

# Creating and Using Personal Value List in Buy@Duke

## Add entries to PVL using Buy@Duke Personalization

The screenshot shows the SRM User Settings page in a browser. The page title is "SRM User Settings - SAP NetWeaver Portal - Windows Internet Explorer provided by Duke University Financial Services". The browser address bar shows "https://ept.oit.duke.edu/irj/portal?use\_sap\_login=true". The page has a blue header with "Duke @ WORK" and "Welcome SRM SHOPPER 20". Below the header is a navigation bar with "MyInfo", "Universal Worklist", and "Buy@Duke". The "Buy@Duke" tab is selected, and the "Personalization" sub-tab is active. The main content area is titled "Personal Data" and contains several sections: "Form of Address" (Mr.), "Academic Title", "First Name" (Niels), and "Last Name" (Bohr). Below this is the "User Account" section, which includes "Organizational Assignment" (Department: 3224000901, Position: Shopper20), "Functional Assignment", and "Department Address Details" (Building: Physics, E-Mail: niels.bohr@duke.edu). At the bottom of the "User Account" section is the "Attributes for Position Shopper20" section, which has a dropdown menu for "Attribute" set to "wBS Element\*" and a "Log" button. Below this is a table with columns for "Standard", "Default", "Value", and "Changeable". The table contains three rows of data. A red callout box points to the "Attribute" dropdown with the text "Attribute WBS, Cost Center, or GL". Another red callout box points to the "Add Line" button with the text "Use Add Line to create additional entries". At the bottom of the page are "Save", "Read Only", and "Check" buttons. The Windows taskbar at the bottom shows the start button and several open applications, including Microsoft Office Word, SAP Logon, Databases, Microsoft Excel, Document1, Mozilla Firefox, and Internet Explorer. The system clock shows 3:19 PM.

Personalization Tab

Use Add Line to create additional entries

Attribute WBS, Cost Center, or GL

Standard	Default	Value	Changeable
<input type="radio"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>
<input type="radio"/>	<input type="checkbox"/>	2030717	<input checked="" type="checkbox"/>
<input type="radio"/>	<input type="checkbox"/>	2031211	<input checked="" type="checkbox"/>

## Add entries to PVL using Standard Search (example for WBS shown)

Create Shopping Cart - SAP NetWeaver Portal - Windows Internet Explorer provided by Duke University Financial Services

Create Shopping Cart

Number 3000002259 Document Name Z\_SRMSHOP20 08/17/2011 15:03 Status In Process Created On 08/17/2011 15:03:52 Created By Mr. Niels Bohr

Line 1: Account 646000 requires an assignment to a CO object  
 Line 1: Enter a value in the mandatory field WBS Element in account assignment

**Work Breakdown Structure Element (WBS Element)**

WBS element: Project definition and description | WBS element: short identification | WBS element: person responsible

Person responsible:  To   
 Person Responsible:  To   
 WBS Element:  To   
 Description:  To   
 Dept. Project Name:  To   
 Grant Administrator Name:  To   
 Status:  To

Restrict Number of Value List Entries  [Go to Personal Value List](#)

**GENERAL VALUES** Adds the selected values to the favorites list

Name of responsible person (Project manager)	Number of the responsible person (project manager)	Structure Element (WBS Element)	PS: Short description (1st text line)
KRAFT, MONICA	00330698	REL 2030226	5P50-HL084917-05 MINI #2-COMP 203
KRAFT, MONICA	00330698	REL 2030227	5P50-HL084917-05 MINI #2 SUB #1C2
KRAFT, MONICA	00330698	REL 2030235	5P50-HL084917-05 MINI #7-COMP 203
KRAFT, MONICA	00330698	CLSD 3030510	5U01-AI-066590-03 SUB #3-P3030451
KRAFT, MONICA	00330698	CLSD 3030553	5U01-AI-066590-02 SUB #3-P3030370

**Annotations:**

- Click this link to Return to the Personal Value List
- To add new entry to Personal Value List – select a line and click OK button

# Adding to a PVL for Vendors, Material Groups is done from the Standard Search (Material Group example shown)

**Create Shopping Cart**

Number 3000002259 Document Name Z\_SRMS

Line 1: Account 646000 requires an assignment to a...  
Line 1: Enter a value in the mandatory field WBS Ele...  
Line 1: Error in account assignment for item 1  
Line 1: Material Group still contains the default value  
No source of supply found for item

