Procurement

VIP

User’s Manual

2003
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Learning Objectives

After completing this course, the user will be able to:

- Log in to the VIP application
- Change the log-in password
- Create a VIP account
- Query the Oracle system to find an existing VIP number
- Change the PTAEQ on an existing VIP Number
- Set an Inactive Date
- Run VIP Reports
**Introduction to Yale VIP**

VIP numbers are used to facilitate communication of charging instructions to University-wide contract suppliers.

- A VIP number is a 10 character "alias" that is linked to a specific University charging instruction (PTAEO – Project, Task, Award, Expenditure Type, Organization). The first 3 characters are always VIP, followed by 7 numbers.

- VIP numbers are linked to a generic VIP expenditure type, 822000. During the invoice payment process, the generic VIP expenditure type is converted to the expenditure type associated with the University-wide contract referenced on the invoice.

The Procurement Office strongly recommends the use of VIP numbers instead of PTEAO numbers when placing orders against university-wide contracts by phone, fax or on-line.

For more information regarding contract orders, see Policy 3201 General Purchasing Policy and Procedure 3201 PR.1 Purchase Requisitions and Purchase Orders.
Browser Settings – Internet Explorer 6.0

Apply the following settings to successful navigate through the Internet Procurement application using Internet Explorer 6.0.

1. Click **Tools** on the Internet Explorer menu bar to open the drop down menu. Select **Internet Options**.

![Internet Options](image1)

2. The **Internet Options** window opens. Click the **Settings…** button in the **Temporary Internet files** section.

![Internet Options](image2)
3. The *Settings* window opens. Click **Automatically** under the *Check for newer versions of stored pages:* section.

![Settings Window]

4. Click the **OK** button to close the open Internet Explorer windows.
Browser Settings – Netscape 4.79

Apply the following settings to successful navigate through the Internet Procurement application using Netscape Communicator 4.79.

1. Click Edit on the Netscape menu bar to open the drop down menu. Select Preferences.

![Netscape Menu Bar]

2. The Preferences window opens. Click the + next to Advanced in the Category section.

![Preferences Window]

The official version of this information will only be maintained in an on-line web format. Any and all printed copies of this material are dated as of the print date. Please make certain to review the material on-line prior to placing reliance on a dated printed version.
**Browser Settings – Netscape 4.79**

3. Three links become available – Cache, Proxies and SmartUpdate. Click once on Cache.

4. Click **Every time** under the Document in cache is compared to document on network: section.

5. Click the **OK** button to close the *Preferences* window.
Accessing the VIP Application via YAMS

The Yale Administrative Menu System (YAMS) provides the links for accessing the Yale VIP application. YAMS is accessed with the following steps.

1. Click once on the Start button.

2. The Windows Workstation appears, as shown below. Click once on Yale Admin Menu.
Accessing the VIP Application via YAMS, cont.

2. The Yale Administrative Menu System screen appears on the desktop as shown below. If the Yams message box, “You are currently NOT connected to one or more of the production drives. Double click on the YAM for what to do next.” appears; do not double click on the YAMS icon. Click OK to close the Yams message box.

3. In the top frame of the Yale Administrative Menu System, under Categories, click once on Financial, Procurement & HR Applications.
Accessing the VIP Application via YAMS, cont.

4. The bottom frame of the Yale Administrative Menu System, Yale Application Links is activated, as shown below. Double-click on Financial, Procurement and Human Resources link.

<table>
<thead>
<tr>
<th>Yale Application Links</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financials, Procurement and Human Resources</td>
</tr>
<tr>
<td>Organizational Hierarchy</td>
</tr>
<tr>
<td>PTAEO Validator</td>
</tr>
<tr>
<td>R11iReady</td>
</tr>
</tbody>
</table>

5. The University Authorized User Agreement message box appears. Clicking on the OK button indicates the user’s agreement to abide by Yale University policies.

6. The Central Authentication Service (CAS) window displays. Users type their Net ID in the net id field. Central campus users type their Eudora e-mail password in the Password field. Medical School users type their good morning password in the Password field.
Logging-in to VIP

In order to access the Yale VIP application and other core Oracle Applications, the user must log-in to the Oracle Applications screen with their net id and password. A user is responsible for all transactions conducted with his/her net id and password. Therefore, it is very important that the password is kept confidential and not shared with others. The Central Authentication Service (CAS) window is where users log-in to the VIP application. Application access and responsibility levels are validated for entering, viewing and modifying data. To log on/access the Oracle Application, take the following steps:

1. Enter your NetID in the NetID field.
2. Enter your password in the Password. Central Campus users should use their email password to log on. Medical School users should use their NT or “Good Morning” password.
3. Click the Login button.

