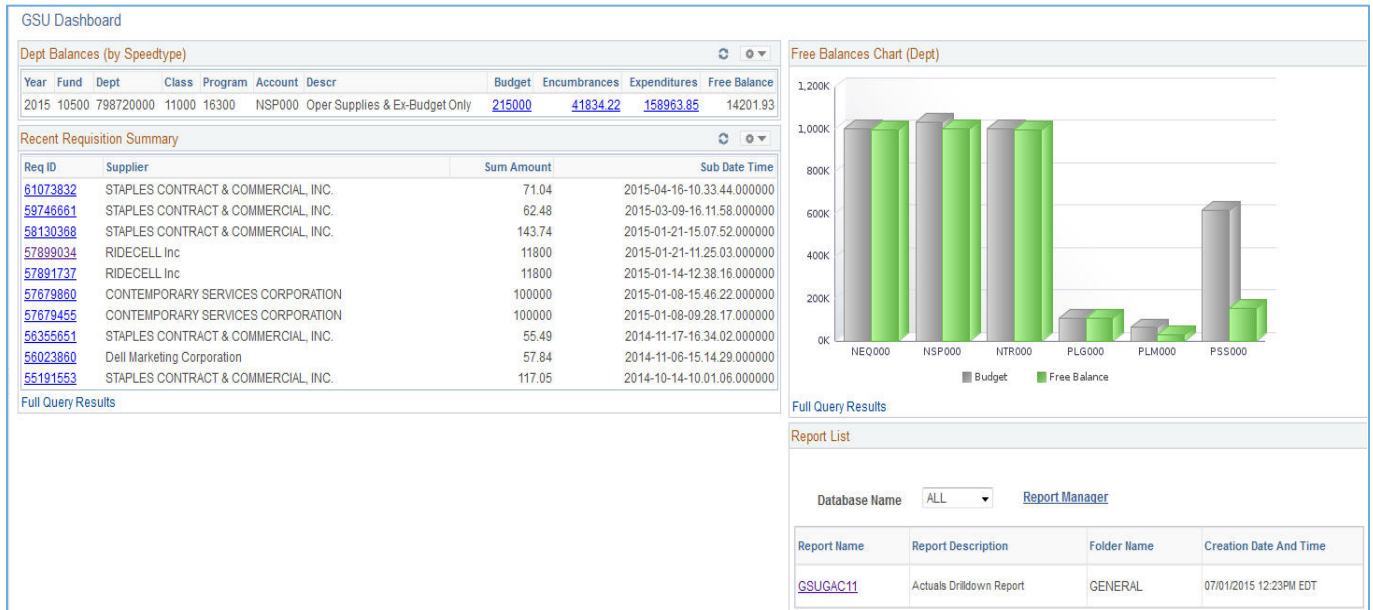    In the example below, Budgets Overview link was selected and opened on the right side of the page.



  - **Customize:** Additional links to websites, queries, and reports can be added to the GSU Workcenter, by selecting the drop down on the top right of each box. For more information, please see the customize Workcenter training guide on the Spectrum website.



# Dashboard

The Dashboard is a summary page inside the Workcenter that can provide quick information about speedtypes, budgets, and purchases. The desired speedtype and budget will need to be set up.
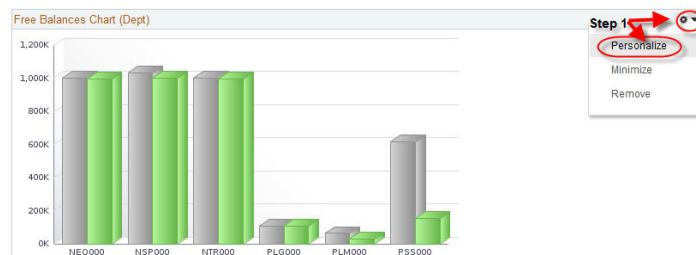


### Description of each section

- **Department Balances**- Provides an overview of the expenditures and available balance of a selected speedtype.
- **Free Balances Chart**- Provides a graphical view of a department's available funds for each budget account.
- **Recent Requisition Summary**- Provides a brief list of recent requisitions for a chosen speedtype. It also provides links to more information about each requisition.
- **Report List**- Provides a list of recently run reports.

### How to set up dashboard

In order to use the dashboard, there is a onetime set up of the Department Balance, Free Balances Chart, and Recent Requisition Summary sections with the desired speedtype.

**Step 1**: Select the dropdown at the top right corner of the section and select Personalize.



**Step 2**: Enter desired speedtype and year and select Save.

# New Queries in Workcenter

**1. Speedtype Lookup**: Search for speedtype and associated information.



**2. POby Speedtype:** Search for purchase orders associated with a speedtype.



Note: Select the purchase order link to view information associated with the Purchase Order.

**3. Vouchers by Speedtype**: Search for vouchers associated with a speedtype



Note: Select voucher link to view additional information associated with voucher.

**4. Dept Balances (by Speedtype) & Project Balances (by Speedtype)**: Use these two queries to view budget information for a department or project speedtype.

5. **Dept Balances (by Chartfield) & Proj Balances (by Chartfield)**: Use these two queries to view budget information for a department or project using chartfield information.



GSU_PER_FB_DEPTS_CF - Dept Balances (by Chartfields)

| Year: | 2013 |
| Fund: | 10500 |
| Dept: | 798720000 |
| Class: | 11000 |
| Program: | 16300 |

View Results

Download results in : Excel SpreadSheet  CSV Text File  XML File  (1 kb)

View All                                                                                                    First ◄ 1-1 of 1 ► Las

| | Year | Fund | Dept | Class | Program | Account | Descr | Budget | Encumbrances | Expenditures | Free Balance |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | 2013 | 10500 | 798720000 | 11000 | 16300 | NSP000 | Oper Supplies & Ex-Budget Only | 200000.000 | 12050.600 | 174754.190 | 13195.21( |

6. **Requisition Summary (by Speedtype):** Find requisitions for a designated speedtype.



GSU_REQUISITIONS

SpeedType: PANTHERBUI

View Results

Download results in : Excel SpreadSheet  CSV Text File  XML File  (12 kb)

View All **Select requisition link for more information**

| | Req ID | Supplier | Requisition Total | |
|---|---|---|---|---|
| 1 | 61073832 | STAPLES CONTRACT & COMMERCIAL, INC. | 71.04 | 04/16/2015 10:33:44AM |
| 2 | 59746661 | STAPLES CONTRACT & COMMERCIAL, INC. | 62.48 | 03/09/2015 4:11:58PM |

Note: Select requisition link to be taken to Panthermart to view more information about requisition.

# Workflow

The creation and approval process for Journals, POs, and Vouchers in Spectrum has not changed, but additional features have been added to make processing and checking document status easier.

**Similarities Vouchers, POs and Journals**:

1. Vouchers, purchase orders, and journals will be created the same way they were in 8.9. Once one is created an email will be sent to the approver. The approver accesses the approval page and selects approve, deny, or hold.

2. The workflow levels will be the same (Example Journal created > Department approver 1 > Department approver 2).

3. Worklist is still available as it was in version 8.9.

**Changes for Vouchers, POs and Journals**:

1. **Email**- Once the voucher, purchase order or journal has been created an email will be sent to the approver. The email now provides more information about what has been created and a link that will take the approver directly to the document after log in.



2. **Approval page**- More information about the voucher, purchase order, or journal is on the approval page.
3. **Status of PO**- The approval history stays with the voucher, purchase order, or journal. The visual picture of the approval is now vertical instead of horizontal.