Show My Tasks Order Close Print Preview

General Data

Name of Shopping Cart: Z\_SRMSHOP20 08/17/2011  
Default Settings: Set Values  
Team Shopping Cart:  Make accessible to my Purch...  
Approval Process: Display / Edit Agents  
Document Changes: Display

Item Overview

Total Val. (Gross) 10.00 USD

Line Number	Item #	Supplier	Supplier Cat #	Description
1	1	None		PVL Item

Search Material Group

Display As: Flat List Go to Personal Value List

Note: Placeholder search with \* is possible. Search ignores upper/lowercase spelling.

Material Group:  
Description:  
 Restrict Number of Val... List En

Start Search Res...

GENERAL VALUE LIST

Add to Personal Value List

Description	Material Group
Animals	001
Animal Supplies	002
Athletics	003
Computer Equip & Sfw	004
Fac Materials & Svcs	005
Food	006
Furniture	007
Hazardous Materials	008
Lab Equipment & Supp	009
Maintenance	010
Med Equip & Supplies	011
Office Equip & Suppl	012
Pharmaceuticals	013
Printing	014
Radioactive Material	015

OK Cancel

SESSION\_MANAGER prdas04 INS

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# To View and Select entry from Personal Value List

Create Shopping Cart - SAP NetWeaver Portal - Windows Internet Explorer provided by Duke University Financial Services

Create Shopping Cart

Number 3000002259 Document Name Z\_SRMSHOP20 08/17/2011 15:03 Status In Process Created On 08/17/2011 15:03:52 Created By Mr. Niels Bohr

Line 1: Account 646000 requires an assignment to a CO object  
 Line 1: Enter a value in the mandatory field WBS Element in account assignment  
 Line 1: Error in account assignment for item 1  
 Line 1: Material Group still contains the default value  
 No source of supply found for item

Show My Tasks Order Close Print Preview Notify Save Check Delete

General Data

Name of Shopping Cart: Z\_SRMSHOP20 08/17/2011 15:03 Approval Note

Default Settings: [Set Values](#)

Team Shopping Cart:  Make accessible to my Purchasing Substitutes

Approval Process: [Display / Edit Agents](#)

Document Changes: [Display](#)

Default Address: 0102141575 - Edwin L. Jones Bldg 2 / Research Drive , Durham , 27710 NC US

Item Overview

Total Val. (Gross) 10.00 USD

Details Add Item Copy Paste Duplicate Delete Change ALL Filter Settings

Line Number	Item #	Supplier	Supplier Cat #	Description	Quantity	UoM	Price	Account Category	Account Assignment	Matl Grp	Delivery Dt.	Account Assignment Description	G/L Description
1	1	None		PVL Item List	1	EA	10.00	WBS		46000	ZZZZZ	08/20/2011	OFFICE SUPPLIES AND
.					1.000		0.00			ZZZZZ	08/20/2011		
.					1.000		0.00			ZZZZZ	08/20/2011		
.					1.000		0.00			ZZZZZ	08/20/2011		
.					1.000		0.00			ZZZZZ	08/20/2011		
.					1.000		0.00			ZZZZZ	08/20/2011		
.					1.000		0.00			ZZZZZ	08/20/2011		
.					1.000		0.00			ZZZZZ	08/20/2011		

Show My Tasks Order Close Print Preview Notify Save Check Delete

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start 9 Microsoft ... 4 SAP Logon... Databases - I... Microsoft Exc... Document1 - ... Mozilla Firefox... 3 Internet E... Applications 3:04 PM

Mouse Click on Fields to obtain the Dropdown Search Box

# Select a Personal Value and Transfer to Shopping Cart

Create Shopping Cart - SAP NetWeaver Portal - Windows Internet Explorer provided by Duke University Financial Services

## Create Shopping Cart

Number 3000002259 Document Name Z\_SRMSHOP20 08/17/2011 15:03 Status In Process Created On 08/17/2011 15:03:52 Created By Mr. Niels Rohr

