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**PRD Personal Settings &
Attributes**
(MM_PRD_200)

Presented by Enterprise Applications Training

UK Information
Technology Services

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Course Content

Unit 1: Personal Settings & Attributes

Unit 2: Personalized Object Work List (POWL)

PRD Help Websites



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Unit 1: Personal Settings & Attributes



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Personal Settings Overview

Personal Settings relate to the user's *employee data* and are established via Site Navigation.

Default information populates into this area based on data from Human Resources org structure.

Personal Settings must be confirmed and setup for all roles during the first visit to myUK.

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Accessing the Personal Settings

1. Click on the **myUK** logo on the UK Home Page (www.uky.edu/UKHome)



2. Click on the **Log-In** button



Sign in with your linkblue account

3. Enter your linkblue account and password
4. Click on the **Sign in** button

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Payment Request Tab & Site Navigation

5. Select the Payment Request tab

6. Click Settings

Subject	From
Approve Invoice Number 3000002540 by JPHINE00	Hines, .
Approve Invoice Number 3000002519 by TMDAY00	Day, To
Approve Invoice Number 3000002460 by SEHENS1	Hensor
Approve Invoice Number 3000002449 by TMDAY00	Day, To
Approve Invoice Number 3000002447 by TMDAY00	Day, To
Approve Invoice Number 3000002418 by JPHINE00	Hines, .
Revise Shopping Cart 9000000518 with Value 1.000.00 USD	Locke,
Accept Decision / Adjust Shopping Cart Number 9000000494	Locke,
Accept Decision / Adjust Shopping Cart Number 9000000495	Locke,
Approve Invoice Number 3000002657 by SEHENS1	Hensor

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Personal Settings: Position Tab

The screenshot shows the 'Personal Settings: Position Tab' interface. It includes sections for 'Personal Data', 'Position', and 'User Account'. The 'Position' section contains 'Organizational Assignment', 'Functional Assignment', and 'Department Address' fields. The 'User Account' section contains 'Department Address' and 'E-Mail' fields. A blue note box at the bottom states: 'Note: Address data on the Position tab relates to the employee as an individual. It is not the delivery address for goods.'

7. Click Edit to make changes

8. Form of Address is required

Data on left side of Position tab is organization data and not to be edited

9. E-Mail address is the only data on right side to be edited

Note: Address data on the Position tab relates to the employee as an individual. It is not the delivery address for goods.

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Personal Settings: User Account Tab

10. Click **User Account** tab

11. Confirm **Standard Settings** are correct and/or edit as necessary

If you are not completing **Attributes**, click **Save** when finished with **Personal Settings**

My Procurement Substitutes is not relevant for the PRD Creator – Do not complete.

User Account

Standard Settings

User ID:

E-Mail:

Time Zone: Eastern Time (New York)

Language:

Date Format:

Decimal Notation:

My Procurement Substitutes

Name of Substitute	Start Substitution On	End Substitution On
The table does not contain any data		

Persons I Represent As Substitute

Substitute For	Start Substitution On	End Substitution On
The table does not contain any data		

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Attributes Overview

Attributes are default components which populate into every Payment Request Document to facilitate more efficient entry. Due to the wide fluctuation of cost objects utilized by departments for PRDs, entry of attributes is optional.

The following attributes can be set as defaults:

- Account Assignment Category
- Cost Center
- WBS Element



Not setting attributes will require manual entry of components at the document creation level.

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Attribute: Account Assignment Category

The Account Assignment Category designates which type of account assignment will default into each PRD.

1. Return to Position tab within Personal Settings

The screenshot shows the SAP 'User Account' form with the 'Position' tab selected. The form is divided into several sections: 'Organizational Assignment' (Department: SRMTST1, Position: P0135M5), 'Functional Assignment' (Department Head Of, Purchasing Group: SRMTST1), and 'Department Address' (Street: 322 Peterson Serv, Postal Code: 40503, City: Lexington, Ky, Country: US). Below these is the 'Attributes for Position Contracting Officer III' section, where the 'Attribute' dropdown menu is open, showing 'Account assignment category*' as the selected option. Other visible attributes include Cost Center*, Delivery address*, Product Category*, Request, Request type, and WBS Element*.

2. Select Account assignment category as the Attribute type

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Attribute: Account Assignment Category (Continued)

Note: This task only designates the category of account assignment to default into each Payment Request Document. The actual cost center or WBS numbers are entered on the following screens.