4. The Welcome screen displays the user’s name and the Main Menu tab shows the Self Service and Core Applications to which the user has access. Click once on YUAP Phase 2 VIP Manager, which is listed under the Applications heading.
**Logging-in, cont.**

5. The Jinitiator launches the Oracle application.

6. The **Oracle Applications** box appears on the screen as shown below.
## Overview of the Toolbar

As the Oracle Core Applications are used, the following toolbar buttons activate as needed. These functions are described in the table below.

<table>
<thead>
<tr>
<th>Button</th>
<th>Name</th>
<th>Detail Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Button" /></td>
<td>New Record</td>
<td>Creates a new record in the active form</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Find</td>
<td>Displays the Find window to retrieve records</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Show Navigator</td>
<td>Returns to the Navigator window</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Save</td>
<td>Commits or saves your database transaction (hot key ( \text{F10} ))</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Next Step</td>
<td>Updates the Process workflow in the Navigator by advancing to the next step in the process. It also saves any pending changes in the active form</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Switch Responsibility</td>
<td>Displays menu of core applications to switch responsibilities</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Print</td>
<td>Prints the current screen that the cursor is in. In some cases it may print a report associated with the current data</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Close Form</td>
<td>Closes the form that is currently open</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Cut</td>
<td>Cut the current selection to the clipboard</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Copy</td>
<td>Copies the current selection to the clipboard</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Paste</td>
<td>Pastes from the clipboard into the current field</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Clear Record</td>
<td>Clears all data pertaining to the current record in the window</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Delete</td>
<td>Deletes the current record from the database</td>
</tr>
</tbody>
</table>
# Overview of the Toolbar, cont.

<table>
<thead>
<tr>
<th>Button</th>
<th>Name</th>
<th>Detail Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Edit Field" /></td>
<td>Edit Field</td>
<td>Opens the Editor window for the current field</td>
</tr>
<tr>
<td><img src="image" alt="Zoom" /></td>
<td>Zoom</td>
<td>Links to the Schedule Lines form in the Labor Distribution Module. This shortcut is not used in the Payroll Time Entry application</td>
</tr>
<tr>
<td><img src="image" alt="Translations" /></td>
<td>Translations</td>
<td>Opens the Translations window (if multiple languages are installed)</td>
</tr>
<tr>
<td><img src="image" alt="Attachments" /></td>
<td>Attachments</td>
<td>Opens the Attachments window</td>
</tr>
<tr>
<td><img src="image" alt="Folder Tools" /></td>
<td>Folder Tools</td>
<td>This button is not in use at Yale</td>
</tr>
<tr>
<td><img src="image" alt="Window Help" /></td>
<td>Window Help</td>
<td>Displays general help for the current application</td>
</tr>
</tbody>
</table>
Creating a VIP Number

Departmental VIP Administrators are responsible for creating VIP numbers for University employees within their department. Each VIP number is associated with one individual and one PTEAO. An individual can be the VIP Card Owner for more than VIP number if appropriate. The following example details the appropriate steps when creating a VIP number.

1. After selecting **YUAP Phase 2 VIP Manager** from the **Welcome** screen, the **Navigator – YUAP Phase 2 VIP Manager** window displays with two options; **Distribution Set** and **Request**. Double click on **Distribution Set** or click once on the option and then click **Open** or the plus sign on the left.

2. Both options are expanded as shown below. Double click on **Distribution Sets** or click once on the option and then click **Open** or the plus sign on the left.
**Creating a VIP Account, cont.**

3. The **Distribution Sets** screen displays with the cursor in the **Description** field, as shown below. This free text field allows the user to enter the name associated with the funds or funding source. Although the user can enter up to 240 characters into this field, only the first 10 to 15 characters appear on the report. It is optional to enter information in this field. In this example, enter General Appropriations.

4. Tab twice to the flexfield.

Note: When creating a new VIP account, there is no need to enter an **Inactive On** date.

5. The **Distribution Sets** window displays with the cursor in the **VIP Card Owner** field. Type the last name of the individual to whom the VIP Number will be assigned and click **OK** or click once on the **List of Values** button to the right of the field.
Creating a VIP Account, cont.

7. The VIP Card Owner screen displays all names that contain Slaughter in this example. Click once on Slaughter, Ms Shaundolyn. Click OK to close this screen. If there is only one name associated with the query, it will automatically populate the flexfield and this screen will not display.

