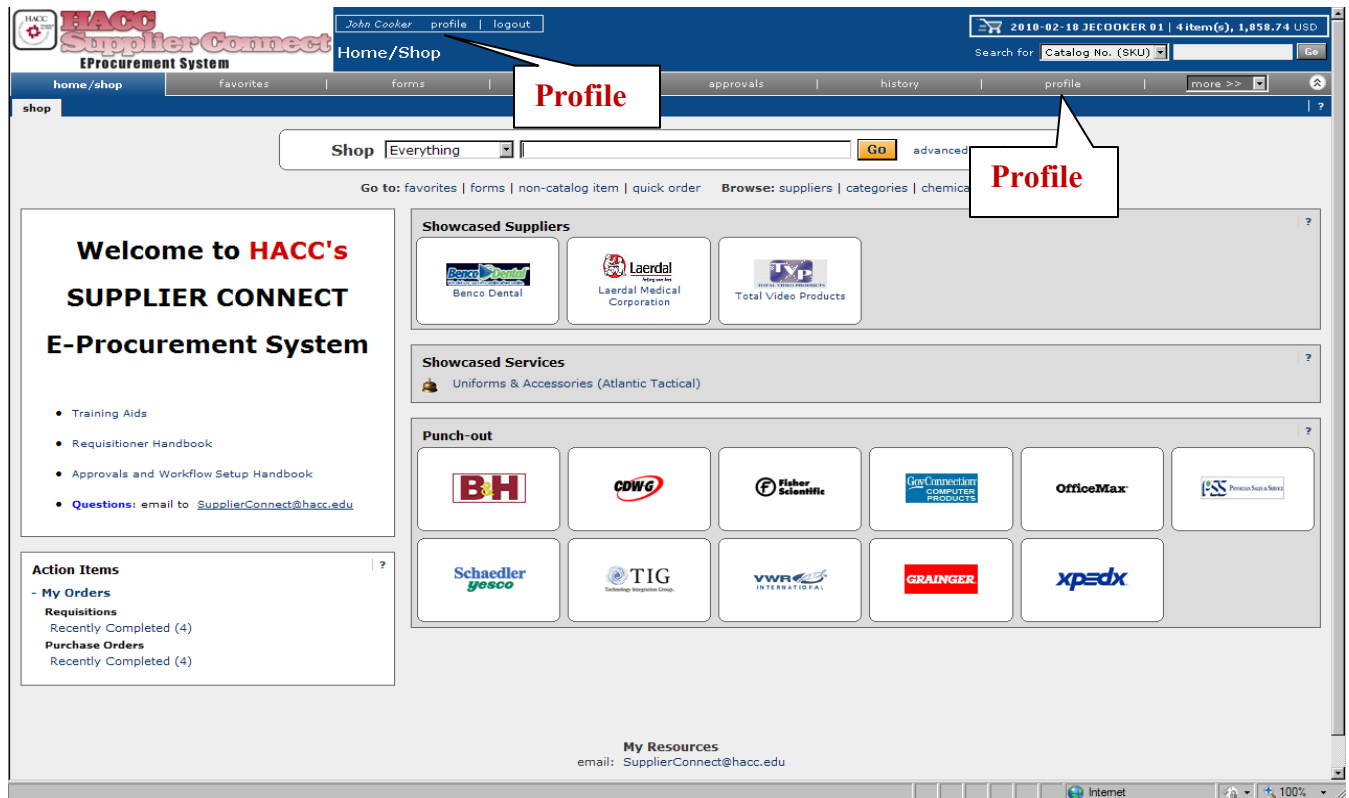




HACC SupplierConnect Profile Setup



From the HACC SupplierConnect E-Procurement “Showcase Display” page, each user, whether a requestor or an approver has a unique profile, including identification, purchasing abilities, and site accessibility.

To view and/or to modify a profile, click on one of the two locations above. When opened there are four primary tabs with multiple sub-tabs. The primary tabs are:

- User Settings
- Purchasing
- Permissions
- History

User Settings Tab

The “**User Identification**” screen has several fields pre-loaded. As changes are made, click the “Save” icon. Three things to note on this screen:

- **User Name** - this is always in UPPER CASE – Your user name is your Banner User Name.
- **Change Password** – at the initial use and every 5 months you will need to change your password. You will be prompted each day beginning 15 days before the expiration of your current password. Clicking on the words “Change Password” will open another window to allow you to change your password.
- **Password ‘help’ question** – this is not mandatory but may assist in helping you to remember a password.

