VIRGINIA PASSENGER RAIL AUTHORITY

Vendor Portal User Manual

April, 2024

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VIRGINIA PASSENGER RAIL AUTHORITY

Welcome to the Vendor Portal

A Portal Just For You

VPRA's system for financial transactions is Dynamics 365. We create and track budgets, requisitions, purchase orders, invoices, and payments in Dynamics. Now, our vendors can also access Dynamics to view and print purchase orders, to submit invoices, and to track approval and payment of invoices.

This Manual will provide you with instructions for setting up your vendor portal account, onboarding users, how to submit invoices, how to view and print purchase orders, how to track VPRA's review and payment of invoices, and how to set up alerts. You will also learn how to create contacts and addresses, and to upload insurance certifications and banking information. We will also provide helpful hints on how to customize your screen and views.

Portal Users

Before you jump into registering for the Vendor Portal, let's talk about who might want to use the Portal. There are three security roles for vendor portal users. These roles control what your users can see and do:

- Role 1: Maintain vendor contact persons and vendor user requests
- Role 2: View and print purchase orders and purchase agreements in the vendor portal
- Role 3: Maintain invoices in the vendor portal
- Role4: View and track payment status of invoices

You need to have one, and only one, Primary User. The Primary User should be the individual who will be responsible for maintaining users of your account and uploading documents, including bank account information for payment. This person should have all four of these security roles. For the most part, your other users will be provided only Roles 2 and 4, the View and print POs role and the View invoices role. Depending on your internal process, you may also choose to provide more than one person with the ability to maintain (i.e., submit) invoices. You likely want to limit only one or two users to Role 1. More on Portal Users later.

User Role	Purpose
1. Maintains vendor contact persons and vendor user requests	Allows a vendor user to provide access to their portal to other vendor staff members
2. View and print purchase orders and purchase agreements in the vendor portal	View-only access
3. Maintain invoices in the vendor portal	Allows a vendor user to submit invoices and to monitor status of payment
4. View vendor invoice details on the vendor portal	View-only access to see status of invoice: reviewed, approved, paid

How Do I Sign Up?

Some of you are brand new to VPRA, and some of you have been doing business with VPRA. If you are new, you will follow the Instructions just below. If you are already doing business with VPRA, your Vendor portal account already exists. Your instructions will be a little different. Jump to Section II, Existing Vendor Registration.

Important: The person who submits the New Vendor Registration request should be the individual who will maintain users of your account and upload documents, including bank account information. This person will also be the one and only Primary User for your Vendor Portal account.

I. NEW VENDOR REGISTRATION

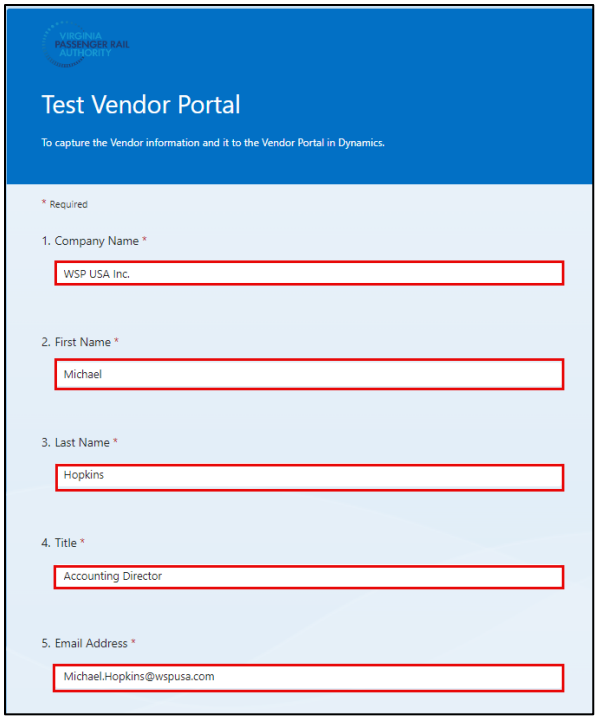
To get started, click this link, or copy and paste it into your web browser:

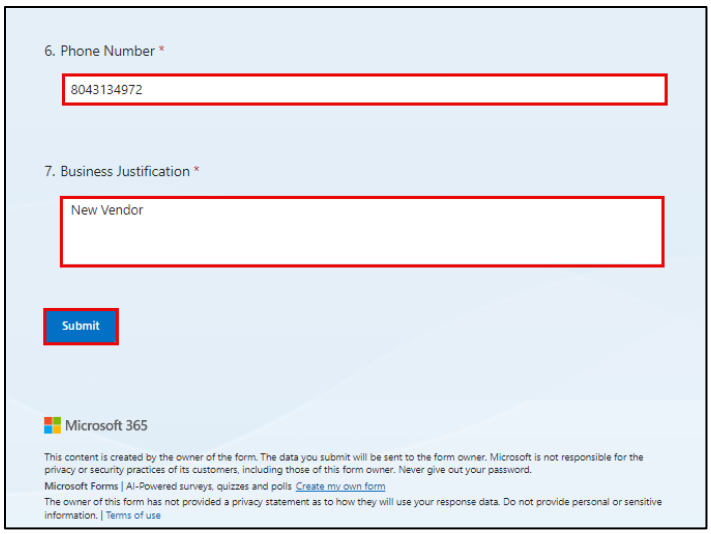
Vendor Portal - VPRA (vapassengerrailauthority.org)

You have been directed to the VPRA website. Find and click the link that says, "**Vendor Form**." A Registration Form will open. Follow the steps below to initiate the registration process. Remember, the person identified should be your Primary User.

Step 1: Within VPRA's vendor portal registration request, enter the following details:

- **Company Name:** Your legal name, not doing business as name
- **First Name**
- **Last Name**
- **Title**
- **Email Address**
- **Phone Number**
- **Business justification** – Enter "**New Vendor**" or "**Existing Vendor.**"



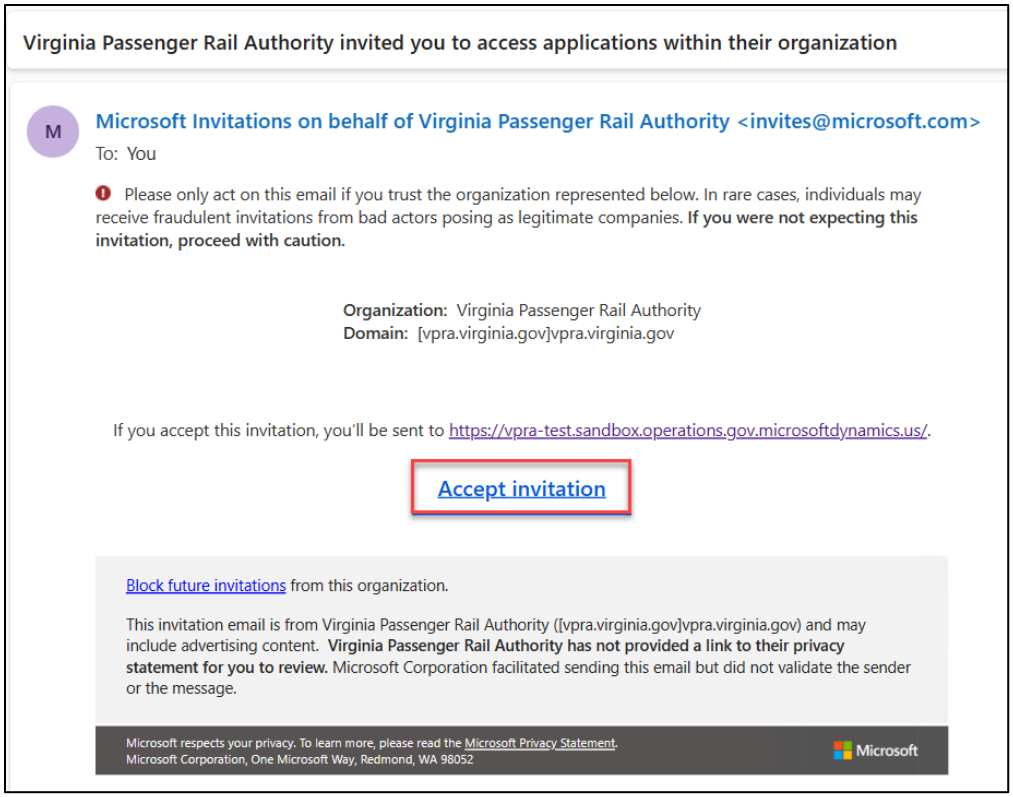


Step 2: Click **Submit** to send the request to the VPRA Purchasing team for review.

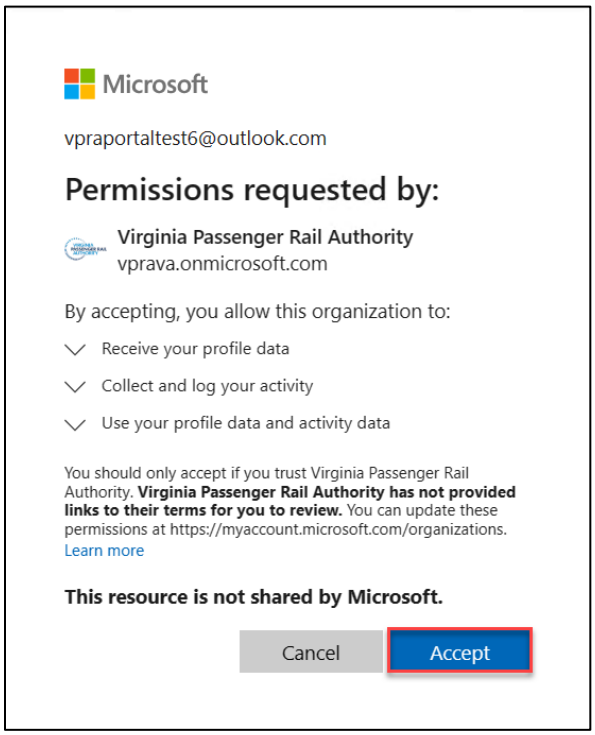
Important: The details entered on the VPRA registration form will be passed to Dynamics. VPRA's Procurement team will receive a notification, telling us to review the request. Please allow five (5) business days for VPRA to process your request.

Step 3: You will receive an email to the email address you provided on the Registration request form after VPRA has reviewed and approved your request. Check your Junk or Spam folder if you don't receive an email.

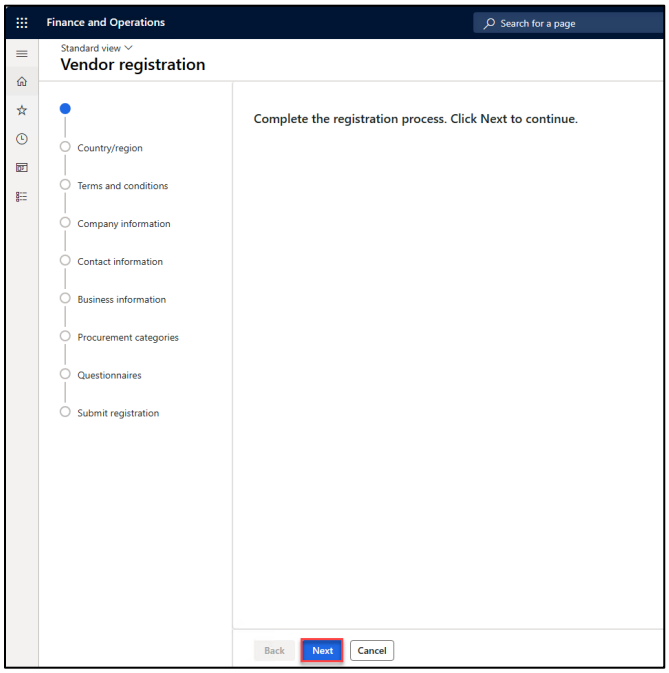
When you receive the email, click **Accept Invitation**.



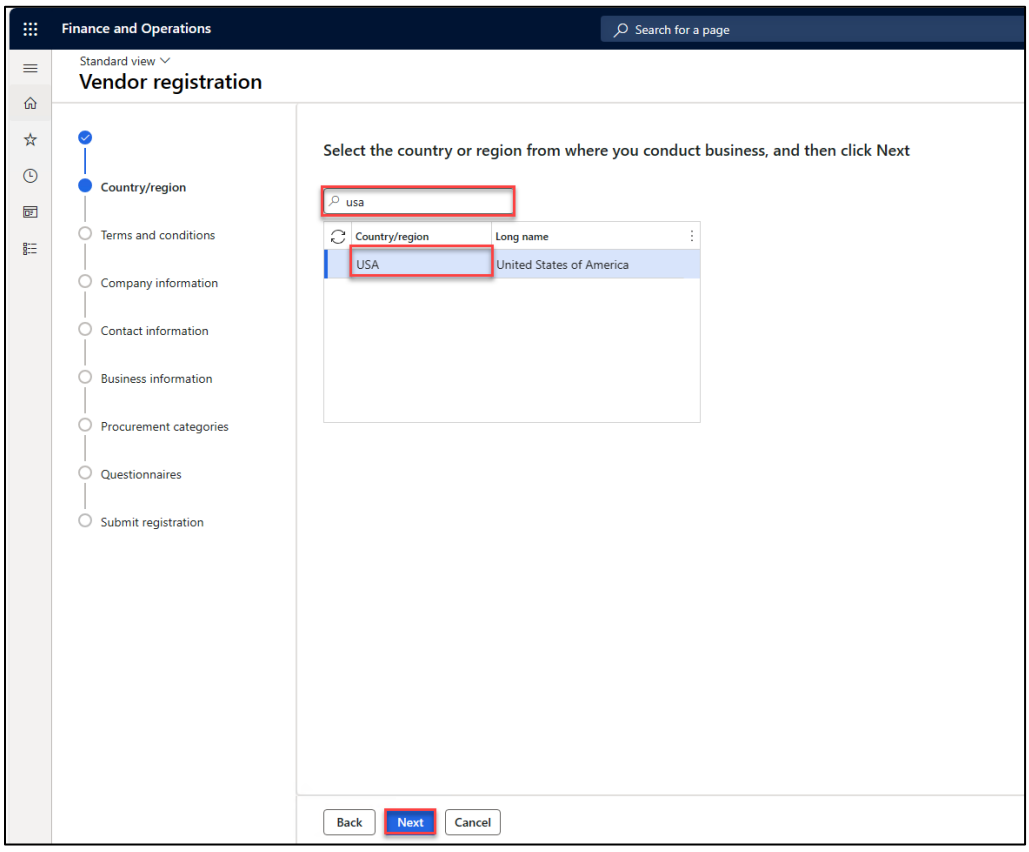
Step 4: Accept the request for permissions to proceed with the registration process.



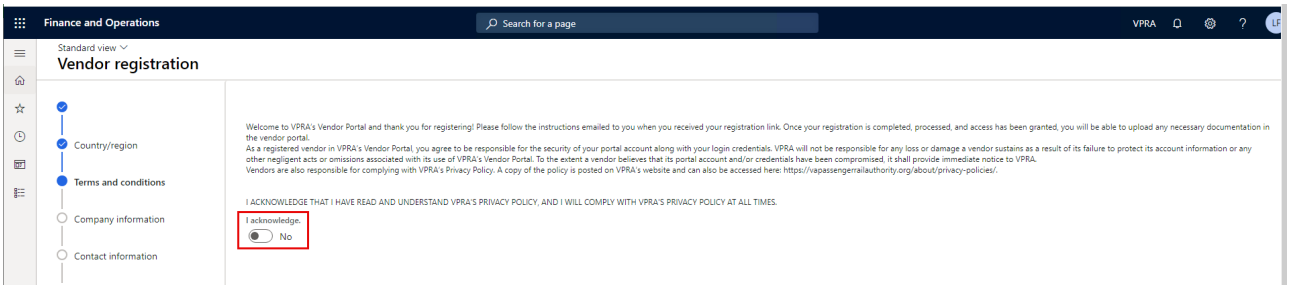
Step 5: Dynamics 365 will be launched to begin the registration process. Select **Next**.



Step 6: Select **USA** within the **Country/region** list, and then click **Next**. Note that the search bar can be used to filter results.

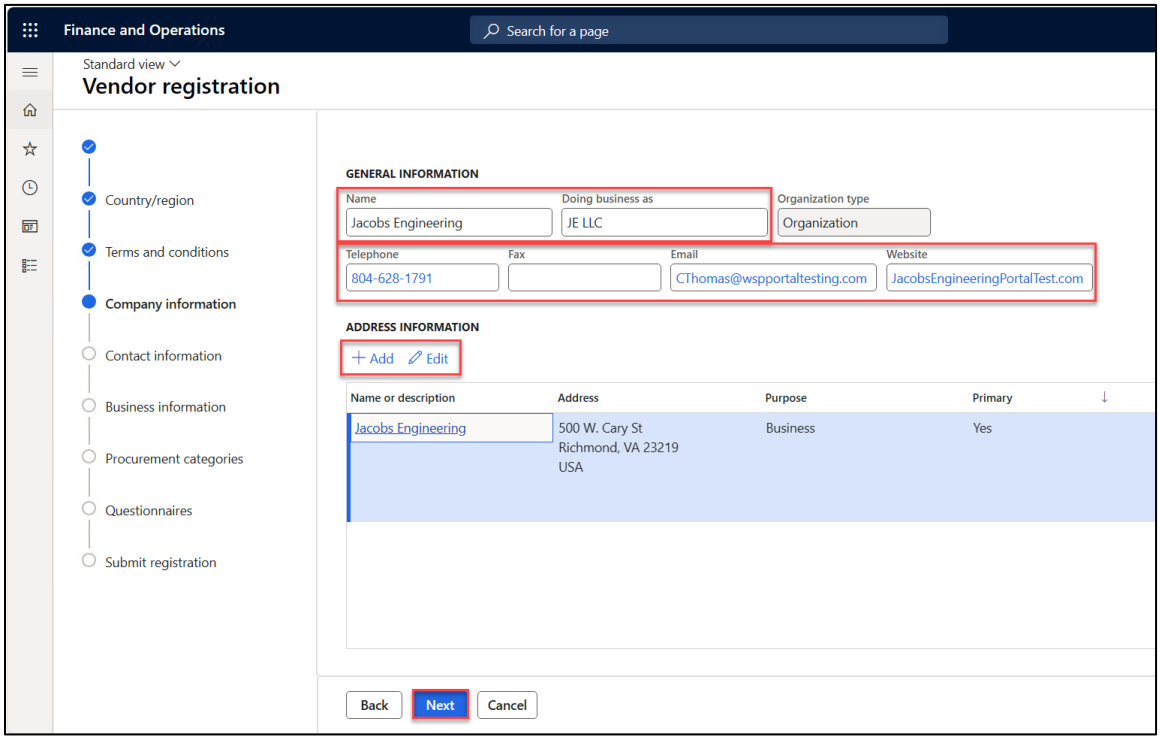


Step 7: Review the general text and acknowledge that it has been read and understood by toggling from No to **Yes**. Click **Next**.

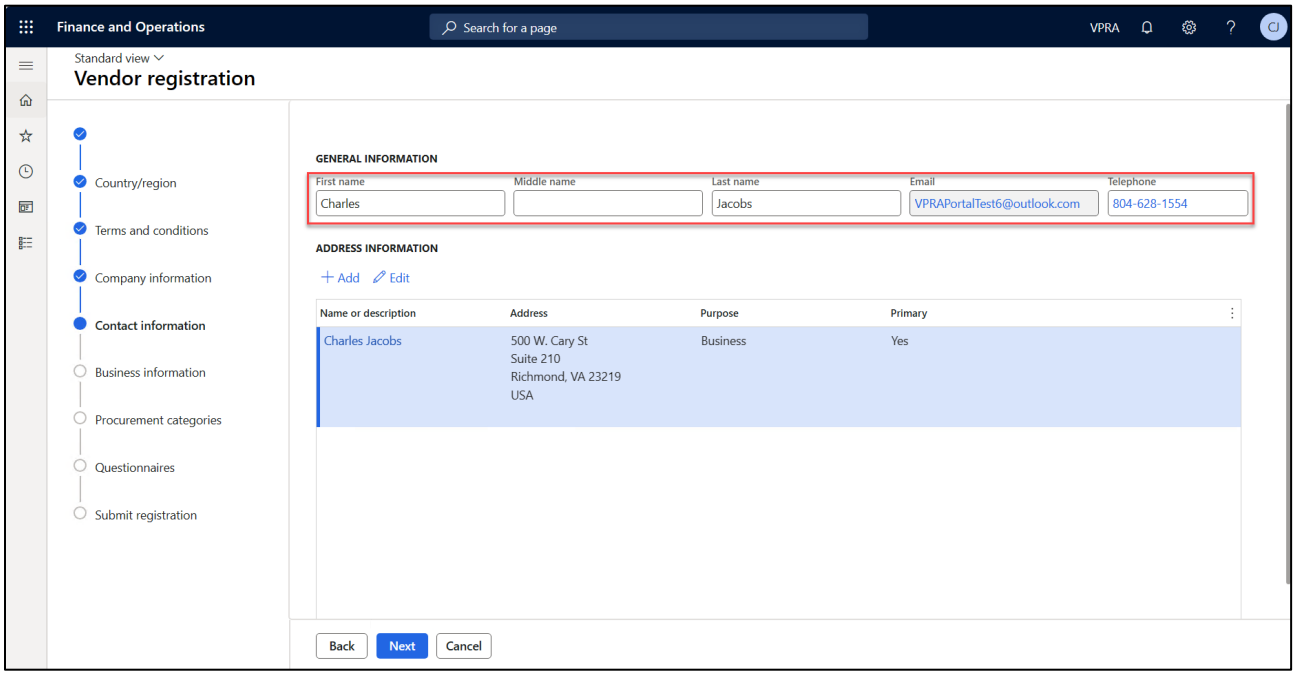


Step 8: Enter general company and contact information as applicable. To add an address, use the **Add** button. To modify an existing address, use the **Edit** button. Once finished, click **Next**. This is where the **main office address** and **remit to address** should be entered.

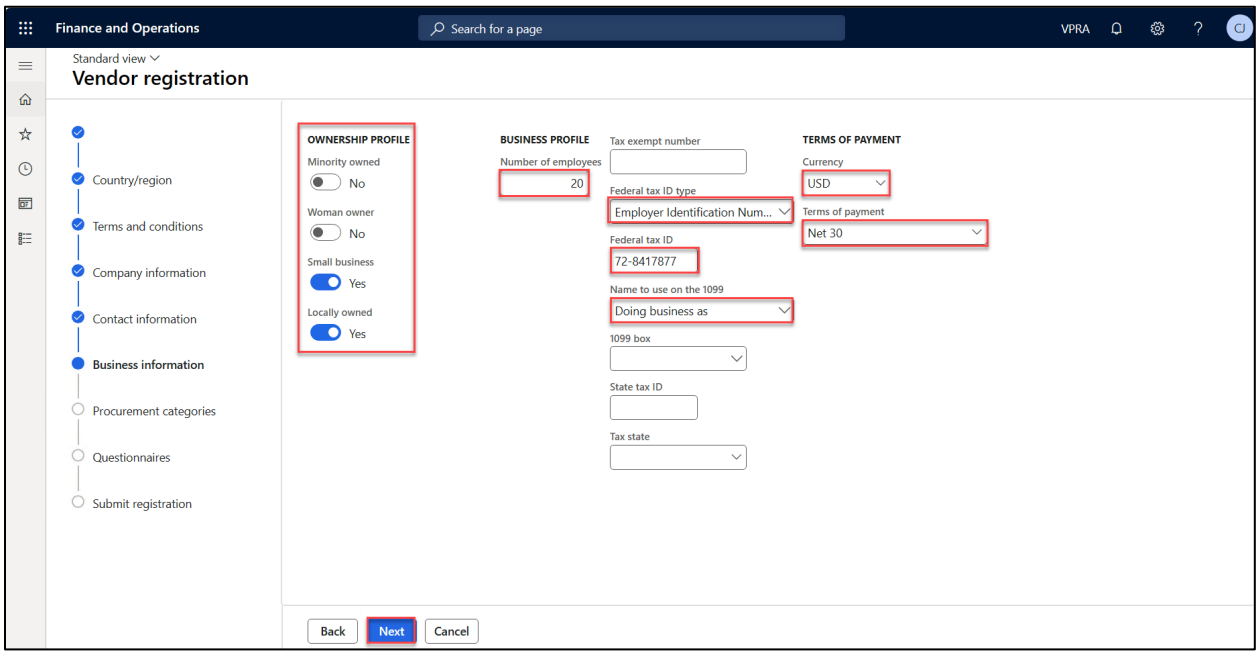
Note: *This screen is for general company contact information. The next step provides instructions for contact information for the individual who is registering for the vendor portal and other key vendor contacts.*



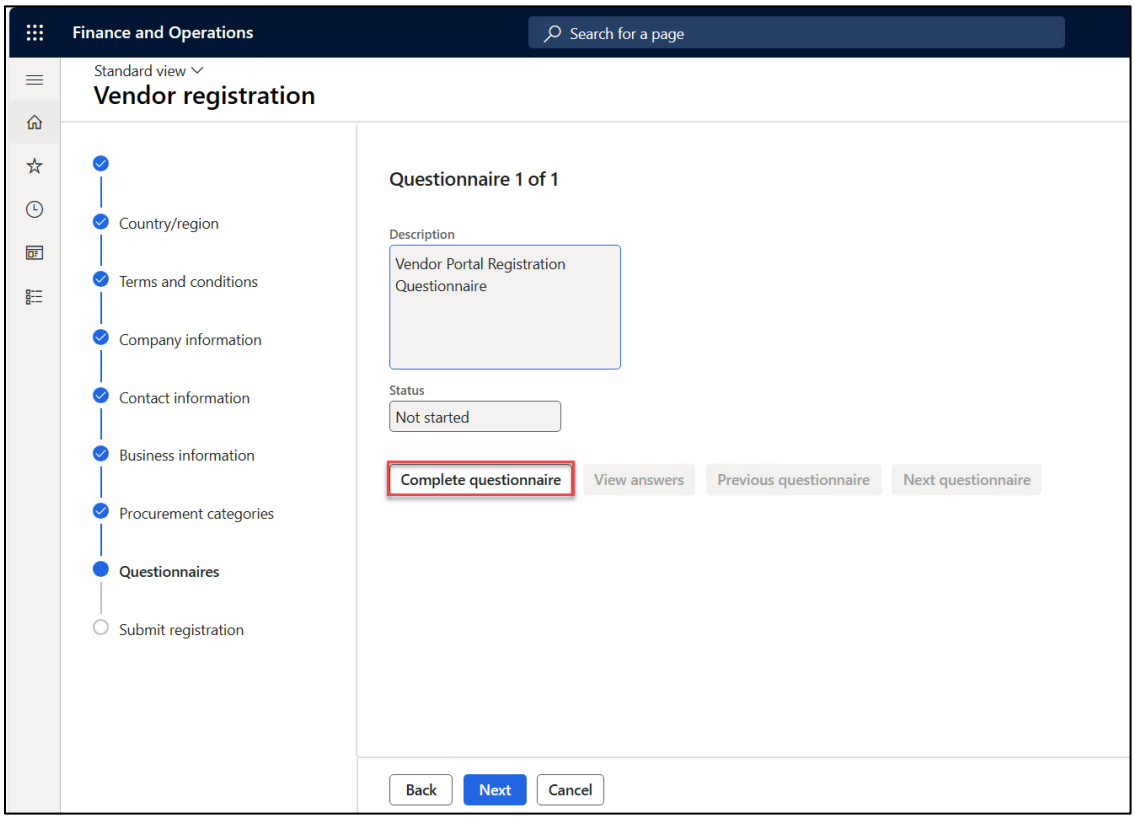
Step 9: Enter your personal contact information and address details. Click **Next**.



