Tulane University
eProcurement

Module 1: Customizing User Profiles
Training User Guides
1.0 Signing Into eProcurement
Target Audience: All

1. Login into Gibson using your preferred Internet Browser.
2. Enter your Tulane Active Directory user name and password at the login screen. Username is case sensitive. Passwords are case sensitive. If unsure of the proper password, then reset the password through the Forgot Your Password? link just below the Password field.
3. Click the Sign In button. Once logged in, the role(s) and permissions assigned to the user dictate what screens are visible and what functions are accessible.

What’s My Profile?
Profiles in eProcurement allow you to make the buying and paying process more efficient and customize your user experience by allowing you to save default information, shopping addresses, frequently used chart field values, cart assignees, notification preferences and email approval options. Note, some of the values in your profile are maintained by the system administrators and cannot be changed - these include user roles, permissions, order settings and approval settings.

1.1 Setting Default Accounting Code Favorites
Target Audience: Shopper/Requestor

Users have the ability to set default accounting codes for eProcurement purchases. To select default accounting codes, sign into eProcurement using your normal Tulane system administered credentials.

1. From the ePro home page, click your name in the dashboard located in the top right and select View My Profile from the menu.
2. From Default User Settings, click Custom Field and Accounting Code Defaults.
3. The Custom Field and Accounting Code Defaults page will appear. From there select the **Code Favorites** tab. Within the dialog box, click **Add**.

4. The following fields are available for data entry: **Nickname**, Organization, Account/Project, Natural Account and Department Use. Decide on a Nickname for the Accounting Code you are selecting. You also have the ability to identify the string as a default for all ordering activity.

5. If you are unsure of the Organization, Account/Project, Natural Account and/or Department Use codes, click the **Select from all values link** for value options.

6. A Custom Field Search dialogue box will appear. Enter a description for the code you are searching for and click **Search**.

7. A list of values will appear in another dialogue box. **Select** the appropriate value.

8. Follow the same steps for Account/Project, Natural Account and Department Use. Once all fields are selected, check the **Default** box and click **Save**.
1.2 Entering Default Accounting Codes to your Profile
Target Audience: Buyer

Depending on your role, access and permission in eProcurement, you may have the ability to enter accounting codes to your profile other than the default accounting code provided by the Tulane System Administrator. The shopper/requester role will not have ability to add other default accounting codes. This module only applies to the Buyer role.

1. From Default User Settings, click Custom Field and Accounting Code Defaults, then Codes.
2. Within this menu, you have the option of defaulting Organization Natural Account, Task and Award. Be selective in what accounting values should be used as these values defaults for every order. Click Edit on the respective chart field component.
3. Within the Codes tab, click on Create New Value. Within the “Search for Value” section, use the Value field to search for a specific value or the Description field to search for a term associated with the value (e.g. President) and click Search.

1.3 Enter Default Shipping Address
Target Audience: Shopper/Requestor

1. From the ePro home page, click your name in the dashboard located in the top right and select View My Profile from the menu.
2. From Default User Settings, click Default Addresses.
3. The Default Addresses page will appear. In the Ship To tab, click on the Select Addresses for Profile button.
4. Search using a building name, street name, or street number. The directory of addresses includes only approved Tulane address locations. Non-Tulane addresses are prohibited.

5. Once you have identified the preferred address, click the corresponding option button.

6. You will be prompted to complete user specific data for the Attention and Room/Dept. You also have the option of making this your default address. Please note: Default addresses can be edited per order, as needed. Click the Save button to store this address in your profile. This will ensure future orders are prompted with this shipping address.

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### 1.4 Enter Default Billing Address

**Target Audience: Shopper/Requestor**

1. Follow steps 1 and 2 from Section 1.3 Enter Default Shipping Address. The Default Addresses page will appear. Click the Bill To tab, on the Select Addresses for Profile button.

   ![](select_addresses_profile.png)

2. From the Select Address Template dropdown box, select the Accounts Payable option. You'll notice that the Billing Address (or Bill To) has been defaulted to the only option available, which is the Accounts Payable preferred billing address.

   ![](select_address_template.png)
3. Select the Default checkbox and click Save to use the default Accounts Payable address for billing purposes.

1.5 Update Email Notifications

Target Audience: All

1. From the View My Profile menu option, navigate to the Notification Preferences option and then Shopping, Carts & Requisitions.

2. A list of notifications will appear in the right window pane. After scanning the notification sub-category, use the icon to assess what each notification controls. Select the Edit Section link in the top right corner.

3. To change a notification, click on the Override option button and select the preferred options which include: Email, Notification, Email & Notification or None and then select Save Changes. When actions are performed in ePro, emails can be generated to notify users of these actions. Users should check these email notification boxes to increase the level of individual notification. By clicking the icon next to the notification preference, a brief definition will be displayed to assist users in making a decision.

4. The Email option triggers outbound emails to your Tulane email address when the event occurs. Notifications trigger eProcurement system notifications that are only viewable in the Dashboard menu under Notifications.
1.6 Customizing Personal Settings

**Target Audience:** All

1. Users can customize some of their personal settings in eProcurement by navigating to the View My Profile option then **User’s Name, Phone Number, Email, etc.**

2. From this screen, users can edit personal settings depending on the level of access and fields made available by the system administrator. Be sure to save changes made by selecting the **Save** button.

3. Users can also edit language, time zone and display settings by navigating to the **Language, Time Zone and Display Settings** link in the menu tab.

4. Users can edit various settings some including language, geographical settings, help over mouse over settings, email preferences and etc. Be sure to save changes made by selecting the **Save** button.
1.7 Entering a Default Cart Assignee
Target Audience: Shopper

1. From the View My Profile menu option, navigate to the Default User Settings and then Cart Assignees.

2. From the Cart Assignees page, select the Add Assignee button in the upper left corner.

3. A search dialogue box will appear. Search for your assignee using Last Name, First Name, User Name and/or Email.

4. Locate the designated assignee and click Select.

5. Once you have selected your assignee, you can also click the Set as Preferred button to ensure the assignee name is easily accessible when you attempt to assign a draft cart.
1.8 User Access and Roles

Target Audience: All

Sign into eProcurement using your normal Tulane system administered credentials.

1. From the ePro home page, click your name in the dashboard located in the top right and select View My Profile from the menu.

2. Navigate to User Roles and Access and select Assigned Roles.

3. The role assigned to your user will appear. Your role determines the level of access in eProcurement.

4. Select Access from the User Roles and Access menu.

5. This page shows the level of access that will be available to the user on the history searching pages for purchase orders, requisitions, invoices and receipts.