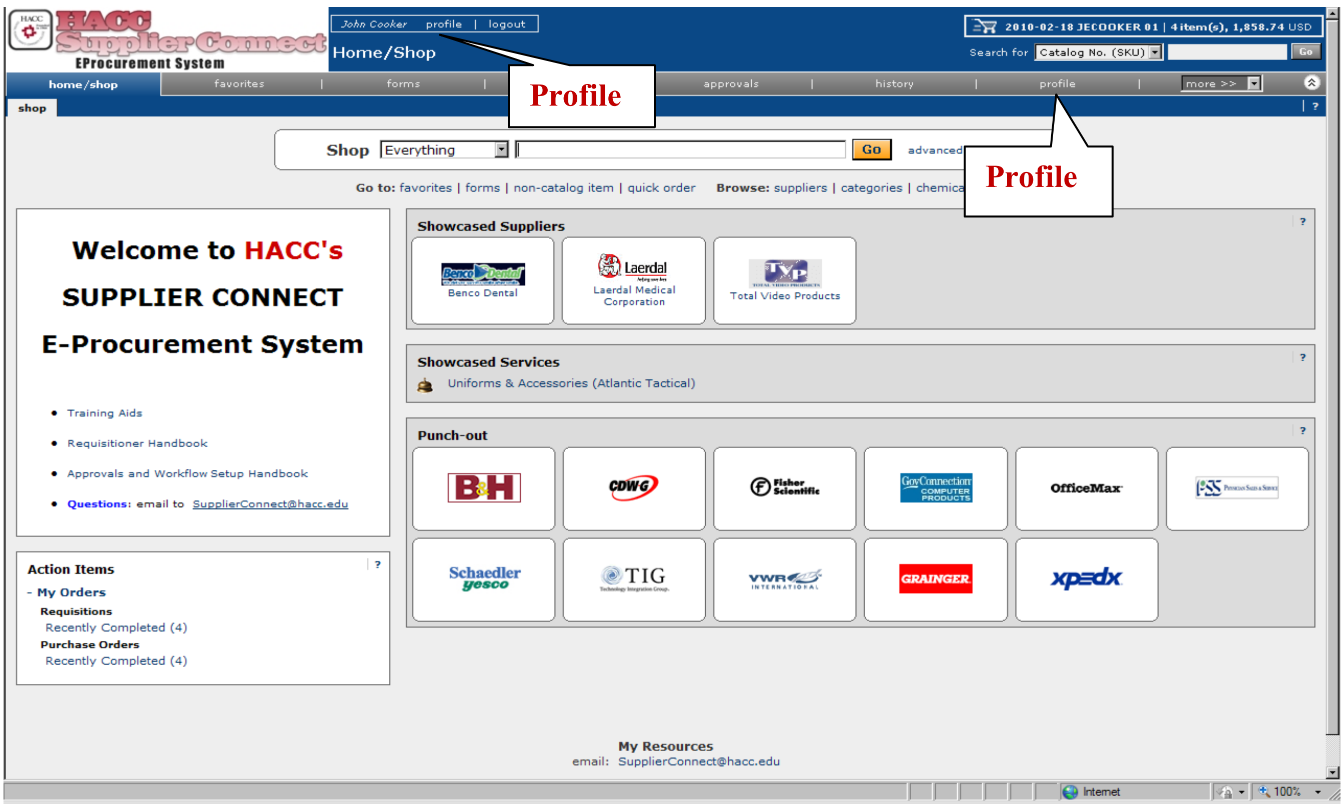
HACC SupplierConnect Profile Setup



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.

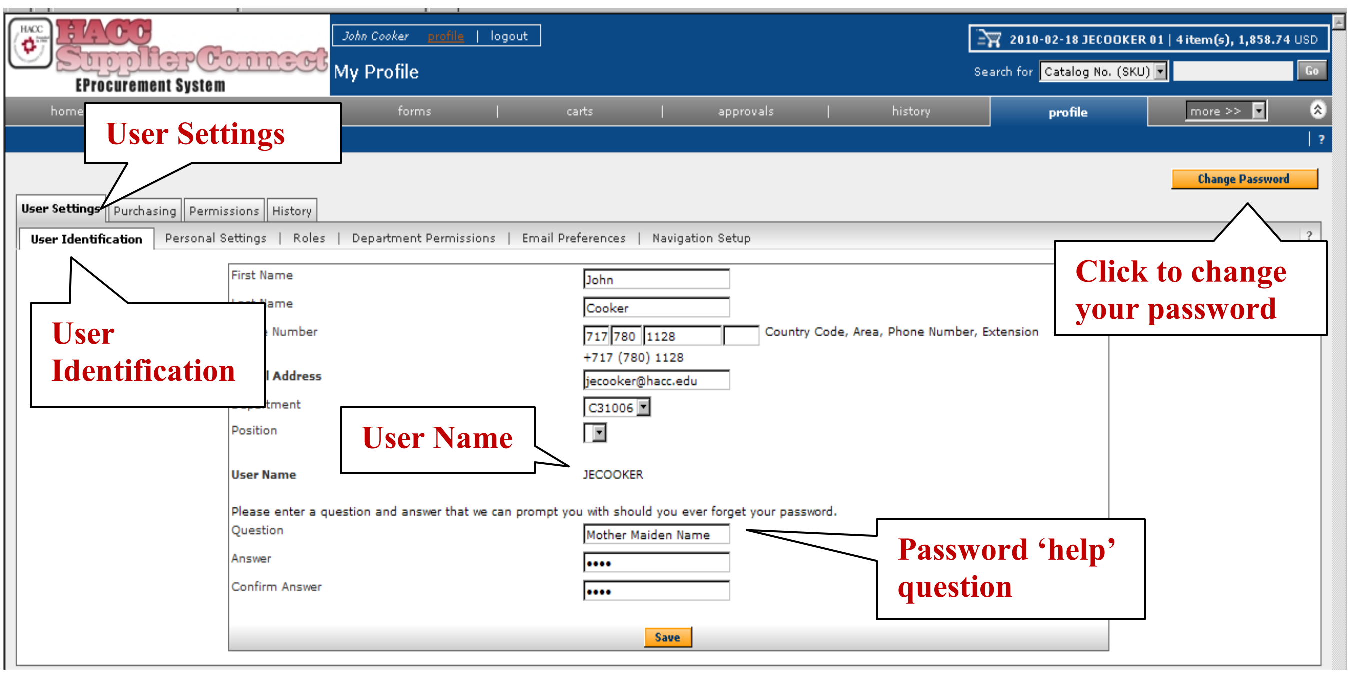
To view and/or to modify a profile, click on one of the two locations above. When opened there are four primary tabs with multiple sub-tabs. The primary tabs are:

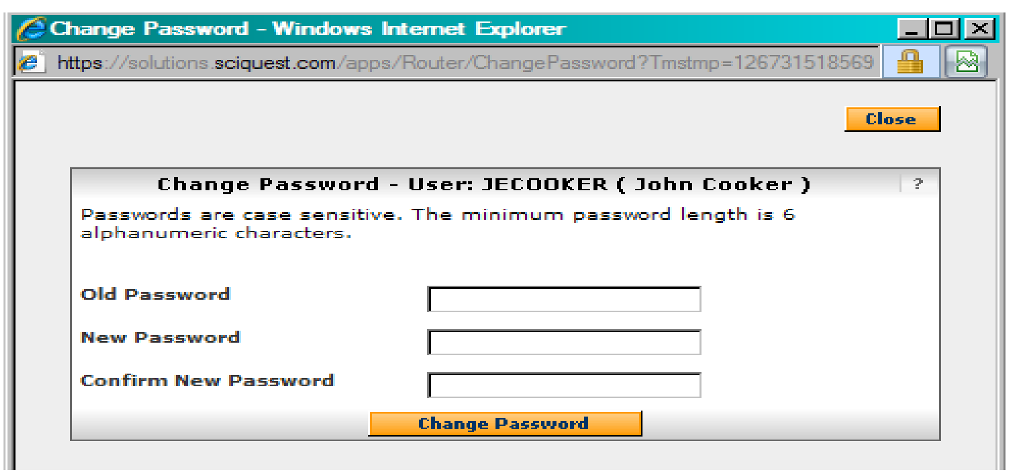
- User Settings
- Purchasing
- Permissions
- History

