



UNIVERSITY OF  
PORTSMOUTH

e5.4

Introduction and Navigation

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# Introduction

## What is e5

The e5 financial management system is used by the University to provide an integrated solution to various finance-related needs. These include statutory financial accounting, management accounting and budgetary control, aiding the procurement process, payment of suppliers and employee expenses, and supporting credit control functions.

## General Security

### Security

The e5 system has extensive security where activity can be tracked and monitored for the standards of data being entered onto the system.

It is important that the system, and the data held on it, are used responsibly and in accordance with the procedures determined by Finance and under no circumstances should a user's account be shared.

### Accounts

Access to the system will be enabled by Finance when the appropriate training has been successfully completed. Each account will be set up with access to the appropriate menus, screens and functions.

## Contacts & Information

The [IT Training webpages](#) provide a wide variety of information relating to the University's corporate systems. This information includes:

- IT Training contacts
- Appropriate Finance, Registry & Human Resource contacts
- Course content and availability information
- Resources, e.g. the latest versions of each manual

Additional resources are also available from the [Finance Department's webpages](#).

# Access and Navigation

## Logging in to e5

Go to [www.port.ac.uk/staffessentials](http://www.port.ac.uk/staffessentials) and select the link to the e5 Finance System. The login screen will be displayed in a browser window.