User Settings

User Identification

First Name: John
Last Name: Cooker
Phone Number: 717 780 1128
Country Code, Area, Phone Number, Extension: +717 (780) 1128
Email Address: jccooker@hacc.edu
Department: C31006
Position: [Dropdown]
User Name: JECOOKER

Please enter a question and answer that we can prompt you with should you ever forget your password.

Question: Mother Maiden Name
Answer: [Redacted]
Confirm Answer: [Redacted]

Click to change your password

Save

Change Password

Change Password - User: JECOOKER (John Cooker)

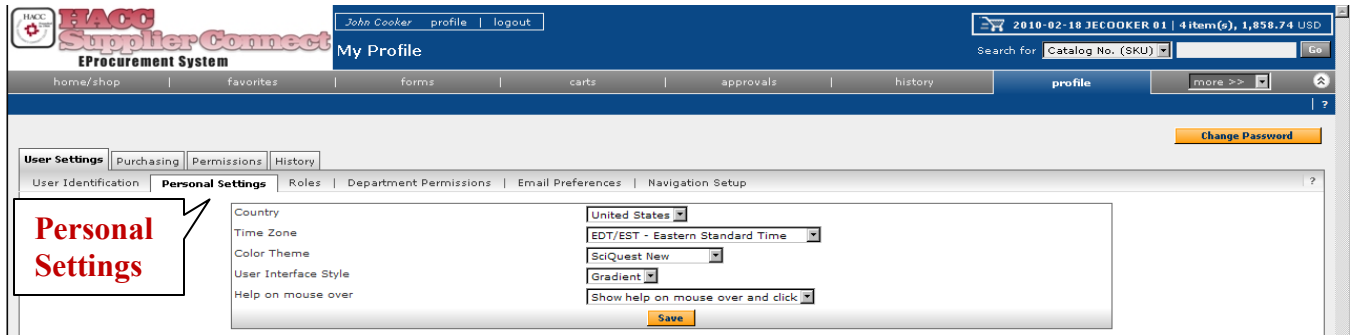
Passwords are case sensitive. The minimum password length is 6 alphanumeric characters.

Old Password: [Input Field]
New Password: [Input Field]
Confirm New Password: [Input Field]

Change Password

Close

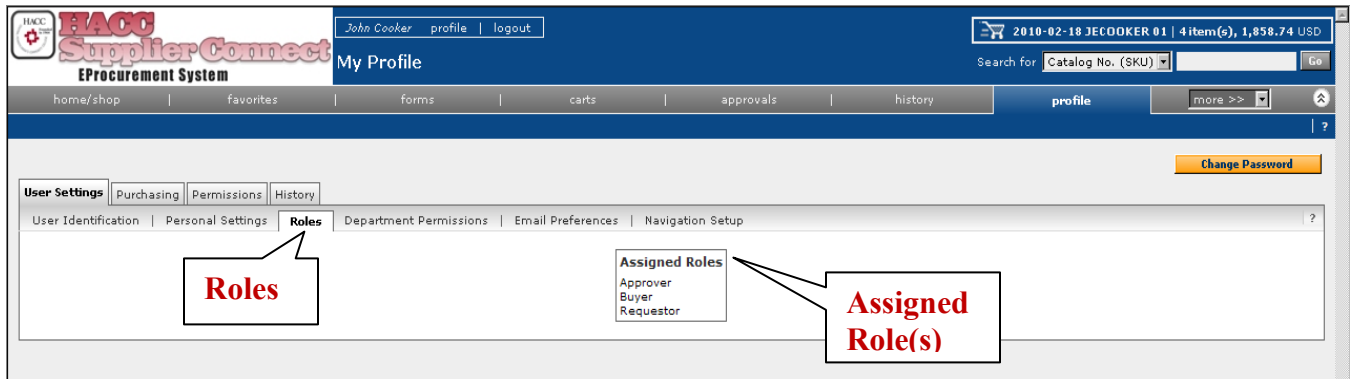
The “Personal Setting” sub-tab allows for several personal choices.



Typical selections are:

- Country United States
- Time Zone EDT/EST Eastern Standard Time
- Color Theme (Personal choice)
- User Interface Style (Personal choice)
- Help on mouse over 2 choices: Show help on mouse over and click
Show help only on click

The “Roles” sub-tab merely identifies the role assigned to you. If you are a requestor only, then the “Assigned Roles” will have only that role in it. On the other hand, you may be an approver only and therefore only “Approver” will appear. (There are situations where a user may have multiple roles as the illustration suggests).



The sub-tab “Department Permissions” has been loaded with information provided by Banner and generally is your primary organization number. This same number appears on the first profile screen. (Purchasing has the ability to change this number if needed.)

