

eMail and eForms

Gail Kemper

Sandra Gill

Clarence Wilson



Question and Answers

- Q.1 If more than one pcard, is there a way to set one as the default pcard for use in the email?
- A.1 This is an excellent idea and has been submitted to the tech team for evaluation.

Question and Answers

- Q.2 Is there a way for eVA to send a reminder to an approver that there is a requisition waiting for their approval?
- A.2 If approvers can be advised to change their email notifications, they can get these reminders immediately. They simply need to click the PREFERENCES link at the top of the eMail screen, choose 'Change eMail Notification Preferences', and select 'Requisition', there is an option called 'When my approval is overdue – send repeatedly'. The first individual email notification is sent once, and after that, the notification is included in a summary email sent once per weekday until the approver takes action or is no longer the active approver.

Question and Answers

- Q.3 Can commodity codes display in the eMall like they do in the Quick Quote application so when typing a description, the associated codes appear for selection?
- A.3 This is also an excellent idea and one that we can put forth for future enhancements.

Question and Answers

- Q.1 If more than one pcard, is there a way to set one as the default pcard for use in the email?
- A.1 This is an excellent idea and has been submitted to the tech team for evaluation.

Question and Answers

- Q.4 Why does it split the order when the info is identical ?
- A.4 When punchout orders are delivered electronically to the vendor on the ARIBA side, the order is a single transaction of the items that are on the punchout site and these go directly into the vendor's ordering system. If a non-catalog item is added to the eVA requisition, it is transmitted separately from the punchout cart and technically, there isn't a way to add these two items together.

Question and Answers

- Q.5 Can punchout vendors in the eMall display alphabetically?
- A.5 This has been requested in the past and we are waiting for a technical solution for this from the ARIBA company. They have suggested that buyers select the "Refine your results by Supplier" option from the left hand menu and when the default 5 suppliers display, choose the 'Show All' suppliers. This regenerates the supplier list in the LEFT menu in alpha order so you can scroll to find your supplier. Once selected, the right hand page will only show the punchout(s) for this supplier.

Question and Answers

- Q.6 When I print my PCO/EP, it prints a few lines onto a 2nd page, wasting paper. How can this be remedied?
- A.6 Good news! Any day now a new format for the PO print will be migrated to Production that will allow many orders with one-two items to print on just one page. The eVA T&C's have been reduced in size and extra rows have been eliminated.

Question and Answers

- Q.7 What is an eForm?
- A.7 GLAD YOU ASKED !!!! I'll pass it back to Gail to demonstrate what an eForm looks like and where this technology is headed



Return to Portal

Configure Tabs

Common Actions



Create

Requisition

Electronic Forms

VMI Asset Tracking Form

Buysense Profile

More...



Manage

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Administrator

Reports

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Catalog

Title:

Requisition

ID:

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Purchase Order

VMI Asset Tracking Form

User Profile

Travel Profile

More...



My Saved Searches

Reqs I Created This Month

Toner Purchases

Olivia & Company - URL ve...

My Approved Documents

TerriHigginsRequisitions

My Labels

Shane's Requisitions (7)

Joe's Orders (3)

Archive Items (469)

Equipment Requisitions (4)

SPL-create ORDER label (

My Documents

| ID | Title | Date |
|---------------------------|--|----------|
| FORM10187 | CSPL-6544- Approver timestamp on date | 10/24/20 |
| FORM10182 | CSPL-6544 - Timestamp on approver entry PRINT view | 10/24/20 |

Recently Viewed



PR6142322 Scr... 0 - copied PR



Create

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Preferences

FORM10227: Untitled Electronic Forms

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Exit

Electronic Forms

Provide the requested information.

1

Electronic Forms

2

Electronic Form Fields

3

Comments

4

Approval Flow

5

Summary

Title:

Untitled Electronic Forms



Preparer:

Kemper, Gail,

On Behalf Of: *

Kemper, Gail,



eForm:

(none selected)



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Exit

- Electronic Forms
- 1 Electronic Forms
 - 2 **Electronic Form Fields**
 - 3 Comments
 - 4 Approval Flow
 - 5 Summary

FORM10227: Untitled Electronic Forms

COMPLETE FORM - ELECTRONIC FORMS



Most Quick Requests can be processed with minimal information. Complete below fields according to agency's business needs. In addition to Item Description, Qty, and Unit of Measure, the Estimated Total Cost(s) should be provided, if available.