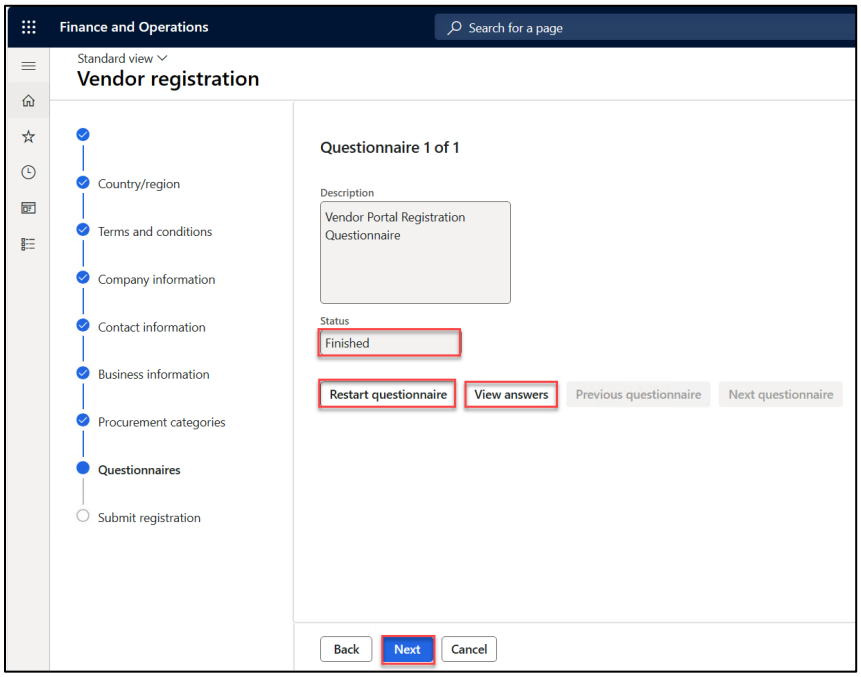
Step 10: Make appropriate selections within the **Ownership Profile**, **Business Profile** and **Terms of Payment** sections. Click **Next**. Continue with the selections in **Procurement categories**.



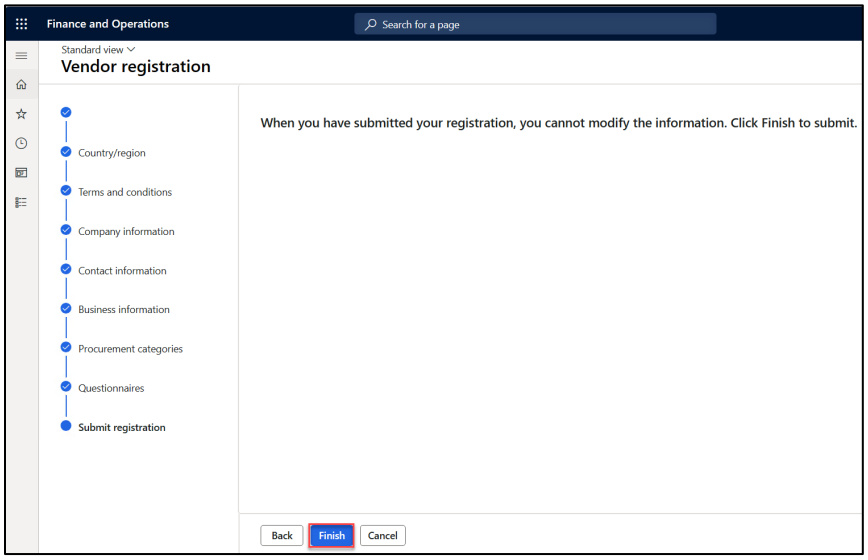
Step 11: Select **Complete questionnaire**. Enter a response for each question, and then use the **Forward** button to advance to the next question. After responding to the final question, click **End**.



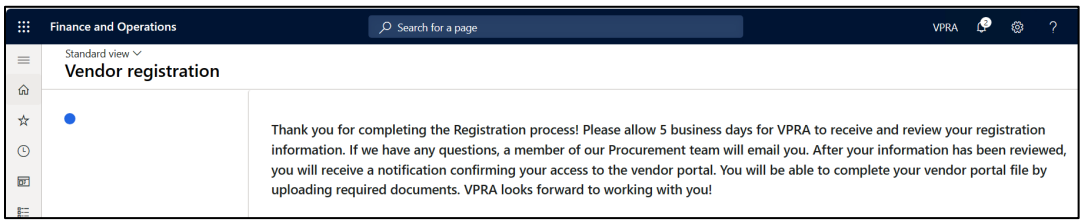
Step 12: Use the **Restart questionnaire** or **View answers** options, as needed. Once complete, the questionnaire **Status** will show as **Finished**. Click **Next**.



Step 13: When ready, click **Finish** to submit the registration request to VPRA for processing.



Step 14: A confirmation message will appear. VPRA's Procurement department will review the request within five business days and contact you with next steps.



Important: Please allow 5 business days for VPRA to receive and review your registration information. If we have questions, we will email you. Once your information is reviewed and approved, your vendor portal account will be created. You will receive an email from VPRA Procurement. You will then be able to upload relevant documents, such as small business certification, certificates of insurance, banking details, and the like.

Important: Your login credentials are your work email address and your work email address password. This is true for each user; i.e., each user will log in using their own work email address and the associated password to the email address.

Step 15. You will receive an email from VPRA confirming creation of your vendor portal account. We will provide an Electronic Funds Transfer form for you to complete so we can confirm your banking account information. You will also need to upload other relevant documents, such as a copy of your W9, evidence of small business certifications, if applicable, and certificates of insurance. Go to Using the **Vendor Portal > Uploading Documents** below.

VPRA will put your account on hold until the remaining information is uploaded. Once received, your account will become active.

II. EXISTING VENDOR REGISTRATION

If you are an existing vendor, VPRA has already created a vendor portal file for you. Now, we just need to provide you with access. As an existing vendor, you can initiate your access to the vendor portal in one of two ways. You can use the link provided in Section 1, Step 1. When you complete the registration initiation form, select **Existing Vendor**. The other way to obtain access to your vendor portal is by invitation from VPRA. VPRA will send you an email inviting you to register to access your existing vendor portal account.

Using the Vendor Portal

Congratulations! Now, you have access to your Vendor Portal account. In this section, we will teach you how to do the following:

- View and print purchase orders and purchase agreements
- Submit invoices and track review and payment
- Add users
- Upload documents
- Maintain information stored in your Vendor Portal
- Set alerts

Important: Before you get started, make the following changes to your Vendor Portal environment with the instructions available below in the section **Environment and User Settings**

- Change the time zone from GMT to your time zone, as necessary
- Turn on notifications

I. PURCHASE ORDERS AND PURCHASE AGREEMENTS

Before we get started, let's make sure we understand the function of a VPRA Purchase Order (PO) and the function of a VPRA Purchase Agreement (PA).

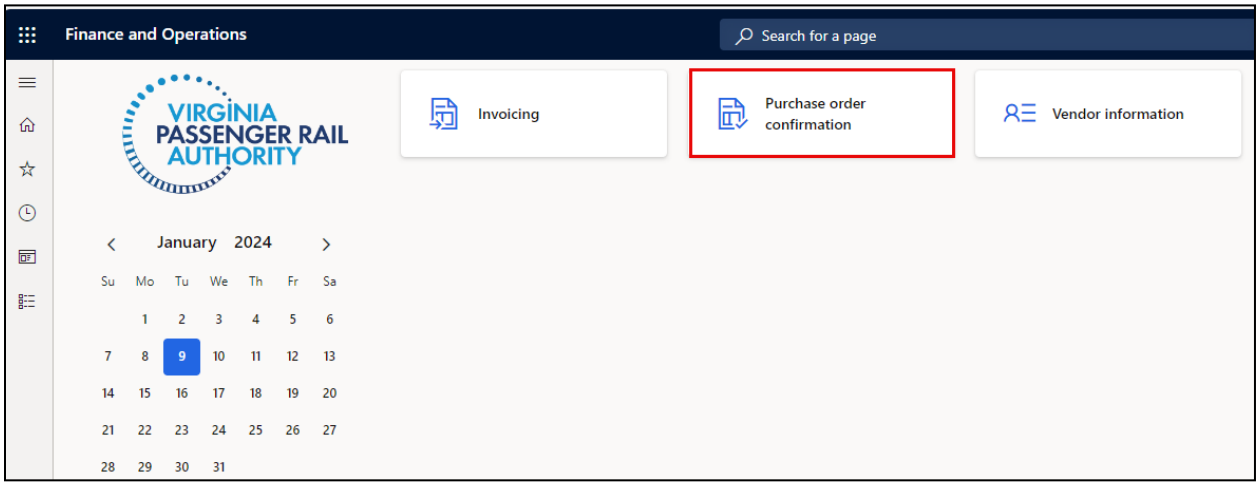
Purchase Orders: VPRA issues POs to confirm what we are purchasing, the quantity, and the cost. POs are also used to track project budgets and current project spend. For each open PO you have with VPRA, you should submit one corresponding invoice. For fastest review, approval, and payment, your invoice should reflect the VPRA PO number. VPRA often adds attachments to POs at the PO line level; for example, change orders, task orders, emails authorizing an expense, etc.

Purchase Agreements: PAs are a tool in Dynamics to track certain types of contracts. Not every contract is a PA. For clarity, a "Purchase Agreement" is a Dynamics 365-specific term. Do not panic if you have a written contract or agreement with VPRA, but don't have a PA in Dynamics.

VPRA uses Dynamics 365 PAs to track budgets for certain types of contracts: bench contracts and multi-year contracts that include Annual Work Plans (AWPs). For example, every firm on a bench contract has a fully executed contract. Each firm on a bench contract will be issued separate task orders for each task they perform for VPRA. To track and connect task order spend, VPRA creates a PA for the fully executed contract. Then, each time a task order is issued, VPRA issues one PO for the task order. Similarly, if your firm has an AWP with VPRA, VPRA creates a PA in Dynamics for the fully executed contract, and then issues an annual PO (or multiple POs) for the AWP, reflecting the total allowed spend for that fiscal year.

Vendor Portal Homepage

Your homepage will look similar to the image below:

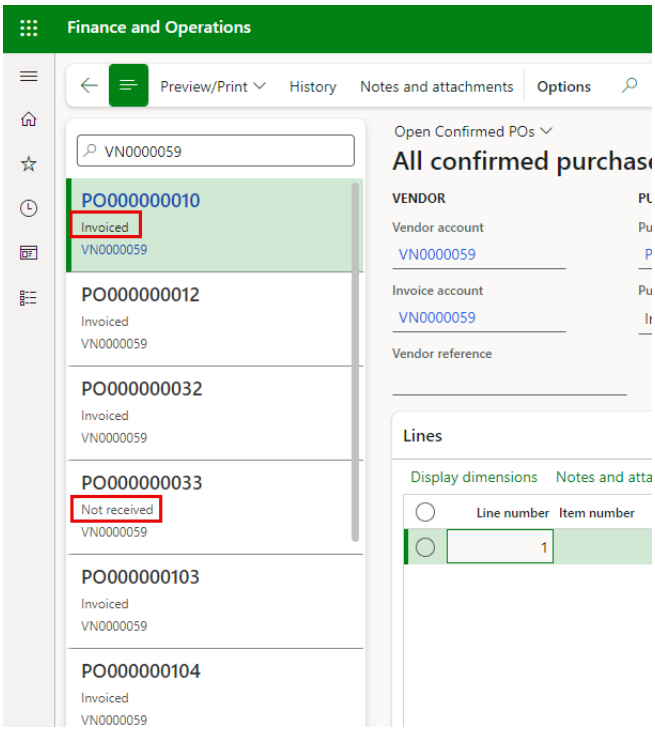


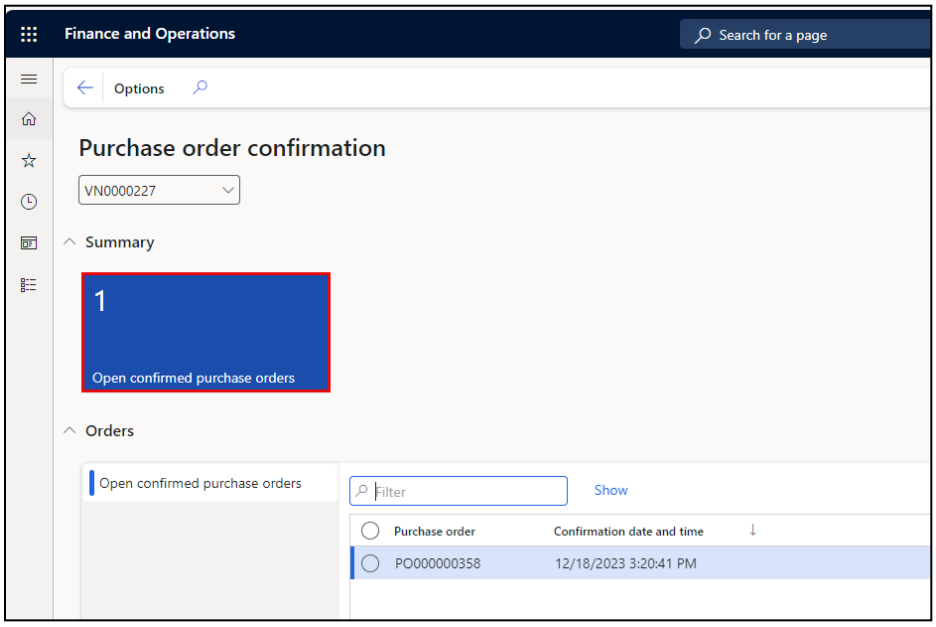
You will see tiles in your main workspace that provide shortcuts to your main portal views. For more on navigation within your portal, please see **Section IV, General Navigation and User Preferences**.

View and Print POs

Access Menu Path:	Modules > Vendor collaboration > Purchase orders > All confirmed purchase orders

Step 1: There are two ways to view your list of Purchase orders. You can navigate to All confirmed purchase orders using the Access Menu Path above. You can also select the **Purchase order confirmation** workspace tile. If you are having trouble seeing all of your purchase orders, then use the Access Menu Path. (See screenshots on the next page.)





Step 2: Select the **Open confirmed purchase orders** tile.

Step 3: You will see a page of all open, confirmed purchase orders. This section focuses on open purchase orders, meaning the PO has not yet been delivered to VPRA, invoices are still expected, or both. From this list, you can do the following:

1. Select a specific PO in the left pane. You can see the status of the PO under the PO number.

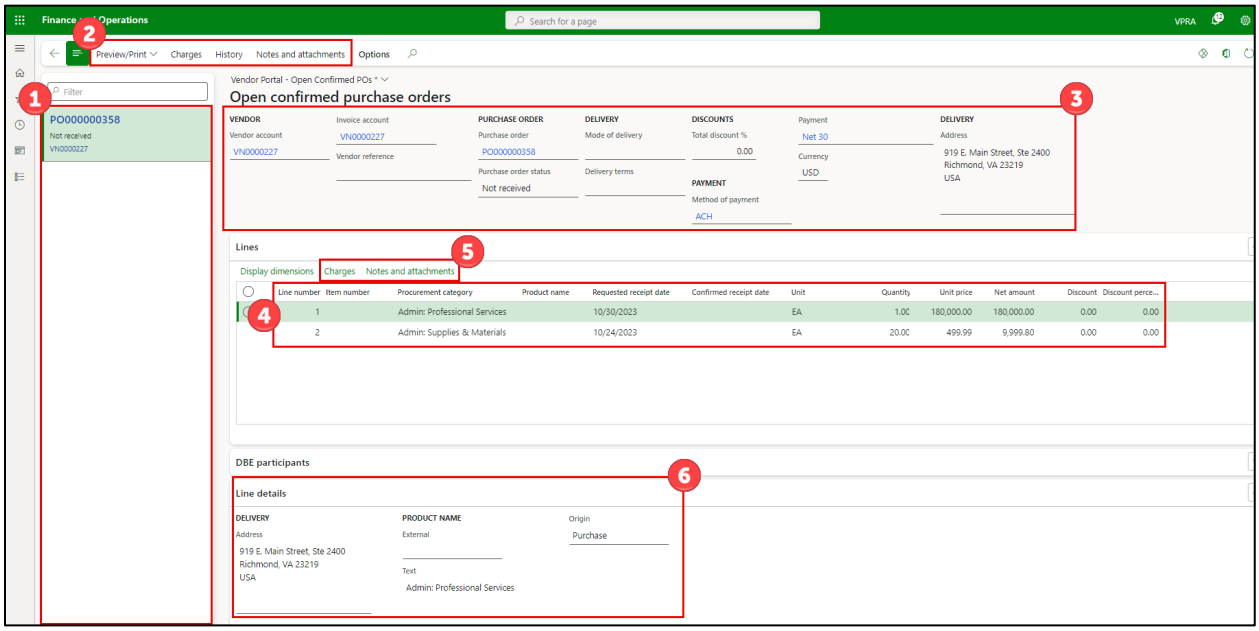
2. Click **Preview/Print** in the top ribbon to generate a copy of the PO, view header level **Charges**, and review **Notes and Attachments** that the VPRA Procurement team has added.

    a. ***Note:*** *If reviewing header level* ***Notes and attachments****, select the applicable note or attachment in the left pane of the subsequent screen, and then click* ***Open*** *to download a copy.*

3. Review header level information for the selected PO.
4. Review line level information for the selected PO.
5. Review line level **Charges**, as well as **Notes and attachments**.

    Note: *If reviewing line level* ***Notes and attachments****, select the applicable note or attachment in the left pane of the subsequent screen, then click* ***Open*** *to download a copy.*

6. Review **Line details** based on the line selected in section 4 above.

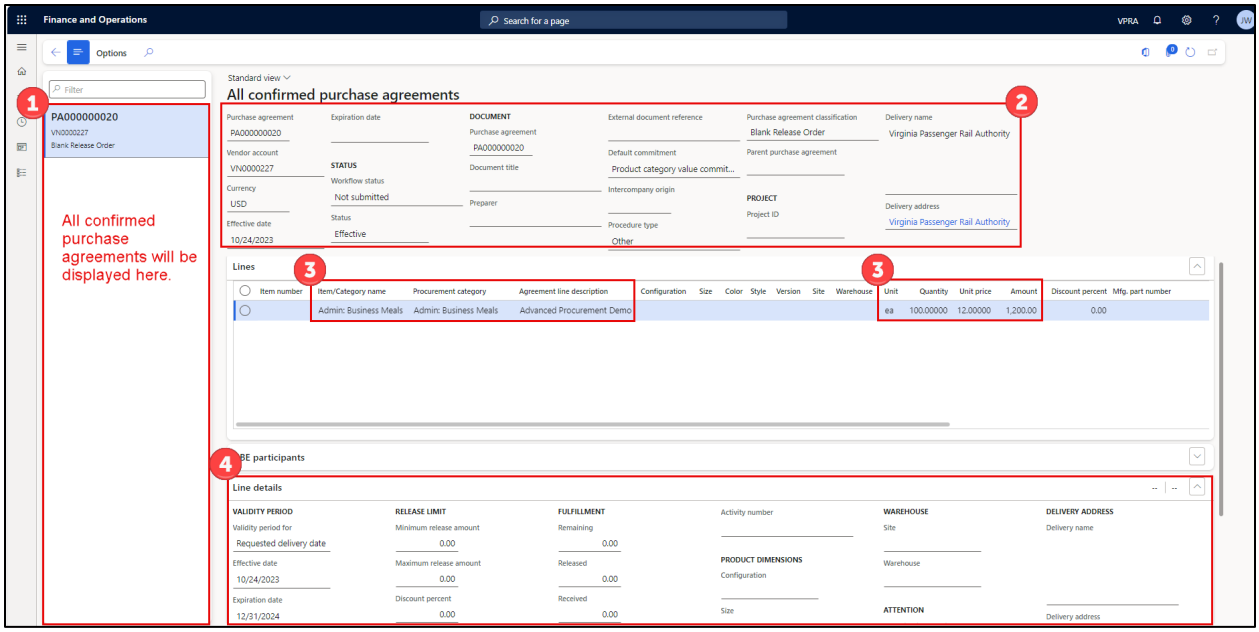


View and Print PAs

Access Menu Path:	Modules > Vendor Collaboration > Purchase Agreements > All Confirmed Purchase Agreements

Step 1: A page of all PAs will generate. Within this page, you can do the following:

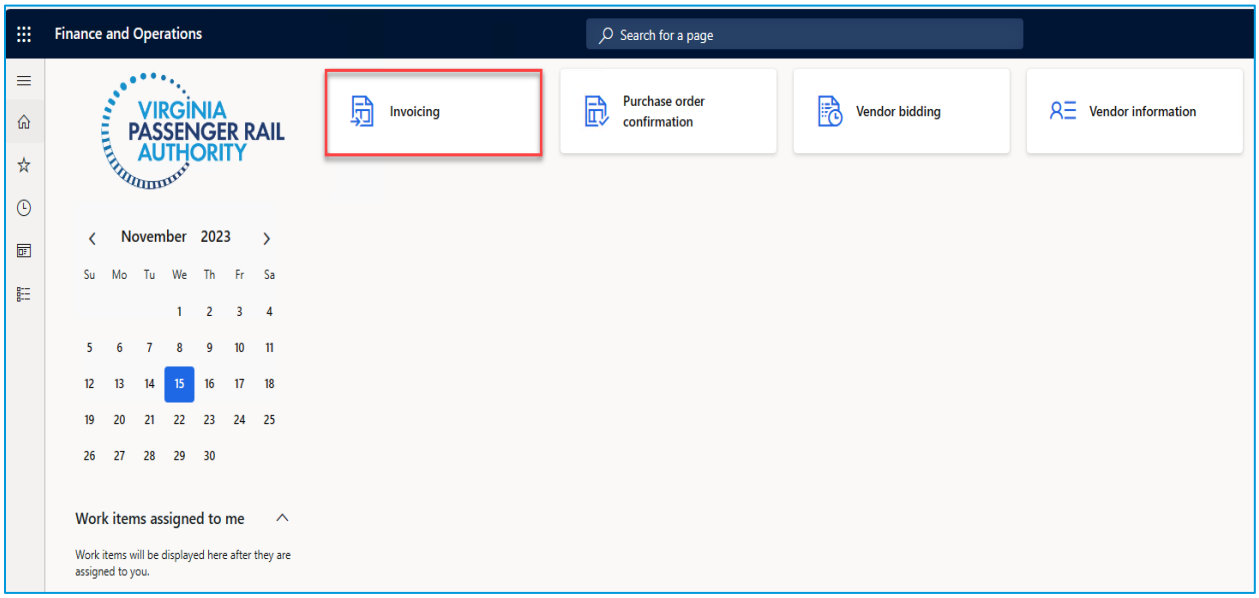
1. Select the specific PA in the left pane.
2. Review header level information.
3. Review line level information.
4. Review additional details based on the specific line selected.