User Settings Tab

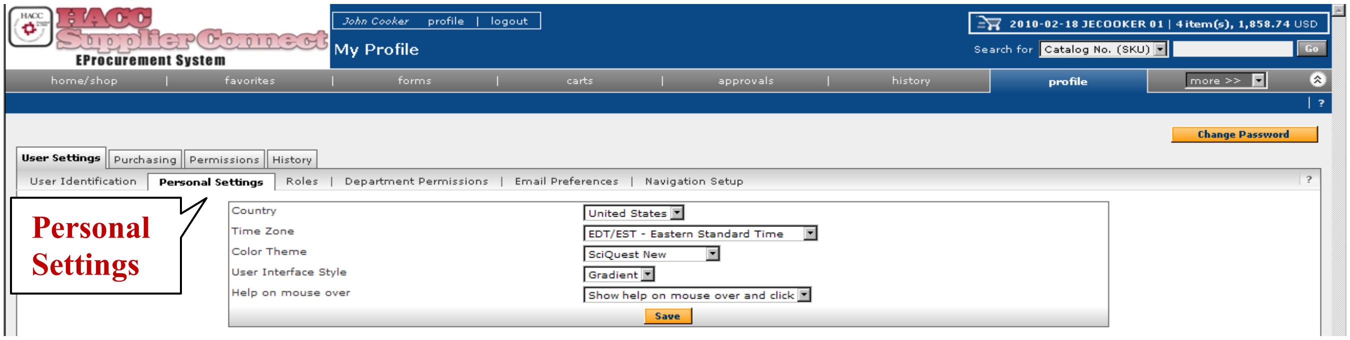
The "**User Identification**" screen has several fields pre-loaded. As changes are made, click the "Save" icon. Three things to note on this screen:

- **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.





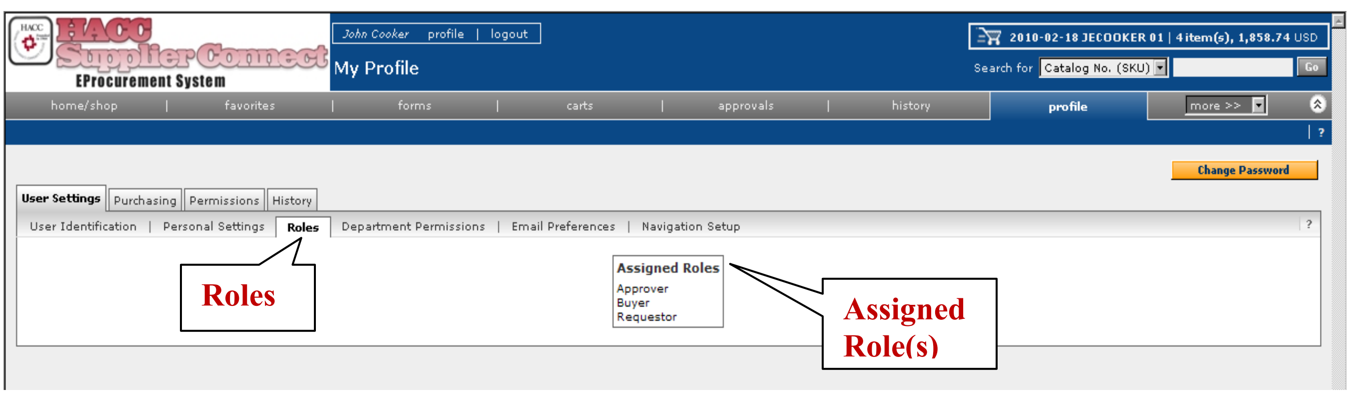
The “**Personal Setting**” sub-tab allows for several personal choices.



Typical selections are:

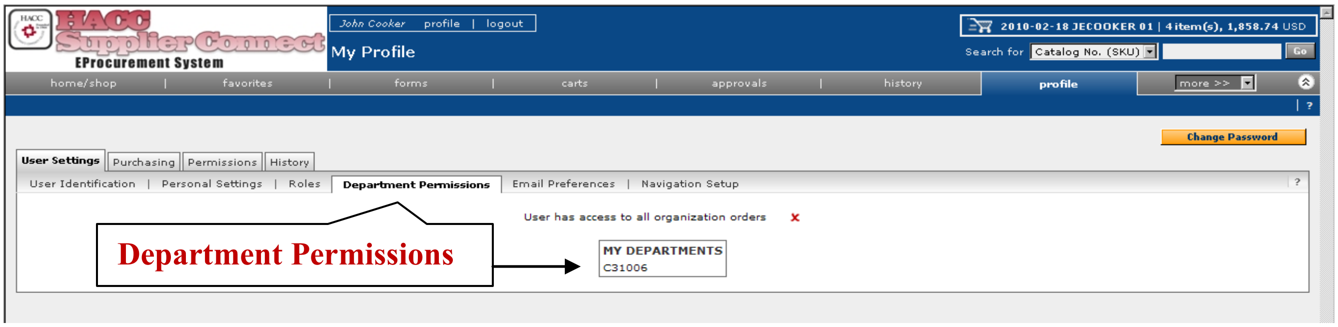
- Country — United States
- Time Zone — EDT/EST Eastern Standard Time
- Color Theme — (Personal choice)
- User Interface Style — (Personal choice)
- Help on mouse over — 2 choices: Show help on mouse over and click
  Show help only on click

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).

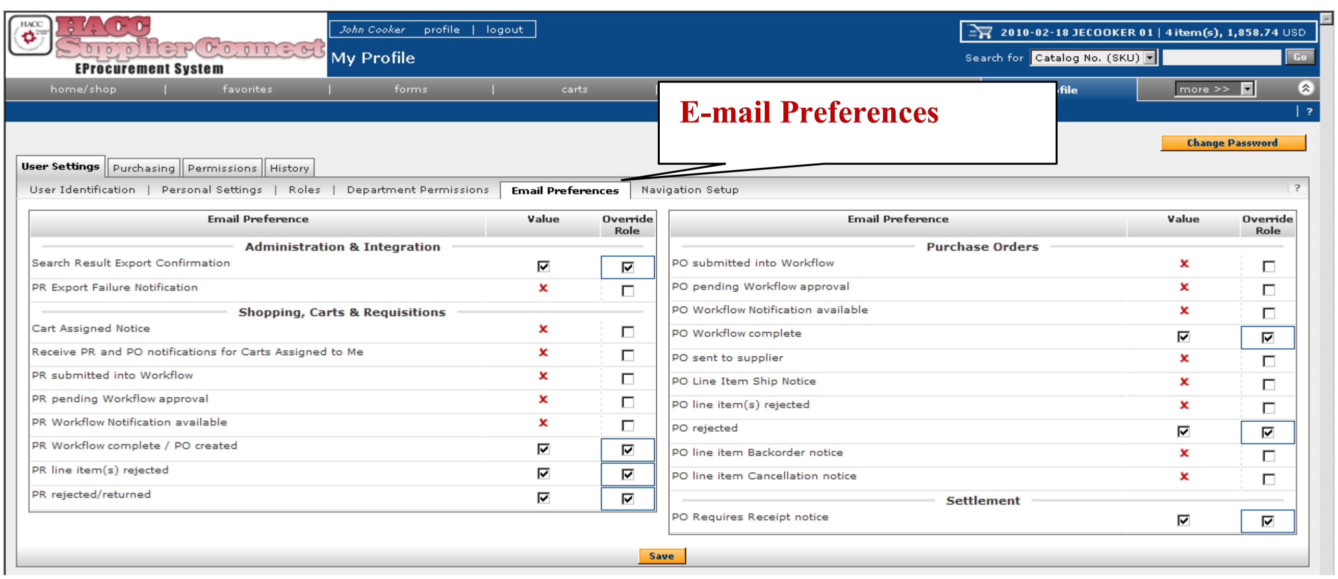


The sub-tab "**Department Permissions**" has been loaded with information provided by Banner and generally is your primary organization number. This same number appears on the first profile screen. (Purchasing has the ability to change this number if needed.)