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Line 1: Enter a value in the mandatory field WBS Element in account assignment  
Line 1: Error in account assignment for item 1  
Line 1: Material Group still contains the default value  
 No source of supply found for item

Show My Tasks Order Close Print Preview

General Data  
Name of Shopping Cart: Z\_SRMSHOP20 08/17/2011  
Default Settings: [Set Values](#)  
Team Shopping Cart:  Make accessible to my team  
Approval Process: [Display / Edit Agents](#)  
Document Changes: [Display](#)

Default Address: 0102141575 - Edwin L. Jones Bldg 207 Research Drive, Durham, 27710 NC US

Item Overview  
Total Val. (Gross) 10.00 USD

Details Add Item Copy Paste Duplicate Delete Change ALL Filter Settings

Line Number	Item #	Supplier	Supplier Cat #	Description	Quantity	UoM	Price	Account Category	Account Assignment	GL Acct	Matl Grp	Delivery Dt.	Account Assignment Description	G/L Description
1	1	None		<a href="#">PVL Item List</a>	1	EA	10.00	WBS		646000	ZZZZZZ	08/20/2011		OFFICE SUPPLIES AND
.					1.000		0.00				ZZZZZZ	08/20/2011		
.					1.000		0.00				ZZZZZZ	08/20/2011		
.					1.000		0.00				ZZZZZZ	08/20/2011		
.					1.000		0.00				ZZZZZZ	08/20/2011		
.					1.000		0.00				ZZZZZZ	08/20/2011		
.					1.000		0.00				ZZZZZZ	08/20/2011		
.					1.000		0.00				ZZZZZZ	08/20/2011		

Show My Tasks Order Close Print Preview Notify Save Check Delete

Work Breakdown Structure Element (WBS Element)

Go to General Value List

Delete Entry

PERSONAL VALUES

Work Breakdown Structure Element (WBS Element)	PS: Short description (1st text line)
2030717	5P30-CA014236-37 MINI #6-COMP 2030711
2031211	2R01-AID49934-11

OK Cancel

Personal Values are shown in POP up window - to transfer value to shopping cart select line and click OK

# To Do A Standard Search

Create Shopping Cart - SAP NetWeaver Portal - Windows Internet Explorer provided by Duke University Financial Services

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 No source of supply found for item

Work Breakdown Structure Element (WBS Element)

Go to General Value List

Delete Entry

PERSONAL VALUES

Work Breakdown Structure Element (WBS Element)	PS: Short description (1st text line)
2030717	5P30-CAD14236-37 MINI #6-COMP 2030711
2031211	2R01-AID49934-11

OK Cancel

Click on General Value List  
To Search for More Entries

General Data

Name of Shopping Cart: Z\_SRMSHOP20 08/17/2011 15:03  
 Default Settings: [Set Values](#)  
 Team Shopping Cart:  Make accessible to my team  
 Approval Process: [Display / Edit Agents](#)  
 Document Changes: [Display](#)

Default Address: 0102141575 - Edwin L. Jones Bldg 207 Research Drive , Durham , 27710 NC US

Item Overview

Total Val. (Gross) 10.00 USD

Details Add Item Copy Paste Duplicate Delete Change ALL Filter Settings

Line Number	Item #	Supplier	Supplier Cat #	Description	Quantity	UoM	Price	Account Category	Account Assignment	GL Acct	Matl Grp	Delivery Dt.	Account Assignment Description	GL Description
1	1	None		PVL Item List	1	EA	10.00	WBS		646000	ZZZZZZ	08/20/2011		OFFICE SUPPLIES AND
.					1.000		0.00				ZZZZZZ	08/20/2011		
.					1.000		0.00				ZZZZZZ	08/20/2011		
.					1.000		0.00				ZZZZZZ	08/20/2011		
.					1.000		0.00				ZZZZZZ	08/20/2011		
.					1.000		0.00				ZZZZZZ	08/20/2011		
.					1.000		0.00				ZZZZZZ	08/20/2011		
.					1.000		0.00				ZZZZZZ	08/20/2011		

Show My Tasks Order Close Print Preview Notify Save Check Delete

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start 9 Microsoft ... 4 SAP Logon... Databases - I... Microsoft Exc... Document1 - ... Mozilla Firefox... 3 Internet E... Applications 3:05 PM