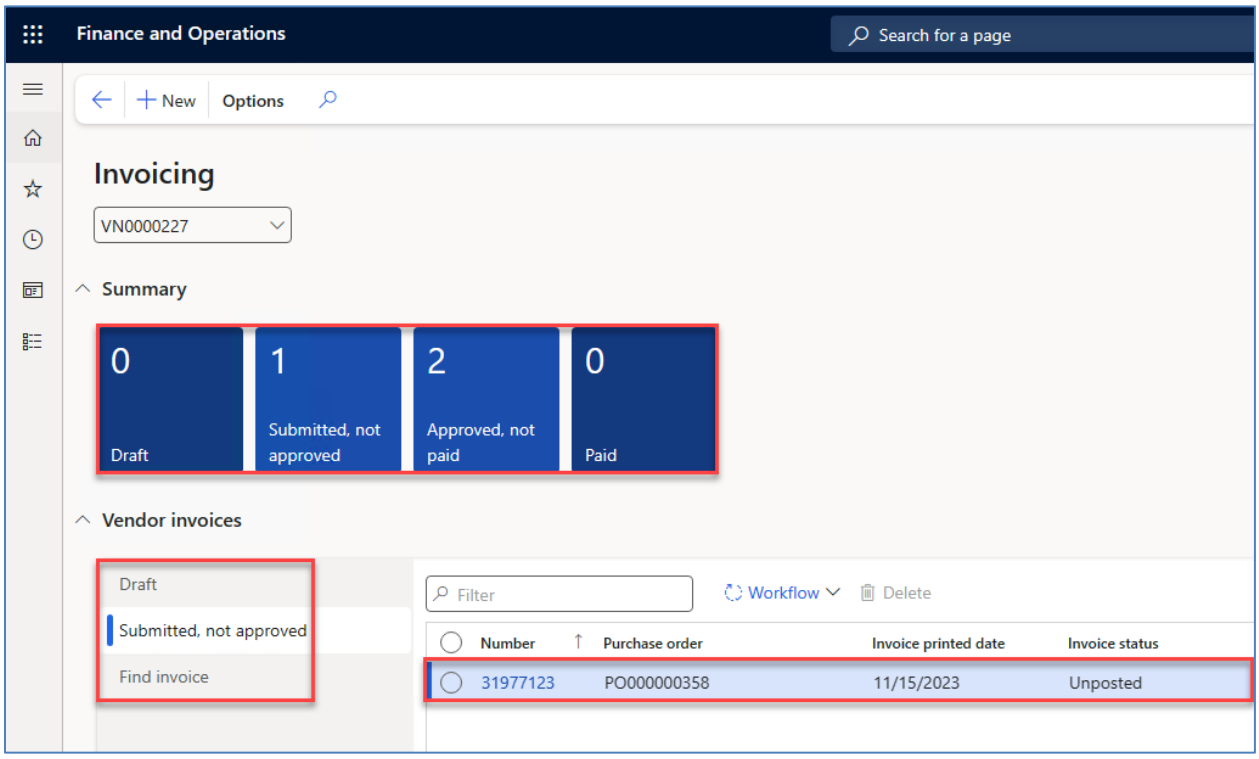
View and Check Status of Invoices

Access Menu Path: Modules > Vendor Collaboration > Workspaces > Invoicing

Step 1: Select the **Invoicing** tile in the Dynamics workspace.



Step 2: Use the tiles and tabs to review the status of invoices submitted to VPRA. Notice that the **Summary** tiles tell you where the invoice is in the VPRA approval and payment process.



Draft	Invoices that have been created, but not yet submitted to VPRA for processing.
Submitted, not approved	Invoices that have been submitted to VPRA for processing but are pending review.
Approved, not paid	Invoices that have been submitted to and approved by VPRA. If an invoice is **short-paid**, you will see the invoice here and the amount approved for payment.
Paid	Invoices that have been submitted to, approved, and **paid** by VPRA.

Notice **Vendor Invoices** allows you to sort your invoices based on their status.

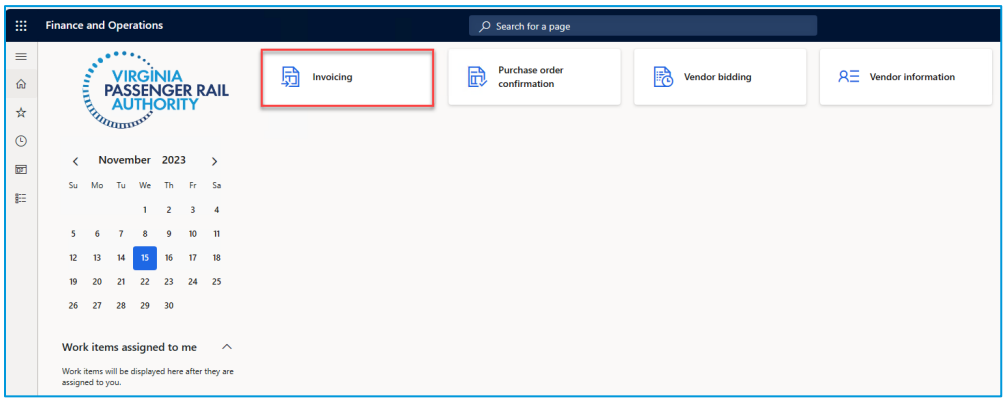
Draft	Invoices that have been created, but not yet submitted to VPRA for processing.
Submitted, not approved	Invoices that have been submitted to VPRA but are pending review by VPRA.
Find Invoice	Search for invoices in any status.

Once the invoice is approved, the detailed version of the invoice is no longer visible.

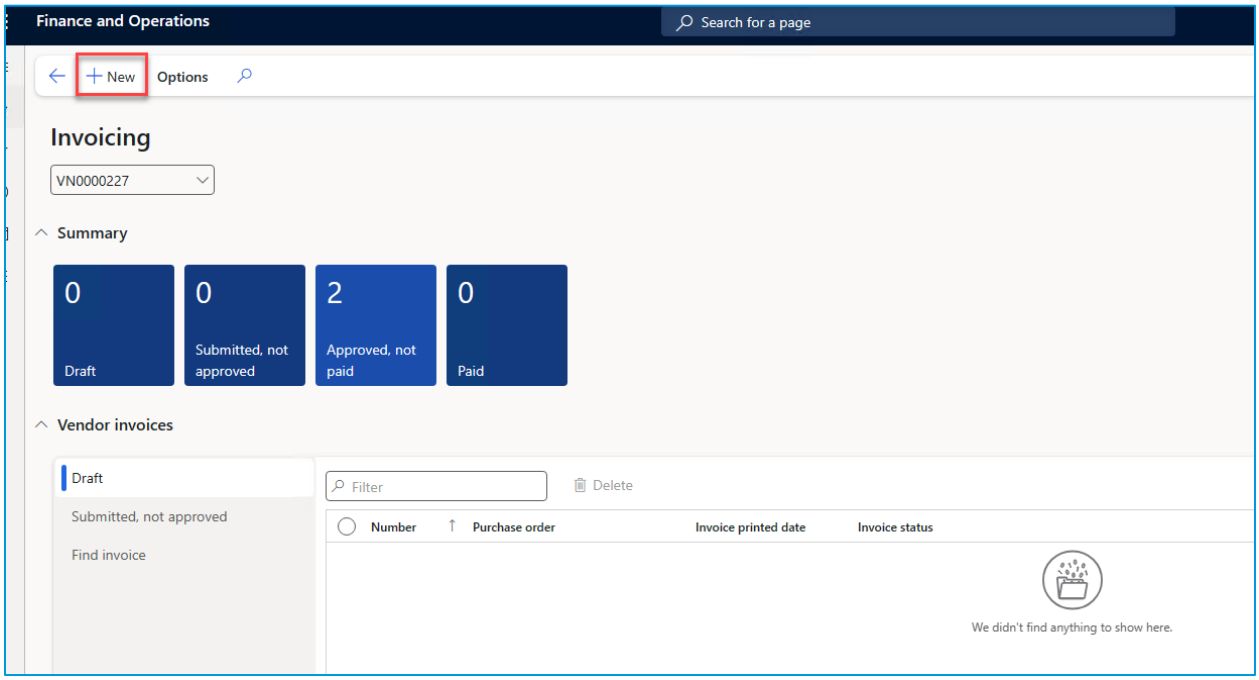
II. SUBMIT AN INVOICE THROUGH THE VENDOR PORTAL

Access Menu Path: Home > Invoicing workspace

Step 1: From the Dynamics 365 home page, select the **Invoicing** workspace.

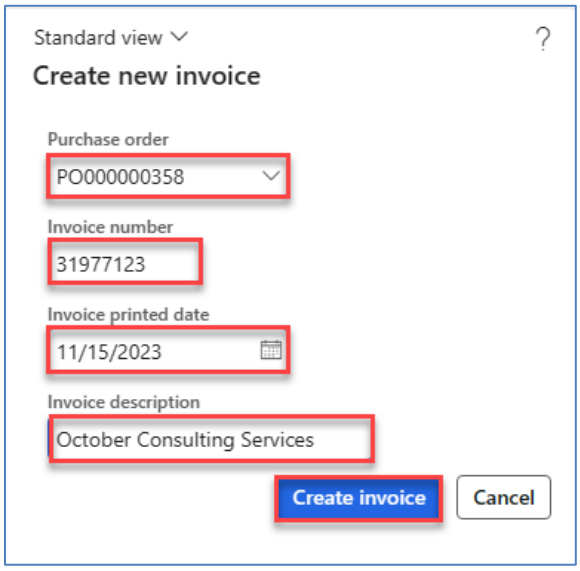


Step 2: Within the **Invoicing** workspace, select **New**. A pop-up window appears.

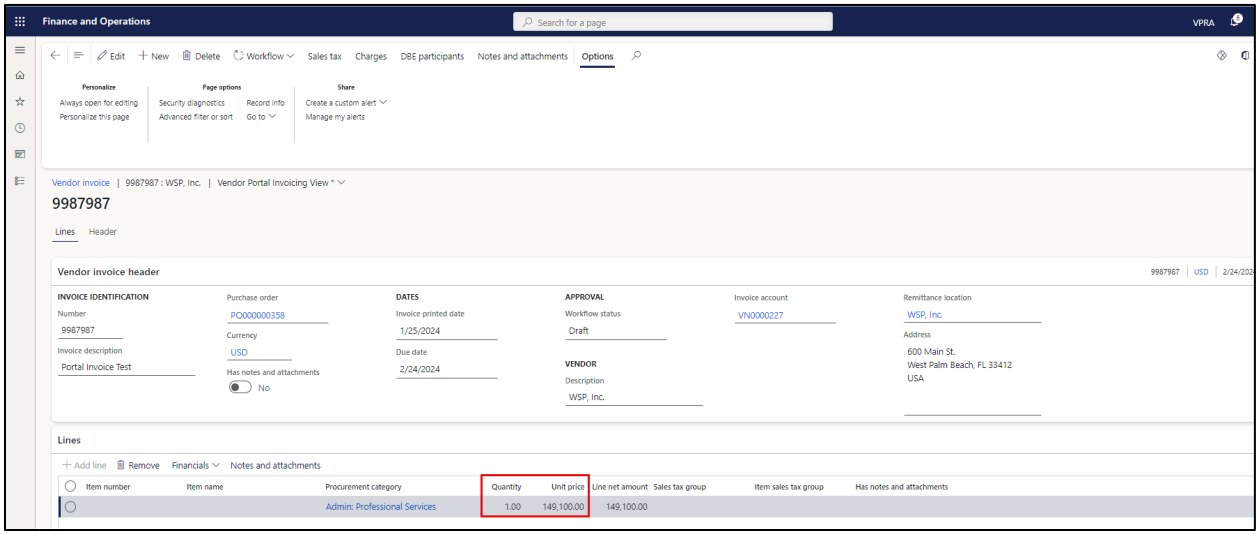


Step 3: Enter the following information, then click **Create invoice**:

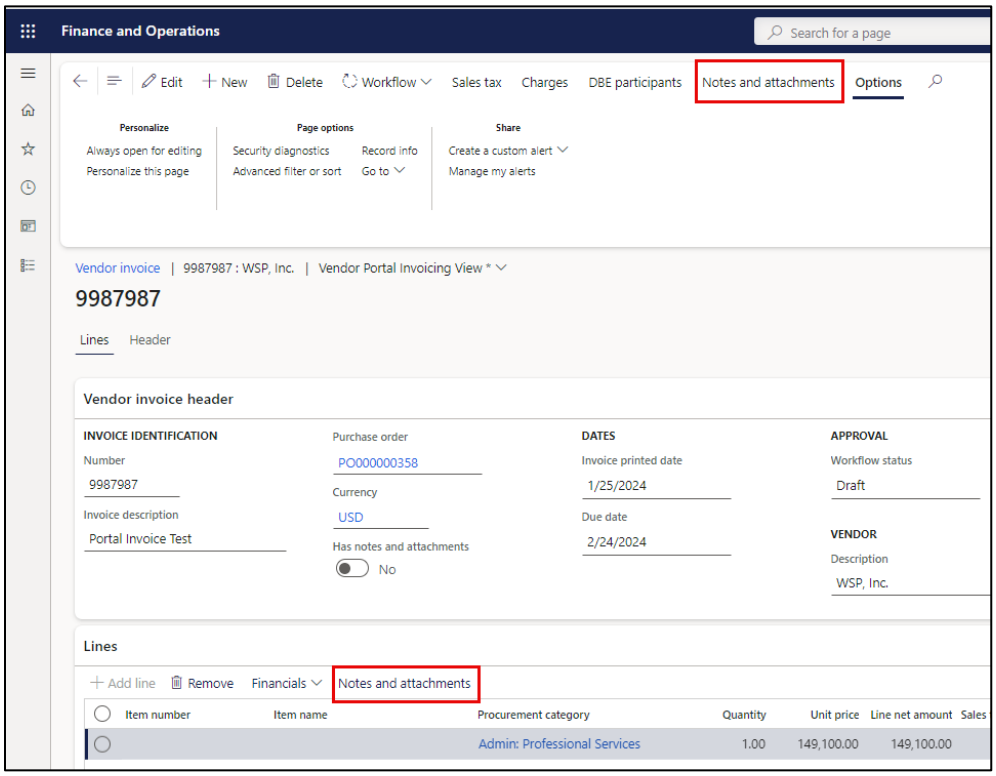
- **Purchase order**
- **Invoice number**
- **Invoice printed date (this should be the date you are submitting the invoice)**
- **Invoice description (e.g., "work performed Feb. 1 – 29, 24")**



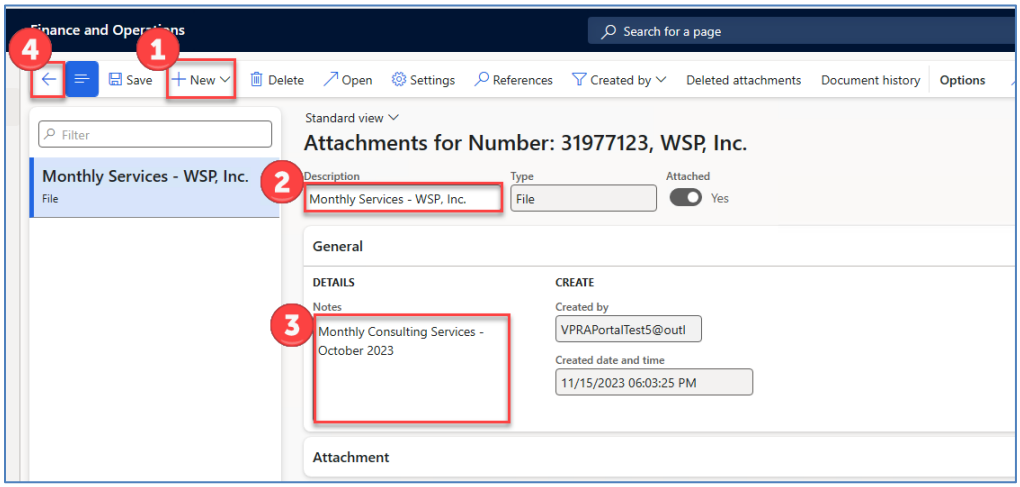
Step 4: Within the **Vendor invoice**, enter a **Quantity** and **Unit price**. Note that the remaining balance of the line will be automatically displayed.



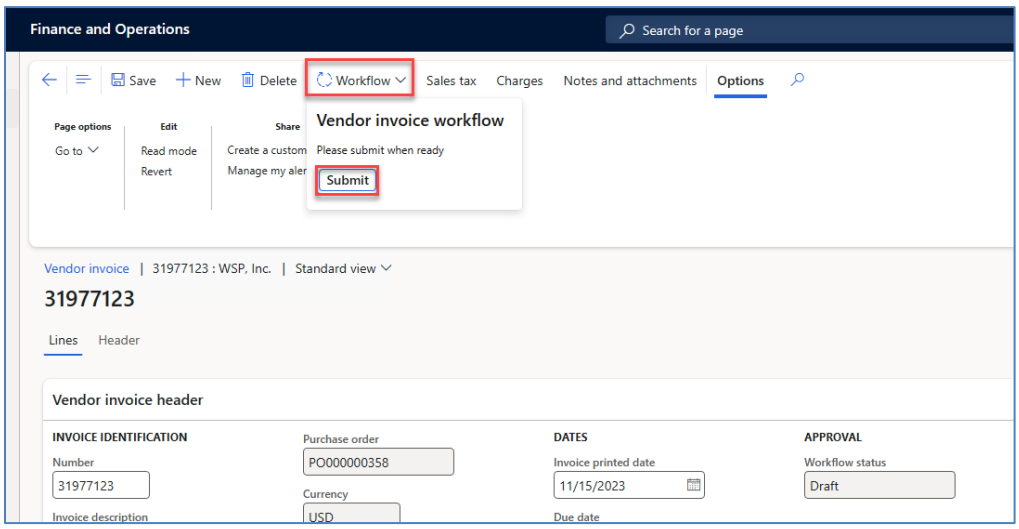
Step 5: Attach a copy of the invoice and any other supporting documentation by selecting the header or line level **Notes and attachments**.



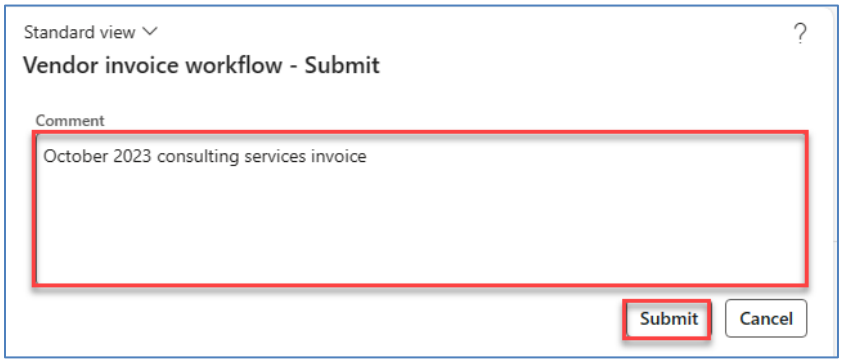
Step 6: Select the **New** dropdown, and then select an attachment type. Enter a **Description** and **Notes** to describe the content of the document. Click **Save**, and then click the **back arrow** to return to the invoice.



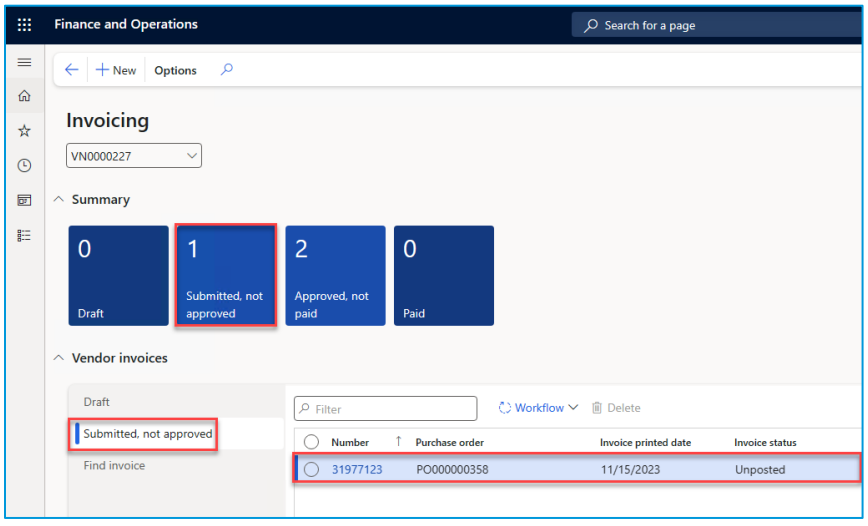
Step 7: When ready to submit the invoice to VPRA's Accounts Payable department, select the **Workflow** dropdown, and then **Submit**.



Step 8: You may enter a **Comment**, and then click **Submit** for VPRA processing.



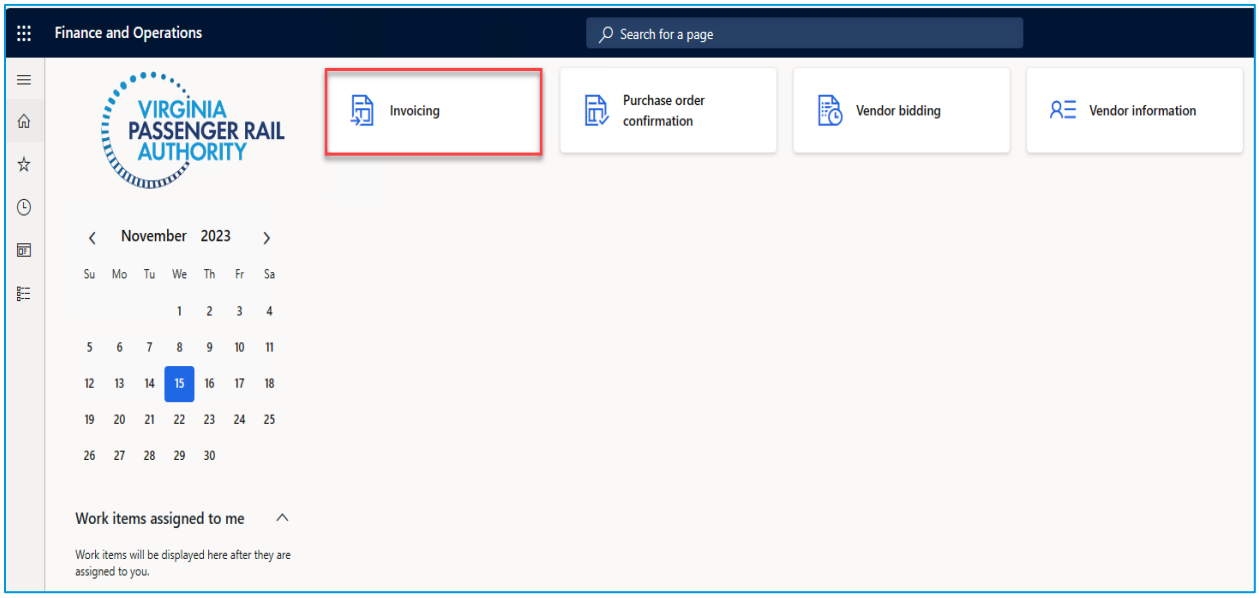
Step 9: The invoice will be visible within the **Submitted, not approved** tile on your workspace. To review the detailed invoice, select the invoice **Number** hyperlink.



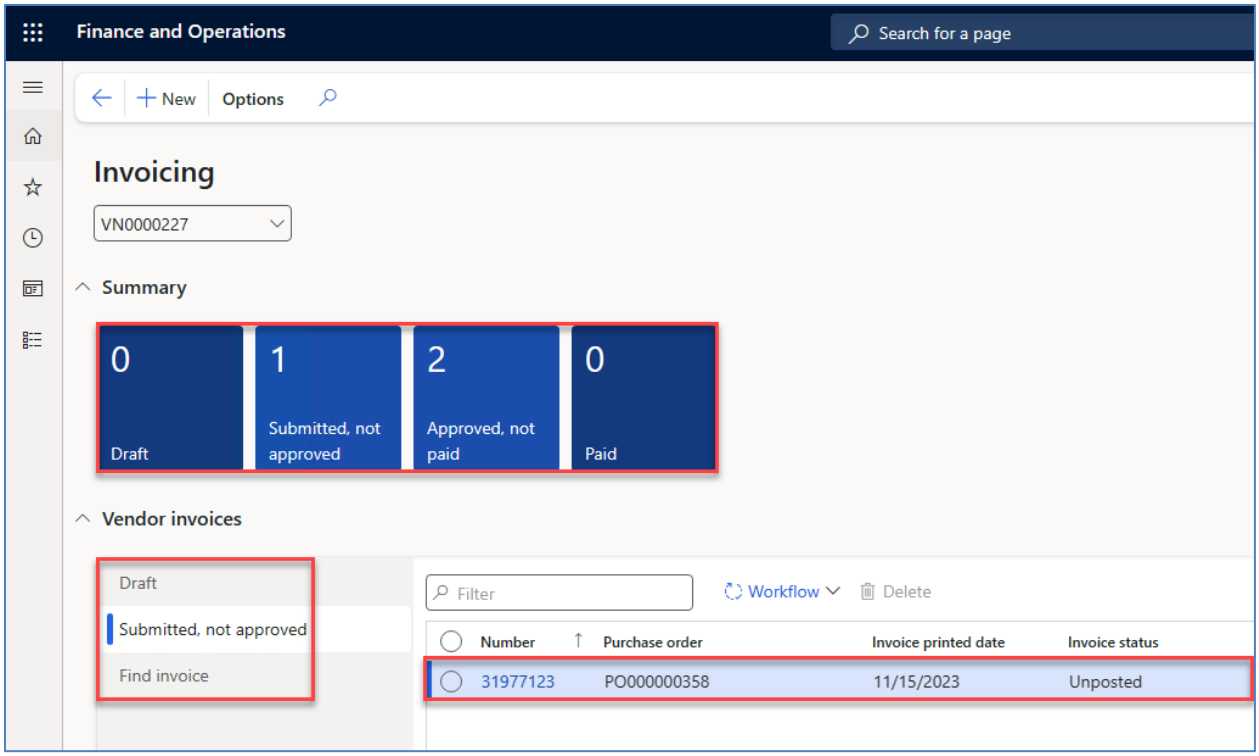
Check the Status of a Pending Invoice

Access Menu Path: Home > Invoicing workspace

Step 1: Select the **Invoicing** tile in the Dynamics workspace.