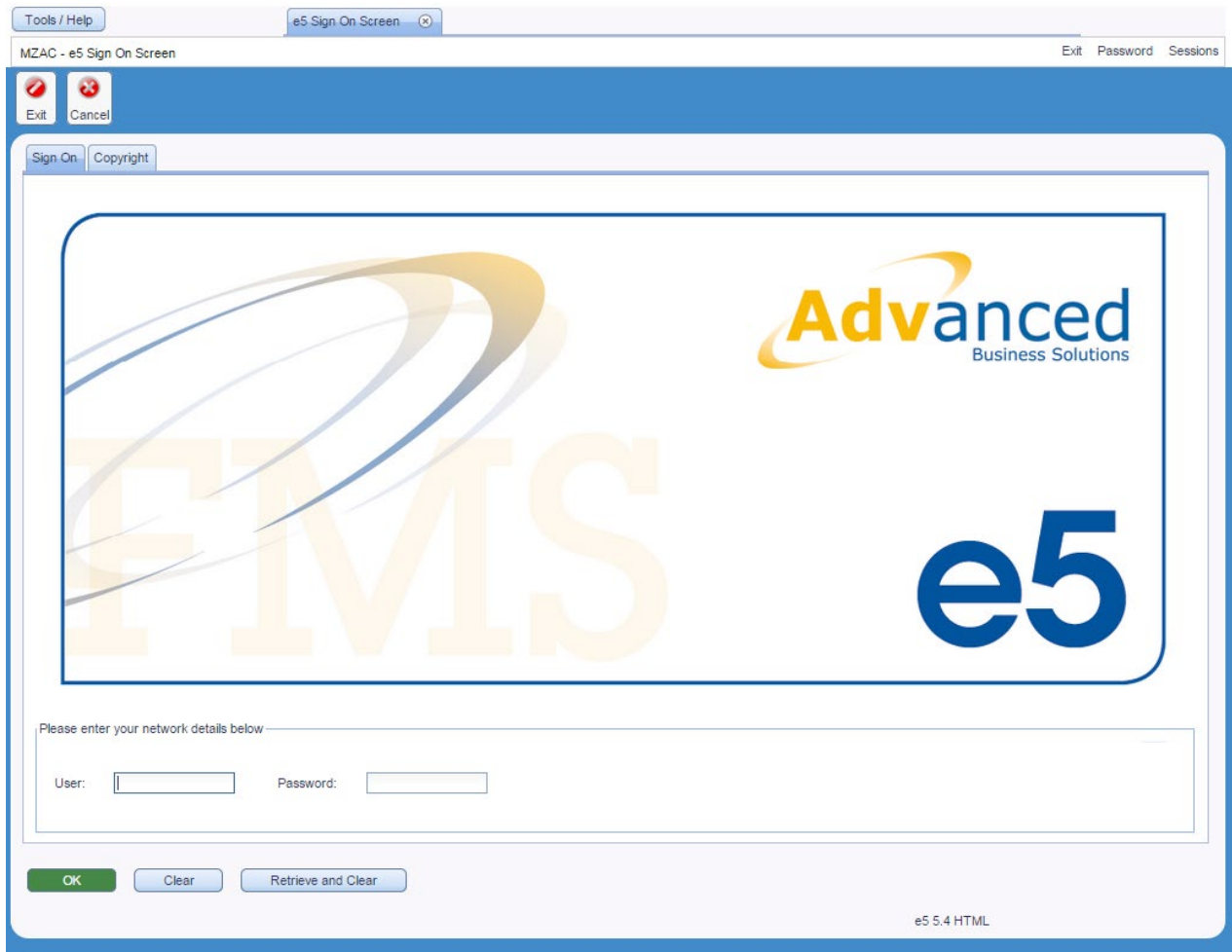


Figure 1 - Logging On


















## Process to Login to e5


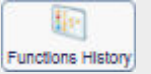
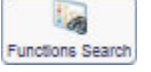
- Enter the user name and password. This will be the same as your regular network login credentials
- Click OK

## Process to Logout of e5

- Click the Exit button on the main menu
- E5 will timeout after 45 minutes

## On a list screen, moves the visible area of the screen

Icon	Icon Text	Icon Description
	Exit	Goes back one function
	Cancel	Moves back one previous action at a time
	Update	Saves the current process
	Update Warnings	If a warning message is displayed, this icon is used to clear a warning and update the page
	Accept Warnings	If a warning message is displayed, this icon is used to clear a warning and allow further processing of the order
	Forward	On a list screen, moves the visible area of the screen
	Backward	On a list screen, moves the visible area of the screen
	Next Format	If a screen has lots of information to present, press the button to show the screen in different ways
	Right	Moves the visible screen to the right
	Left	Moves the visible screen to the left
	Prompt	Assists in the completion of entry fields
	View	Displays a 'view only' entry screen
	Refresh	Refreshes the screen to the last update
	More	Display more records
	Amend	Amendments to the page
	Insert	Displays an entry screen to create a new record
	Copy	Creates a new record based on information in an existing record

Icon	Icon Text	Icon Description
	Favourite Enquiry	Parameters used on an enquiry screen to be retained and re-run on demand
	Functions History	Shows a list of screens previously visited
	Functions search	A list of functions within the system

# e5 Functionality


## Warning, Error and Information messages

The top right of the screen will show warning or information messages. Warning messages are in green, error messages in red.

### Warning messages

Warning messages indicate that a mistake may have been made, or that a point of no return has been reached. Action must be taken either to revise the data or accept the warning, before further processing can occur.

For example, 'PLK18 Order line status will be changed to complete'.

If a warning message is displayed, use the 'Accept Warning' icon  to clear a warning and allow further processing of the order. Once warnings have been accepted, e5 will allow the order to be updated or navigation to other linked screens.

### Error Messages

Error messages indicate that information will not be accepted until corrections are made. Either the data must be corrected or the process aborted,

For example, 'ZSA11 A value must be entered in this field'.

### Information Messages

Information messages may give useful information but require no action.

For example, 'DOC01 Order number ABC00123 will be created'.

### Colour Coding

A colour in a field will denote the type of message displayed.

Colour	Type	Description
Red	Error	Field content is blank or incorrect and will need reviewing before continuing
Orange	Locked	This shows as a locked record, more than one user is accessing the same record. Please contact a member of the systems team in finance to unlock orders



Colour	Type	Description
Yellow	Warning	Field content will need reviewing before continuing
Green	Information / Prompt Return	Can continue to input, system filling in field from prompt return
Blue / Aqua	Format Error	For example - The Date field is in an incorrect format

## System preferences

The system preferences are available from the Tools/Help menu, allowing a degree of customisation from the system default.