Department Permissions

The screenshot shows the 'My Profile' page with the 'Department Permissions' sub-tab selected. A callout box labeled 'Department Permissions' points to a box containing 'MY DEPARTMENTS C31006'. The page also shows a message: 'User has access to all organization orders' with a red 'x' icon.

“Email Preferences” are very important. Throughout each stage of the process, from creating a requisition (or cart) as referred to in SupplierConnect), to approval/rejection, e-mails may be generated. The options for a requestor may be different from an approver.

The screenshot shows the 'My Profile' page with the 'Email Preferences' sub-tab selected. A callout box labeled 'E-mail Preferences' points to the table of email preferences. The table is divided into three sections: Administration & Integration, Shopping, Carts & Requisitions, and Purchase Orders. The 'Settlement' section is also visible at the bottom.

Email Preference	Value	Override Role
Administration & Integration		
Search Result Export Confirmation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PR Export Failure Notification	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Shopping, Carts & Requisitions		
Cart Assigned Notice	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Receive PR and PO notifications for Carts Assigned to Me	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PR submitted into Workflow	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PR pending Workflow approval	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PR Workflow Notification available	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PR Workflow complete / PO created	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PR line item(s) rejected	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PR rejected/returned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Purchase Orders		
PO submitted into Workflow	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PO pending Workflow approval	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PO Workflow Notification available	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PO Workflow complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PO sent to supplier	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PO Line Item Ship Notice	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PO line item(s) rejected	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PO rejected	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PO line item Backorder notice	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PO line item Cancellation notice	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Settlement		
PO Requires Receipt notice	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

E-mail Preferences cont'd.

Use your mouse to highlight each description to understand what conditions you would like to receive or not receive an email. The screen below demonstrates a help box that was open to explain what “PO Rejected” means.

The screenshot shows the 'Email Preferences' section of the 'My Profile' page. It contains two tables of email preferences. The first table, 'Administration & Integration', has columns for 'Value' and 'Override Role'. The second table, 'Purchase Orders', also has columns for 'Value' and 'Override Role'. A 'Help Box' is open for the 'PO rejected' entry in the second table, displaying a tooltip: 'Email to a requisitioner that an approver rejected an entire purchase order. Do not want to see help on mouse over? Click here to disable it.' A 'Save' button is located at the bottom of the form.

In the illustration above, a check appears in the “value” column for the e-mail that will be received. To change, **first** click on the “Override Role” box and **second** click on the box in the “value” field. **Third**, the change must then be saved.

“Navigation Setup” tab permits customization of the top navigational bar. The default navigation bar has Home/Shop, Favorites, Forms, Carts, (Approvals if the user is an approver), history and profile from left to right.

The screenshot shows the 'Navigation Setup' tab of the 'My Profile' page. It displays the top navigation bar with links for 'home/shop', 'favorites', 'forms', 'carts', 'approvals', 'history', and 'profile'. Below the navigation bar, there are 'insert' and 'remove' buttons for each link. At the bottom, there are 'Update' and 'Restore & Update to Defaults' buttons.

Navigation Setup cont'd.

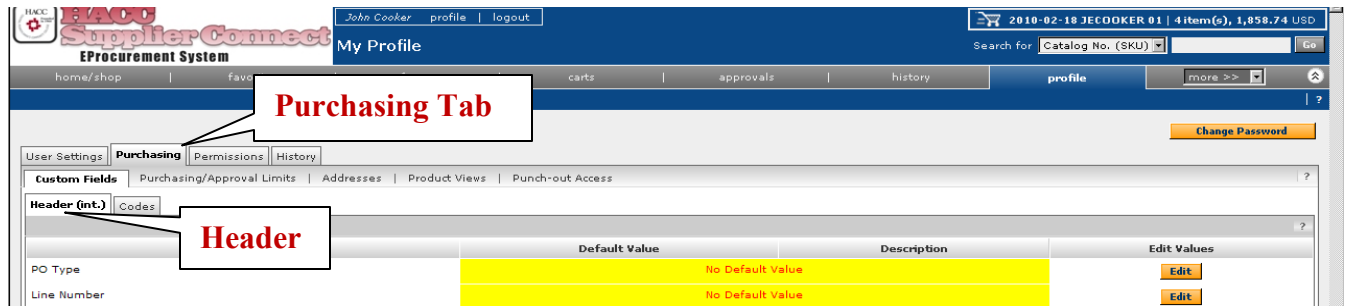
Each of the primary **Navigation Bar** tabs may be customized to best suit the user's needs. Select the desired primary navigation tabs using the drop down lists provided below. Selections will be ordered in the order displayed. Any options that are not selected will fall under an "Other" drop down list in the navigation bar itself.