Step 2: Use the tiles and tabs to review the status of invoices submitted to VPRA. The **invoice Number** hyperlink in the middle of the screen can be clicked to open the detailed view of the invoice. Notice that the **Summary** tiles tell you where the invoice is in the VPRA process.



Draft	Invoices that have been created, but not yet submitted to VPRA for processing.
Submitted, not approved	Invoices that have been submitted to VPRA for processing but are pending review.
Approved, not paid	Invoices that have been submitted to and approved by VPRA. If an invoice is **short-paid**, you will see the invoice here and the amount approved for payment.
Paid	Invoices that have been submitted, approved, and **paid in full** by VPRA.

Notice **Vendor Invoices** allows you to sort your invoices based on their status.

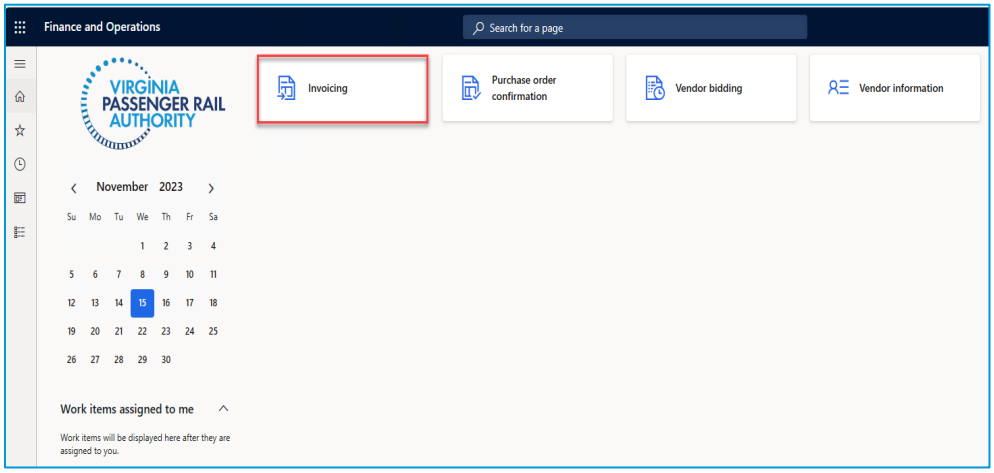
Draft	Invoices that have been created, but not yet submitted to VPRA for processing.
Submitted, not approved	Invoices that have been submitted to VPRA but are pending review by VPRA.
Find Invoice	Search for invoices in any status.

Important: If you have any questions or issues when submitting invoices, please contact VPRA Accounts Payable department at accountspayable@vpra.virginia.gov or 804-546-1012.

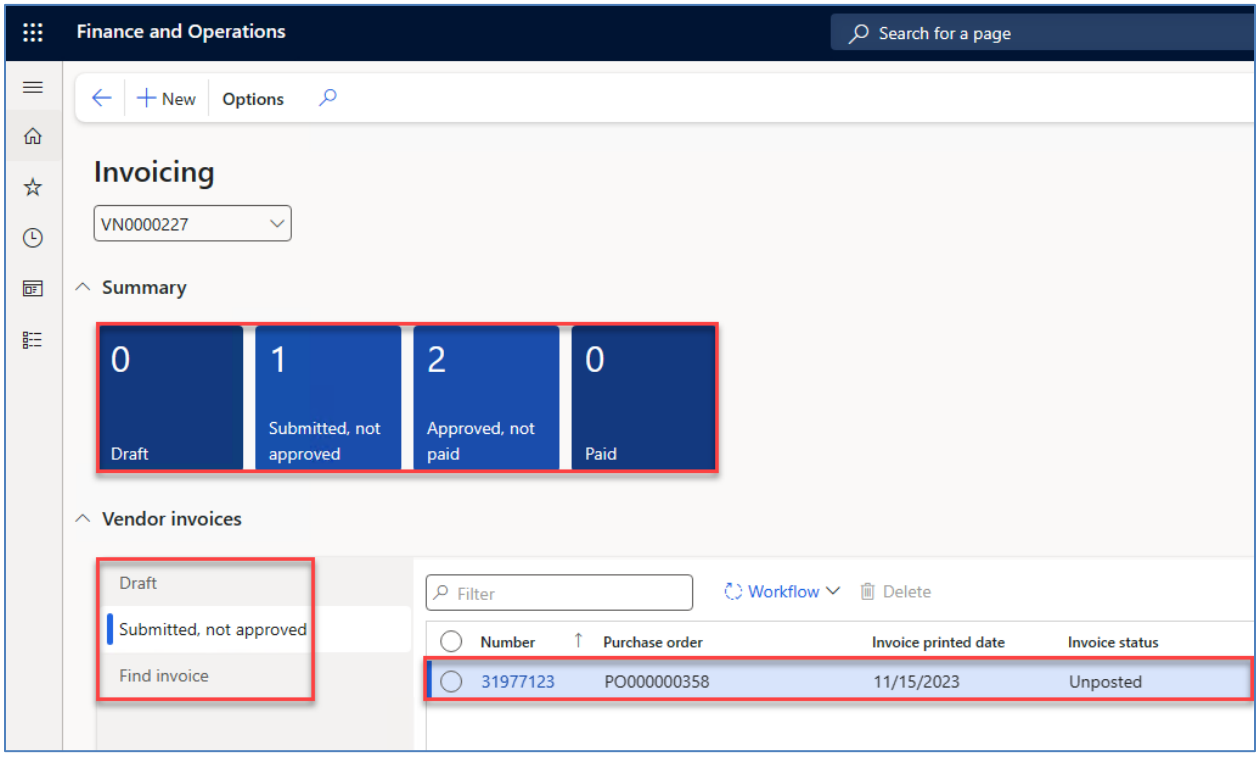
Submitting Revised Invoices

You may receive a notification stating that an Invoice needs to be revised. This may include requests for a change to an hourly rate or an unallowable charge. The notification will appear at the bell icon on the top right-hand side of the main workspace or toward the bottom of the left-hand side of the screen under the section titled **Work items assigned to me**. You can also set up an alert to email you when an invoice is in Request change status or Rejected status. See pages 47-48 below for instructions on setting up alerts.

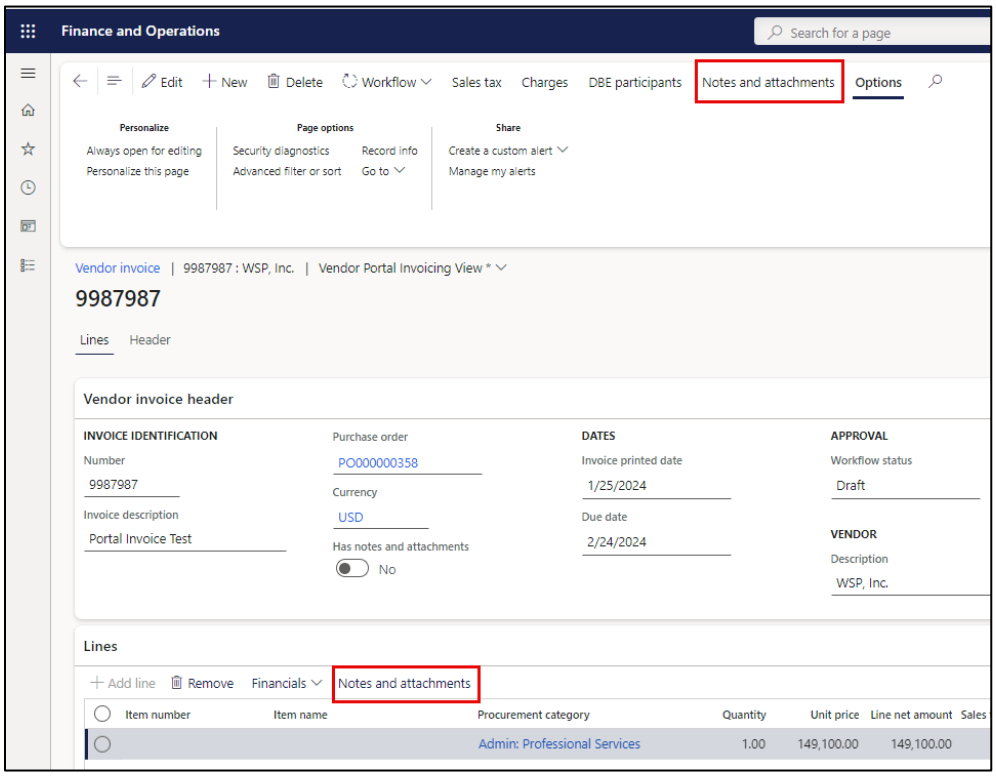
Step1: Use the Invoice tile on your homepage to navigate to a list of your invoices.

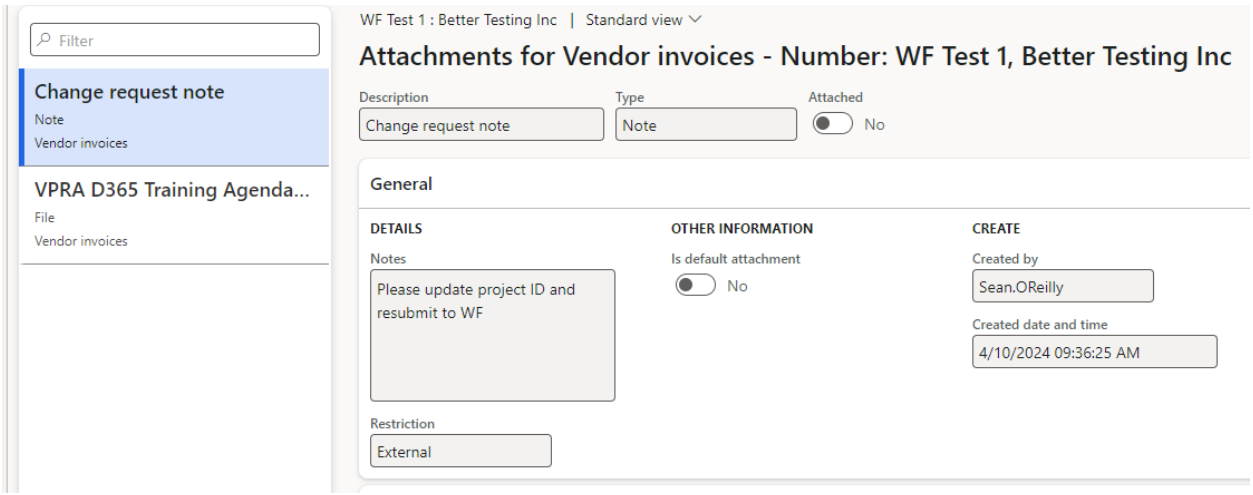


Step 2: Find the invoice requiring a change in your list of invoices. Click the invoice number hyperlink to open the invoice.



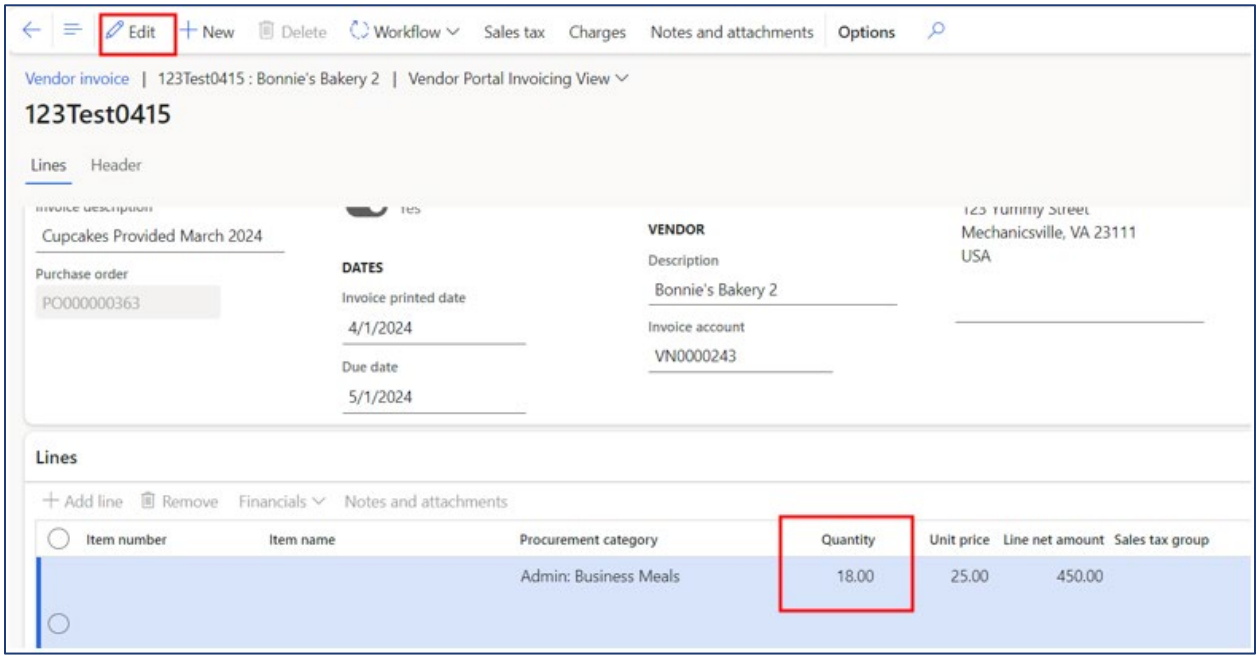
Step 3: Navigate to the **Notes and attachments** for the invoice. The VPRA Project Manager will insert a note and upload relevant documents, describing the reason for the requested change.



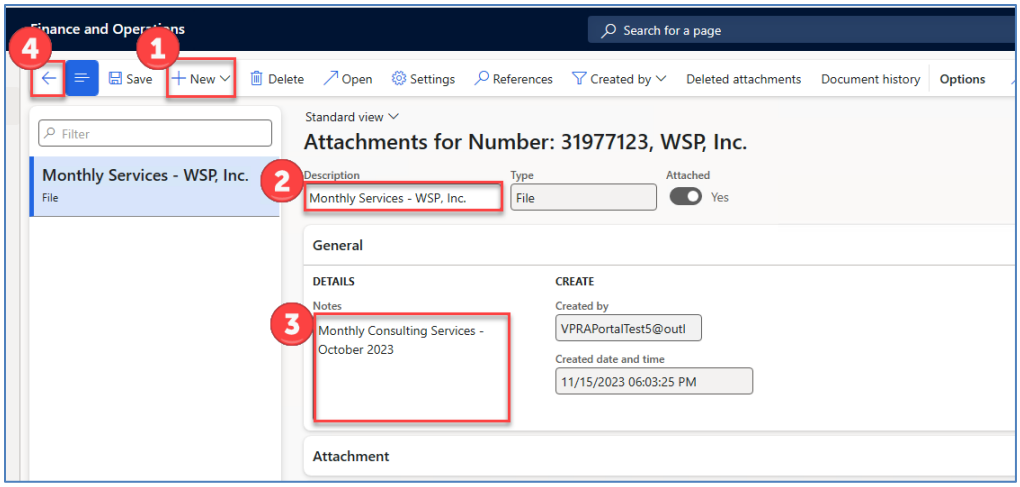


Step 4: Review the **Details** in the change request note. If you have questions about the requested change, contact the VPRA Project manager. If you understand the request, follow the instructions in the next steps to upload and submit a revised invoice.

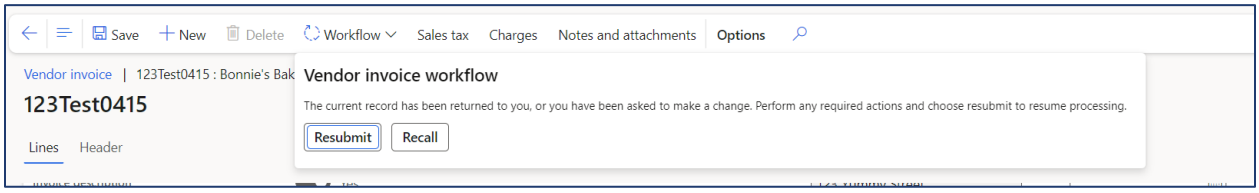
Step 5 (if required): If a change in amount is requested, you will need to update the Quantity to reflect the updated amount. Click **Edit** in the upper left-hand corner on the invoice screen and adjust the **Quantity** field to the updated amount:



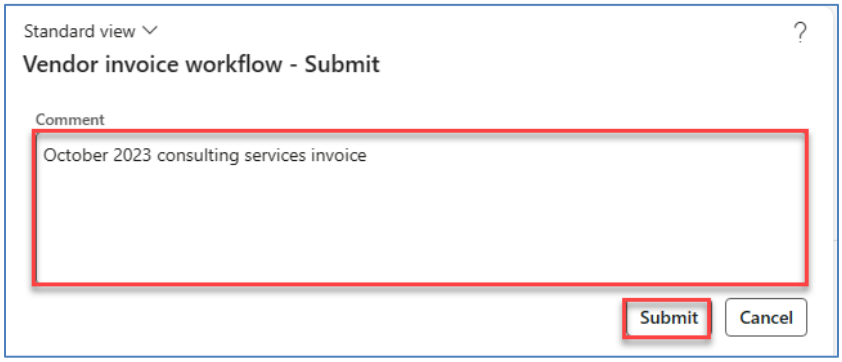
Step 6: Click **Notes and attachments** and select the **New** dropdown. Then select an attachment type and upload the revised invoice. Enter a **Description** in the **Notes** box to describe the content of the document. Click **Save**, and then click the **back arrow** to return to the invoice.



Step 6: When ready to re-submit the invoice to VPRA, select the **Workflow** dropdown, and then **Re-submit**.



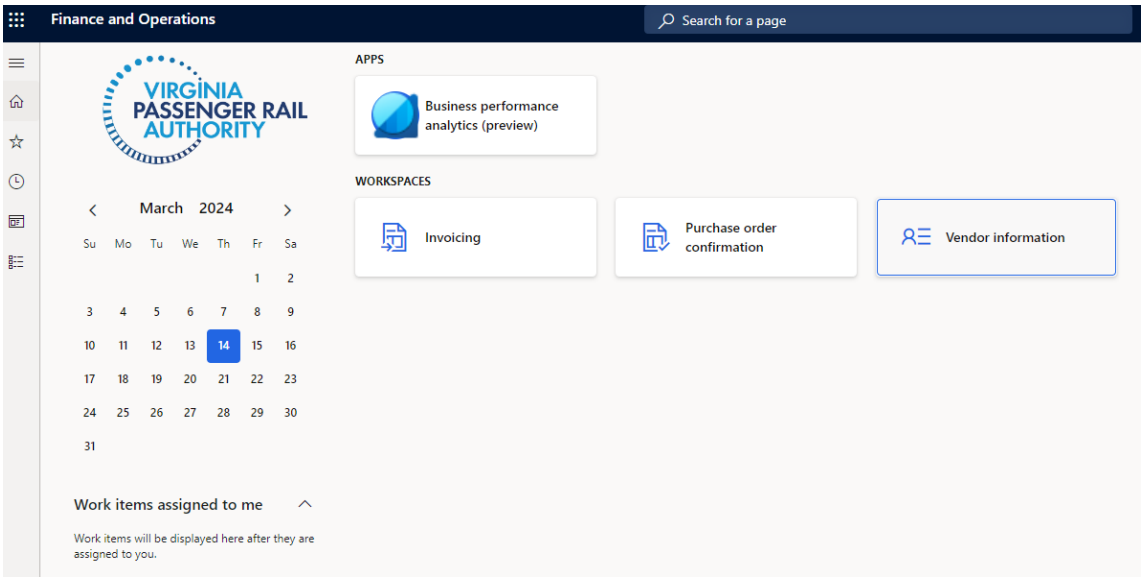
Step 7: You may enter a **Comment**, and then click **Submit** for VPRA processing.



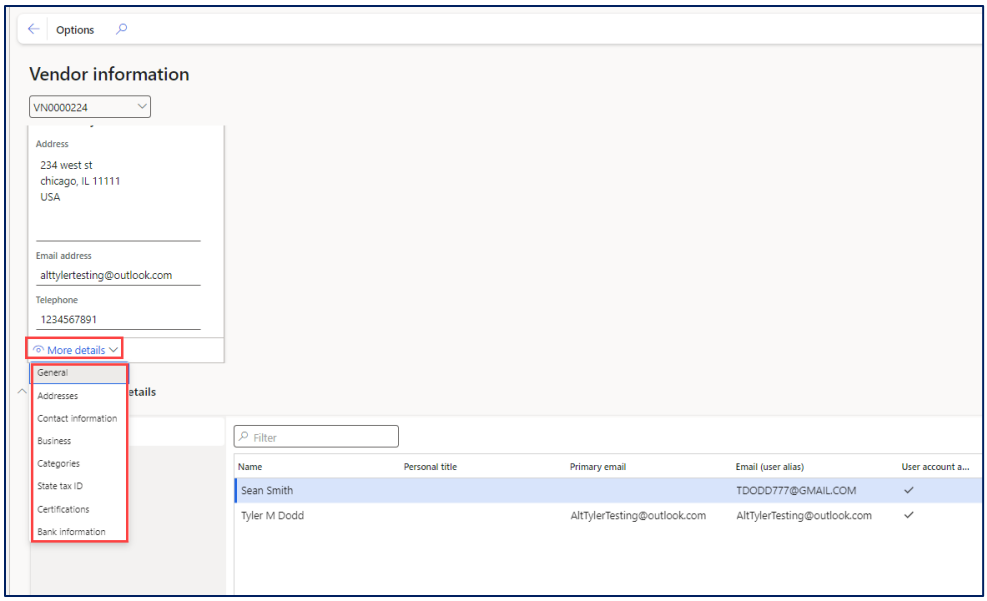
III. MAINTAIN VENDOR INFORMATION IN PORTAL

Your vendor workspace provides a dashboard to view and maintain basic company and contact information. Depending on the level of access you have as a vendor user, you will either be able to view information, maintain/revise information, make requests to provision new users, modify existing users, or inactivate users from your portal.