Department Permissions

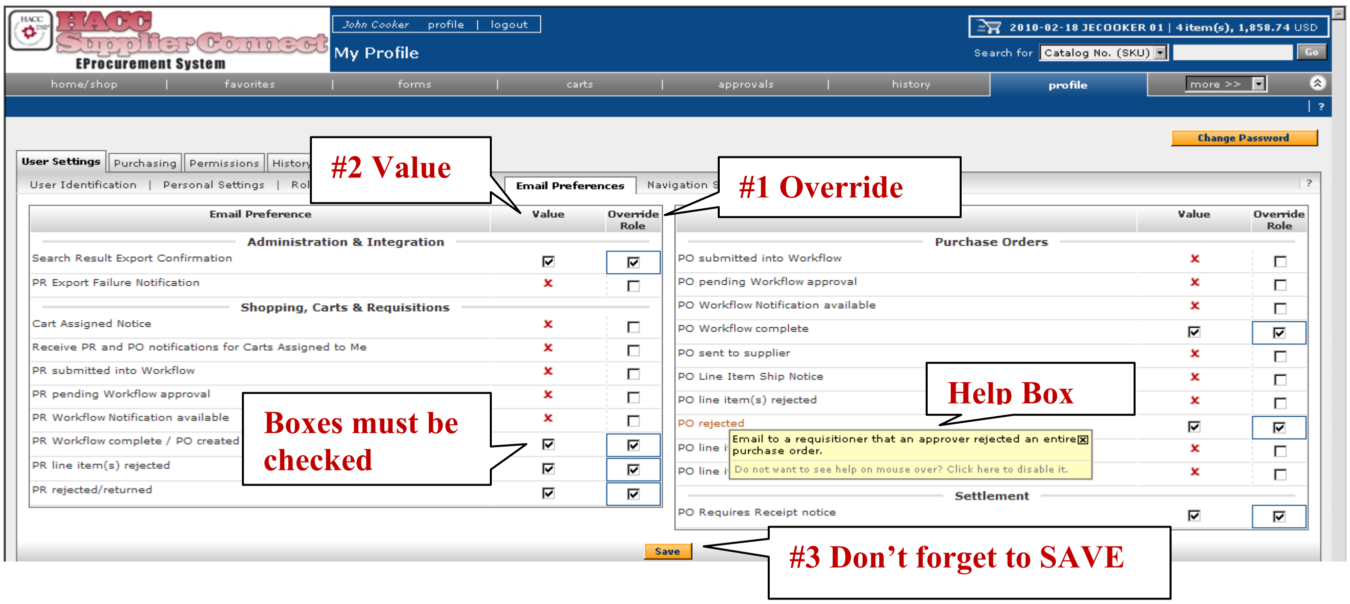


"**Email Preferences**" are very important. Throughout each stage of the process, from creating a requisition (or cart) as referred to in SupplierConnect), to approval/rejection, e-mails may be generated. The options for a requestor may be different from an approver.



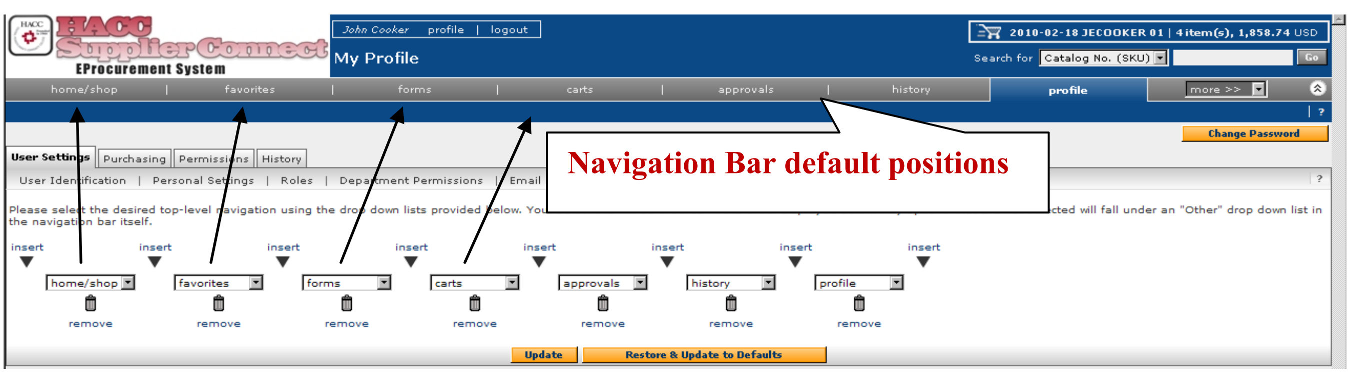
E-mail Preferences cont'd.

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.



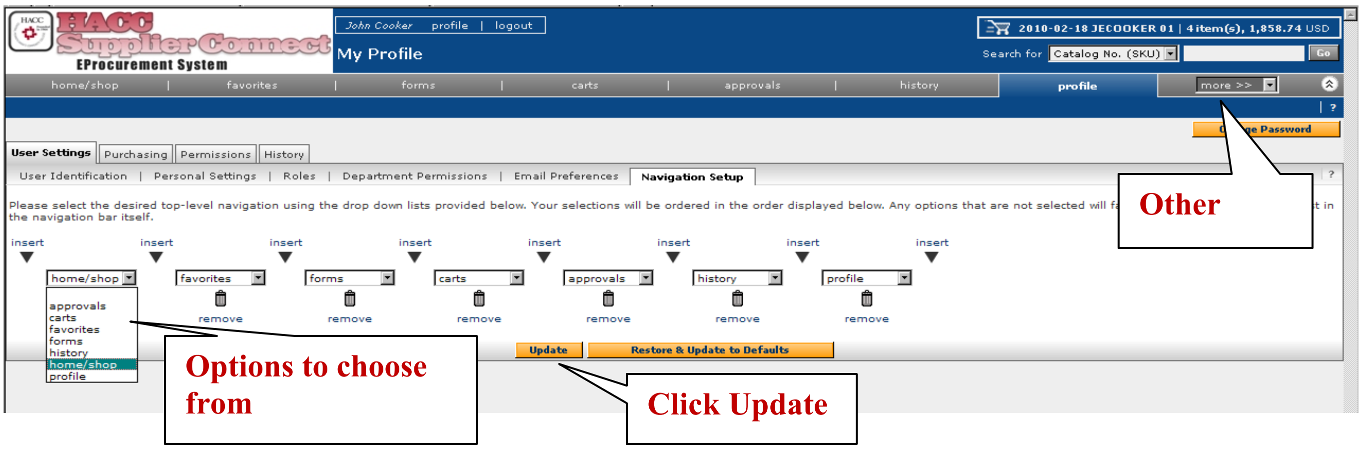
In the illustration above, a check appears in the "value" column for the e-mail that will be received. To change, **first** click on the "**Override Role**" box and **second** click on the box in the "**value**" field. **Third**, the change must then be saved.

"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.



Navigation Setup cont'd.

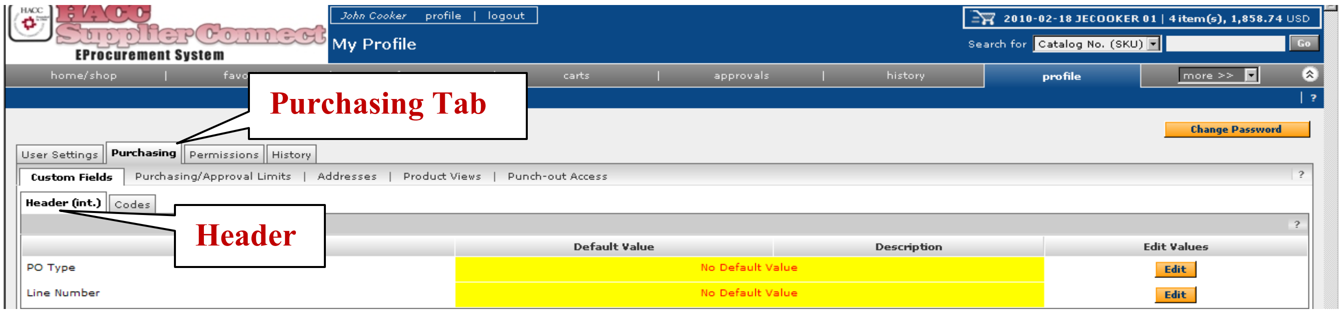
Each of the primary **Navigation Bar** tabs may be customized to best suit the user's needs. Select the desired primary navigation tabs using the drop down lists provided below. Selections will be ordered in the order displayed. Any options that are not selected will fall under an "Other" drop down list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