Standard	Deactivate	Value Description
<input type="radio"/>	<input type="checkbox"/>	FI
<input type="radio"/>	<input type="checkbox"/>	All Aux Acct Assgts
<input checked="" type="radio"/>	<input type="checkbox"/>	Cost Center
<input type="radio"/>	<input type="checkbox"/>	Fund
		Order

3. Determine which type of Cost Assignment Category you will most frequently use for PRDs and click the **Standard** radio button. **Cost Center** will be the most common selection for most PRD Creators.

Important: Be sure not to check Deactivate for any selections.

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Attribute: Cost Center

Attributes for Position Contracting Officer III

Attribute: Account assignment category*

Cost Center

Delivery address*

Product Category*

Request Cost Center

Request type Fund

WBS Element Order

4. Select **Cost Center** from the drop-down menu to assign a default Cost Center number

5. Select **Logical system** (there will be only one choice)

6. Click **Add Line**

Attributes for Position Contracting Officer III

Attribute: Cost Center Logical system: DEV System UKD.ECC*

Add Line

Standard	Deactivate	Value Description

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Attribute: Cost Center (Continued)

7. Enter the Cost Center number that you will most frequently use for Payment Requests

If needed, a search feature is available through the Possible Entries icon

Standard	Deactivate	Value Description	Value
<input checked="" type="radio"/>	<input type="checkbox"/>		1012572060

8. Click the **Standard** radio button

As long as you select **Cost Center** as the Account Assignment type, this number will automatically default into every PRD. It can alternatively be overwritten or entered on an individual document basis.

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Attribute: WBS Element

If you frequently pay for goods or services using a WBS Element, you can alternatively set a default WBS to populate into your Payment Request Documents.

Attributes for Position Contracting

Attribute:	Cost Center
	Account assignment category*
	Cost Center
	Delivery address*
	Product Category*
	Request
	Request type
	WBS Element

1. Select **WBS Element** from the Attribute drop-down menu

TIP: A WBS Element is a type of cost object for grants or capital projects.

Attributes for Position Contracting Officer III

Attribute:	WBS Element	Logical system:	DEV System UKD.ECC*	Add Line	Remove
		activate			
		Value	Description		

2. Select **Logical system** from the drop-down list (there will be only one choice)

3. Click **Add Line**

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Attribute: WBS Element (Continued)

4. Enter the WBS Element that you will most frequently use for Payment Requests.

5. Click the **Standard** radio button

If needed, a search feature is available through the **Possible Entries** icon

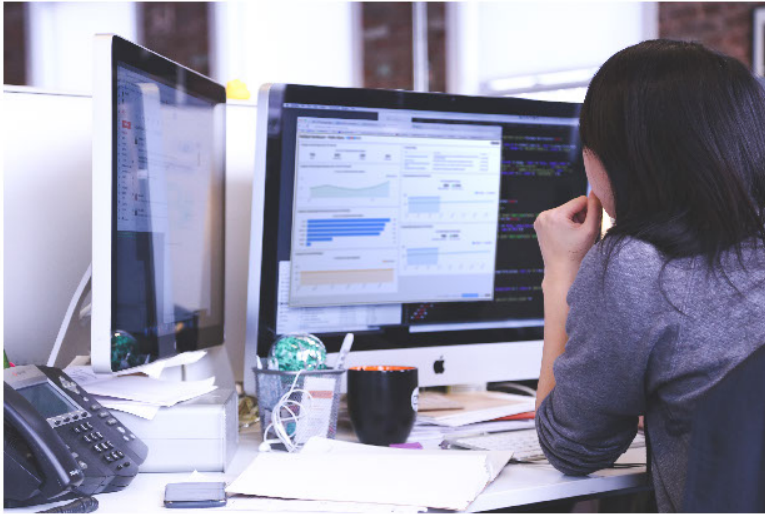
As long as you select **WBS Element** as the Account Assignment type, this number will automatically default into every PRD. It can alternatively be overwritten or entered on an individual document basis.

Standard	Deactivate	Value Description	Value
<input checked="" type="radio"/>	<input type="checkbox"/>		3047765430

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Unit 2: Personalized Object Work List (POWL)



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Introduction to the POWL

Personalized Object Work List

- a.k.a., the POWL or “dashboard”
- Serves as home base for each PRD user
- Contains Active Queries, Quick Criteria Maintenance and document history with active links.