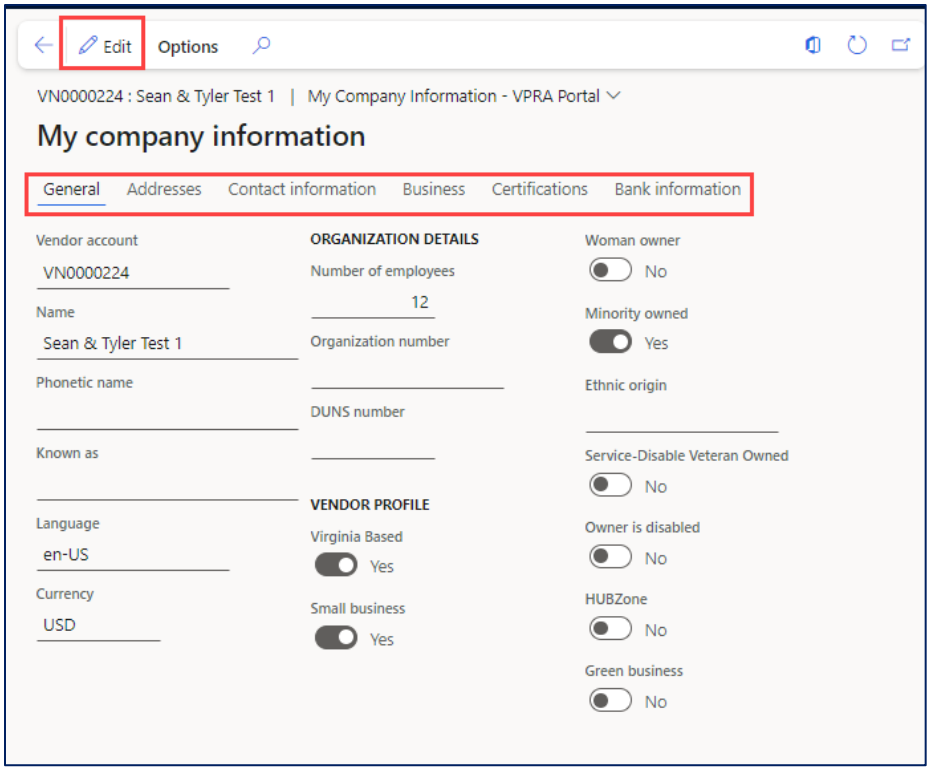
Access Menu Path:	Modules > Vendor collaboration > Workspaces > Vendor information -OR- click the Vendor information tile



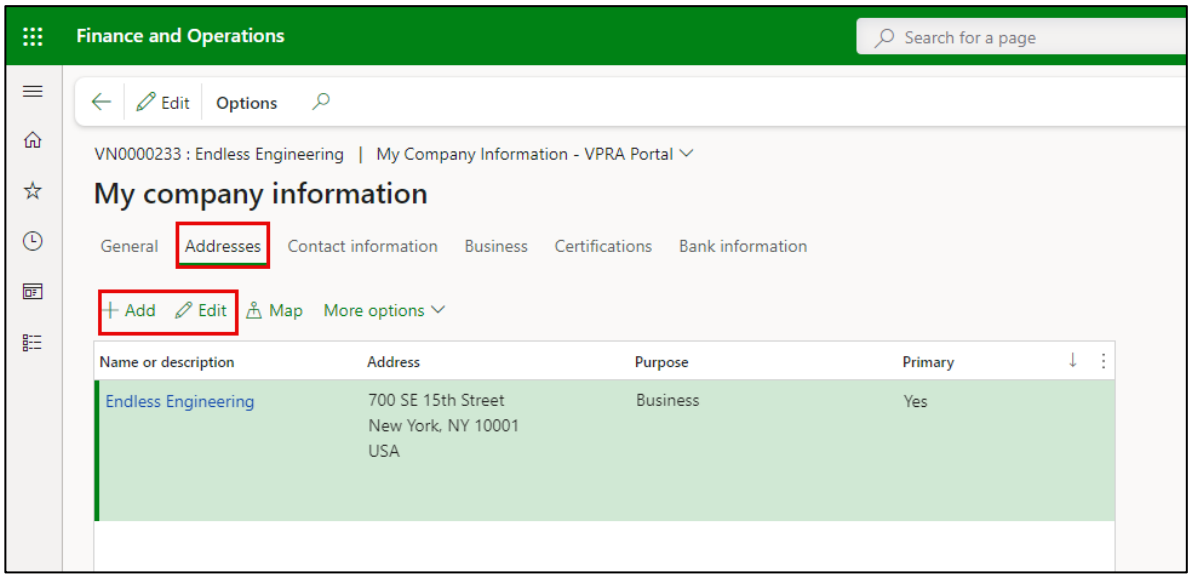
Step 1: Within the **Vendor information** workspace, you can find your Vendor account number on the top left-hand side of the form. Click the **More details** dropdown and select an option to view and/or edit your company's basic information. We selected **General**.



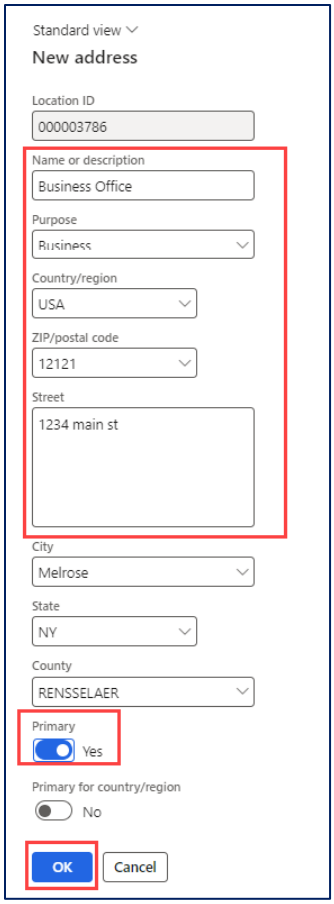
Step 2: The **My company information** page will open. Review the information in each tab for accuracy and completeness. Select **Edit** from the ribbon at the top to make changes. Note, some of the fields across each tab may be non-editable. If changes to non-editable fields are needed, you will need to request that your company's portal primary user make the change or contact VPRA to make the change. See Step **15** below.



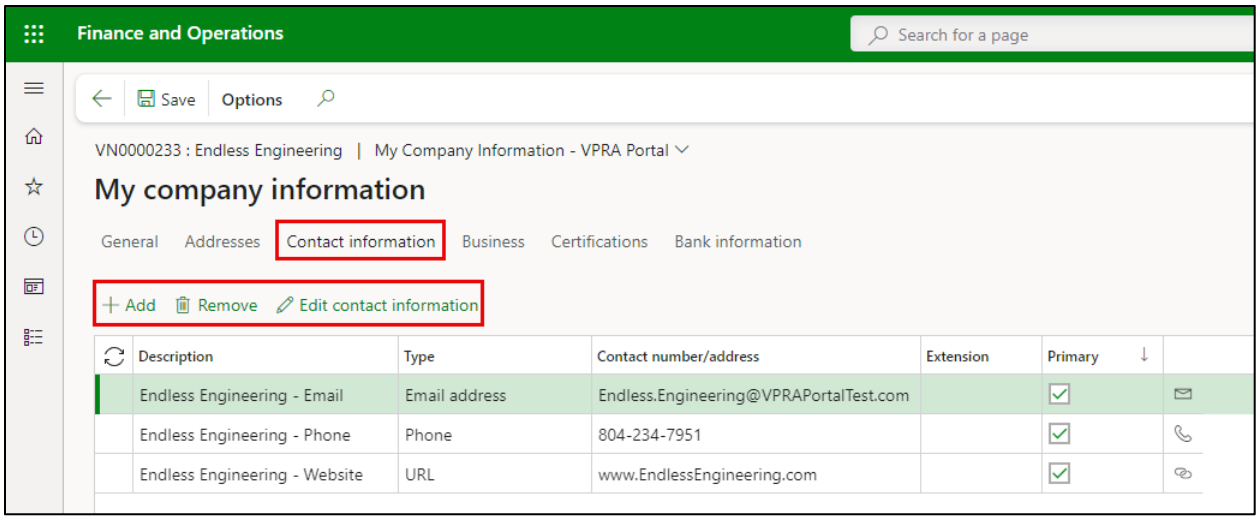
Step 3: Click the **Addresses** tab. View the information or click **Add** to create new addresses. Select **Edit** to edit existing address information.



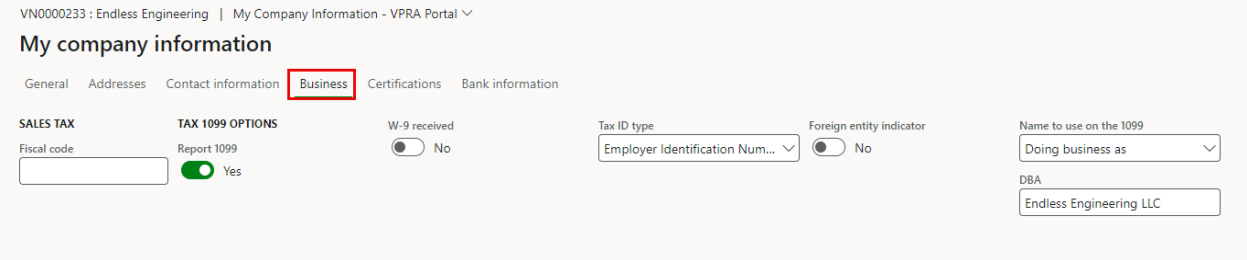
If creating a new address, populate the **Name or description**, **Purpose**, **Street,** and **ZIP/postal code** fields. Dynamics will automatically populate the related **Country/region, City, State** and **County**. If this will be your company's new primary address, toggle **Primary** to "**Yes**". Once finished, click **OK** and then click **Save**.



Step 4: Click the **Contact information** tab. Use the **Add, Remove** and **Edit contact information** buttons to add, remove, or edit company contact information. Please note that access to these buttons and their related functionality will be driven by user security roles.

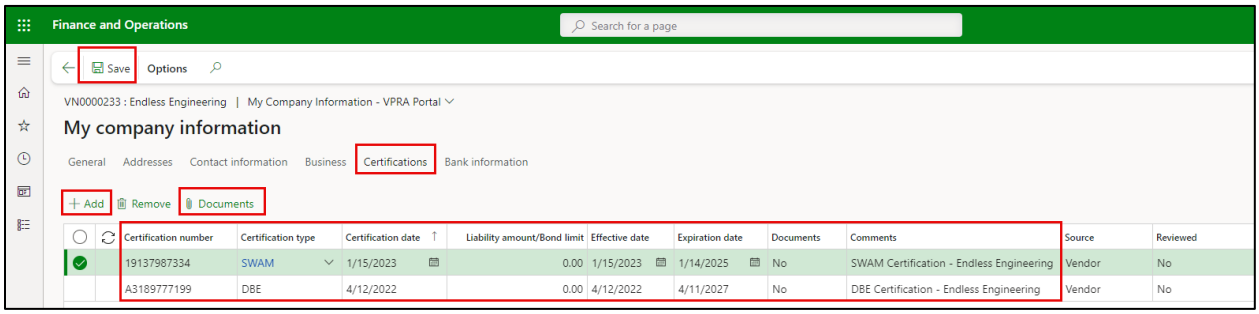


Step 5: Click the **Business** tab to view tax 1099 reporting information. Here, you can view or update the **Report 1099, W-9 received, Federal tax ID, Tax ID type, Foreign entity indicator, Name to use on the 1099,** and **DBA** fields.

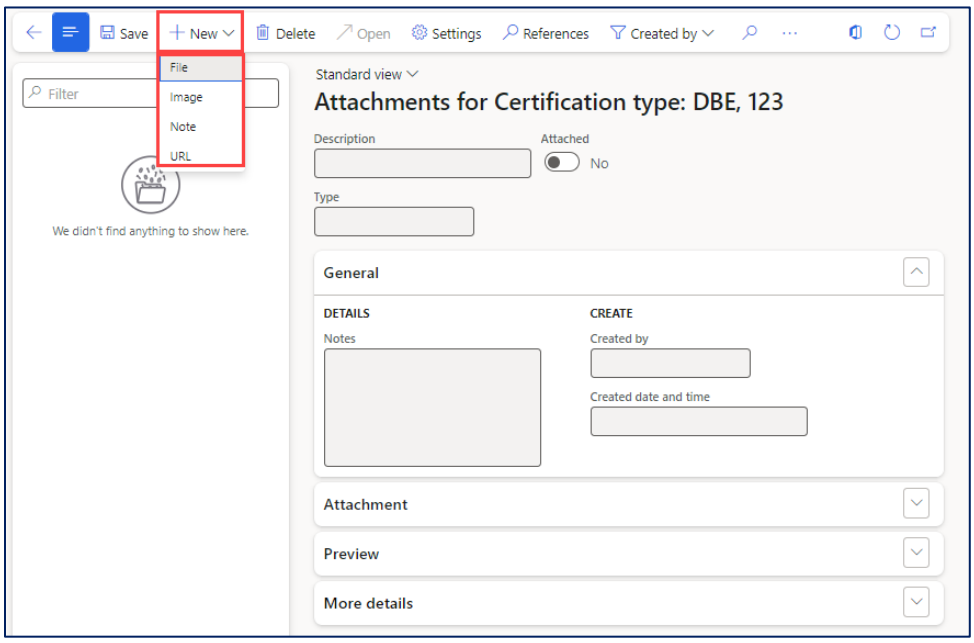


Step 6: Click the **Certifications** tab to view vendor certification information. Vendors can **Add** new certifications, **Edit** existing certifications, or attach **Documentation** related to certifications.

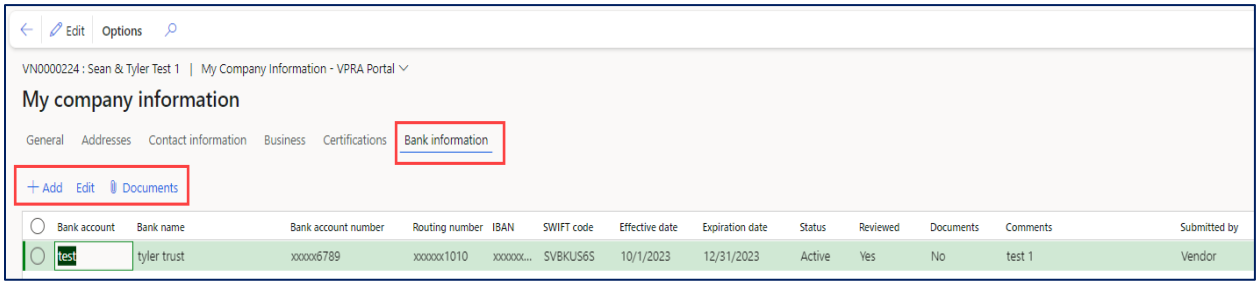
If adding a new certification, select **Add** and complete the **Certification number** and **Certification type**. If applicable, enter a **Certification date**, **Liability amount/bond limit**, **Effective date,** and **Expiration date.** Use the **Comments** field to further describe the Certification type. If providing documentation, **Save** the certification, and then click **Documents**.



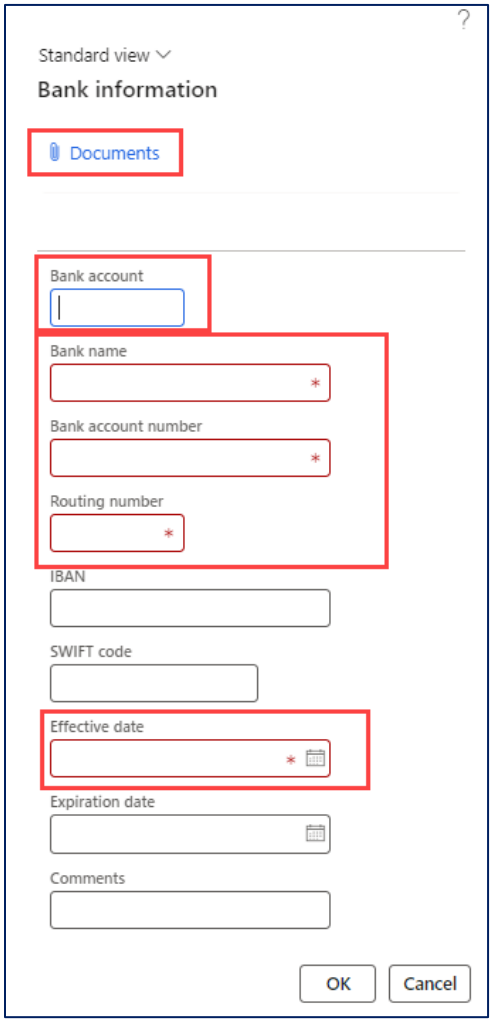
Click **New** and select the document type. The system will prompt you to attach a file if selecting **File** or **Image**. Repeat these steps to add additional documentation, then save and close the form once complete. Add a **Description** and **Notes** to describe the document and use the **Preview** function to see the document.



Step 7: Click the **Bank Information** tab. The screen will allow you to **Add** or **Edit** bank account information, as well as attach related **Documents**. Note, your user role may not allow you to change this information.

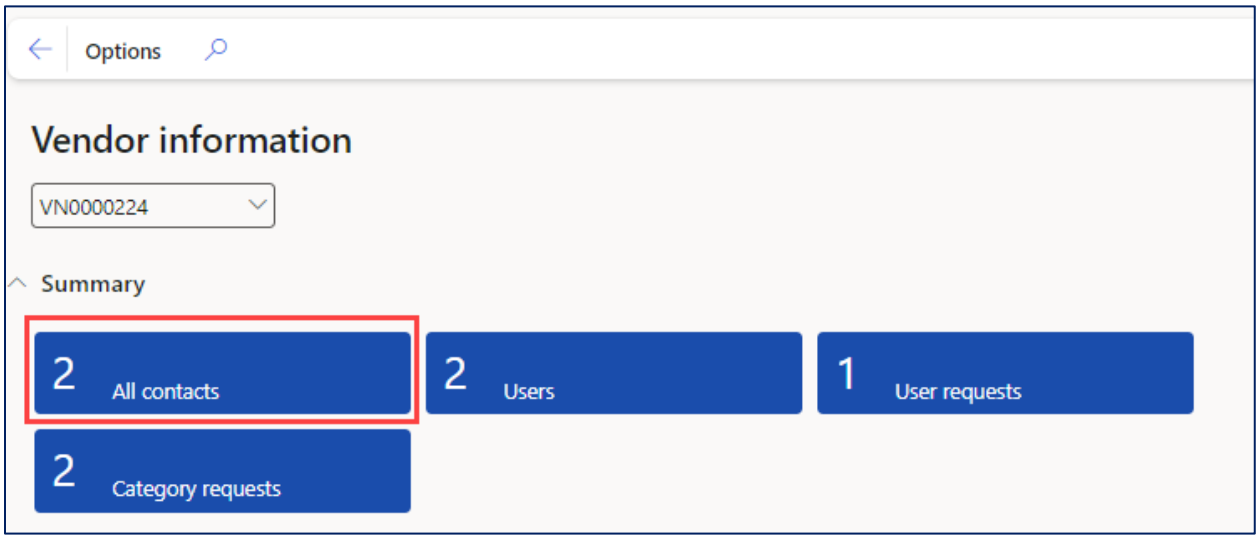


If adding a new bank account, click **Add** and complete the highlighted fields shown on the screenshot below. All remaining fields are optional. Add supporting documentation to the bank account, following the steps outlined in Step 6 above. Click **OK**.

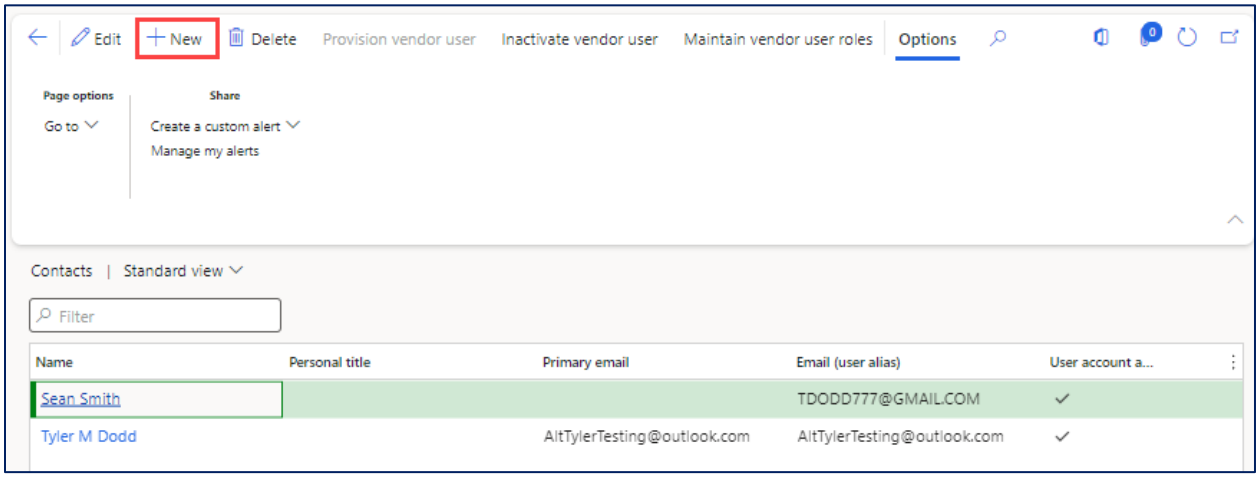


Step 8: Click **Save** and exit the form to return to the Vendor information workspace.

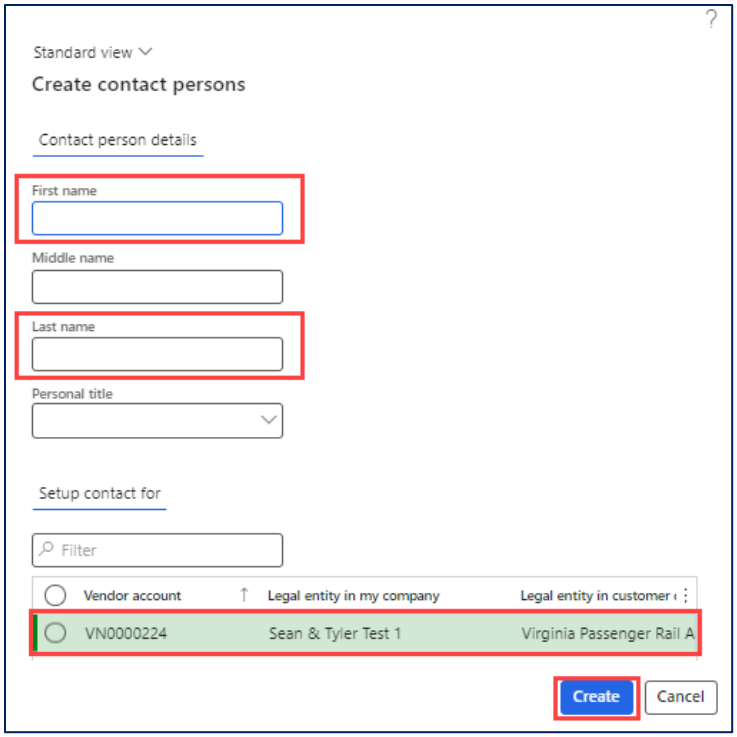
Step 9: Within the **Vendor information** workspace, click the **All contacts** tile under Summary level. The screen that opens allows you to view and maintain all contacts, as well as add new contacts.



Step 10: Use the **+ New** button to add new contacts and assign their Dynamics user role if you want this contact to have access to the vendor porta. Step 13 explains how to create the user role.

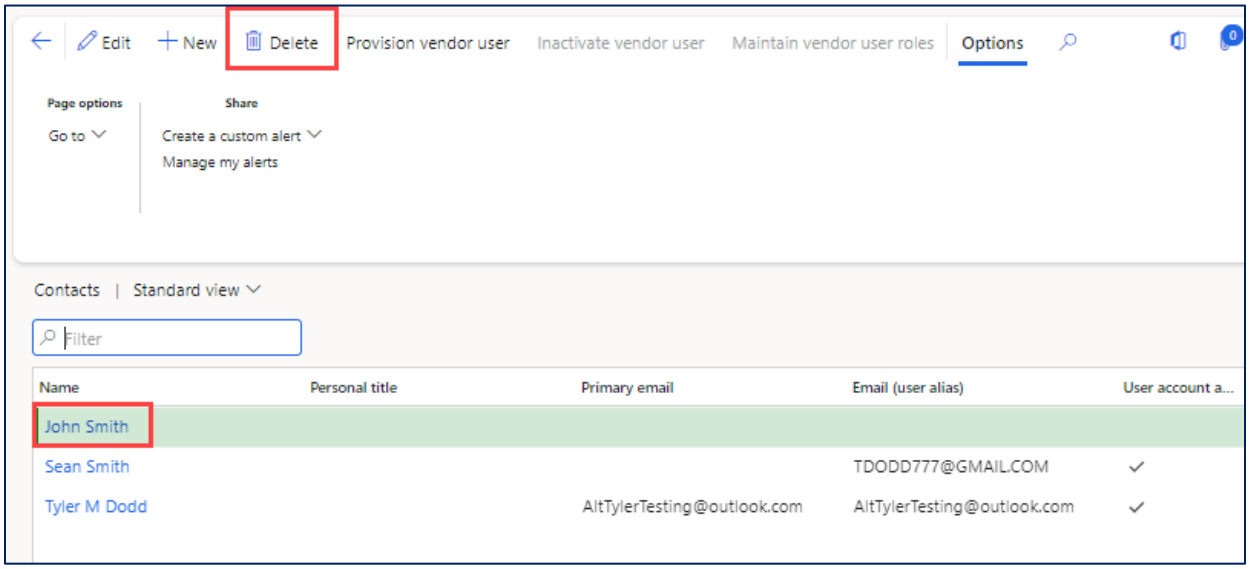


Within the **Create contact persons** screen, enter a **First name**, **Middle Name** (if desired), and **Last Name.** In the **Setup contact for** section at the bottom of the screen, select the legal entity for that contact. Once all of the required information has been entered, click **Create**.