8. The first three letters of the VIP card owner’s last name are visible in the flexfield. In the line item detail area, 1 defaults in the Num field and 100 defaults in the % field. This indicates that there is one PTAEO linked to one VIP number. Click once on the list of values button or the F9 key in the Account field to open the Accounting Flexfield.
Creating a VIP Account, cont.

9. Type the Project in the Project field, 1022313, in this example. The cursor moves to the Task field if all the character spaces are filled. If leading zeros are not entered, tab to the Task field. The name associated with the Project appears to the right of the field and the Task and Award fields become active.

10. At the Task field, click the LOV button or the F9 key to populate. If only one Task is associated with the Project, it will populate in the field, Tisket, in this example. The name associated with the Task appears to the right of the field. If multiple Tasks are associated with the entered Project, they will appear in a List of Values window. In those cases, select the appropriate Task and click OK to populate the Task field. Optionally, the user may type the Task instead of using the LOV.
Creating a VIP Account, cont.

11. At the Award field, click the LOV button or the F9 key to populate. If only one Award is associated with the Project, it will populate in the field, 0001DB, in this example. The name associated with the Award appears to the right of the field. If multiple Awards are associated with the entered Project, they will appear in a List of Values window. In those cases, select the appropriate Award and click OK to populate the field. Optionally, the user may type the Award instead of using the LOV.

12. In the Expenditure Type field, type 822000. It does not autopopulate. The Expenditure Type Description, VIP Card Expense, appears to the right of the field. If the LOV button or the F9 key is clicked at this field, all expenditure codes at the University are viewable, but are not allowed for VIP numbers. If another Expenditure Type is entered erroneously, an error message will generate at the point of save. 822000 is the only allowable Expenditure Type for the VIP application.
Creating a VIP Account, cont.

13. At the Organizational Unit field, click the LOV button or the F9 key to populate. If only one Org is associated with the Project, it will populate in the field, 621201, in this example. The name associated with the Organizational Unit appears to the right of the field. If multiple Orgs are associated with the entered Project, they will appear in a List of Values window. In those cases, select the appropriate Org and click OK to populate the field. Optionally, the user may type the Organization instead of using the LOV.

14. The Balancing Segment field populates with 02 by clicking F9 or the LOV button. No other value can be entered into this field.

15. After the user enters the PTAEO in the Accounting Flexfield screen, click the OK button to close the screen.
Creating a VIP Account, cont.

16. On the Distribution Sets screen, the PTAEO appears in the Account field and the name of each segment appears in the Account Description field.

17. Click the Yellow Disk icon on the Oracle toolbar to save the changes. The VIP Number, VIP1286230 in this example, defaults in the Name field. The setup process is now complete.
**Creating a VIP Account, cont.**

**Note:** All system validations occur at the point of Save. If one of these areas is invalid, the user receives an error message and will have to re-enter the Accounting Flexfield screen to make the necessary corrections. These include:

- The YAS validation of user access to organization
  
  ![Error Message]

  **Error:** Org 521201 is not in your list.
  Please correct this error before continuing.

- The 822000 VIP Expenditure Type
  
  ![Error Message]

  **Error:** Expenditure Type must be 822000.
  Please correct this error before continuing.

- The start and end dates of the entered PTAEO
  
  ![Error Message]

  **Error:** Org is not in your list.
  Please correct this error before continuing.

**Important!** Although a VIP number displays in the Name field, it is not valid until the appropriate changes are applied. The user will not be able to save the VIP record until the amendments have been made.
**Creating a VIP Account, cont**

18. The user can now clear the form by clicking **Edit** on the Oracle menu and selecting **Clear**, then **Form** or selecting **File, Close Form** to open another application or exit the Oracle applications by clicking **Exit Oracle Applications**.

19. If **Exit Oracle Applications** is selected, a message box appears to confirm the exit action. Select **OK**. Be sure to exit out of all open browsers associated with the Oracle applications. Close the Jinitiator window and exit out of the Welcome screen.
Querying to Find an Existing VIP Number

A Department VIP Administrator may query a VIP number to make edits to the record.

1. After logging into the Yale VIP application, at the Distribution Sets screen, the cursor is blinking in the Description field. See Logging in for instructions to reach this screen.

2. On the menu bar, choose View then Query By Example, then select Enter or press F7.
Querying to Find an Existing VIP Number, cont.