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

Purchasing Tab

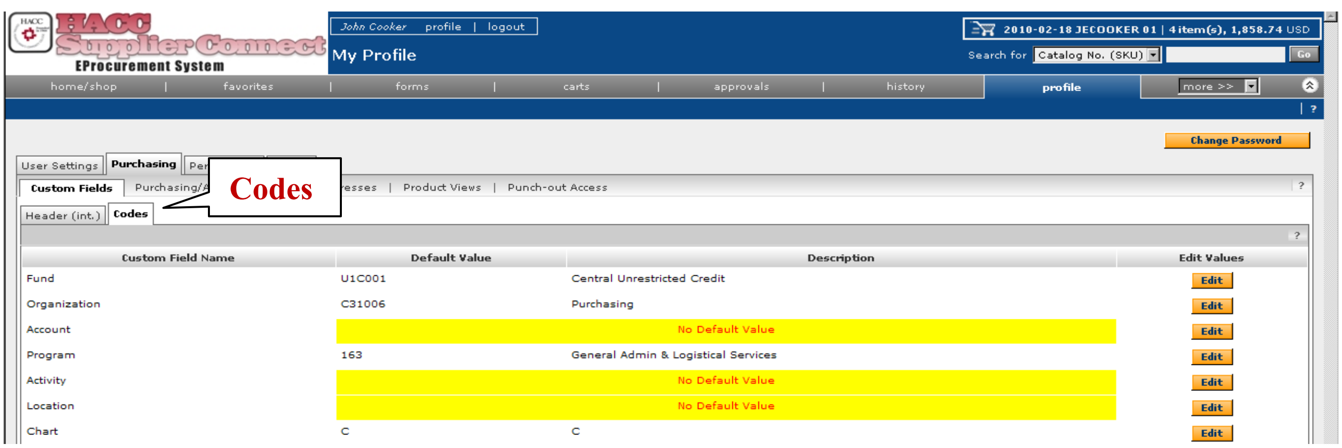
Illustrated below, the "**Custom Field**" screen has two sub-tabs:



- **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.

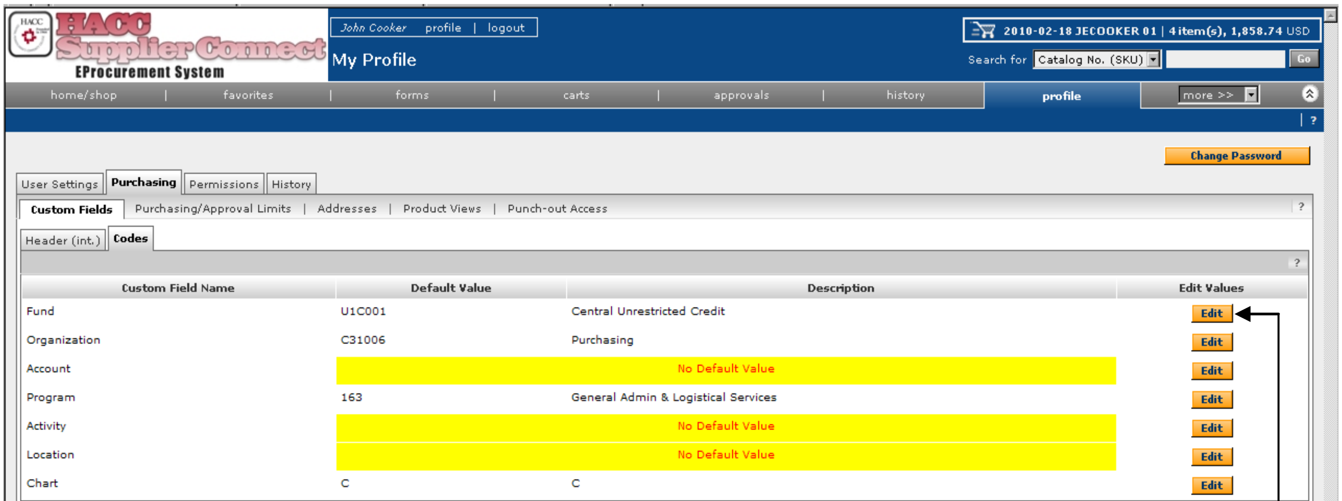
  There is one absolute default that is recommended to be set. That is "**Chart**". The default value of "**Chart**" is "**C**". The following screen shots will illustrate the steps to add your individual Fund, Org, Account and Programs. (If you do not know your Fund or Program, e-mail SupplierConnect@hacc.edu.)

  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.



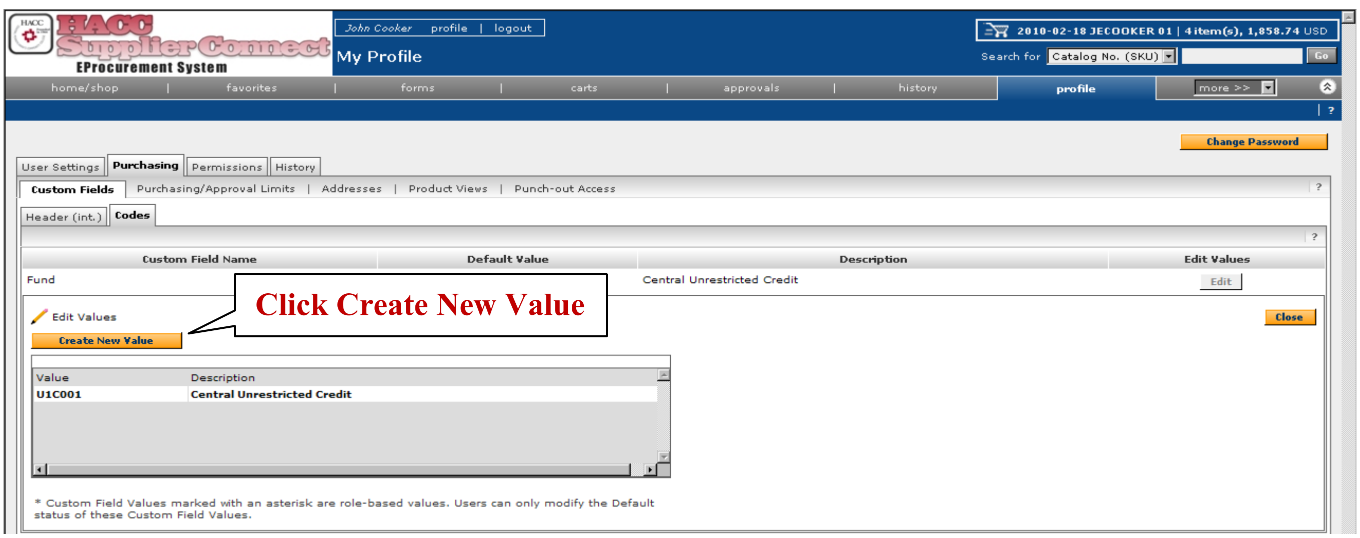
Creating default "**values**" is the identical process for all parts of the FOAPAL. **"Fund"** will be illustrated in the following screen shots.

Custom Field, "creating values" cont'd.



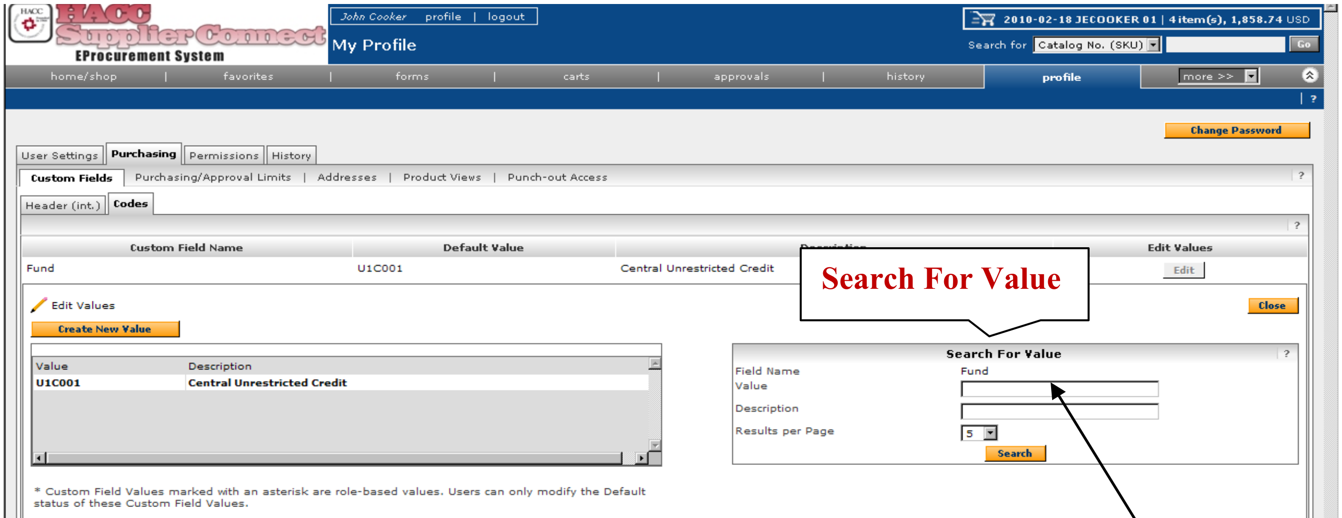
To create (or edit) a value, follow these steps:

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

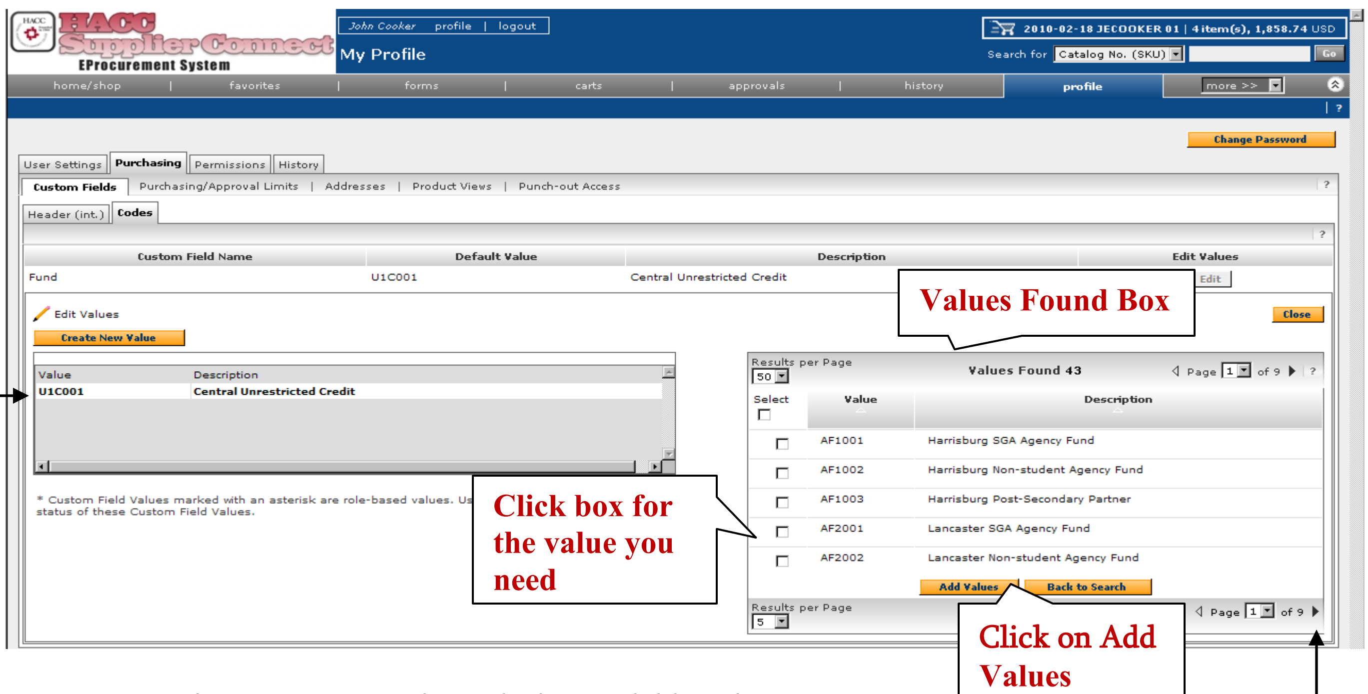


3. Click on "**Create New Value**" and a **"search for value"** box will open.

Custom Field, "creating values" cont'd.



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.



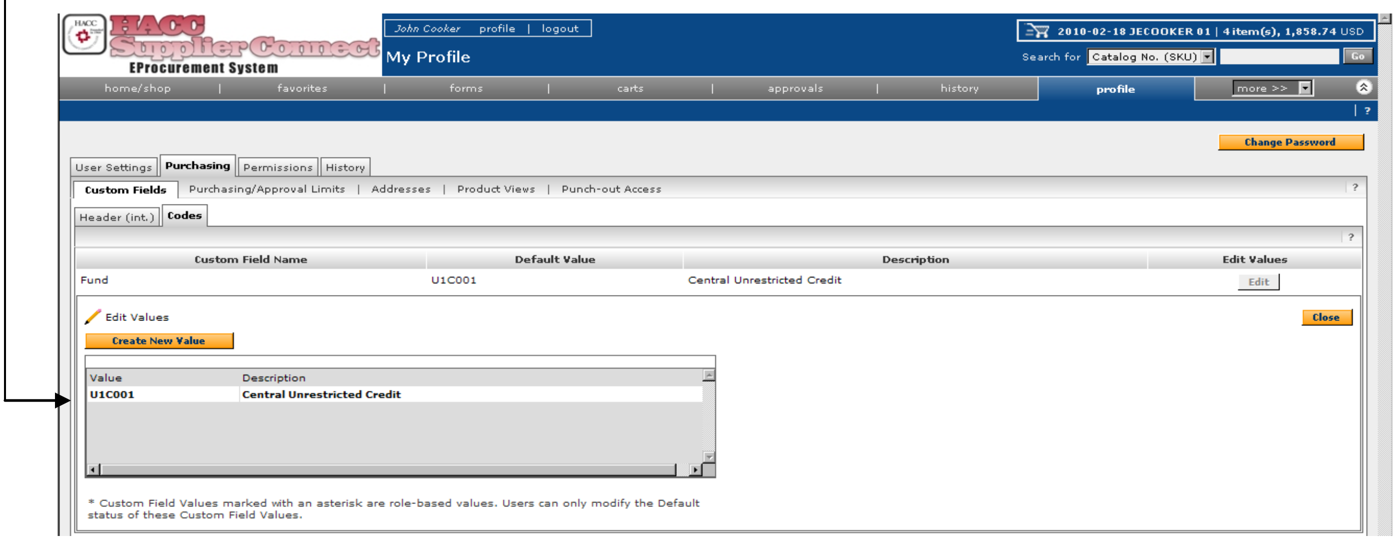
7. Using the arrows, page through the available values.
8. When the value is located, select the value by clicking in the box to the left of the value.
9. Click "Add Values". The value will be added to the box on the left.

Custom Field, "creating values" cont'd.

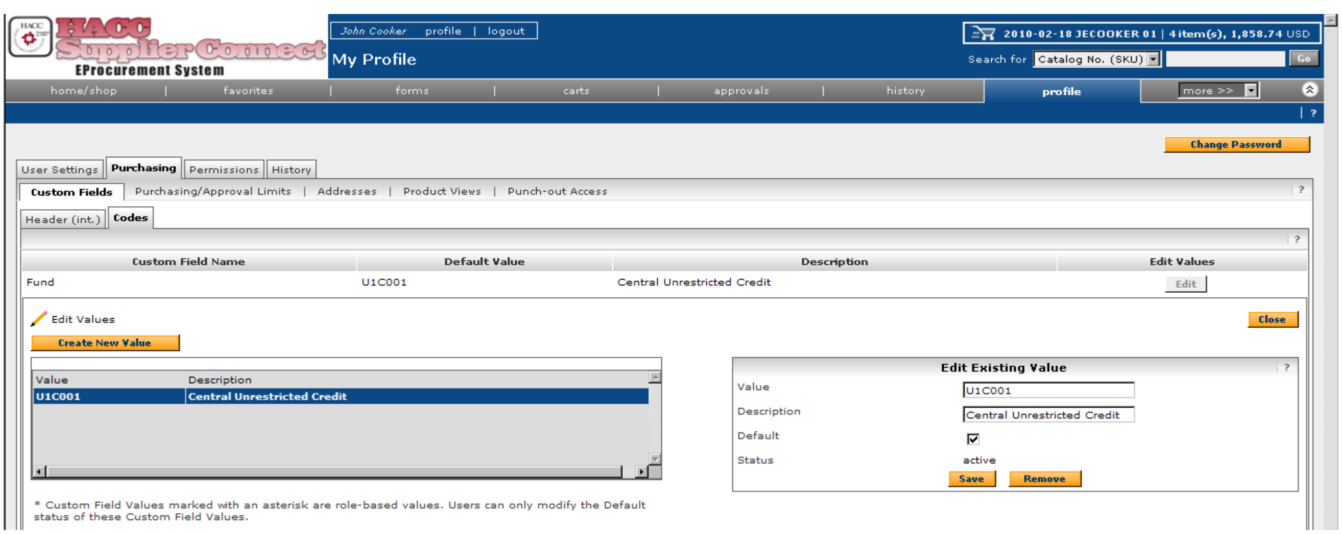
A value can be made a "default" which will bring the value into the accounting field automatically when applying the accounting in the requisition process. If a default is not chosen, the value must be chosen from a list.