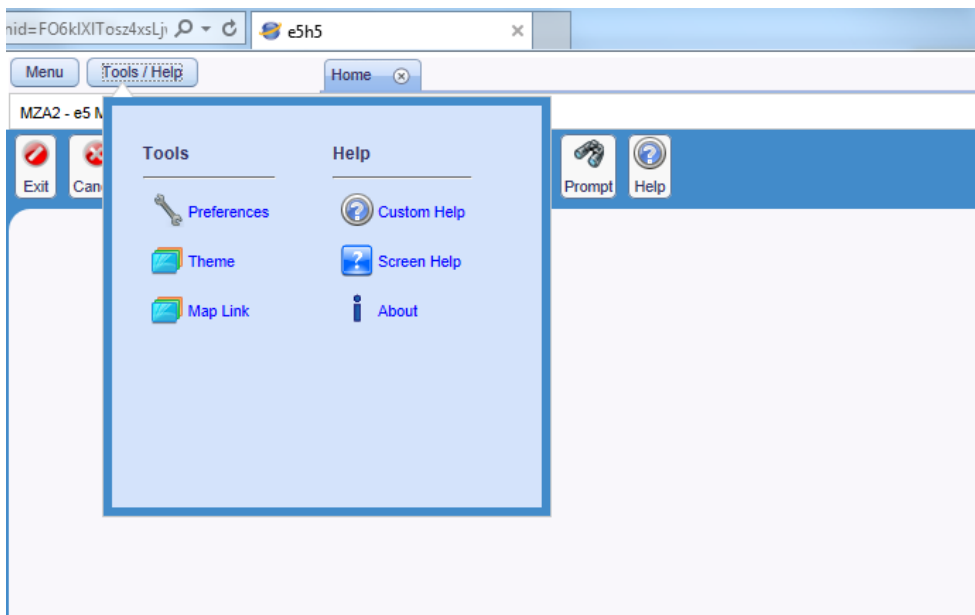


Figure 2 - Preferences

## Basic Tab

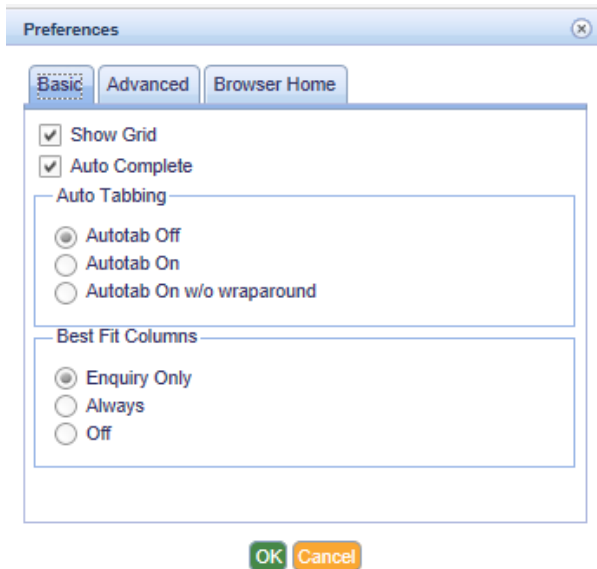


Figure 3 - Basic Tab

The basic tab has the following options:

### Show Grid

Shows grid lines on list boxes, helps make data on a row more visible.

### Auto Complete

Based on the characters being typed a drop down list of previously entered data.

### Auto Tabbing

Causes e5 to advance to the next field when the field before it has been completed.

### Best Fit Columns

Controls the sizing of the columns dependent on content.

## Advanced Tab

### Right Align

Select this to right align numeric fields.

### Decimal Symbols

Choices to customise decimal symbols and groupings of thousands.

## Browser Home Tab

Defines the home page on the background of the system.

## Order Enquiry - Selection Window

The selection window, secondary selection, extended selection and order list are shown on the same screen, with an arrow just to the left to show or hide the view.

The selection window will allow selection of specific criteria when enquiring on an order, e.g. Order Number, Supplier.

## Location

- Menu
- Order Management
- Order Enquiry/Copy

The screenshot displays the 'MDOA - Order - List' application window. The top menu bar includes 'Menu', 'Tools / Help', 'Home', 'Order - List', and 'Messages (1)'. Below the menu is a toolbar with various icons for actions like Exit, Cancel, Backward, Forward, Refresh, Amend, View, Insert, Copy, purchase\_order, Paperclip, Personal Query, Favourite Enquiries, Code Switch, Currency Enquiry, Prompt, and Help. The main content area is divided into several sections:

- Selection:** Contains input fields for Company (UP), Status (No), Order, Order Code, Location, Supplier, Buyer, and Owner. It also includes a 'Preallocated' checkbox and an 'OK' button.
- Secondary Selection:** Contains input fields for Order, Order Code, Buyer, and Location, along with an 'Include Preallocated' checkbox.
- Extended Selection:** A section with a collapsed arrow on the left.
- Order List:** A table with columns: Order Reference, Revision, Line, Code, Status, Create Date, Create User, Buyer, Location, Est Value, Text, Supplier, and Supplier Name. The table is currently empty.