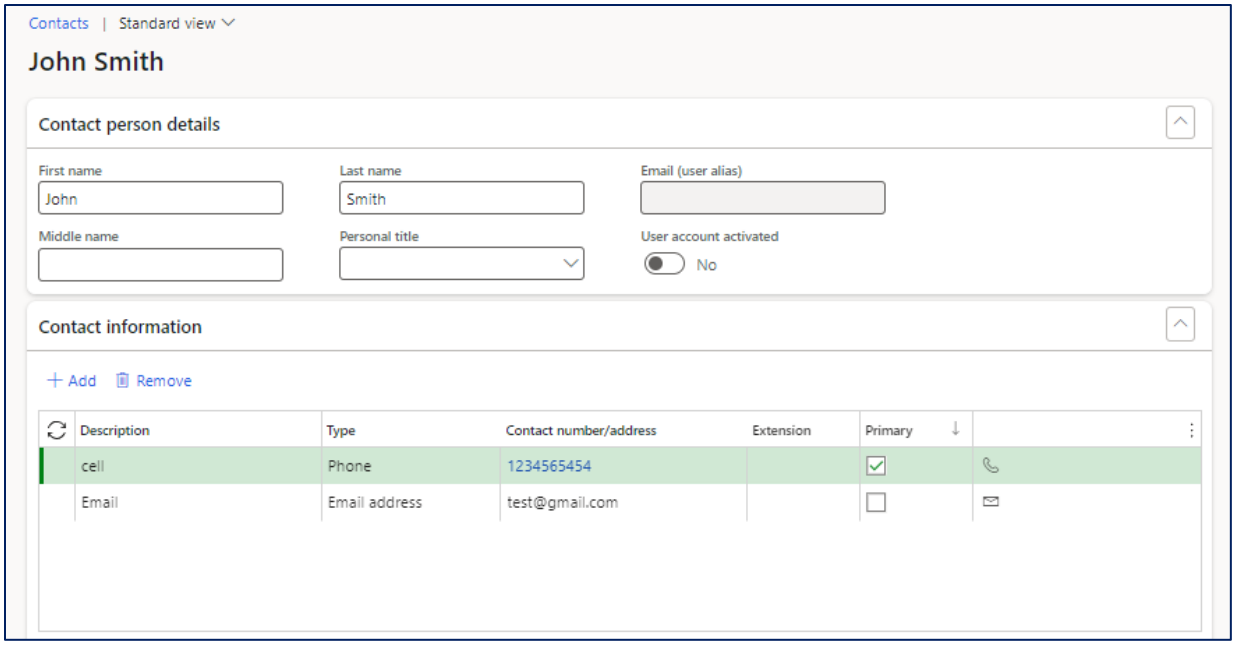


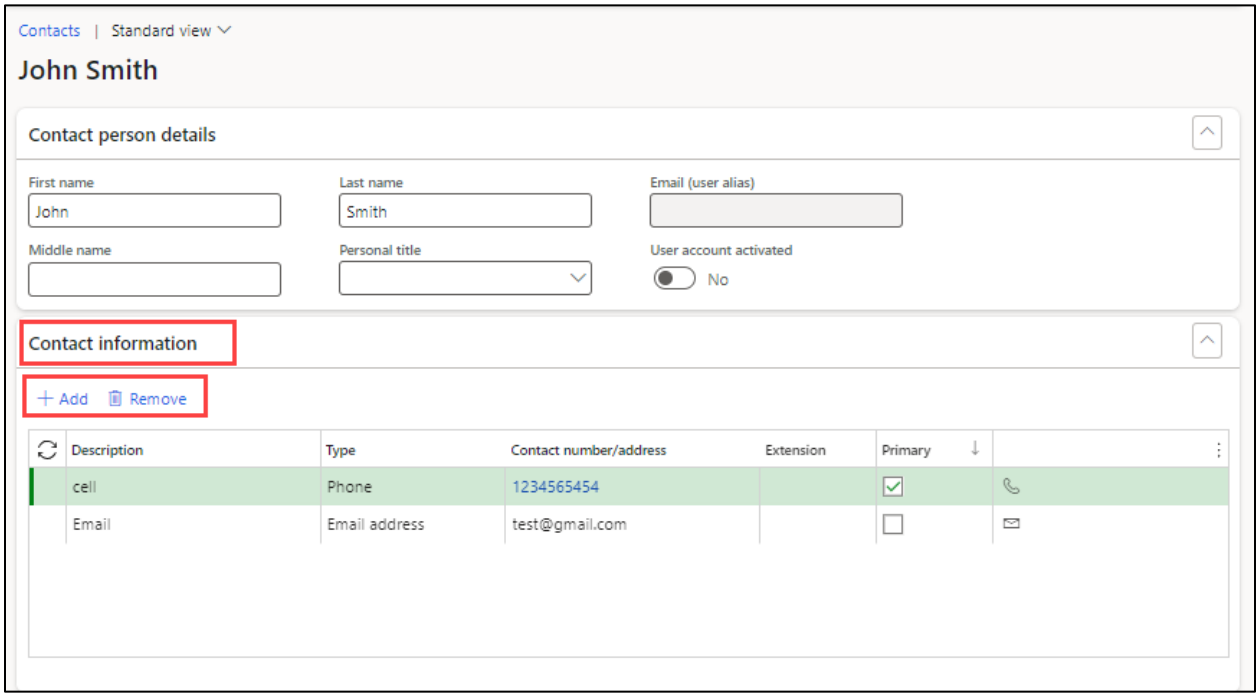
Step 11: You will be returned to the **Contacts** screen to see the list of contacts associated with your company. Use can use the **Delete** button to delete existing contacts. **Note**, (1) your primary user account cannot be deleted, and (2) only the primary user can delete contacts.

Step 12: To edit existing contact details, click the **Name** hyperlink.



The detailed version of the **Contacts** form will open. Within the **Contact person details** and **Contact information** tabs, you can edit existing information. To add new or remove existing contact information, use the **+ Add** or **Remove** buttons in the **Contact information** fast tab.



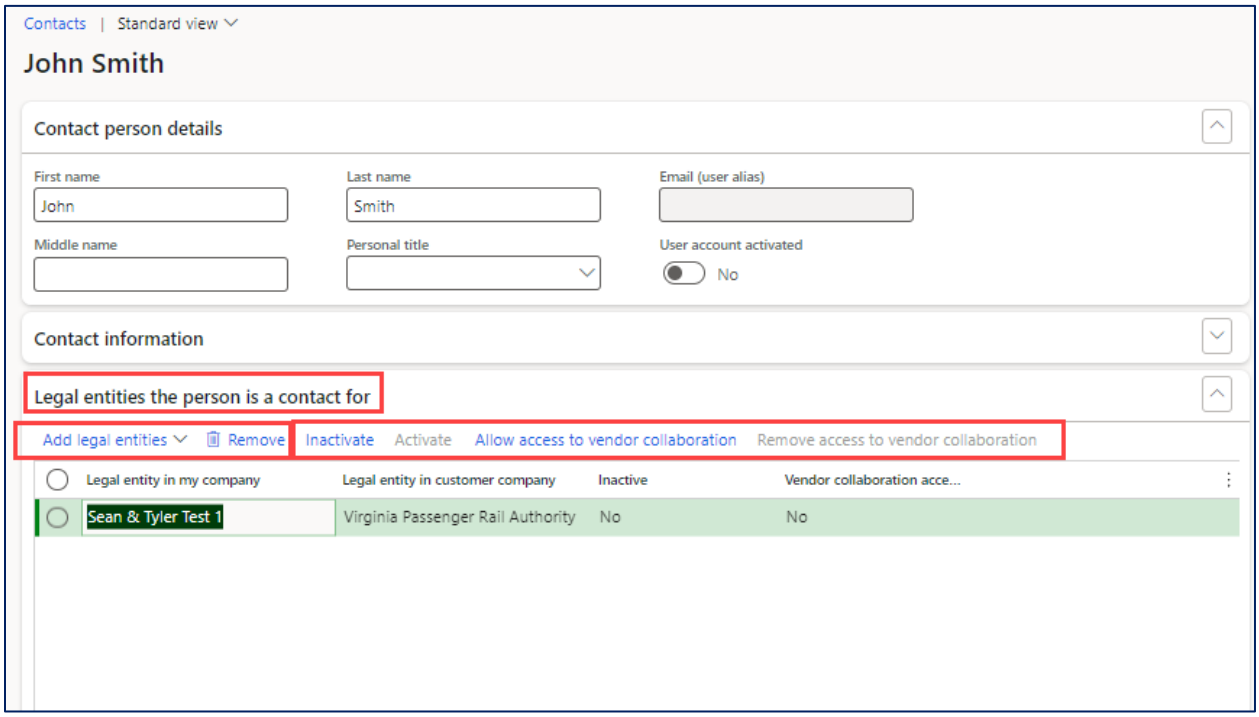


Step 13: You can use the **Remove, Inactivate, Activate, Allow access to vendor collaboration** and **Remove access to vendor collaboration** buttons to perform various actions for that vendor contact from the **Legal entities the person is a contact for** fast tab. A description for each function follows:

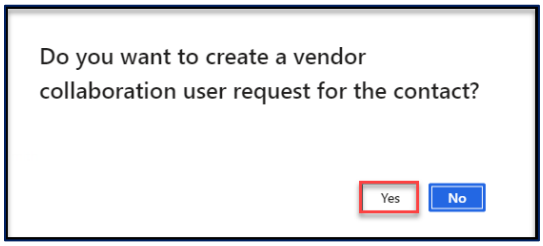
Remove	Removes the link between that contact and your portal account. This deletes the individual contact altogether, i.e., the individual will not have access to the portal and will not be listed as a contact for your company.

Inactivate	Deletes the link between the contact and you. *Only available when Inactivate is set to "No" on the record.*
Activate	Creates a link between a contact and your company. *Only available when Inactivate is set to "Yes" on the record.*
Allow access to vendor collaboration	Provides user access to the vendor portal. *Only available when Vendor collaboration access allowed is "No." If the contact has not yet been provisioned as a portal user, a user request will need to be initiated and processed. See Step 13.*
Remove access to vendor portal	Removes contact's access to the vendor portal but keeps the person as a contact. *Only available when Vendor collaboration access allowed is "Yes."*

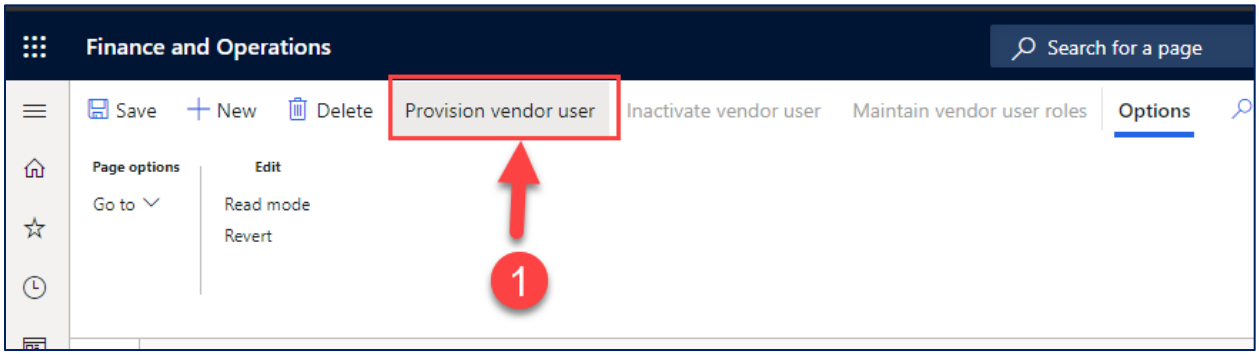
See screenshot below.



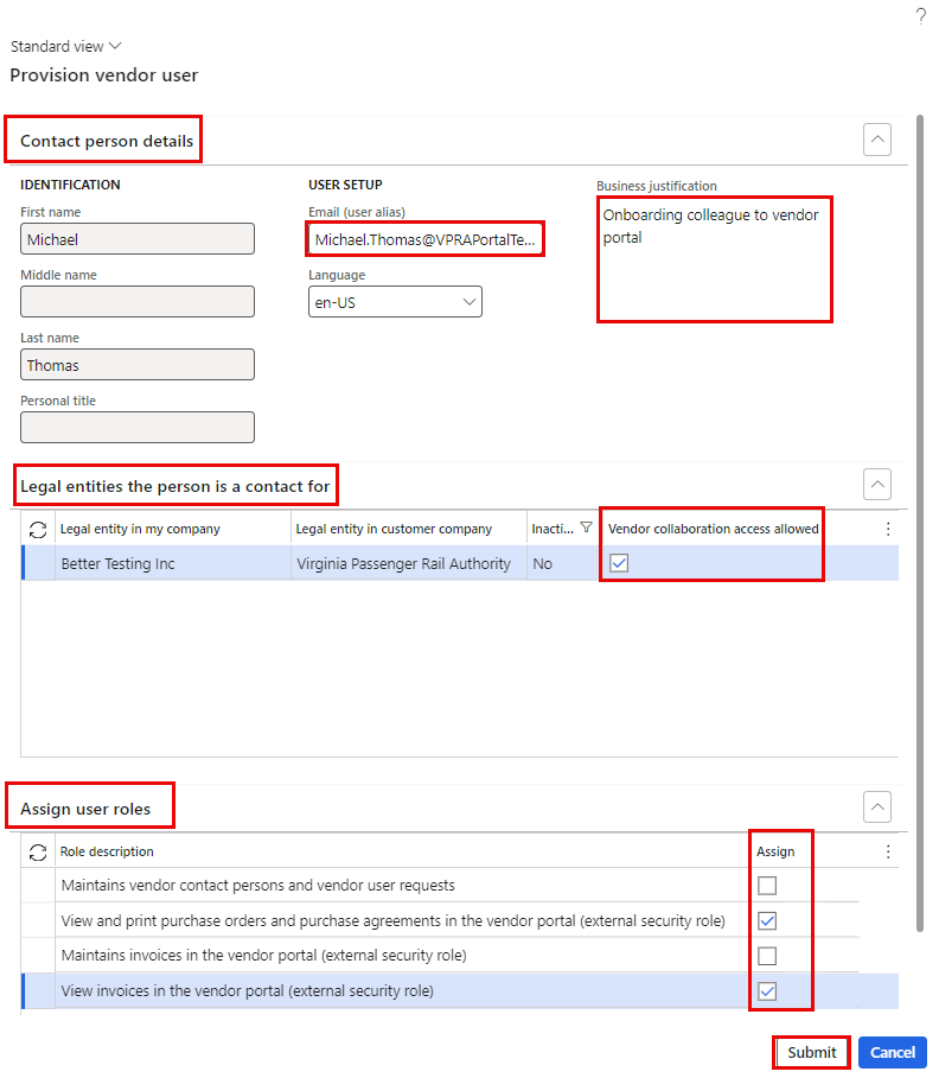
Step 14 (Optional step for when "Allow access to vendor collaboration" button is selected in previous step): The prompt in the screenshot below will pop up. Click **Yes** to provide access to the portal for the newly created contact.



Step 15: Select **Provision vendor user**.

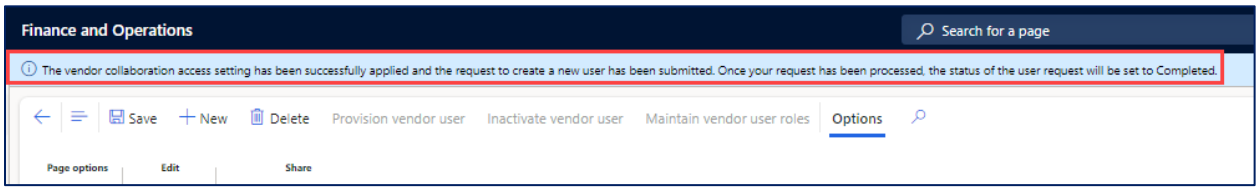


Step 16: In the **Contact person details** tab, enter the contact's Email (user alias) and a Business justification. Within the **Legal entities the person is a contact for** tab, tick the **Vendor collaboration access allowed** box. In the **Assign user roles** tab, tick the box in the **Assign** column to assign the appropriate security role(s) for the contact. See below for a reminder of the permissions each role provides to a contact. Once all information has been specified, click **Submit**.

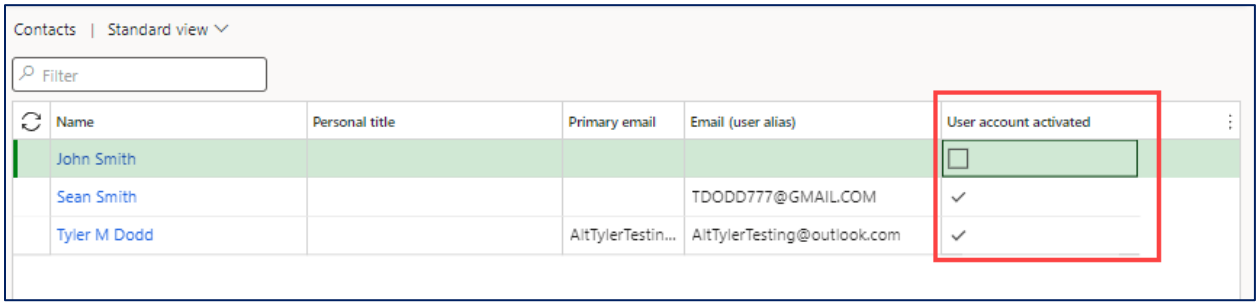


User Role	Purpose
1. Maintains vendor contact persons and vendor user requests	Allows a vendor user to provide access to their portal to other vendor staff members
2. View and print purchase orders and purchase agreements in the vendor portal	View-only access
3. Maintain invoices in the vendor portal	Allows a vendor user to submit invoices and to monitor status of payment
4. View vendor invoice details on the vendor portal	View-only access to see status of invoice: reviewed, approved, paid

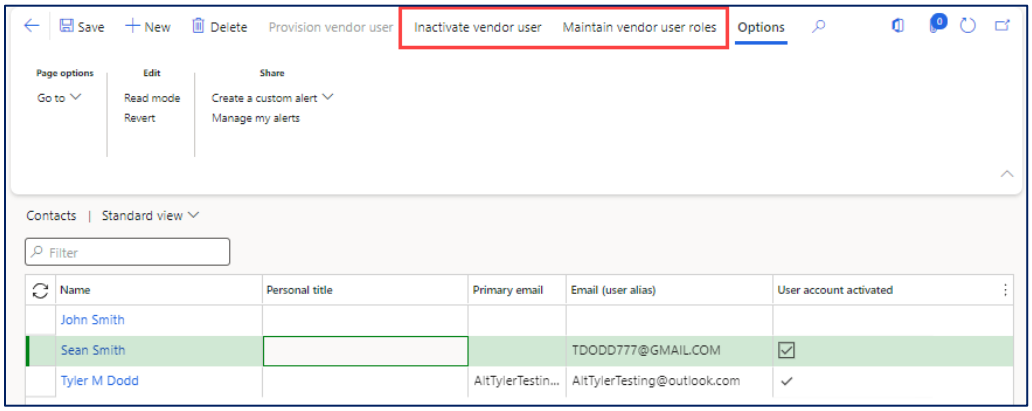
Dynamics will display the following confirmation message after you click Submit. Close the form.



Once the user account request has been processed, you will see that the **User account activated** boxes are ticked in the **Contacts** form.

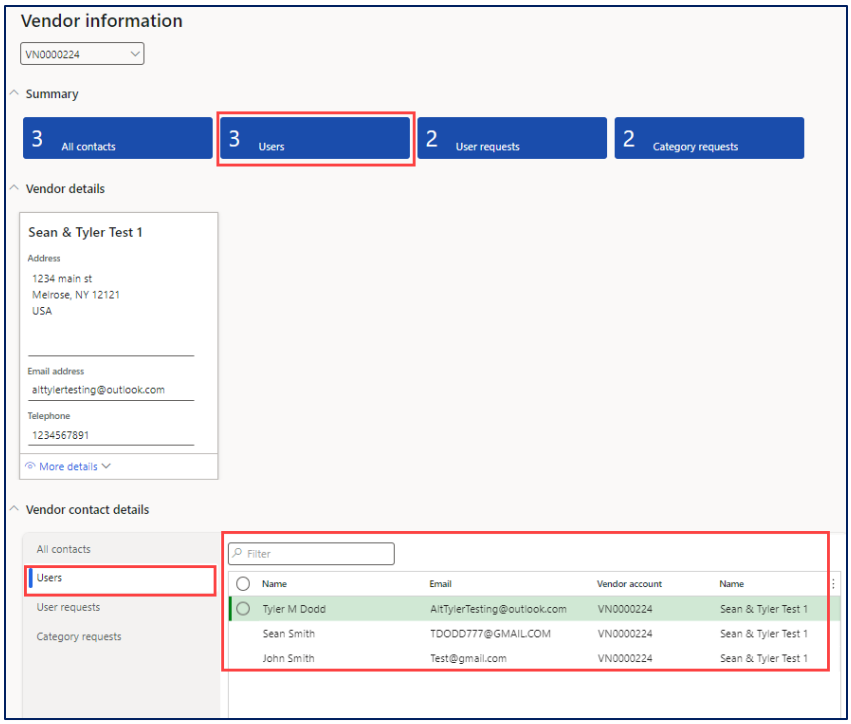


Step 17: In the **Contacts** form, you can use the **Inactivate vendor user** and **Maintain vendor user roles** buttons to inactivate vendor users or to update security role assignments for each contact listed in the organization. *Note, certain fields on these forms will be non-editable because they are not relevant to the specific process.*

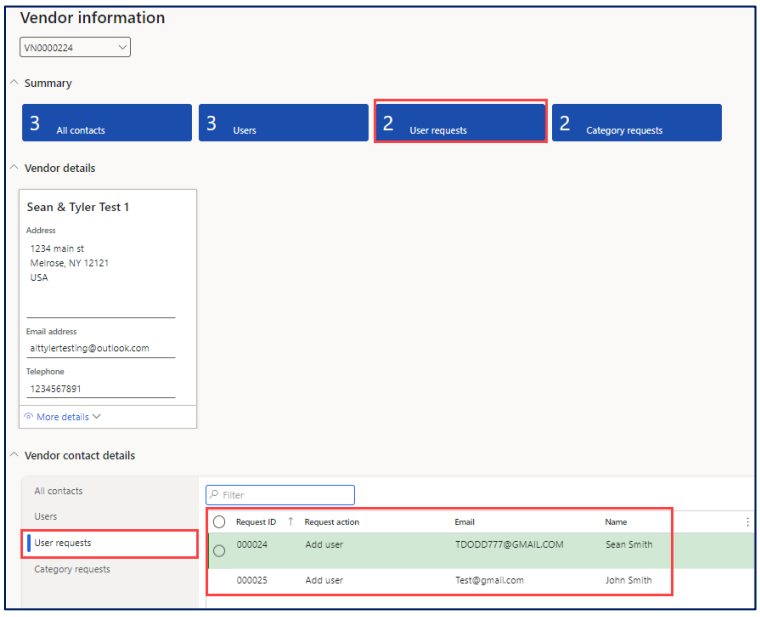


Step 18: Navigate back to the **Vendor information** workspace. Existing user information can be previewed in the **Users** tile. See screenshot below.

Important: VPRA approves all of your requests to Add a User, but VPRA does not approve changes to an existing User.

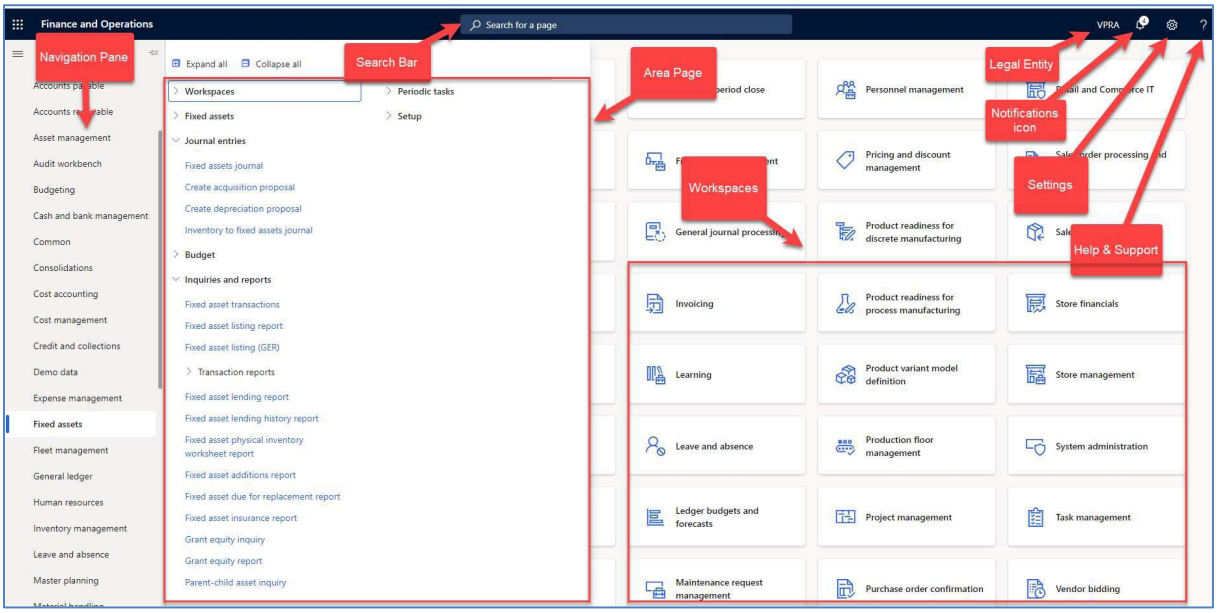


Step 19: In the **Vendor information** workspace, the **User requests** tile can be used to view and monitor your requests, such as the addition of a new user account or the modification of an existing user account (for example, user account inactivation, a change in security role assignment, etc.).