The screenshot displays the 'Navigation Setup' interface. At the top, the user is logged in as John Cooker. The navigation bar includes tabs for home/shop, favorites, forms, carts, approvals, history, and profile. Below this, seven 'insert' drop-down menus allow for customizing the navigation bar. The first menu is expanded, showing a list of available options: approvals, carts, favorites, forms, history, home/shop, and profile. A callout box labeled 'Options to choose from' points to this list. 'remove' buttons are located below each drop-down menu. At the bottom of the setup area are 'Update' and 'Restore & Update to Defaults' buttons, with a callout box labeled 'Click Update' pointing to the 'Update' button. In the top right corner, a 'more >>' button is present, with a callout box labeled 'Other' pointing to it.

You may not have two tabs the same. After making any changes, click "Update".

Purchasing Tab

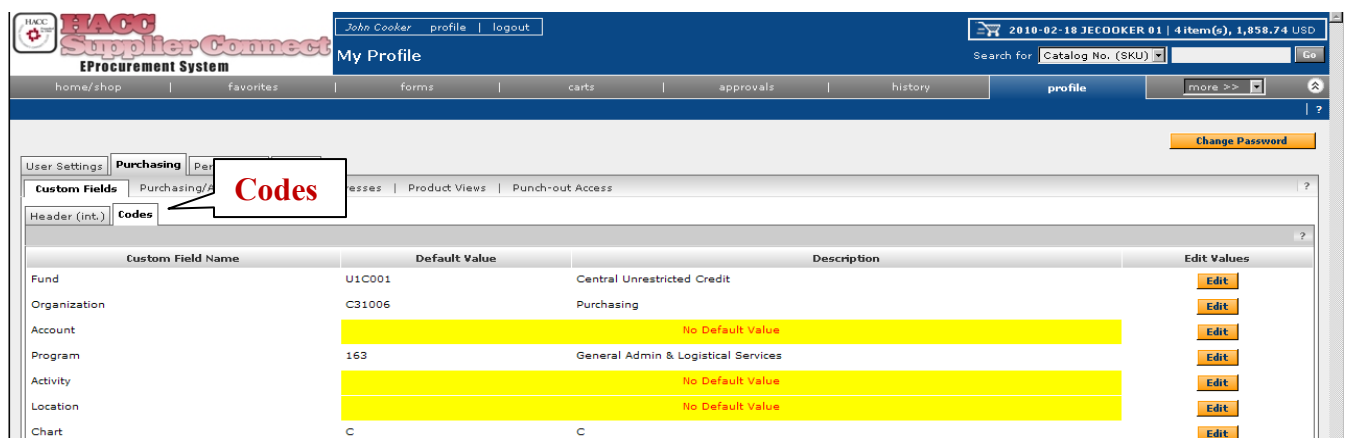
Illustrated below, the “Custom Field” screen has two sub-tabs:



- **Header** – No changes are necessary here for either the requestor or the approver.
- **Codes** – Because each cart/requisition requires Fund, Org, Account and Program, the user should create a list of all their codes in order to put them in the system. They may also designate “defaults” if some numbers are used predominately more than others.

There is one absolute default that is recommended to be set. That is “**Chart**”. The default value of “**Chart**” is “**C**”. The following screen shots will illustrate the steps to add your individual Fund, Org, Account and Programs. (If you do not know your Fund or Program, e-mail SupplierConnect@hacc.edu.)

Note: Neither “Location” nor “Activity” are required codes however some departments that use “Activity Codes” may enter these into the system and utilize them in their accounting.



Creating default “**values**” is the identical process for all parts of the FOAPAL. “**Fund**” will be illustrated in the following screen shots.

Custom Field, “creating values” cont’d.

Custom Field Name	Default Value	Description	Edit Values
Fund	U1C001	Central Unrestricted Credit	Edit
Organization	C31006	Purchasing	Edit
Account	No Default Value		Edit
Program	163	General Admin & Logistical Services	Edit
Activity	No Default Value		Edit
Location	No Default Value		Edit
Chart	C	C	Edit

To create (or edit) a value, follow these steps:

1. Click on EDIT under the column “Edit Values”.
2. A “Create New Value” box will open.

Click Create New Value

Value	Description
U1C001	Central Unrestricted Credit

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

3. Click on “Create New Value” and a “search for value” box will open.

Custom Field, “creating values” cont’d.

The screenshot shows the 'My Profile' page in the HACC Supplier Connect EProcurement System. A 'Search For Value' dialog box is open, allowing the user to search for a value based on the 'Fund' field name. The dialog box contains a 'Field Name' dropdown set to 'Fund', a 'Value' input field, a 'Description' input field, and a 'Results per Page' dropdown set to 5. A 'Search' button is at the bottom of the dialog. A red callout box labeled 'Search For Value' points to the dialog box.