At the bottom of the window, there are buttons for 'Return', 'Lines', 'Reprint', and 'Revisions', and a status bar showing 'University of Ports (Live)' and 'Live: 1014'.

Figure 4 - Selection and Secondary Selection

## Table of fields

Field	Description
Company	Default value of UP
Status pick list	Order status For example, Current or Outstanding

Field	Description
Order	Order prefixes are the characters, which identify the department raising the purchase order. The prefixes are followed by a system generated number  For example: <ul style="list-style-type: none"> <li>• CHM01262 – Pharmacy,</li> <li>• BIO04325 - Biomedical order</li> </ul>
Order Code	Code indicating the type of order  For example: <ul style="list-style-type: none"> <li>• PO – Normal Purchase Order (printed)</li> <li>• CO – Confirmation Order (Not printed)</li> </ul>
Location	Code indicating the location to which the goods or services are to be delivered  For example LIB1 – The University Library
Supplier	Unique number for the supplier providing the goods / services  For example 000136 – Office Depot
Buyer	User id identifies the requisitioning officer who is the point of contact for this order  For example FINMG – Mark Gledhill
Owner	User id identifies the owner of the document, used to trigger an approval step prior to authorisation taking place
Preallocated	Not used

## Points to Ponder

### Current orders and the status selector

Searching using only the order number in the primary selection 'Order' field will display the order irrespective of its status.

The use of any other search criteria will restrict the orders returned to 'current' orders only, i.e. those which have a status of Outstanding, Await Delivery or Await Invoice.

Use the 'Status' pick list on the selection window if orders with any of the other statuses are required.

## Wildcards

The wildcard character, '%', is used to represent any combination of characters.

It can be used at the beginning, middle or end of any filtering criteria entered in a filter field or when refining a list of values, For example:

Filter Criteria	Sample records returned
1%	INT01299, ISO05954
%IGHT	RIGHT, SLIGHT
%DON%	DONALD, MACDONALD, O'DONNELL, CLAYDON

## Using primary and secondary selection

When identifying orders using the Order List selection pane, only one of the primary selection fields can be used.

Additional parameters can be entered as either Secondary Selection criteria, see Page 8 or Extended Selection criteria.

# Order Enquiry - Order List Overview

The Order List screen provides basic information relating to the order, e.g. the supplier, value and status.

This screen is the starting point for all order enquiries on e5. Once the order / range of orders have been identified (see page 8), all other enquiry screens can be accessed from this screen.

The screenshot shows the 'MDOA - Order - List' interface. At the top, there are navigation tabs: 'Menu', 'Tools / Help', 'Chart', 'Home', and 'Order - List'. Below these are various action buttons like 'Exit', 'Cancel', 'Bkwd', 'Fwd', 'Refresh', 'More', 'Amend', 'View', 'Insert', 'Copy', 'purchase\_order', 'Paperclip', 'Personal Query', 'Favourite Enquiries', 'Code Switch', 'Currency Enquiry', 'Prompt', and 'Help'. The main area contains a table with columns: Order Reference, Revision, Line, Code, Status, Create Date, Create User, Buyer, Location, Est Value, Text, Supplier, and Supplier Name. The table lists various orders with their respective details. At the bottom, there are buttons for 'Return', 'Lines', 'Reprint', and 'Revisions'. The footer shows 'University of Ports (Live)' and 'Live: 1014'.