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

1. Click on the "Value" that will become the default.

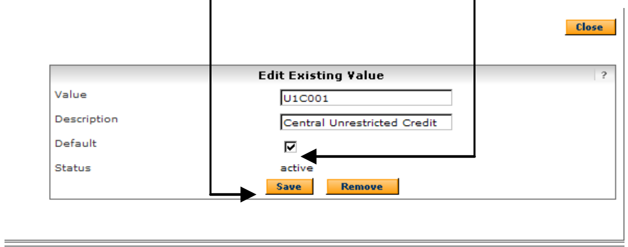


An "**Edit Existing Value**" box will open. The box will be populated with the "Value", "Description", a "default box" and a "status" indicator.



Custom Field, "creating values" Cont'd.

2. Click on the "Default" box.
3. Click "Save".

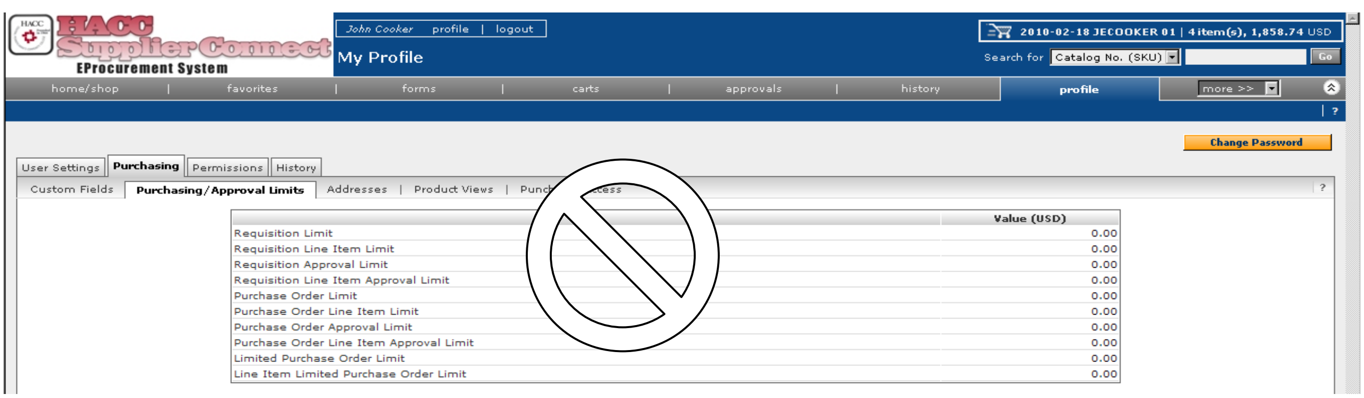


The "value" is now a "default" value. This completes the steps to choose a **FUND** and to make the "Fund" a **"default"** value in the accounting process of your cart/requisition.

REPEAT THESE STEPS FOR:

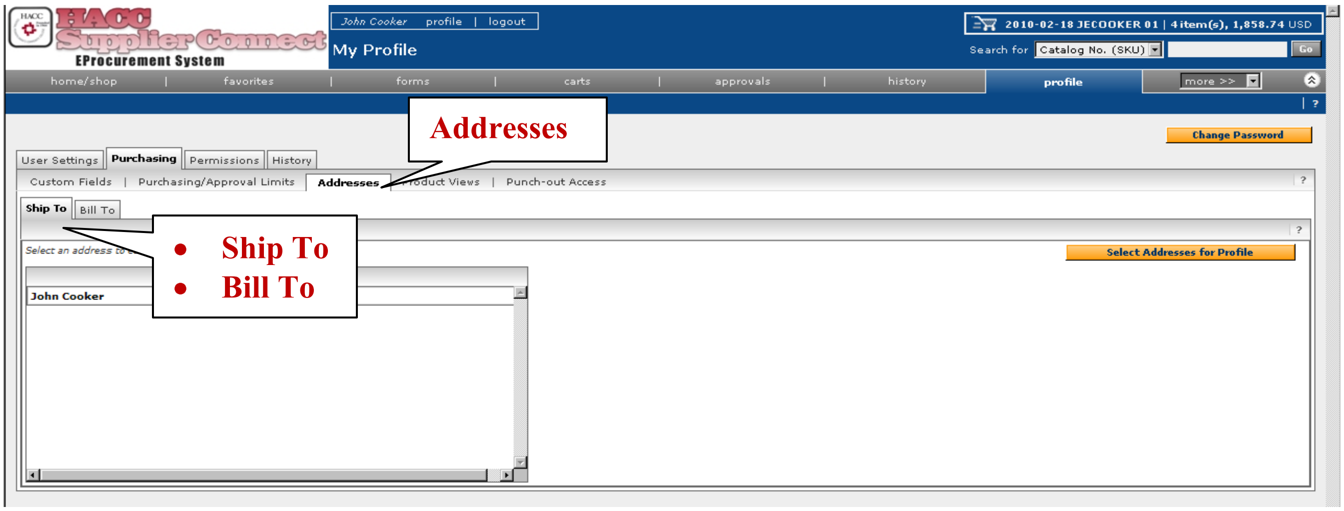
- Organization numbers
- Account numbers
- Program
- Activity (if needed)

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

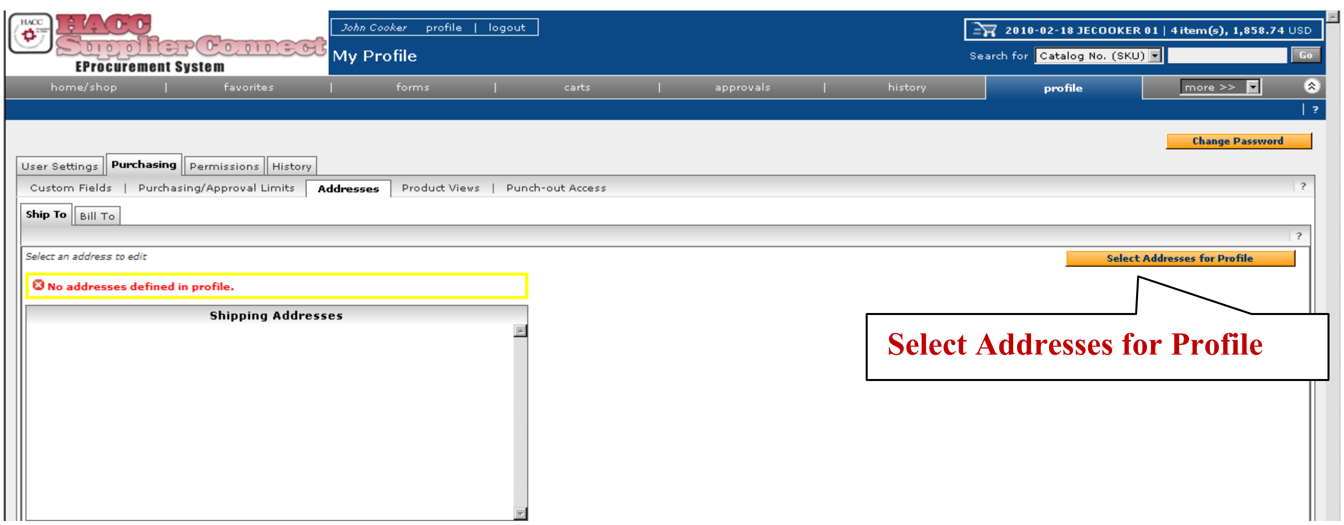


“Addresses” sub-tab has two additional tabs:

- Ship to
- Bill to



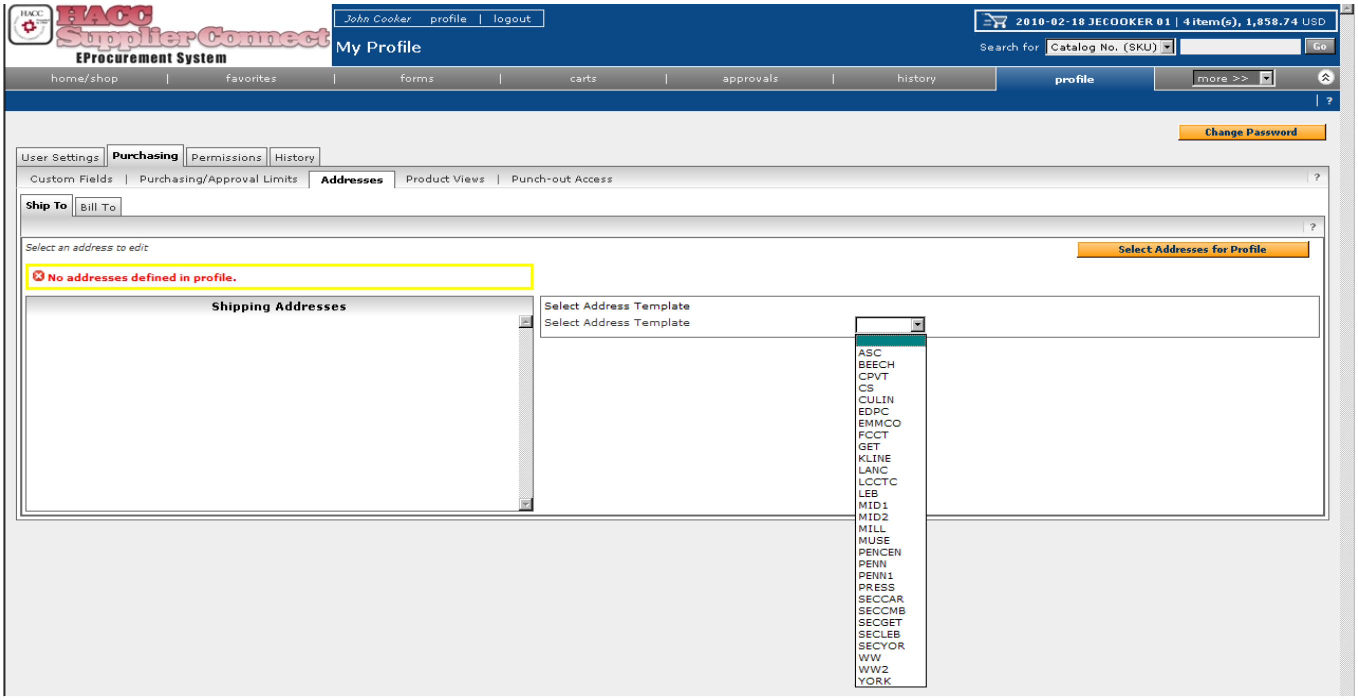
While you have the ability to change “Ship To” when placing an order, the user may want to fill in these fields to eliminate the system asking you to enter the information each time you place an order.



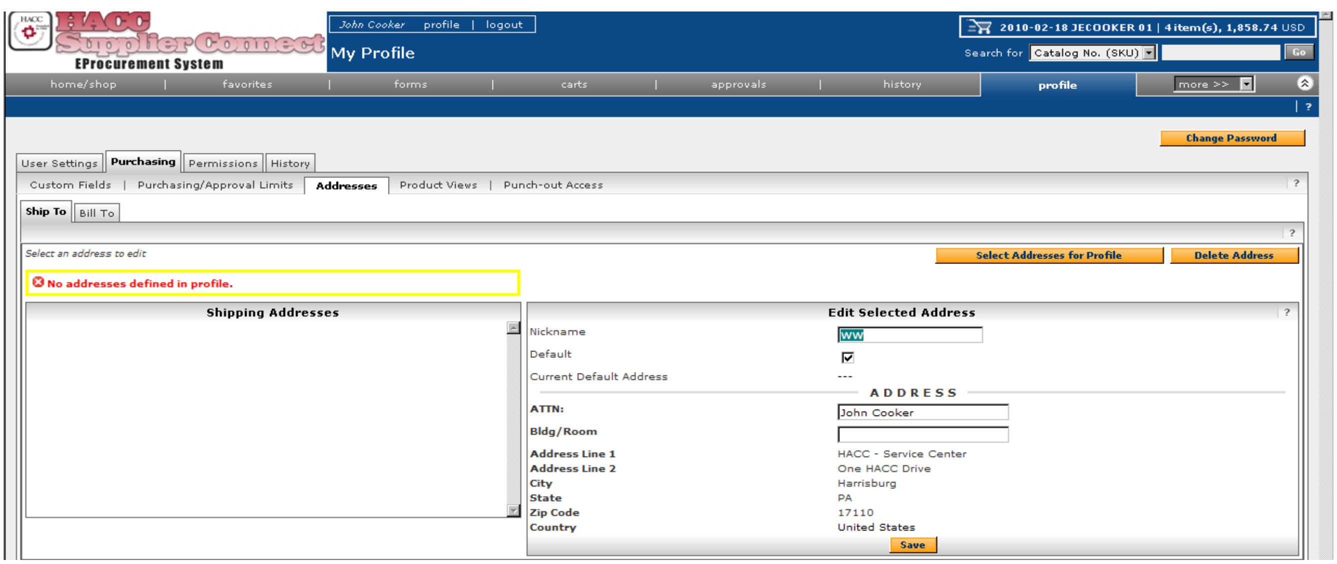
Initially the left hand box “Shipping Address” may be blank. Follow these steps to select an address for profile which will populate the “Ship To” selection of the cart/requisition information.

1. Click on “Select Addresses for Profile”.

Creating "Addresses" / "Ship To" cont'd.

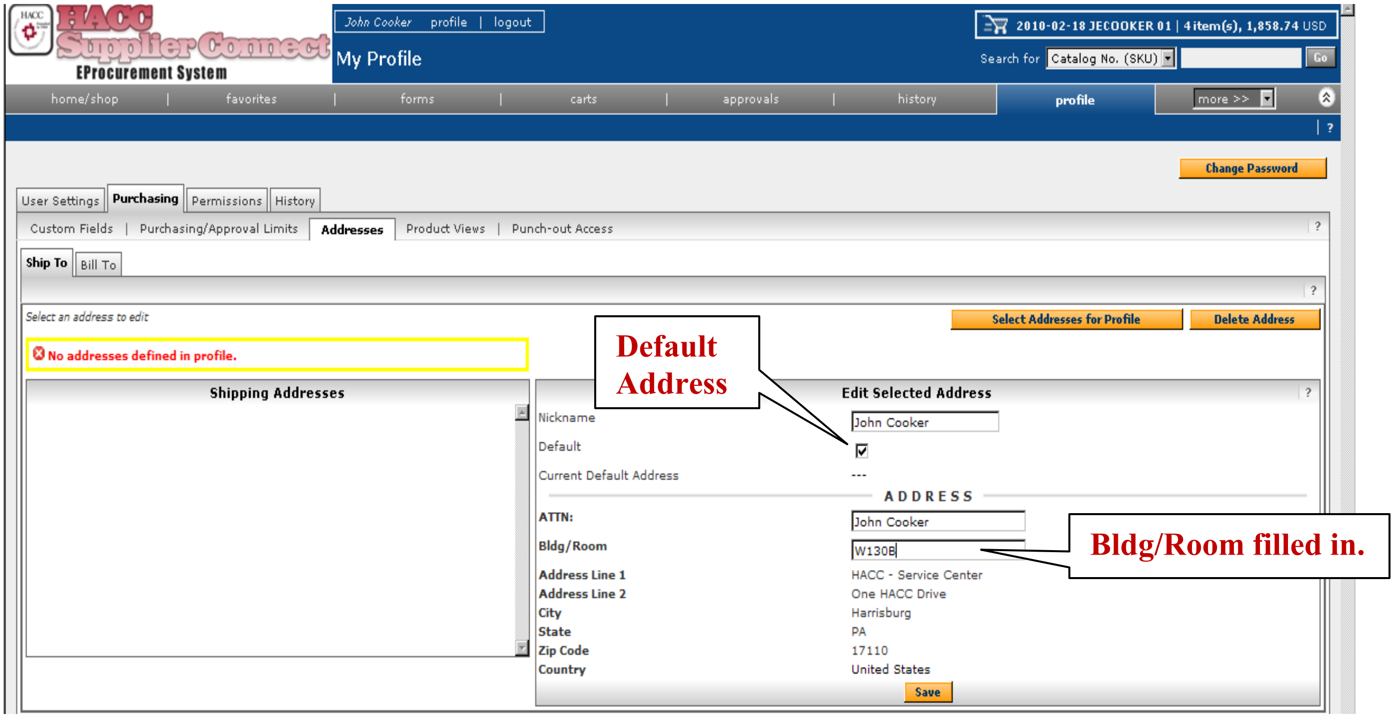


2. Select the **Campus Location** where you are located. For example: WW for "Wildwood". Immediately a "shipping" template will open.