4. A “Search for Value” box opens
5. If you know the Fund number, type the number in the field “Field Name Value”
6. If you don’t know the Fund number, click “Search”; A “Values Found” box opens.

The screenshot shows the 'My Profile' page with the 'Values Found' dialog box open. The dialog box displays a list of values found for the 'Fund' field. The list has columns for 'Select', 'Value', and 'Description'. The values listed are AF1001, AF1002, AF1003, AF2001, and AF2002. A red callout box labeled 'Values Found Box' points to the dialog box. Another red callout box labeled 'Click box for the value you need' points to the 'Select' checkbox for the value AF1001. A third red callout box labeled 'Click on Add Values' points to the 'Add Values' button at the bottom of the dialog box.

Select	Value	Description
<input type="checkbox"/>	AF1001	Harrisburg SGA Agency Fund
<input type="checkbox"/>	AF1002	Harrisburg Non-student Agency Fund
<input type="checkbox"/>	AF1003	Harrisburg Post-Secondary Partner
<input type="checkbox"/>	AF2001	Lancaster SGA Agency Fund
<input type="checkbox"/>	AF2002	Lancaster Non-student Agency Fund

7. Using the arrows, page through the available values.
8. When the value is located, select the value by clicking in the box to the left of the value.
9. Click “Add Values”. The value will be added to the box on the left.

Custom Field, “creating values” cont’d.

A value can be made a “default” which will bring the value into the accounting field automatically when applying the accounting in the requisition process. If a default is not chosen, the value must be chosen from a list.

The following are the steps to make a value a default:

1. Click on the “Value” that will become the default.

The screenshot shows the HAOC Supplier Connect EProcurement System interface. The user is logged in as John Cooker. The main navigation bar includes links for home/shop, favorites, forms, carts, approvals, history, and profile. The 'My Profile' section is active, showing tabs for User Settings, Purchasing, Permissions, and History. The 'Custom Fields' section is expanded, showing a table with columns for Custom Field Name, Default Value, Description, and Edit Values. A table row shows 'Fund' with a default value of 'U1C001' and a description of 'Central Unrestricted Credit'. Below the table, an 'Edit Values' dialog is open, displaying a list of values with 'U1C001' selected. The dialog includes a 'Create New Value' button and a 'Close' button.

An “Edit Existing Value” box will open. The box will be populated with the “Value”, “Description”, a “default box” and a “status” indicator.

The screenshot shows the HAOC Supplier Connect EProcurement System interface, similar to the previous one. The 'Edit Existing Value' dialog is now open, displaying the selected value 'U1C001' and its description 'Central Unrestricted Credit'. The dialog includes a 'Default' checkbox which is checked, and a 'Status' dropdown menu set to 'active'. There are 'Save' and 'Remove' buttons at the bottom of the dialog. The background table and navigation elements remain the same.

Custom Field, “creating values” Cont’d.

2. Click on the “Default” box.
3. Click “Save”.

Value: U1C001
Description: Central Unrestricted Credit
Default:
Status: active

Buttons: Save, Remove, Close

The “value” is now a “default” value. This completes the steps to choose a **FUND** and to make the “Fund” a “**default**” value in the accounting process of your cart/requisition.

REPEAT THESE STEPS FOR:

- Organization numbers
- Account numbers
- Program
- Activity (if needed)

The “**Purchasing/Approval Limits**” sub-tab is not utilized in our current applications.