Order Reference	Revision	Line	Code	Status	Create Date	Create User	Buyer	Location	Est Value	Text	Supplier	Supplier Name
ISO18513	2	1	PO	Await Delivery	22 May 2013	ISOJK	ISOJK	ISO1	1237416.56	Y	B00759	BT IT SERVICES LIMITED
ISO18568	3	2	PO	Await Delivery	10 Jun 2013	ISOJK	ISOJK	ISO1	33284.40	Y	J00181	JANET (UK)
ISO18800	3	1	PO	Await Delivery	13 Aug 2013	ISOJK	ISOJK	ISO1	866.80	Y	P00801	PHS RECORDS MANAGEMENT
ISO18802	5	1	PO	Await Delivery	13 Aug 2013	ISOJK	ISOJK	ISO1	5274.20	Y	S00965	SOUTH WEST TRAINS LTD
ISO18804	2	1	PO	Await Delivery	13 Aug 2013	ISOJK	ISOJK	ISO1	6619.73	Y	R00456	RICOH UK LTD
ISO19012	2	1	PO	Await Invoice	08 Oct 2013	ISOJK	ISOJK	ISO1	477.26	Y	O00118	O2 (UK) LIMITED
ISO19174	1	2	PO	Await Delivery	18 Nov 2013	ISOCC	ISOCC	ISO1	6420.00	Y	N00159	NORTHGATE INFORMATION SOLUTIONS UK
ISO19791	1	3	PO	Await Delivery	02 May 2014	ISOJK	ISOJK	ISO1	6240.00	Y	B01035	BEST PRACTICE TRAINING LTD
ISO19803	2	1	PO	Await Invoice	08 May 2014	ISOJK	ISOJK	ISO1	3332.87	Y	E00400	ESTEEM MANAGED SERVICES LTD
ISO19873	2	1	PO	Await Delivery	23 May 2014	ISOJK	ISOJK	ISO1	2554.50	Y	E00414	EASY NETWORKS LTD
ISO19893	1	4	PO	Await Invoice	02 Jun 2014	ISOJK	ISOJK	LIB1	6540.00	Y	X00017	X2 CONNECT LTD
ISO19925	1	2	PO	Await Invoice	10 Jun 2014	ISOJK	ISOJK	ISO1	420.72	Y	T00100	TIMBERLAKE CONSULTANTS LTD
ISO19938	2	2	PO	Await Delivery	12 Jun 2014	ISOJK	ISOJK	LIB1	214969.10	Y	B00945	BOF GROUP LTD T/A BOF
ISO20032	1	1	PO	Await Invoice	09 Jul 2014	ISOJK	ISOJK	ISO1	189.60	Y	P00741	PACIFIC COMPUTERS LTD
ISO20053	1	3	PO	Await Invoice	11 Jul 2014	ISOCC	ISOCC	ISO4	8540.86	Y	P00284	PORTSDOWN OFFICE LIMITED
ISO20055	2	8	PO	Await Delivery	11 Jul 2014	ISOJK	ISOJK	ISO1	243090.90	Y	B00759	BT IT SERVICES LIMITED
ISO20074	2	2	PO	Await Invoice	17 Jul 2014	ISOJK	ISOJK	ISO12	2800.61	Y	D00023	DELL CORPORATION LTD
ISO20083	1	9	PO	Await Invoice	18 Jul 2014	ISOJK	ISOJK	ISO17	13583.87	Y	P00741	PACIFIC COMPUTERS LTD
ISO20090	2	1	PO	Await Invoice	22 Jul 2014	ISOCC	ISOCC	ISO1	16830.00	Y	B00759	BT IT SERVICES LIMITED
ISO20095	1	1	PO	Await Invoice	23 Jul 2014	ISOJK	ISOJK	ISO4	844.80	Y	L00150	LINK LOCKERS LTD
ISO20116	1	1	PO	Await Delivery	30 Jul 2014	ISOCC	ISOJK	ISO1	6000.00	Y	S00965	SOUTH WEST TRAINS LTD

Figure 5 - Order List

## Primary Details Tab Fields

Field	Description
Order Reference	Order prefixes are the characters which identify the department raising the purchase order. The prefixes are followed by a system generated number  For example CHM01262 – Pharmacy, BIO04325 - Biomedical order
Revision	Number of times this order has been revised
Line	Number of lines on this order