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Navigating to the POWL

From the Site Navigation pane, click **Payment Request** to activate the POWL

Site Navigation

Payment Request

Detailed Navigation

- Work Overview
- Payment Request**
- Settings

Services

Advanced Search

Create Documents

- Payment Request

Related Links

- Payment Request Report

Portal Favorites

POWL

Active Queries

Invoices **All (15)** Saved (42) Awaiting Approval (0) Accepted (0) Finalized (0)

Invoices - All

Show Quick Criteria Maintenance

View [Standard View] Create PRD Display Edit Delete Evaluate Print Preview R

Invoice Number	Invoice Name	Status	Invoice Number (ext)
3000002704	Research participant subject	Awaiting Approval	2343433
3000002703	Meal payment, Student organization	Awaiting Approval	34343434
3000002701	Student refund	Awaiting Approval	45454545
3000002700	Meals for graduation event	Awaiting Approval	4949844
3000002698	Registration fee for conference	Saved	4509-IKU
3000002696	Decorations for office	Saved	959569686
3000002695	Accreditation Fees 2012	Awaiting Approval	96875
3000002694	Payment for meals	Saved	125678

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POWL Overview

The POWL is driven by pre-configured queries that display your Payment Request Documents

The screenshot shows a software interface for viewing Payment Request Documents (PRDs). At the top, there is a section titled "Active Queries" with a menu showing "Invoices All (15)", "Saved (42)", "Awaiting Approval (0)", "Accepted (0)", and "Finalized (0)". Below this is a section titled "Invoices - All" with a "Show Quick Criteria Maintenance" link. A toolbar contains buttons for "View [Standard View]", "Create PRD", "Display", "Edit", "Delete", "Evaluate", "Print Preview", "Refresh", and "Export". The main area is a table with the following data:

Invoice Number	Invoice Name	Status	Invoice Number (external)	Created By	Postin
3000002704	Research participant subject	Awaiting Approval	2343433	Mr. Craig Locke	03/19/
3000002703	Meal payment, Student organization	Awaiting Approval	34343434	Mr. Craig Locke	03/19/
300000	Student refund	Awaiting Approval	454545	Mr. Craig Locke	02/01/
			4945	Mr. Craig Locke	03/18/

Clicking the "All" query at the top will display all PRDs created by you in the bottom section. Drilling into the PRD number will display the document in a new window or tab.

The POWL also shows document details including Status, date created, Invoice Number, etc.

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POWL: Quick Criteria Maintenance

Click to Show Quick Criteria Maintenance

Note: Quick Criteria Maintenance is an extension of the highlighted query in the upper section. Opening it will display additional search criteria allowing the Creator to perform specialized PRD searches. It can be collapsed when not in use.

Can be used to search Payment Request Documents created by you based on various criteria

Role should always be set to reflect only your documents

Invoice Number	Invoice Name	Status	Invoice Number
3000002704	Research participant subject	Awaiting Approval	2343433
3000002703	Meal payment, Student organization	Awaiting Approval	34343434
3000002701	Student refund	Awaiting Approval	45454545

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Quick Criteria Maintenance: Search Criteria

Active Queries

Invoices All (15) Saved (42) Awaiting Approval (0) Accepted

Invoices - All

Hide Quick Criteria Maintenance

Number:

Invoice Name:

Status:

Timeframe:

Created On:

Item Description:

Product Category:

Requestor:

Supplier:

Role: Invoice Created by Me

Apply

Quick Criteria Maintenance Search Criteria includes the following:

- **Number:** PRD Number (30XXXXXXXX)
- **Invoice Name:** Brief description or keyword
- **Status:** All (i.e., wide open), Saved, Awaiting Approval, Rejected, etc.
- **Timeframe:** Date range in which the PRD may have been created
- **Product Category:** Category assigned describing the type of goods or service
- **Supplier:** Vendor name

TIP: After performing a specialized search, clear your entries and click **Apply** to return the highlighted query to its original settings.

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Quick Criteria Maintenance: Search Examples

Example 1 – Enter specific PRD Number and click Apply. PRD displays in lower section. Drill into number to display contents.

Example 2 – Enter specific Status and click Apply. All PRDs meeting this status will display in lower section.

Invoice Number	Invoice Name	Status	Invoice Number
3000002693	Registration fee for conference	Saved	4509-KU
3000002695	Decorations for office	Saved	959569686
3000002694	Payment for meals	Saved	125678

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PRD Help Websites

MM/Purchasing myHelp website: <http://myHelp.uky.edu/HTML/MM.html>

- Contains Quick Reference Cards (QRCs) and printable course manuals

Purchasing website: <https://purchasing.uky.edu>

- After logging in, contains links on How to Buy, AP Quick Reference Guide, etc.

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The End

Congratulations, you have successfully completed this training course!



You may now close this course window and return to your myUK Learning Home page. The course should be listed in your "Learning History" tile, which contains all successfully completed courses.