2010-02-18 JECOOKER 01 | 4 item(s), 1,858.74 USD

My Profile

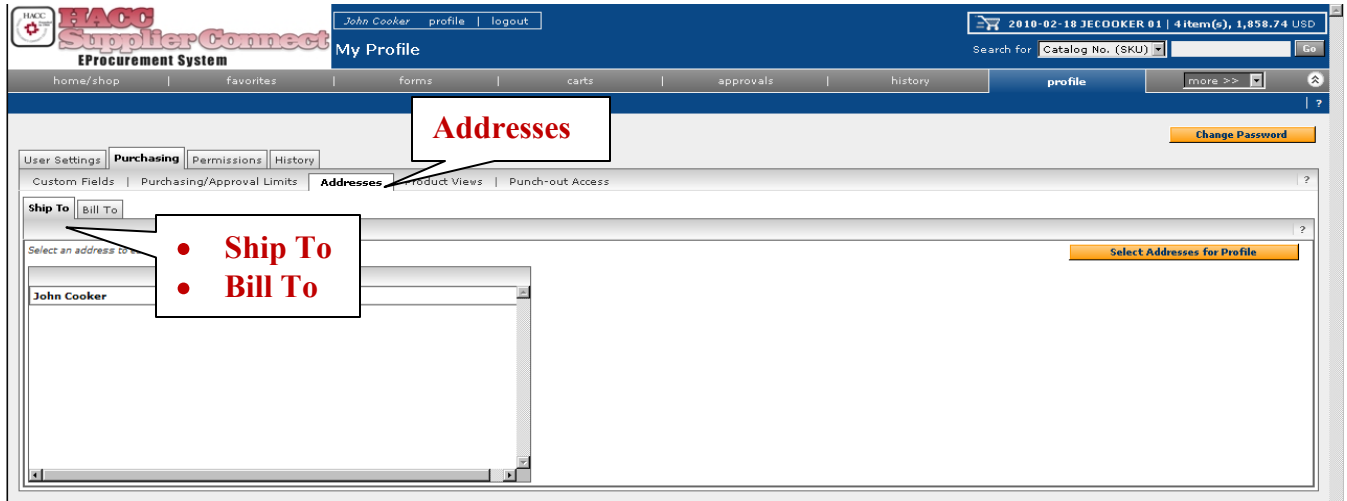
Search for: Catalog No. (SKU)

Change Password

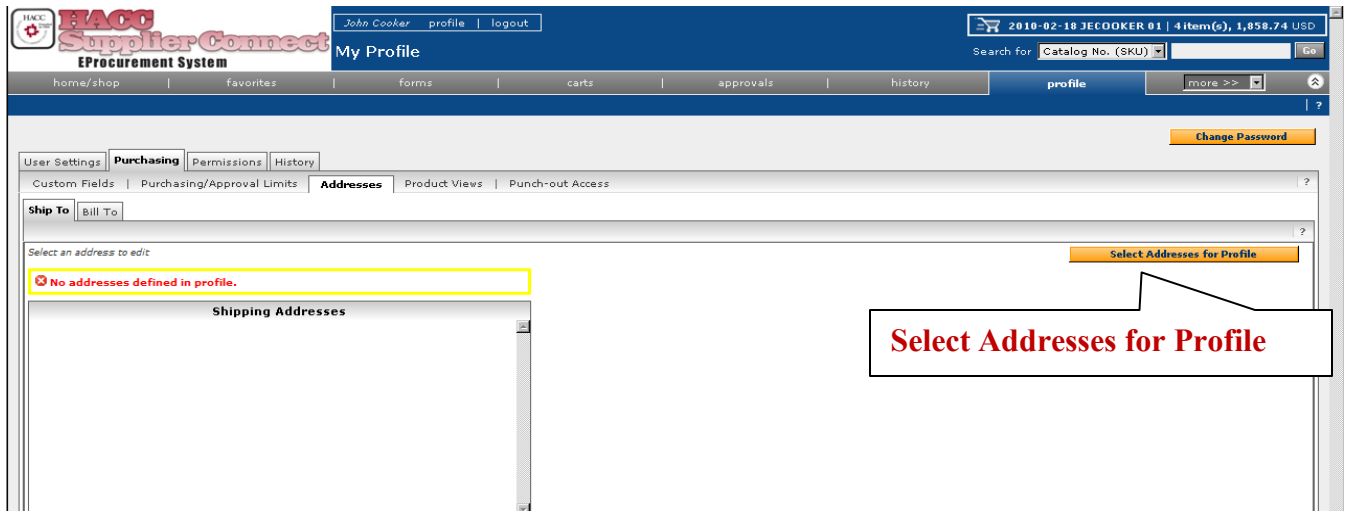
	Value (USD)
Requisition Limit	0.00
Requisition Line Item Limit	0.00
Requisition Approval Limit	0.00
Requisition Line Item Approval Limit	0.00
Purchase Order Limit	0.00
Purchase Order Line Item Limit	0.00
Purchase Order Approval Limit	0.00
Purchase Order Line Item Approval Limit	0.00
Limited Purchase Order Limit	0.00
Line Item Limited Purchase Order Limit	0.00

“Addresses” sub-tab has two additional tabs:

- Ship to
- Bill to



While you have the ability to change “Ship To” when placing an order, the user may want to fill in these fields to eliminate the system asking you to enter the information each time you place an order.



Initially the left hand box “Shipping Address” may be blank. Follow these steps to select an address for profile which will populate the “Ship To” selection of the cart/requisition information.

1. Click on “Select Addresses for Profile”.

Creating “Addresses” / “Ship To” cont’d.

The screenshot shows the 'My Profile' page in the HACC Supplier Connect EProcurement System. The user is John Cooker. The 'Addresses' tab is selected, and the 'Ship To' sub-tab is active. A message box indicates 'No addresses defined in profile.' A dropdown menu for 'Select Address Template' is open, showing a list of campus locations including WW (Wildwood).