Field	Description
Code	Code indicating the type of order For example: PO – Normal Purchase Order (printed) CO – Confirmation Order (not printed)
Status	Overall status of this the order For example - Await Invoice
Create Date	Date this order was entered onto e5
Create User	User id indicating the user who entered the order onto e5 For exemple ISOAS – Adrian Sharkey
Buyer	User id indicating the requisitioning officer who is the point of contact for this/the order For example FINSL – Sarb Laly
Location	Code indicating the location to which the goods or services are to be delivered For example LIB1 – The University Library
Est Value	Value of complete order including any non-recoverable VAT
Est Value	Value of complete order including any non-recoverable VAT
Est Value	Value of complete order including any non-recoverable VAT
Supplier Name	Supplier name relating to the supplier code E.g. Office Depot

## Process to identify orders using the Order List screen

- Enter Primary Selection
- Only enter one of the Primary Selection criteria fields as required. See Points to ponder
- Click OK

## Points to Ponder

### Navigation

Right click on any field within a row to access a list of navigation and command options for the data contained within the row. These options are often duplicated with menu bar options, icons or macro buttons.

### Sorting

All columns can be sorted in ascending or descending order by clicking once on the column header. The sort order is identified by a small triangle in the top right-hand corner of the relevant column header. When re-ordering and moving the columns in rows, the next time the screen is accessed the setting will be retained.



## Macro Buttons and Navigation from Order List Screen

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Button	Description
Return	Returns to the previous screen
Lines	Opens the order lines screen
Reprint	Not used
Revisions	Not used

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# Enquiry - Extended Selection

The extended selection window will allow selection of additional parameters when enquiring on an order, e.g. Order Number, Date Created.

The selection window, secondary selection, extended selection and order list are shown on the same screen, with an arrow just to the left to show or hide the view.

## Location

- Menu
- Order Management
- Order Enquiry/copy
- Extended Selection

The screenshot displays the MDOA - Order - List application interface. At the top, there is a navigation bar with tabs for 'Home', 'Order - List', and 'Order - List'. A 'Messages (1)' indicator is visible in the top right corner. Below the navigation bar is a toolbar with various icons for actions like Exit, Cancel, Backward, Forward, Refresh, More, Amend, View, Insert, Copy, purchase\_order, Paperclip, Personal Query, Favourite Enquiries, Code Switch, Currency Enquiry, Prompt, and Help. The main content area is divided into several sections:

- Supplier/Owner/Preallocated:** Fields for Supplier, Buyer, and Owner, with a checkbox for 'Preallocated' and an 'Include Preallocated' checkbox.
- Extended Selection:** A section with 'Search Ranges' for 'From' and 'To' columns. Fields include Order, Value, Date Created, Date Printed, Invoice Location, Create User, and Currency. An 'Authorisation' section contains 'Group' and 'Code' fields.
- Status Indicators:** A section with checkboxes for 'Awaiting Funds', 'Awaiting Delivery', 'Awaiting Approval', 'Awaiting Invoice Clearance', 'Awaiting Authorisation', and 'Awaiting Acknowledgement'.
- Order List:** A table with columns: Order Reference, Revision, Line, Code, Status, Create Date, Create User, Buyer, Location, Est Value, Text, Supplier, and Supplier Name. Below the table are buttons for 'Return', 'Lines', 'Reprint', and 'Revisions'.

At the bottom left, it says 'University of Ports (Live)' and at the bottom right, 'Live: 1014'.

Figure 6 - Extended Selection

## Table of Fields

Field	Description
Order	Range of orders to search within
From / To	For example - Order From: AHS00234 To: AHS00542

Field	Description
<b>Value</b>	Range of order values to search within
<b>From / To</b>	Fort example - Value From: 500 To: 1500
<b>Date Created</b>	Range of order creation dates to search between
<b>From / To</b>	For example - Date Created From: 01 Jan 2007 To: 01 Apr 2008
<b>Date Printed</b>	Not used
<b>From / To</b>	
<b>Invoice Location</b>	Indicator that displays locations code for the orders
<b>Create User</b>	User id of the user who entered the order onto e5 For example FINMG – Mark Gledhill
<b>Currency</b>	Not used
<b>Authorisation Group</b>	Not used
<b>Authorisation Code</b>	Not used

## Status Indicators

Field	Description
<b>Awaiting Funds</b>	Not used
<b>Awaiting Delivery</b>	Indicator for only orders for which deliveries are still expected
<b>Awaiting Approval</b>	Indicator of 'Y' will ensure that only lines awaiting approval should be included in the search
<b>Awaiting Invoice Clearance</b>	Indicator for only orders with a status of 'Await Invoice'
<b>Awaiting Authorisation</b>	Not used
<b>Awaiting Acknowledgement</b>	Not used

# Enquiry - Order Summary Screen Overview

The Order Summary screen displays an overview of the order.