Title:

Preparer:

On Behalf Of:

#form: Quick Request

Product/Service:

Organization Unit/Div:

Ship To:

Vendor and Quote Info:

Internal Tracking #:

Description, Quantity, and Unit of Measure are Required:

| Description: | Quantity: | Unit of Measure: | Est Unit Cost: | Est Total Cost: | Part Number: | Object: | Other (Acct): |
|----------------------|----------------------|--|----------------------------------|----------------------------------|----------------------|--|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text" value="None selected"/> | <input type="text" value="USD"/> | <input type="text" value="USD"/> | <input type="text"/> | <input type="text" value="None selected"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text" value="None selected"/> | <input type="text" value="USD"/> | <input type="text" value="USD"/> | <input type="text"/> | <input type="text" value="None selected"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text" value="None selected"/> | <input type="text" value="USD"/> | <input type="text" value="USD"/> | <input type="text"/> | <input type="text" value="None selected"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text" value="None selected"/> | <input type="text" value="USD"/> | <input type="text" value="USD"/> | <input type="text"/> | <input type="text" value="None selected"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text" value="None selected"/> | <input type="text" value="USD"/> | <input type="text" value="USD"/> | <input type="text"/> | <input type="text" value="None selected"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text" value="None selected"/> | <input type="text" value="USD"/> | <input type="text" value="USD"/> | <input type="text"/> | <input type="text" value="None selected"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text" value="None selected"/> | <input type="text" value="USD"/> | <input type="text" value="USD"/> | <input type="text"/> | <input type="text" value="None selected"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text" value="None selected"/> | <input type="text" value="USD"/> | <input type="text" value="USD"/> | <input type="text"/> | <input type="text" value="None selected"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text" value="None selected"/> | <input type="text" value="USD"/> | <input type="text" value="USD"/> | <input type="text"/> | <input type="text" value="None selected"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text" value="None selected"/> | <input type="text" value="USD"/> | <input type="text" value="USD"/> | <input type="text"/> | <input type="text" value="None selected"/> | <input type="text"/> |

Estimated Total Cost:

Fund:

Cost Code:

Grant:

Project:

Program:

Justification:

Special Instructions:

[Update](#)

Quick Request

Most Quick Requests can be processed with minimal information. Complete below fields according to agency's business needs. In addition

Title:

Preparer:

On Behalf Of: *

eForm:

Product/Service:

Organization Unit/Div:

Ship To:

Lab Dept
C/O John Mallory

Vendor and Quote Info:

Fisher Scientific

Internal Tracking #:

Choose Value for Organization Unit/Div

Field:

| Name ↑ | Description | |
|--------|---------------|---------------------------------------|
| AP | Accts Payable | <input type="button" value="Select"/> |
| FAC | Facilities | <input type="button" value="Select"/> |
| HR | HR | <input type="button" value="Select"/> |
| LAB | Lab | <input type="button" value="Select"/> |
| PAY | Payroll | <input type="button" value="Select"/> |

Description, Quantity, and Unit of Measure are Required:

| Description: | Quantity: | Unit of Measure: | Est Unit Cost: | Est Total Cost: | Part Number: |
|---------------------|-----------|------------------|--------------------------|-----------------|--------------|
| Anemometer | 3 | each | <input type="text"/> USD | \$75.00 USD | 938-99 |
| Test Tube Rack | 1 | each | <input type="text"/> USD | \$22.00 USD | |
| Graduated Cylinders | 2 | set | <input type="text"/> USD | \$67.00 USD | |

Estimated Total Cost: \$164.00 USD

Fund: Cost Code: Grant: Project: Program:


Justification:

Special Instructions:

Estimated Total Cost:

Fund: 

Cost Code: 

Grant: 

Project: 

Program: 

Justification:




Special Instructions:






Create

Search

Manage

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Preferences

FORM10227: Lab Supplies for John Mallory

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Exit

Review the approvers assigned to review the request. Add and delete approvers as necessary, depending on your permissions.

Electronic Forms

1 Electronic Forms

2 Electronic Form Fields

3 Comments

4 Approval Flow

5 Summary

APPROVAL FLOW - ELECTRONIC FORMS

Legend:  Pending

FORM10227



A154-AITR



A154-PMO Approver



A154-Buyer Inbox



Appro



Add Approver

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Exit

[Return to Portal](#)
[Configure Tabs](#) | [Refresh Content](#)
Common Actions

Create

- Electronic Forms
- Requisition
- VMI Asset Tracking Form
- Buysense Profile
- More...