IV. GENERAL NAVIGATION AND USER PREFERENCES

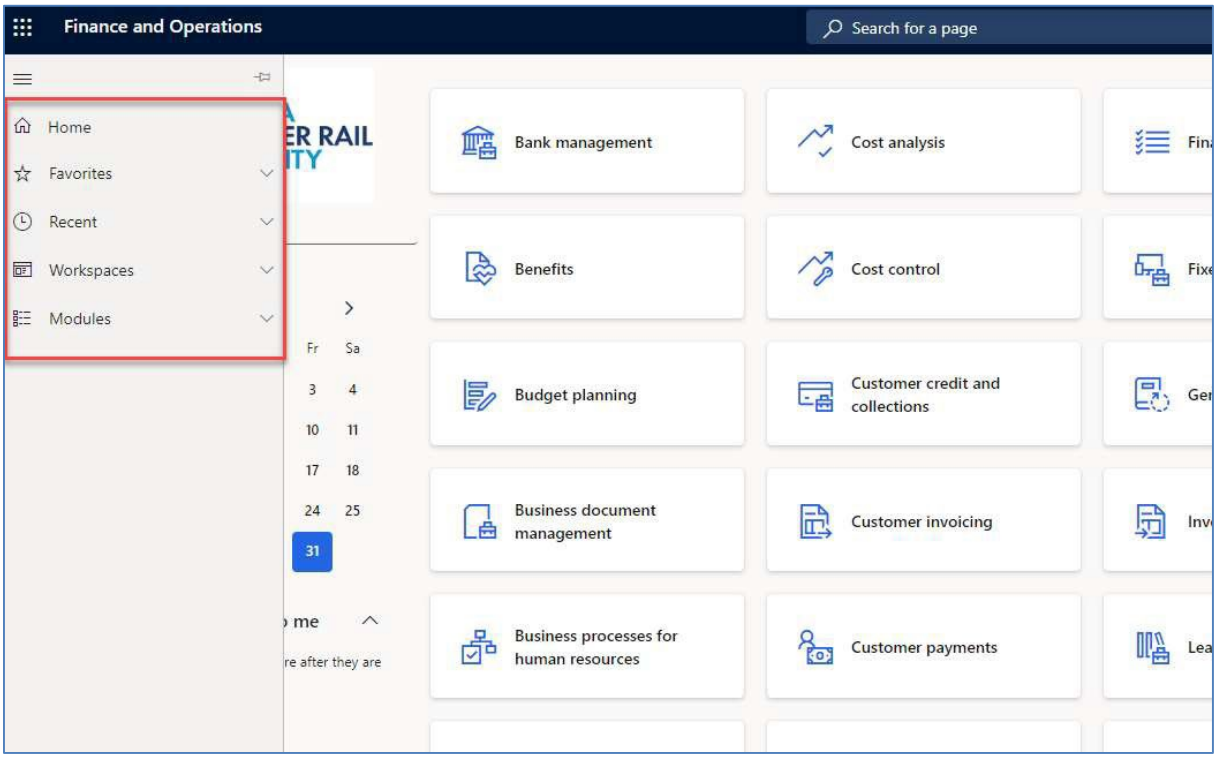
The following sections provide information on how to customize your views, how to navigate around Dynamics, and how to set alerts. These are optional functions that may enhance your user experience.



Navigation Components

Component	Purpose
Navigation Pane	Menu used to navigate to desired area of Dynamics 365.
Search bar	Search for an item within Dynamics 365.
Area Page	Menu that opens once desired item is selected in Navigation Pane. Reveals areas available within that selection.
Workspaces	Tile listing of Workspaces available to the user.
Legal Entity	Displays your company name.
Notifications Icon	Displays any notifications of which the user should be aware and work items assigned to you.
Settings	Allows you to adjust preferences and settings within Dynamics 365.
Help & Support	Provides general help guides related to the page you are on.

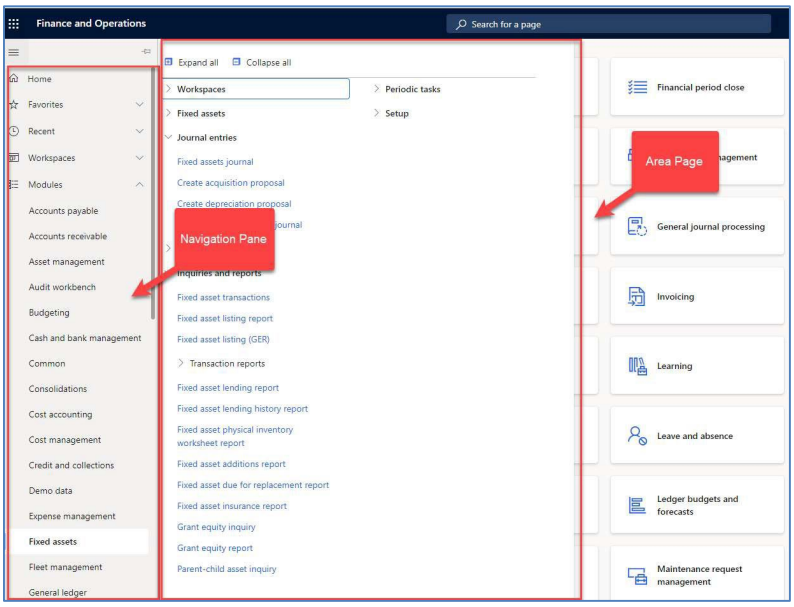
Navigation Pane Features



Component	Purpose
Home	Brings you back to the general landing page.
Favorites	Allows you to save shortcuts to specific modules, forms, or workspaces for easy access. Favorites can be added by selecting the star next to any menu item in the Area Page.
Recent	Displays most recently accessed forms, pages, or workspaces.
Workspaces	Shows a comprehensive list of all workspaces.
Modules	Shows the comprehensive list of all modules, and displays their corresponding menu items.

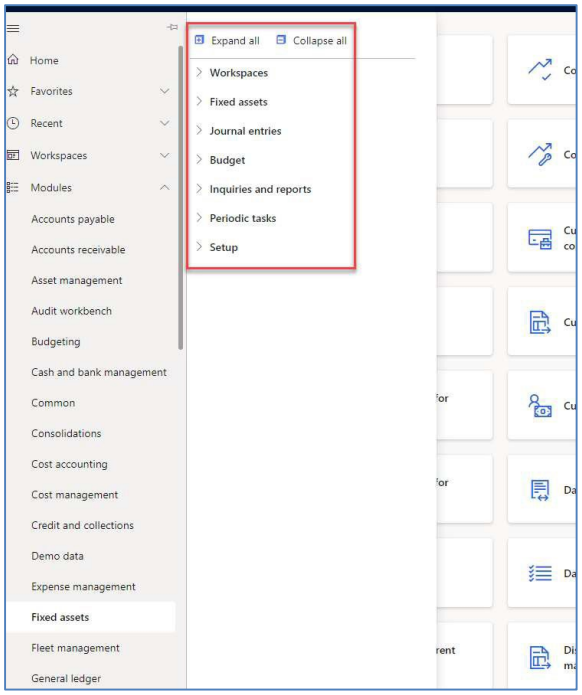
Switching Modules

The **Navigation pane** (left side of screen) lets the user navigate between modules. Once a module is selected, you are able to navigate within the module using the **Area page**.



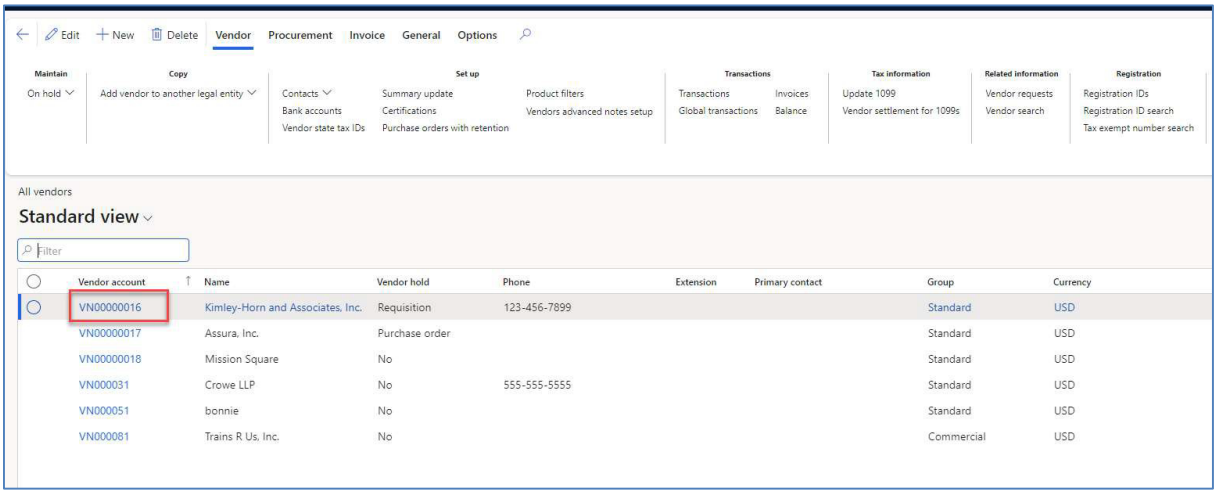
Area Page Menu Items

The Area page is displayed once a specific module is selected from the navigation pane. It shows all menu items relevant to that module. They are grouped logically to make it easier for users to find what they need. Users can expand or collapse groups by clicking the arrow next to the name.

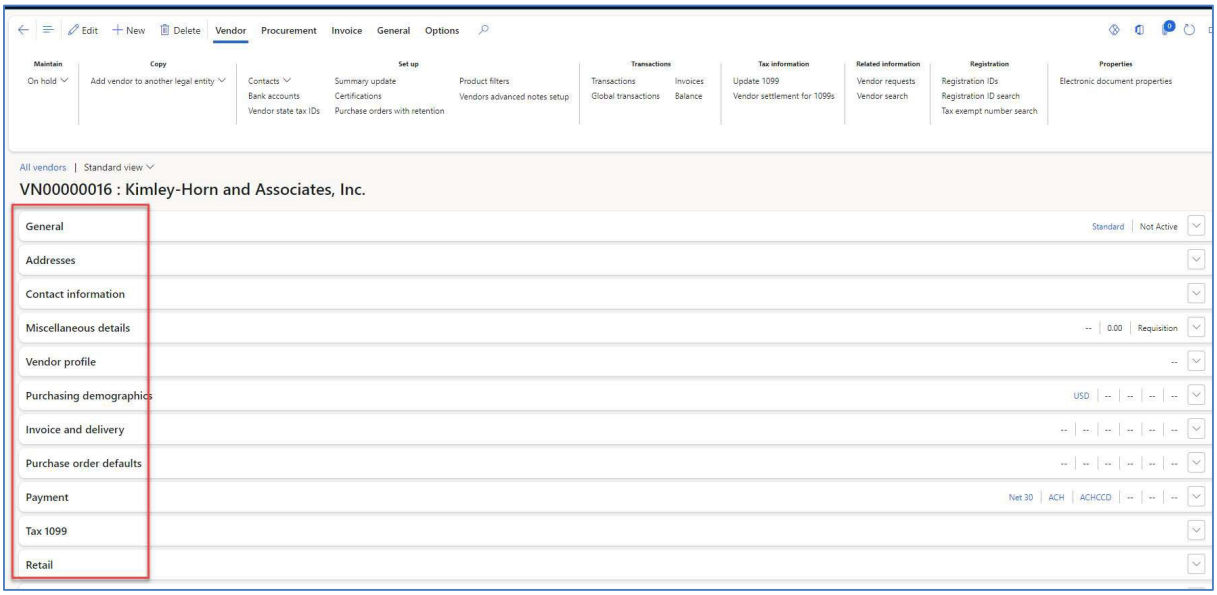


Form Navigation

All Dynamics 365 forms, regardless of module, operate in a similar fashion. Records can be added by pressing the **New** icon in the toolbar. Highlight a record and double click to drill-down into additional information and/or related tables.



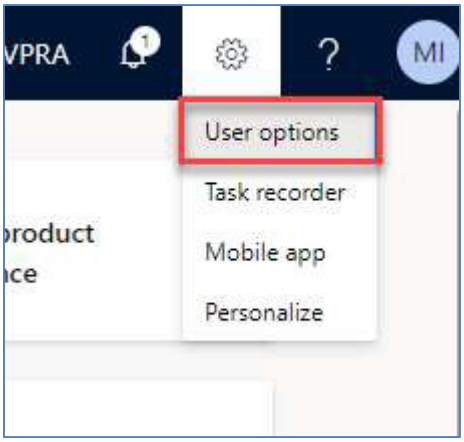
After drilling down into the record, additional tabs allow for further data to be accessed.



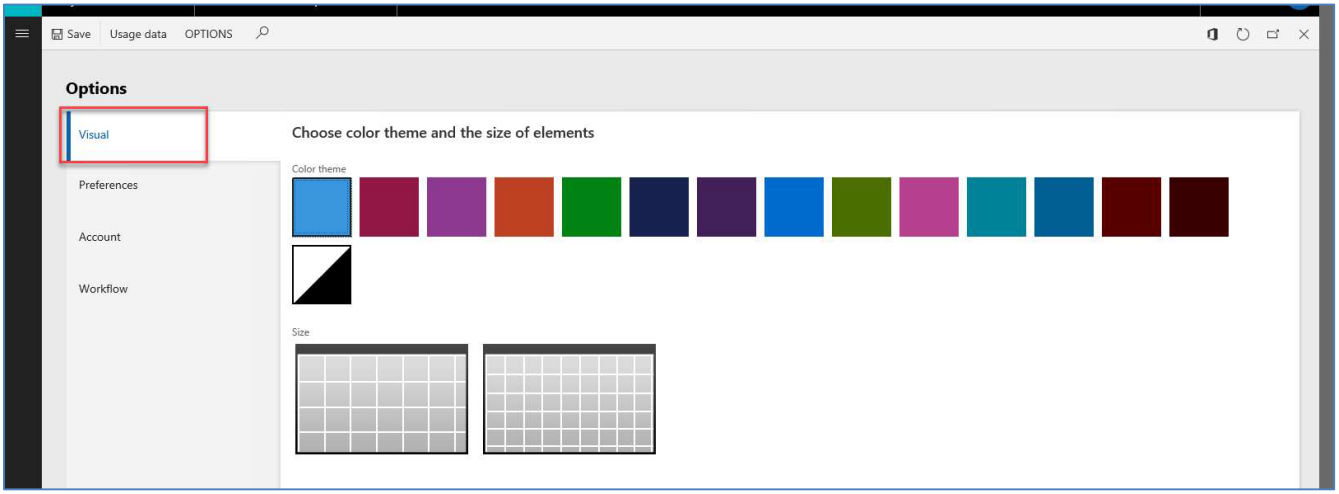
Environment and User Settings

Access Menu Path:	Any page within Dynamics

Step 1: Click the **Settings** icon (picture of a gear) in the top right corner of the form. Select **User options** from the dropdown. As you make changes, be sure to click **Save** in the upper left corner.

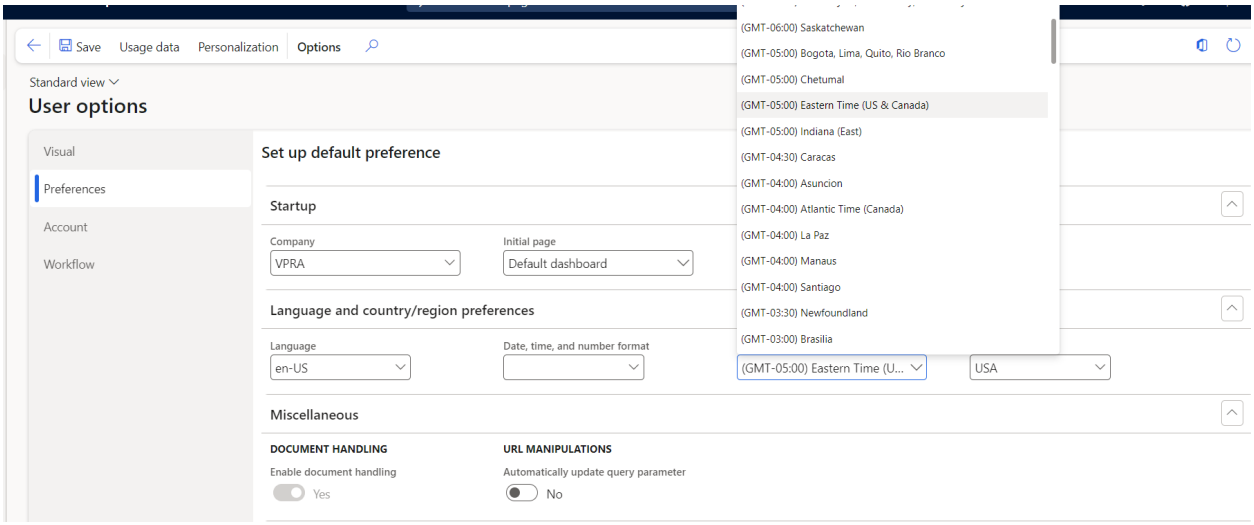


Visual tab: Select **Visual** under Options. This tab will allow users to change the **Color theme** and **Size** of icons on their user interface.

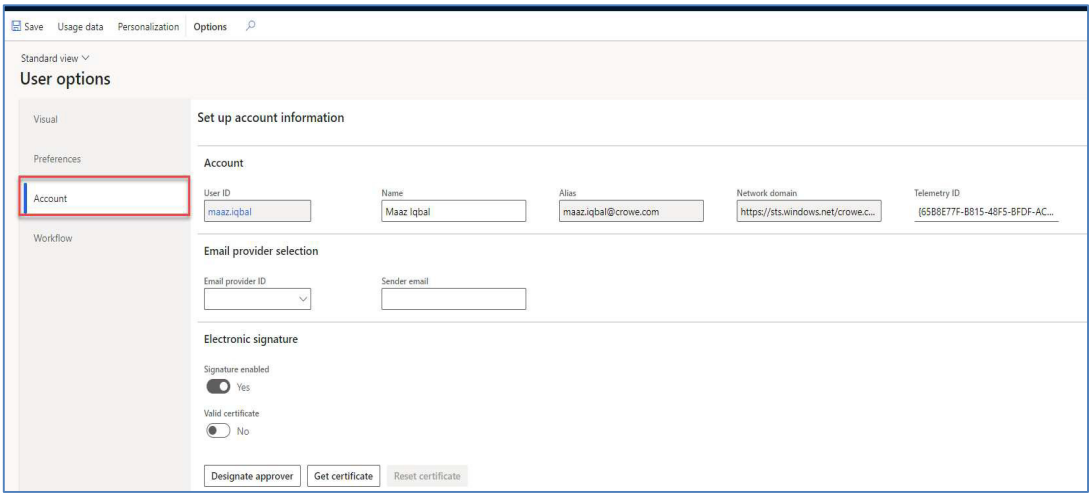


Preferences: Select **Preferences** under Options. This tab allows you to set your user default preferences within Dynamics. **You should update your preferences at a minimum as follows:**

Dynamics defaults to GMT. Adjust to your time zone as shown below.

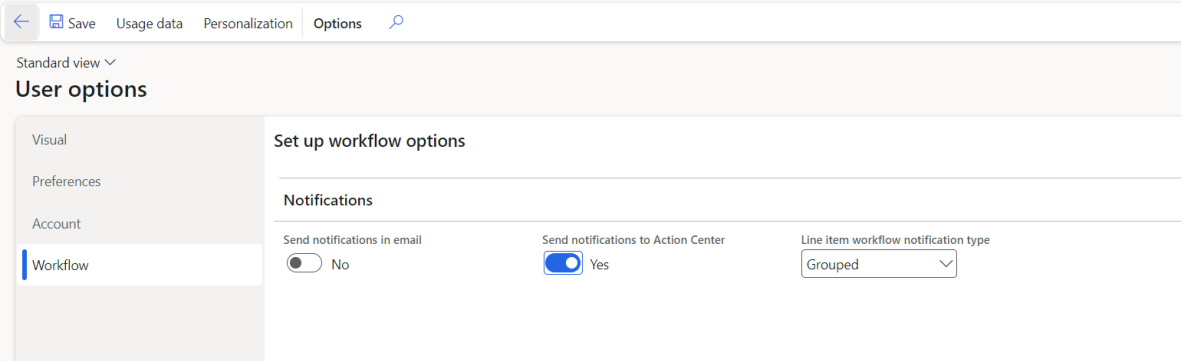


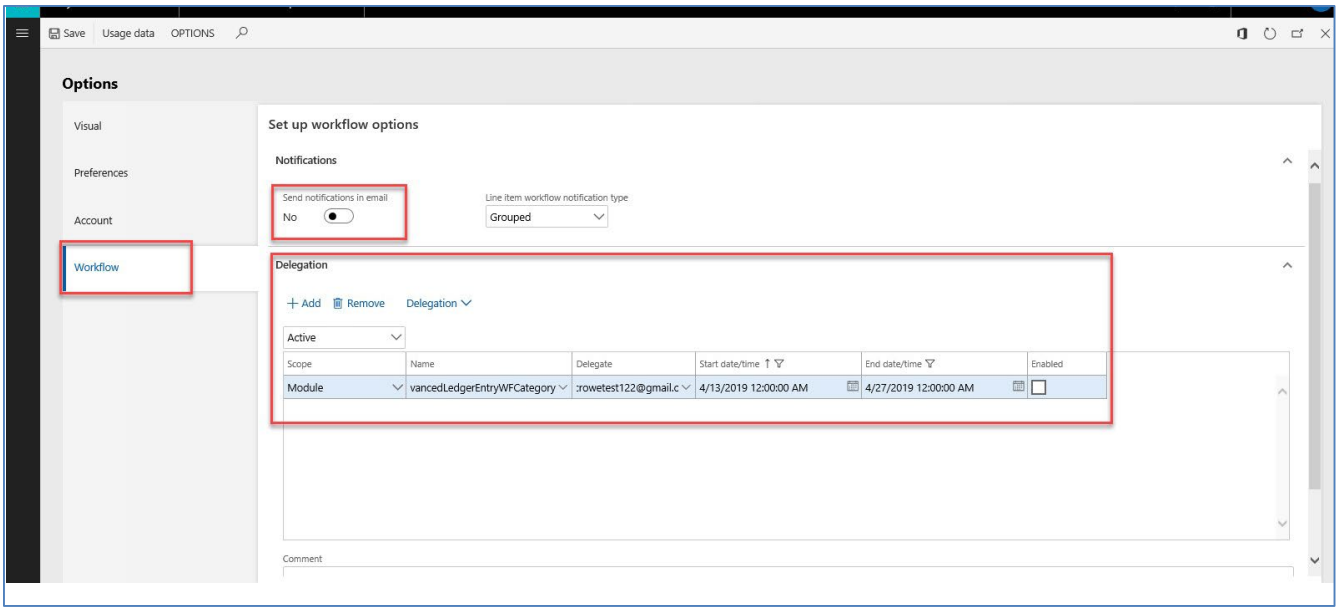
Account: Select **Account** under Options. This tab details basic account information for the user. You can edit this information as necessary.



- Enable **Send notifications in email.** If this is enabled, all workflow notifications will be sent as email notifications, as well as notifications within Dynamics.
- Enable **Send notifications to Action Center** so you are aware of updates to items in your workflow or requiring your attention. These notifications appear in the upper right corner of your home screen in the bell icon.
- Delegation:
    - Users can setup workflow delegation if they are out of the office.
    - Users can setup workflow delegation by the following:
        - Workflow: For a specific workflow
        - Module: For workflows within a module
        - All: For all workflows

Note: *The three options above are going to be unique per user per situation. For example, to delegate all workflow approvals to 1 user, select* ***All.*** *To delegate different workflow approvals to multiple users, choose workflow or module and select the applicable user to whom you want to delegate.*





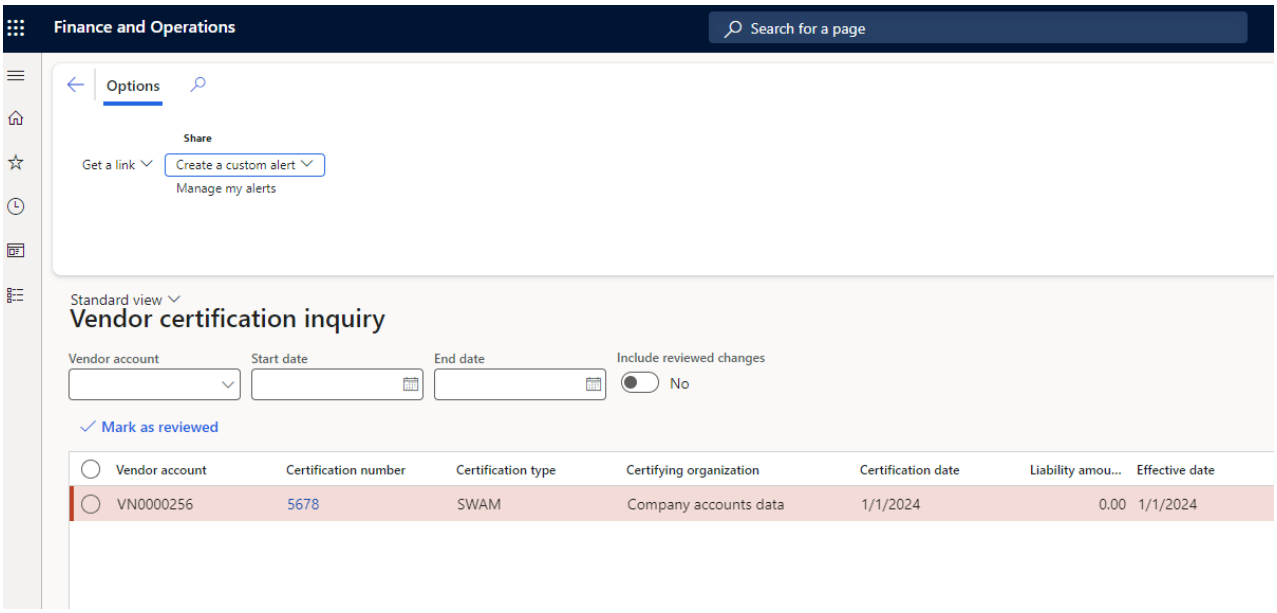
Setting and Maintaining Custom Alerts

This section explains how to set alerts. You might want to set an alert to tell you when a certification is about to expire, when your company's banking information is changed, or when a new user is added to your vendor portal.