In addition to the overall value of the order, receipts and invoices, this screen provides details for individual order lines, e.g. order line value, receipts value and actual value invoiced.

## Navigation Options to Access the Order Summary Enquiry Screen

- Order List screen
- Right click
- Display
- Summary

OR

- Order List screen
- Menu bar
- Display
- Summary

The screenshot displays the MDOP - Order Summary screen. At the top, there is a menu bar with options: Menu, Tools / Help, Chart, Home, and Order Summary. Below the menu bar, the screen title is "MDOP - Order Summary" and the user session information is "Exit GRN's Display Go Session".

The main content area is divided into two sections. The top section contains order details:

Order:	ISO18804	Revision:	2
Supplier:	R00456	RICOH UK LTD	
Currency:	GBP	Rate Type:	
Effective Date:		Exchange Rate:	0.000000
Order Cost:	6619.73	Value Outstanding:	507.30
Value Received:	6112.43	Value Invoiced:	6112.43
Value Accrued:	0.00	Tax Value:	1103.29

Below the order details, there are two tabs: "Base Currency" (selected) and "Foreign Currency".

The bottom section is a table with the following columns: Cmd, Order Value, Tax Value, Outstanding, Received, Accrued, Invoiced, Invoiced Outstanding, Invoiced Held, Non Recoverable VAT, Recoverable VAT, and PEV Line Cost. The first row of data is as follows:

Cmd	Order Value	Tax Value	Outstanding	Received	Accrued	Invoiced	Invoiced Outstanding	Invoiced Held	Non Recoverable VAT	Recoverable VAT	PEV Line Cost
	6619.73	1103.29	507.30	6112.43	0.00	6112.43	0.00	0.00	1103.29	0.00	6619.73

At the bottom of the screen, there is a navigation bar with buttons: Prompt, Quantities, Scaling, Invoice List, Alt. View, and Cancel. The footer of the screen shows "University of Ports (Live)" on the left and "View" on the right.

Figure 7 - Order Summary Screen

## Table of fields

Field	Description
Order	Order prefixes are the characters which identify the department raising the purchase order. The prefixes are followed by a system generated number  For example: CHM01262 – Pharmacy BIO04325 - Biomedical order
Revision	Number of times this order has been revised
Supplier	Unique number for the supplier providing the goods / services  For example 000136
Currency	Not used – defaults to GBP
Rate Type	Not used
Effective Date	Not used
Exchange Rate	Not used
Order Cost	Value of this complete order including any non-recoverable VAT
Value Outstanding	Outstanding amount for the whole order including any non-recoverable VAT
Value Received	Amount received for the whole order including any non-recoverable VAT
Value Invoiced	Total invoiced for the whole order including any non-recoverable VAT
Value Accrued	Not used
Tax Value	Amount of VAT for the whole order

## Base Currency Tab

Field	Description
Cmd	Not used in view mode
Order Value	Total of this order line including any non-recoverable VAT
Tax Value	Amount of any VAT for this order line
Outstanding	Outstanding amount for this order line including any non-recoverable VAT

<b>Field</b>	<b>Description</b>
Received	Total received for this order line including any non-recoverable VAT
Accrued	Not used
Invoiced	Amount invoiced for this order line
Invoiced Outstanding	Total received, but not yet invoiced, for this order line
Invoiced Held	Not used

## Foreign Currency Tab

None of the fields on the Foreign Currency tab are used.


## Macro Buttons and Navigation from Order Summary Enquiry Screen

Prompt	Not used
Quantities	Displays how many items have been ordered
Scaling	Not Used
Invoice List	Not Used
Alt. View	Not Used
Cancel	Returns to the previous screen

# Downloading Data

Data in e5 can be exported from rows to allow manipulation in an external package. Data can be exported to the clipboard, as a CSV file or directly into Excel or Word.