Manage

- Receive
- Administrator
- Reports

Recently Viewed


- FORM10227 La... John Mallory
- PR614332 Scr...O - copied PR
- PR614997 tes...over inserted
- FORM10207 CS...screen format
- E2E:POBP1941992

Search
[Catalog](#)

 Title:
Requisition

 ID:

[Purchase Order](#)

My Saved Searches

- Reqs I Created This Month
- Toner Purchases
- Olivia & Company - URL ve...
- My Approved Documents
- TerriHigginsRequisitions

My Labels

- Shane's Requisitions (7)
- Joe's Orders (3)
- Archive Items (469)
- Equipment Requisitions (4)
- SPL-create ORDER label (2)

[VMI Asset Tracking Form](#)
[User Profile](#)
[Travel Profile](#)
[More...](#)
My Documents

| ID | Title | Date | Status ↑ |
|---------------------------------|--|------------|-----------|
| FORM10187 | CSPL-6544- Approver timestamp on date | 10/24/2014 | Approved |
| FORM10182 | CSPL-6544 - Timestamp on approver entry PRINT view | 10/24/2014 | Approved |
| FORM10161 | CSPL-6525 -PRINT view of eForm | 10/21/2014 | Approved |
| FORM10227 | Lab Supplies for John Mallory | 11/12/2014 | Composing |
| PR614997 | testing MICRO approver inserted | 11/5/2014 | Composing |
| E2E:POBP1941992 | | 10/28/2014 | Composing |

[View More ...](#) (584)

When the eForm is fully approved ----- designated users will have ability to convert to PR!

| ID | Title | Date ↓ | Status |
|---------------------------|-------------------------------|------------|----------|
| FORM10687 | Lab Supplies for John Mallory | 11/12/2014 | Approved |
| FORM10686 | Untitled Electronic Forms | 11/12/2014 | Approved |

[View List ...](#) (2)

FORM10687 - Lab Supplies for John Mallory

Status: Approved

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You may also print the details of the request. ...

Back

Create Requisition

Copy

Print

Summary

Approval Flow

History

Title: Lab Supplies for John Mallory

My Labels: [Apply Label...](#)

COMPLETE FORM - ELECTRONIC FORMS



Quick Request

Most Quick Requests can be processed with minimal information. Complete below fields according to agency's business needs. In addition to Item Description, Qty, and Unit of Measure, the Estimated Total Cost(s) should be provided, if available. Please fill out the form to the best of your ability.

Date Submitted: Wed Nov 12 13:28:09 EST 2014



My Home

My Orders/My U

There are 5 problems that require completion or correction in order to complete your request.

Mouse over the red icons to learn more. Use the Next and Previous links to step through the errors as needed.

Home | Help | Logout

Welcome Kemper, Gail

Create Search Manage Recent

< Previous | Next >

PR489105: ELECTRONIC FORMS TEST REQ

Prev Submit Exit

Review your requisition, make changes as necessary, and submit the request for approval.

Summary Approval Flow

Title: * ELECTRONIC FORMS TEST REQ

On Behalf Of: Kemper, Gail

Fiscal Year: (none selected)

PO Category: R01

Procurement Transaction Type: (none selected)

Header Cross Reference:

Processed Today?

Confirming Order; Do Not Duplicate:

Accounting Summary: [View Accounting Information](#)

My Labels: [Apply Label...](#)

Line Items (1)

Hide Details

| No. | Type | Solicit | Description | Qty | Unit | Price | Amount |
|-----|------|---------|---|-----|------|---------------|-------------------|
| 1 | | | Most Quick Requests can be processed with minimal ... | 1 | each | \$0.00000 USD | \$5,490.00000 USD |

Supplier: (No Preference) *
 Location: (no value) *
 UNSPSC Code: (no value) *
 NIGP Commodity Code: (no value) *
 Contract Number:
 Bill To: (no value) *
 Small Business:
 Minority Owned Business:
 Woman Owned Business:
 Minor Business:

Most Quick Requests can be processed with minimal information. Complete below fields according to agency's business needs. In addition to Item Description, Qty, and Unit of Measure, the Estimated Total Cost(s) should be provided, if available. Please fill out the form to the best of your ability.

Edit Copy Delete | Add from Catalog... Add Non-Catalog Item...

Total Cost: \$5,490.00000 USD

Update Total