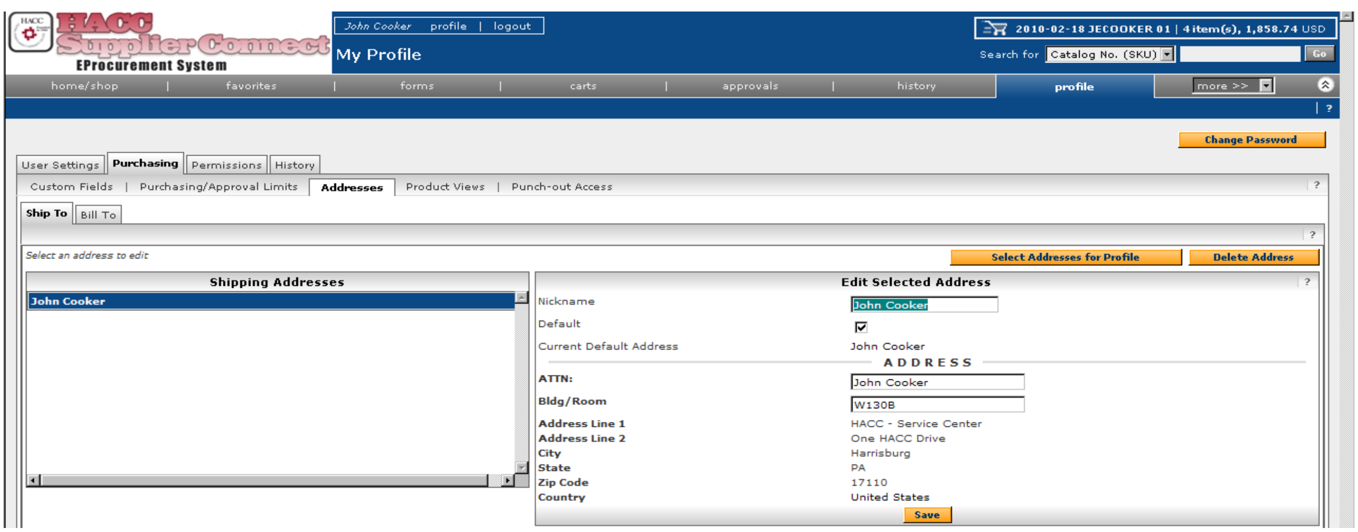
3. It is often recommended to change the "Nickname" to your name.
4. ATTN: Your name has also been populated from the profile.
5. Bldg/Room – Fill in your building and room number. You may change "name" and "Bldg/Room" when you edit the cart/requisition if the final destination is some other person and/or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

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



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

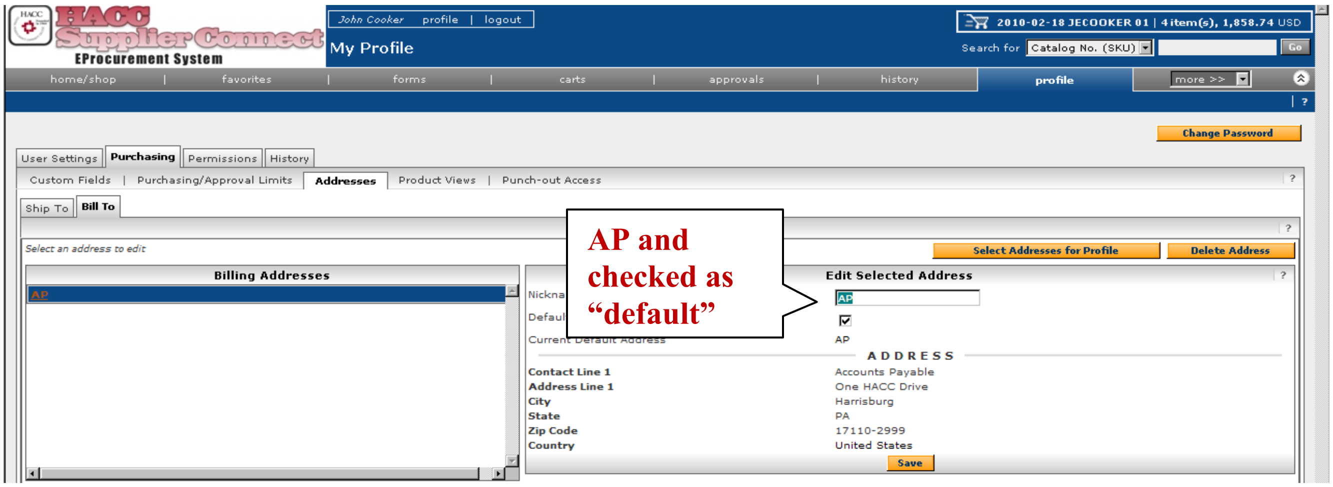
6. Be sure that the “default” box is checked.
7. Click SAVE.



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

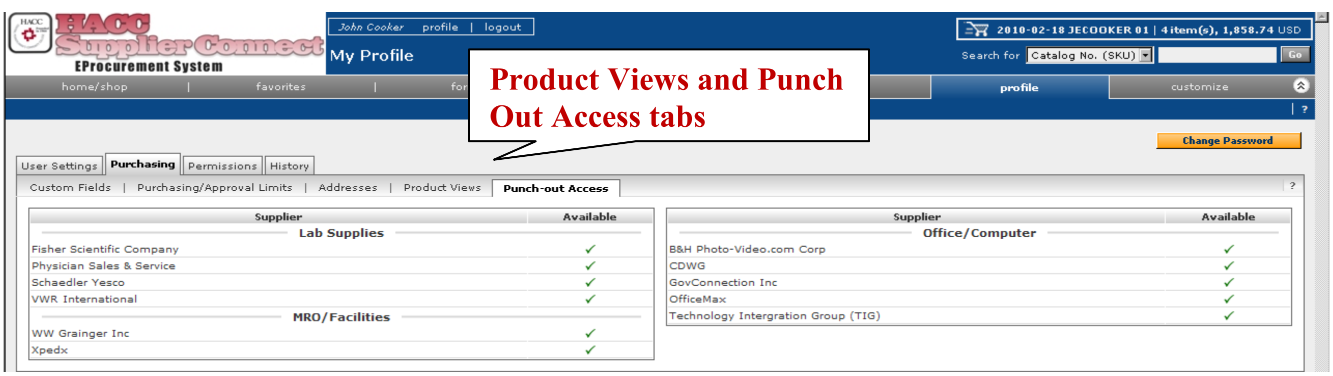
Creating "Addresses" / "Bill To" cont'd.

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.



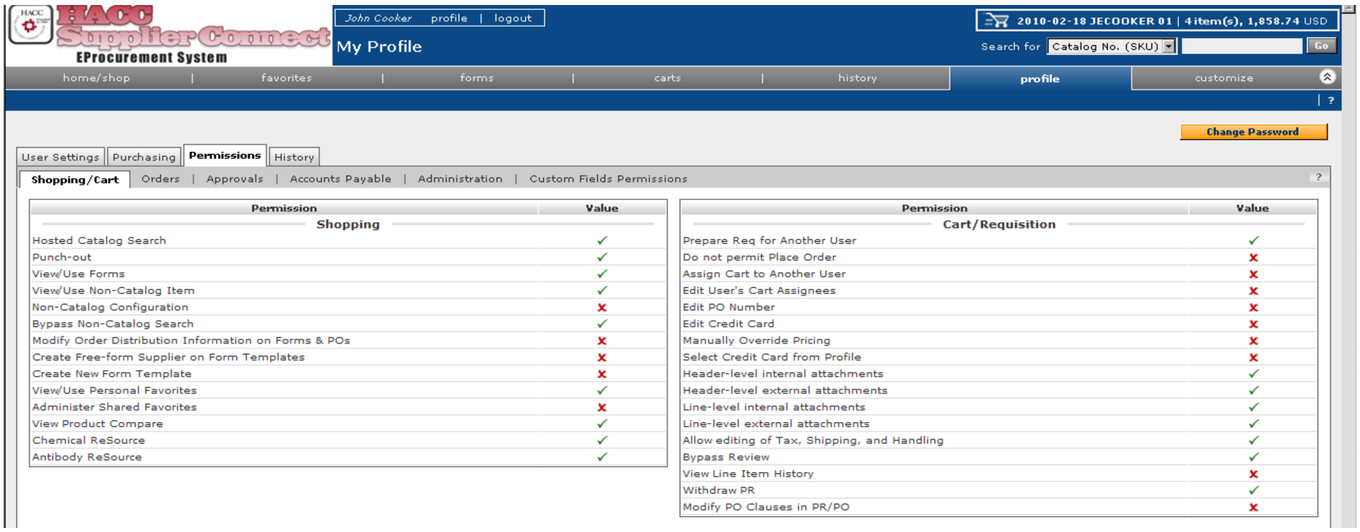
Remember to make "**AP**" the default by checking the "**default**" box and then click **SAVE**.

"**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.



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.