## Process to Download

- Ctrl +D or click the download  button, located at the bottom right of the list screen
- The List Box Download window will be displayed
- Select the Excel or Word tab to export directly into Microsoft Excel or Word
- Deselect a field to exclude it from the download
- Use the miscellaneous tab to select comma or tab separated and format the file
- Click OK. All data from the rows will be copied to the clipboard or downloaded as a Word or Excel file as selected

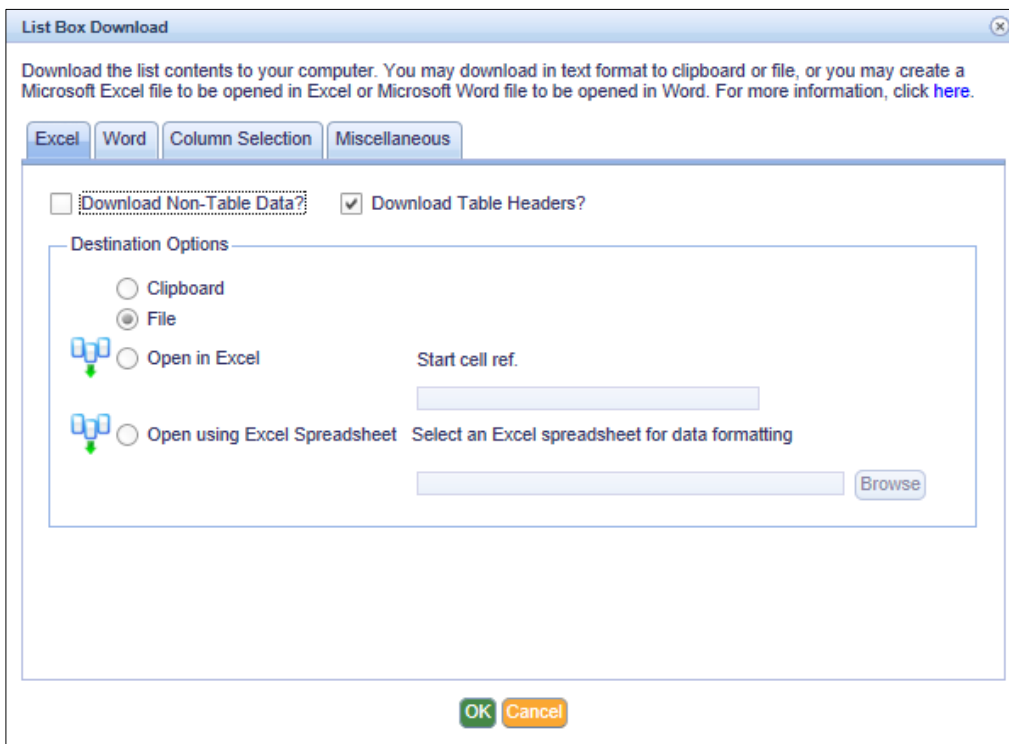


Figure 8 - Download Box



# Data Protection

The e5 system holds personal data about individual members of staff in relation to to the payment of staff expense claims.

This data should be processed in accordance with the General Data Protection Regulation 2018, and should not be disclosed to third parties except in certain circumstances, an example of which is given below.

The e5 system is password protected for security reasons and for that reason you must not share your password with anyone else. Only certain members of staff have the ability to change data and this access control should not be altered without good reason, following documented procedures. The procedures are documented in the [finance manuals](#). You should not leave your computer logged onto the e5 system for any length of time and you should always remember to lock your computer whilst you are away from your desk.

There will be very few situations where data needs to be provided to a third party. In most instances, the member of staff whose data is to be shared should be asked for their consent before the proposed disclosure is completed. There are situations where we may be under obligation to provide the data eg if it is requested by an auditor or if providing the data may be in the public interest. It would be appropriate still to inform the member(s) of staff whose data is to be disclosed prior to the disclosure. Any disclosure should be recorded in case it is queried at a later date.

It should be noted that it is an offence under the General Data Protection Regulation 2018 to knowingly or recklessly disclose personal data. Individuals may be personally liable for such an offence. If you are unsure whether to disclose any data, check first with your manager or the University's Data Protection Officer, Samantha Hill.

If you have any queries about the Data Protection Act and how it affects your work, please feel free to contact the Samantha Hill on x 3642 or look at the University web pages on data protection at [www.port.ac.uk/DPA](http://www.port.ac.uk/DPA).

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