3. The cursor is now blinking in the Name field. Type the VIP number in this field. The letters VIP must be entered in uppercase, as the queries are case sensitive. If the VIP number is not available, tab to the Description field and type the information that was entered in this field when the VIP number was created, then run the query. If only partial information is available, the % can be entered before or after entered data to retrieve all records that contain the specified data. In the example below, only part of the VIP number is known so the user types VIP128623%.

![VIP Number Screen](image)

4. To start the search, choose View from the menu bar, then, Query By Example, then select Run or press F8. If the query is no longer needed, select Cancel or press the Ctrl and Q keys simultaneously.
**Querying to Find an Existing VIP Number, cont.**

4. The retrieved record displays on the screen. If the user enters the full VIP number, only one record is retrieved if the user has access to the organization values linked to the queried VIP number. In this example, since a partial value was entered, the system retrieved multiple records.

![Database Screenshot]

**Note:** If more than one record is associated with a query, **Record: 1/?** displays on the Oracle message bar in the lower left corner. Click on the up and down arrows on the keyboard to scroll through the retrieved records. The picture below displays 2/? because the user has scrolled to the second record of the query results. The question mark indicates that there are additional records associated with the query.

![Record: 2/?]

After retrieving a record, proceed to the next two sections to learn how to make and apply edits to an existing VIP record.
Changing the PTAEO on an Existing VIP Number

The PTAEO linked to an existing VIP number can be changed. This change may impact the processing of outstanding invoices associated with the VIP number by applying the charge to the new account instead of the original PTAEO. Follow the steps in the prior section, Querying to Find an Existing VIP Number, to retrieve a VIP number and apply the necessary changes.

1. The Distribution Sets screen displays with the retrieved VIP number, VIP1286230, in this example. Click in the Account field on the Distribution Sets screen and click the List of Values button or the F9 key.

2. The Accounting Flexfield window opens as shown below.
Changing the PTAEO on an Existing VIP Number, cont.

3. Type the change in the appropriate field and click OK. If changing the Project, the Task, Award and Organization fields are cleared, as shown below, and will have to be repopulated with the list of values button, F9 key or typing in the appropriate values.

4. The updated PTAEO information displays in the Accounting Flexfield. Click OK to apply changes.

5. The Account and Account Description fields now displays the new PTAEO on the Distribution Sets screen.
Changing the PTAEO on an Existing VIP Number, cont

6. Click on the yellow disk icon to save the changes. The changes will be lost if not saved by the user.

Note: All system validations occur at the point of Save. If one of these areas is invalid, the user receives an error message and will have to re-enter the Accounting Flexfield screen to make the necessary corrections. These include:

- The YAS validation of user access to organization
- The 822000 VIP Expenditure Type
- The start and end dates of the entered PTAEO

7. If the PTAEO changes are valid, Oracle message bar indicates that the changes have been saved.

8. The user can now clear the form by clicking Edit on the Oracle menu and selecting Clear, then Form or selecting File, Close Form to open another application or exit the Oracle applications by clicking Exit Oracle Applications.

9. If Exit Oracle Applications is selected, a message box appears to confirm the exit action. Select OK. Be sure to exit out of all open browsers associated with the Oracle applications. Close the Jinitiator window and exit out of the Welcome screen.
Setting an Inactive Date

An inactive date is set for a VIP when the VIP Card Owner leaves the University or the department. This change may impact the processing of outstanding invoices associated with the VIP number. If the Inactive On Date has passed, invoices referencing the inactive VIP number will bounce in Accounts Payable. Follow the steps in the section, Querying to Find an Existing VIP Number, to retrieve a VIP number and apply the necessary changes.

1. The Distribution Sets screen displays with the retrieved VIP number, VIP1286230, in this example. Click in the Inactive On field. This field indicates the date after which the VIP account is no longer active. The inactive date must be at least 1 day after the current date.

2. Click once on the List of Values button or press F9 to access the calendar. The Calendar screen displays. The default date is the current date. The desired inactive date is 30-APR-2003. Click on the up arrow immediately to the left of March 2003 and advance the month to April 2003. Click on 30 on the calendar. Click OK. The Inactive On date cannot be backdated.

Before change:

After change:
Setting an Inactive Date, cont.

3. The Distribution Sets window with the VIP Card Owner field opens automatically. Click OK to close this window.

4. The Inactive On date displays on the Distribution Sets screen, as shown below. Click on the yellow icon to save the change.

Note: A user can change the inactive day at any time, up to the date indicated in the Inactive On field. The inactivity on the account takes hold at 12:01 a.m. of the following day.
Running a Report

There are instances when it is helpful to print a report about information on VIP numbers that has been generated. Follow these steps to generate a report.