2. Select the **Campus Location** where you are located. For example: WW for “Wildwood”. Immediately a “shipping” template will open.

The screenshot shows the 'My Profile' page in the HACC Supplier Connect EProcurement System. The user is John Cooker. The 'Addresses' tab is selected, and the 'Ship To' sub-tab is active. The 'Edit Selected Address' form is open, showing fields for Nickname, Default, Current Default Address, ATTN, Bldg/Room, Address Line 1, Address Line 2, City, State, Zip Code, and Country.

3. It is often recommended to change the “Nickname” to your name.
4. ATTN: Your name has also been populated from the profile.
5. Bldg/Room – Fill in your building and room number. You may change “name” and “Bldg/Room” when you edit the cart/requisition if the final destination is some other person and/or location.

Creating “Addresses” / “Ship To” cont’d.

The screenshot shows the 'My Profile' page in the HACC Supplier Connect EProcurement System. The 'Addresses' tab is selected, and the 'Ship To' section is active. A red callout box labeled 'Default Address' points to the 'Default' checkbox, which is checked. Another red callout box labeled 'Bldg/Room filled in.' points to the 'Bldg/Room' field, which contains 'W130B'. The 'Shipping Addresses' list is empty, and a message states 'No addresses defined in profile.'

In this example, the “Nickname” was replaced with a name, and the “Bldg/Room” was populated with information.

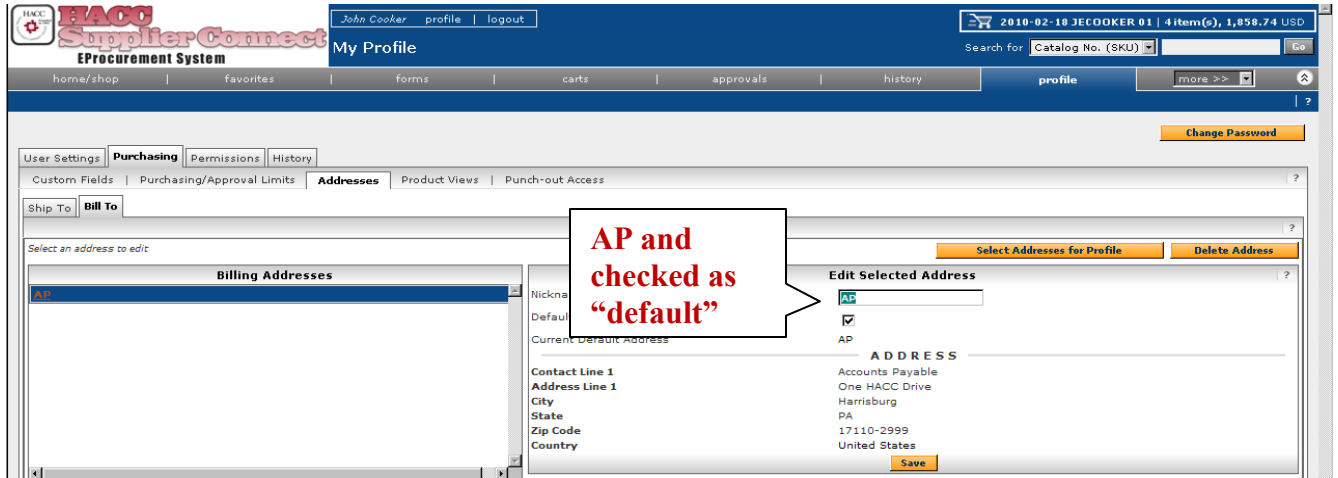
6. Be sure that the “default” box is checked.
7. Click SAVE.

The screenshot shows the 'My Profile' page in the HACC Supplier Connect EProcurement System. The 'Addresses' tab is selected, and the 'Ship To' section is active. The 'Shipping Addresses' list now contains one entry: 'John Cooker'. The 'Edit Selected Address' form shows the 'Default' checkbox checked and the 'Bldg/Room' field populated with 'W130B'.

This “Ship To” address will now fill in the cart/requisition information every time.