Vendor Certification Notifications

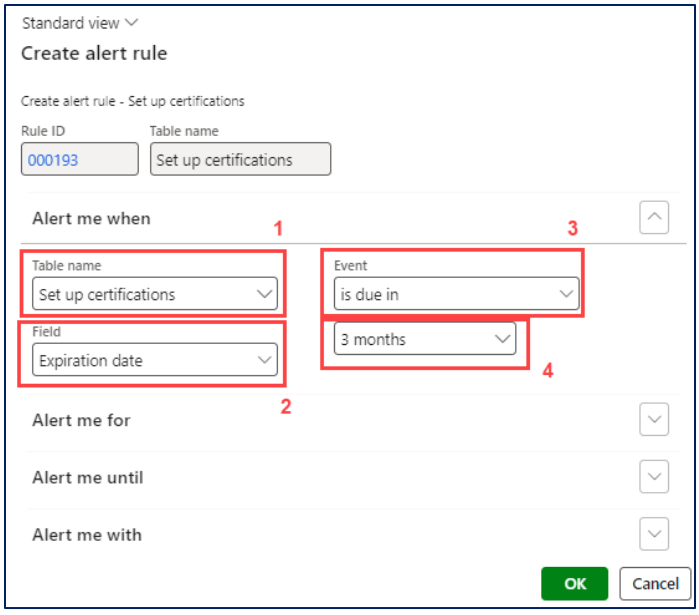
Access Menu Path:	Modules > Accounts Payable > Inquiries and Reports > Vendor Reports > Vendor Certification Inquiry

Step 1: Following the Access Menu Path above, navigate to Vendor Certification Inquiry.



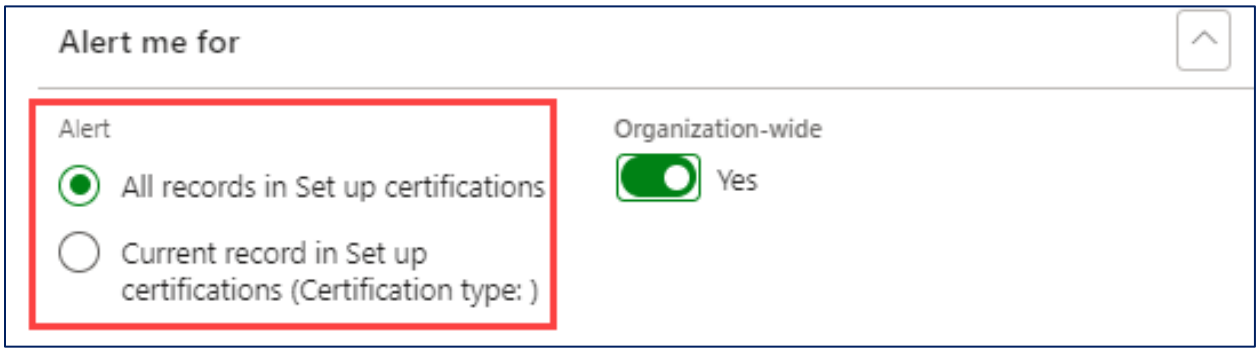
Step 2: Click **Create a custom alert** under **Options**. In the example above, you see that this vendor has a SWAM certification.

Step 3: To create an alert so you are warned prior to a certification expiring, select **Set up certifications** under **Table name.** The selection within the **Table name** dropdown will drive the options available under the **Field** dropdown. Choose **Expiration date**. Then, under **Event**, select **Is Due In.** Last, select **a time frame** when you would like to be notified of the upcoming date. In the example below, an alert will be provided when a certification is set to expire in 3 months.

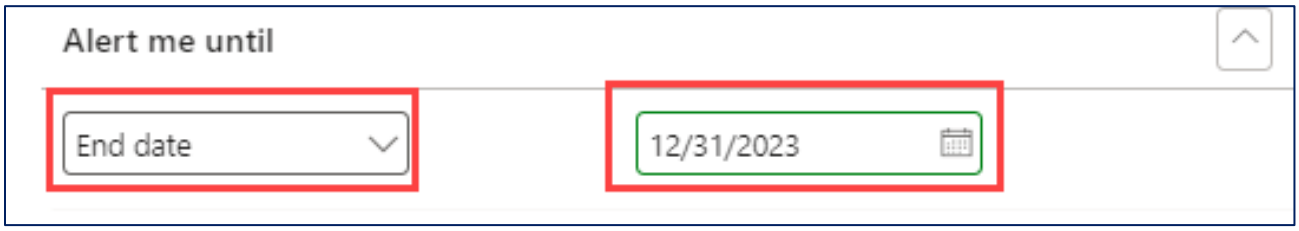


Step 4: Within the **Alert me for** tab, you can choose to receive the notification for **All records In Setup of Certifications** (i.e., all certifications) or just for the **Current record** (i.e., specific certification) selected.

NOTE: *The Organization-wide toggle does not need to be changed. It does not have functionality in VPRA's system.*

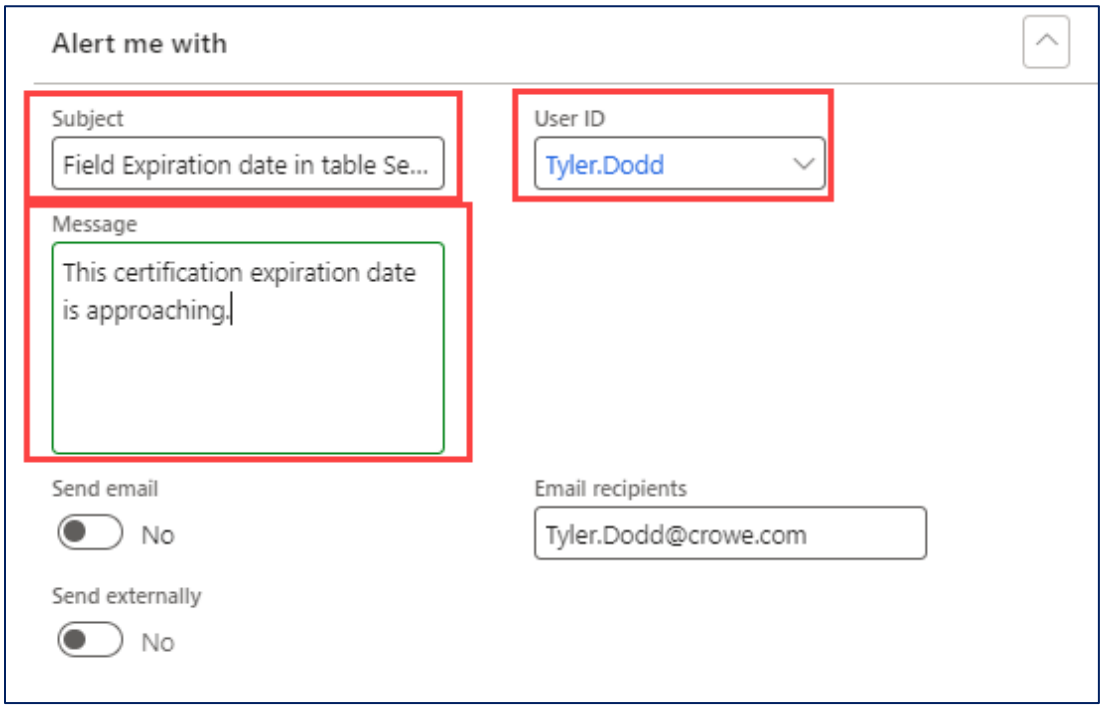


Step 5: Under the **Alert me until** tab, select an **End date** or select **no date** to create an open-ended alert**.** For alerts regarding expiration dates, it is recommended to set the **End date** to the same date that the alert will be triggered. For example, if a certification expires on 3/31/24 and the alert will be triggered 3 months prior to the expiration date, the **End date** should be 12/31/23.

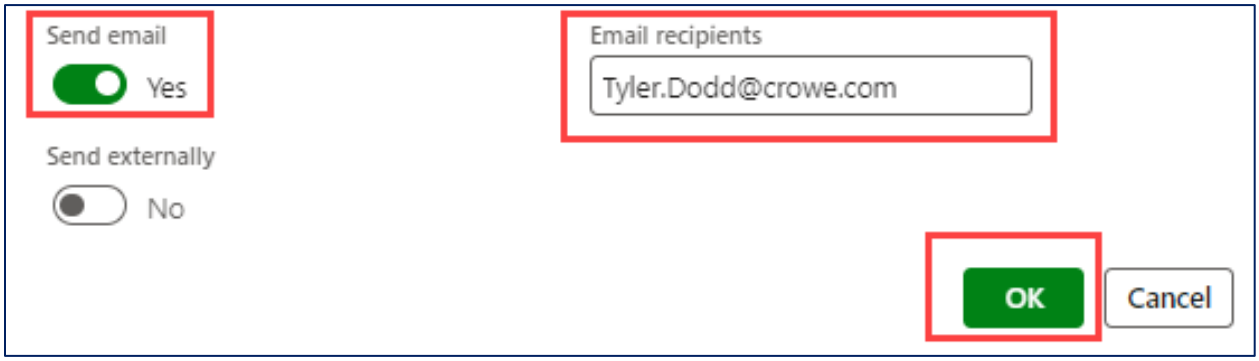


Step 6: Under the **Alert me with** tab, add a **Subject, Message,** and **User ID** for the alert.

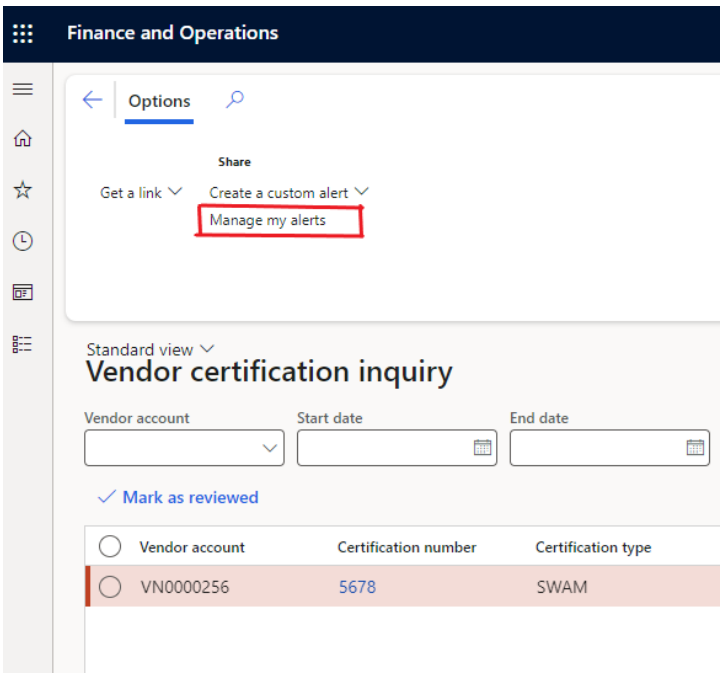
Note: *Only users with system administration access can assign alerts to other users. The* ***User ID*** *field will not be available for most users.*



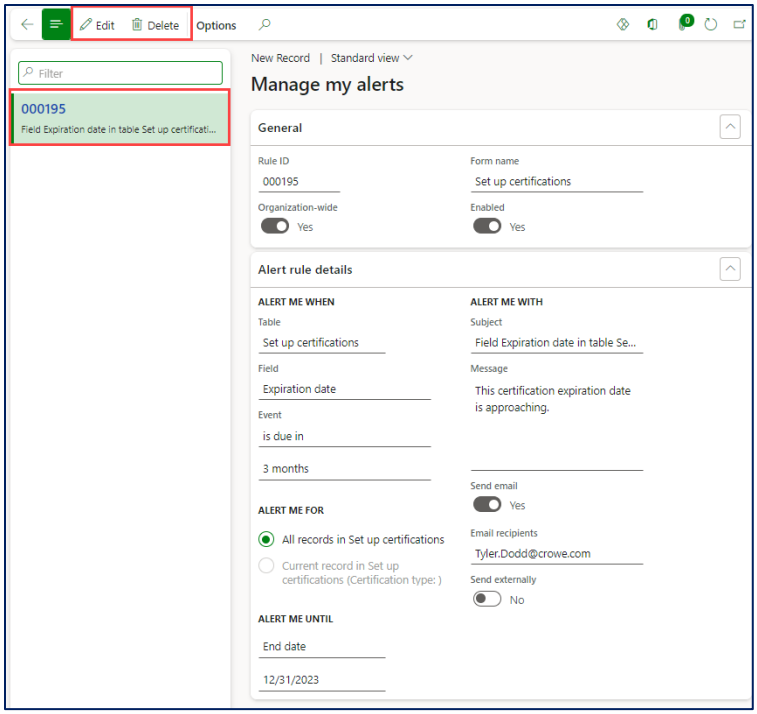
Step 7 (Optional): Toggle **Send Email** to **Yes** to also receive the notification via email. More than one **Email recipient** can be added by using a **semicolon** to separate the email addresses. Once all information is entered, click **OK.**



Step 8: Once the alert has been created, view the alert by clicking **Manage my alerts** within the **Options** tab in the ribbon.



Step 9: Use the **Edit** and **Delete** buttons in the ribbon to edit or remove the alert.



Setting Invoice Alerts

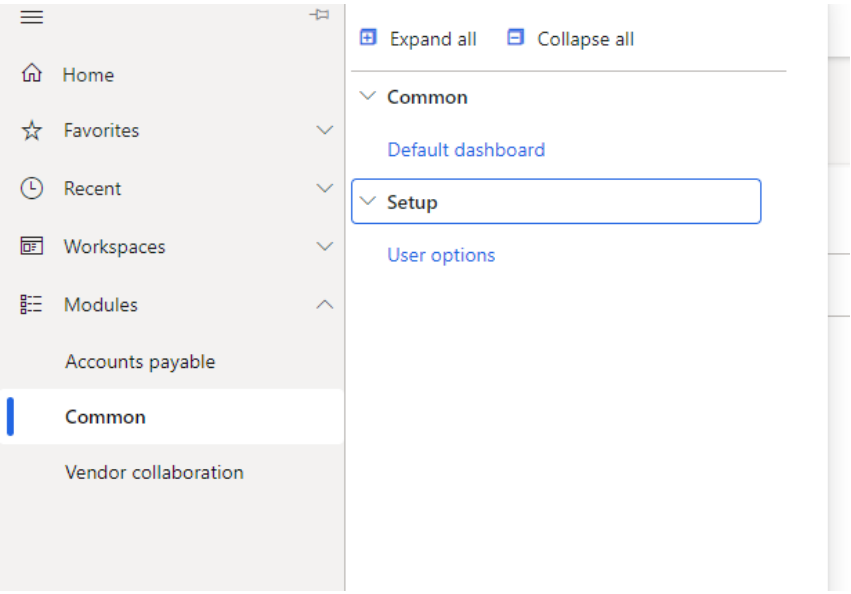
If you are the person who submits invoices on behalf of your company, you will want to set alerts so you know when the status of your invoice changes and importantly, when VPRA is requesting a change to your invoice. Alerts are tied to the person who submitted the invoice. This means that if there are multiple people submitting invoices, you may consider setting up alerts so that each person receives alerts on *all* invoices, not just the invoices they submit. This way someone will receive an alert even when the person who submitted the invoice is out of the office.

There are two ways to set such alerts. If you have multiple people submitting invoices, then we suggest using the second method.

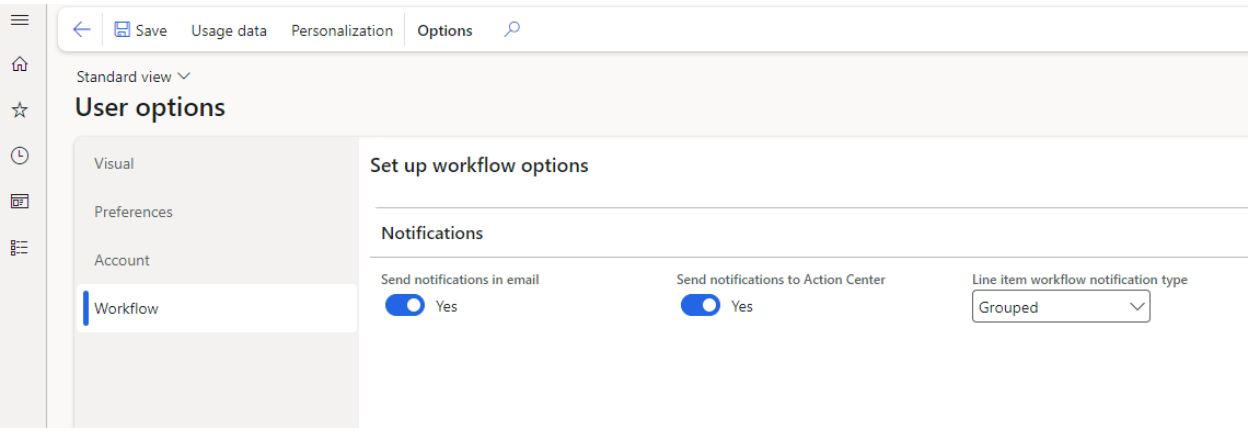
Method One

Access Menu Path: Modules > Common > Setup > User options

Step 1: Navigate to the User options screen following the Menu Path.

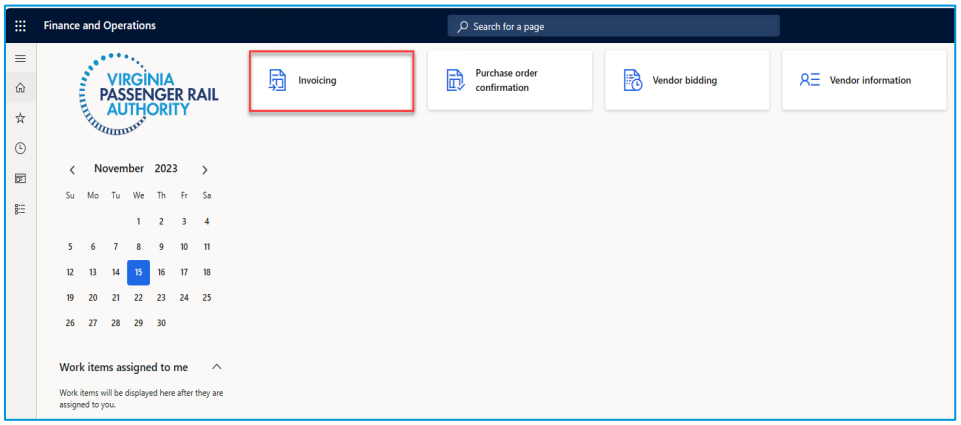


Step 2: Click **Workflow** under User options. Make sure that both toggles are moved to **Yes** for **Send notifications in email** and **Send notifications to Action Center**. These notifications appear in the upper right corner of your home screen in the bell icon.

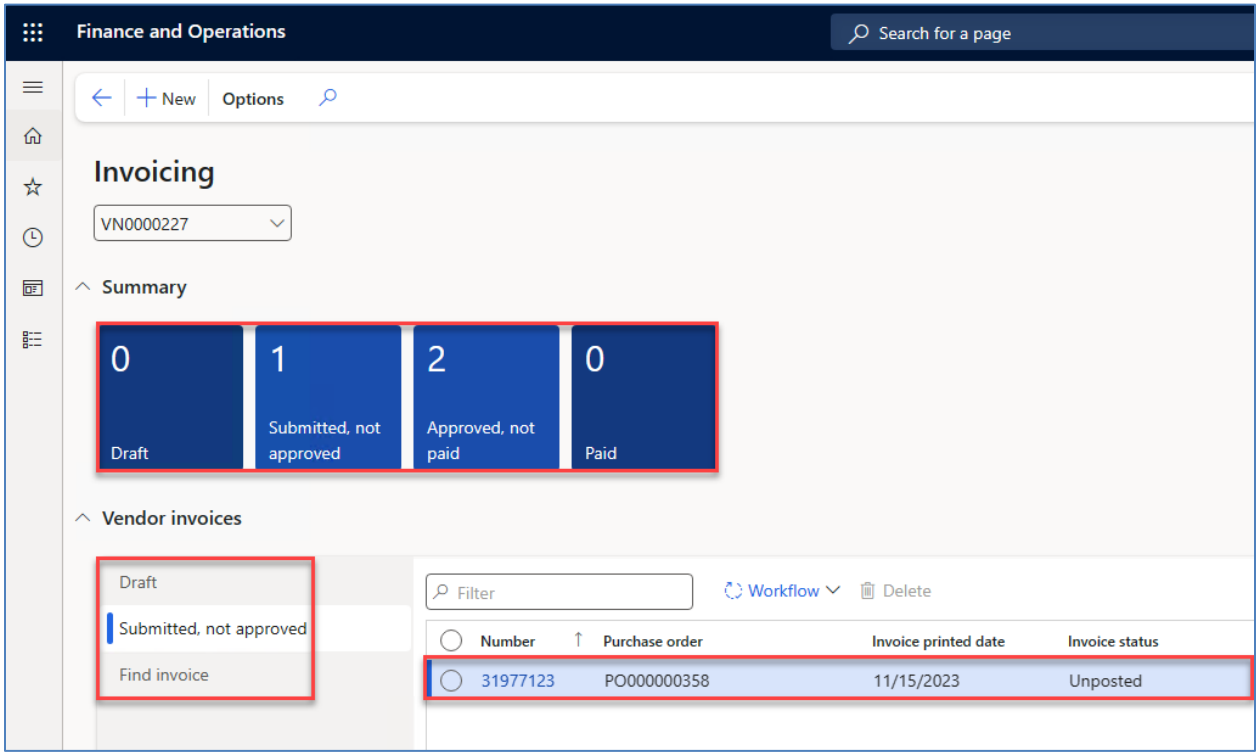


Method Two

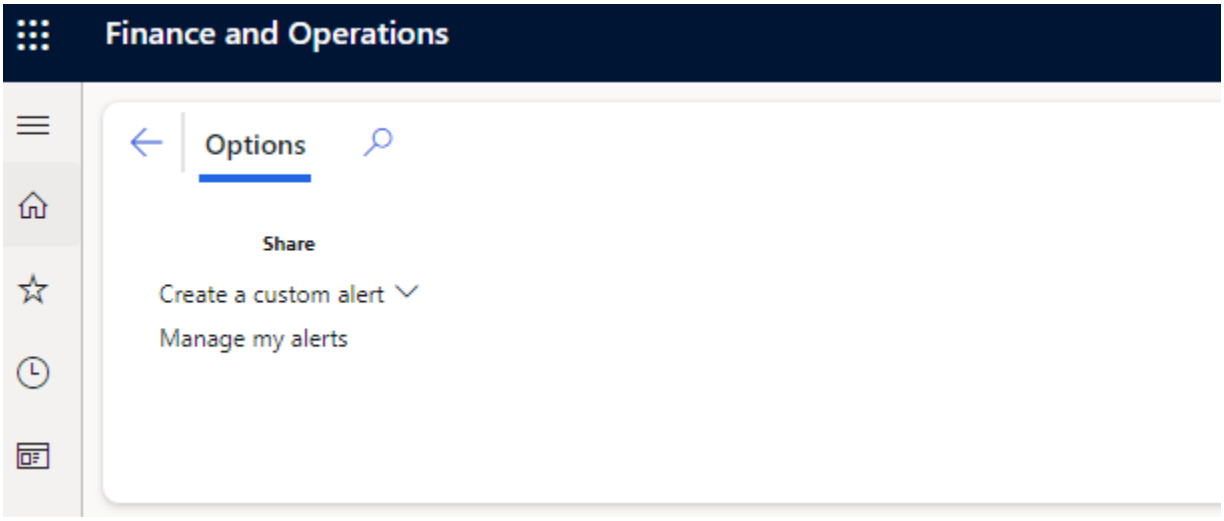
Step1: Use the Invoice tile on your homepage to navigate to a list of your invoices.



Step 2: Click the **Submitted, not approved** tile.



Step 3: In the top ribbon under **Options**, click **Create alert rule**.



Step 4: A pop-up window appears. Under Alert me when, make sure Table name is set to Vendor invoices and the Field is Vendor invoice review status.

Portal Security and Privacy

As a registered vendor in VPRA's Vendor Portal, you are responsible for the security of your portal account along with your login credentials. You and your users need to protect your account information and your login credentials. You will be responsible for any loss or damage you sustain as a result of your failure to protect your account information and your use of VPRA's Vendor

Portal. If you believe or know your portal account and/or credentials have been compromised, please let VPRA know immediately.

Vendor Users are also responsible for complying with VPRA's Privacy Policy. A copy of the policy is posted on VPRA's website and can also be accessed here: https://vapassengerrailauthority.org/about/privacy-policies/.