1. Double click on Request, then double click on Run, or click once on Run then click Open in the lower right corner.

2. The Submit a New Request window opens with the default option, Single Request checked. Click OK to proceed.
Running a Report, cont.

3. The Submit Requests screen displays. At the Name field, click once on the List of Values button or press F9.

4. The Reports window displays with five report options – Detail, Inactive On, Org, Owner and PTAEO. Yale Custom VIP Detail Report is highlighted but not recommended. Double click on the Yale Custom VIP x Owner Report.
Running a Report, cont.

5. The **Parameters** window displays. The cursor is blinking in the **Organization** field. Click once on the List of Values button.

6. The Parameters window displays with **FASCHM SBC Chemistry 61201** populated in the Organization field. Click **OK**. If user has access to multiple orgs, type a % before the org number then click the List of Values button.

7. The data defaults in the **Parameters** field. Click **Submit**.
Running a Report, cont.

8. The report request information appears on the Requests screen. The pending report has a green background in the Phase and Status fields. The Requests screen displays with the Request ID number, Name of the report, Phase of Pending in this example, and Status Normal as shown below. At the top of the screen, there are the Refresh Data, Find Requests and Submit a New Request buttons. Click the Refresh Data button to update report phase. At the bottom of the screen, the Hold Request, Cancel Request, View Details and Diagnostics button display. The View Output and View Log buttons are not active at this phase because the report is still Pending.

9. After clicking the Refresh Data button, the Phase of the requested report is updated to Completed. Click the View Output button, which is now active. The Hold Request and Cancel Request buttons are no longer active as the running of the report has completed.
Running a Report, cont.


For Internet Explorer users: If the report does not open and the message below displays, check browser settings for Internet Explorer.
**Running a Report, cont.**

11. The user can now close the form by clicking **File** on the Oracle menu and selecting **Close Form** to open another application or exit the Oracle applications by clicking **Exit Oracle Applications**.

12. If **Exit Oracle Applications** is selected, a message box appears to confirm the exit action. Select **OK**. Be sure to exit out of all open browsers associated with the Oracle applications. Close the Jinitiator window and exit out of the Welcome screen.
Exiting out of Oracle Applications

Complete the following steps to close all windows associated with the Oracle Financial, Procurement and Human Resources applications.

1. At the bottom of the screen, three tiles display. The coffee cup tile is the Oracle core applications. Select this tile first

2. Click File on the Oracle menu and selecting Exit Oracle Applications.

3. A message box appears to confirm the exit action. Select OK.
**Exiting out of Oracle Applications, cont.**

4. Click on the tile to open the Jinitiator window.

5. Click on the X in the upper right corner to close this screen.
Exiting out of Oracle Applications, cont.

6. Click on the remaining tile.

7. The Welcome screen displays. Click on the yellow arrow going through the red door.

8. The Yale Central Authentication Service screen appears. All Oracle applications have now been successful closed. Browser may be closed at this time.
## Resources

<table>
<thead>
<tr>
<th>Service</th>
<th>Contact Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central Campus Help Desk</td>
<td>432-9000</td>
</tr>
<tr>
<td>Medical School Help Desk</td>
<td>785-3200</td>
</tr>
<tr>
<td>Electronic Commerce</td>
<td>432-3227</td>
</tr>
<tr>
<td>Yale University Home Page</td>
<td><a href="http://www.yale.edu">http://www.yale.edu</a></td>
</tr>
<tr>
<td>Yale Procurement Home Page</td>
<td><a href="http://www.yale.edu/procurement/">http://www.yale.edu/procurement/</a></td>
</tr>
<tr>
<td>Quick Forms</td>
<td><a href="http://www.yale.edu/ppdev/forms/quickforms.html">http://www.yale.edu/ppdev/forms/quickforms.html</a></td>
</tr>
<tr>
<td>OBOE</td>
<td><a href="http://websrv.its.yale.edu/oboe">http://websrv.its.yale.edu/oboe</a></td>
</tr>
<tr>
<td>Yale Policies and Procedures</td>
<td><a href="http://www.yale.edu/ppdev">http://www.yale.edu/ppdev</a></td>
</tr>
<tr>
<td>Organizational Development &amp; Learning Center</td>
<td><a href="http://learn.caim.yale.edu/lcdb/default.htm">http://learn.caim.yale.edu/lcdb/default.htm</a></td>
</tr>
</tbody>
</table>