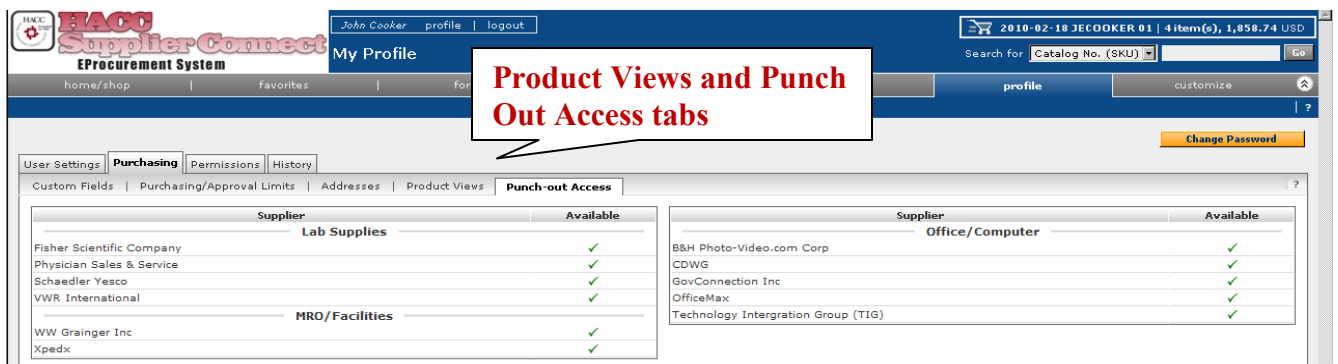
Creating “Addresses” / “Bill To” cont’d.

The steps for creating a “Bill To” address is identical to the “Ship To” except there is only ONE address for “Bill To”. That is the AP address.



Remember to make “AP” the default by checking the “default” box and then click **SAVE**.

“Product View” and “Punch Out Access” sub-tabs merely indicate access to which or generally “ALL” “product views” and “Punch Out” suppliers the user has access to use.



Permissions Tab –

Shopping/Cart, Orders, Approvals, Accounts Payable, Administration, Custom Field Permissions are all pre-set. Information only -nothing can be altered by the user.

The screenshot shows the 'Permissions' tab in the 'My Profile' section. It contains two tables of permissions:

Permission	Value
Shopping	
Hosted Catalog Search	✓
Punch-out	✓
View/Use Forms	✓
View/Use Non-Catalog Item	✓
Non-Catalog Configuration	✗
Bypass Non-Catalog Search	✓
Modify Order Distribution Information on Forms & POs	✗
Create Free-form Supplier on Form Templates	✗
Create New Form Template	✗
View/Use Personal Favorites	✓
Administer Shared Favorites	✗
View Product Compare	✓
Chemical ReSource	✓
Antibody ReSource	✓
Cart/Requisition	
Prepare Req for Another User	✓
Do not permit Place Order	✗
Assign Cart to Another User	✗
Edit User's Cart Assignees	✗
Edit PO Number	✗
Edit Credit Card	✗
Manually Override Pricing	✗
Select Credit Card from Profile	✗
Header-level internal attachments	✓
Header-level external attachments	✓
Line-level internal attachments	✓
Line-level external attachments	✓
Allow editing of Tax, Shipping, and Handling	✓
Bypass Review	✓
View Line Item History	✗
Withdraw PR	✓
Modify PO Clauses in PR/PO	✗

History Tab –

Every click during the setup or modification of your profile is recorded. You can review this information if you need to at any time. It will continue to create new entries as you make modifications.

The screenshot shows the 'History' tab in the 'My Profile' section. It displays a table of activity logs:

Date	User	Action	Section	Selection	Field	Old Value	New Value
2/27/2010 11:29 PM	John Cooker	Role Removed	Roles	Buyer			
2/27/2010 11:29 PM	John Cooker	Role Removed	Roles	Approver			
2/19/2010 9:33 AM	John Cooker	Role Added	Roles	Buyer			
2/19/2010 9:33 AM	John Cooker	Role Added	Roles	Approver			
2/17/2010 11:33 PM	John Cooker	Role Removed	Roles	Buyer			
2/17/2010 11:33 PM	John Cooker	Role Removed	Roles	Approver			
1/21/2010 2:57 PM	John Cooker	Role Added	Roles	Buyer			
1/21/2010 2:57 PM	John Cooker	Role Added	Roles	Approver			
1/21/2010 2:51 PM	John Cooker	Role Removed	Roles	Buyer			
1/21/2010 2:51 PM	John Cooker	Role Removed	Roles	Approver			
1/20/2010 12:06 PM	John Cooker	Modified	Permissions : Cart/Requisition	Do not permit Place Order	Value	true (inherited)	false
1/20/2010 10:39 AM	John Cooker	Modified	Purchasing/Approval Limits	Line Item Limited Purchase Order Limit	Value	2,500.00 USD	0.00 USD (inherited)
1/20/2010 10:39 AM	John Cooker	Modified	Purchasing/Approval Limits	Purchase Order Line Item Limit	Value	5,000.00 USD	0.00 USD (inherited)
1/18/2010	Andy Higgins	Default user address changed (via import)	Addresses				WW