



## Buyers Essential Set Up: Personal Profiles

Personal Profiles is a one-off set up that must be completed the first time you use iProc. It enables you to set up your printer and copies to allow automatic printing, phone numbers, contact email address and favourite cost centre code.

### Step 1 Setting up your printer with UFS

- From the E-Business suite homepage, click on the **iProcurement Buyer** responsibility.
- Click on **Personal Profiles** and a blank profile page will display.



- To put the screen into query mode and search for the field you need to check, you have two options:
  - Press **F11** on your keyboard to put the screen in query mode
  - Click **View > Query by Example > Enter**.
- The first line of the screen will go blue, which indicates it is in query mode.
- Type in **%PRINTER%**, to search for the printer in your department you wish to use.



The % acts as a wildcard and assists with your search. By starting and finishing with the % the system will look for the word PRINTER, that appears anywhere in the Profile Name field.

Profile Name	Default Value	User Value
%PRINTER%		

- f) To run the query, again you have two options; either press **Ctrl F11** or navigate to **View > Query by Example > Run**.
- g) The screen now displays the printer you use when printing from UFS. If this is correct then you simply leave it and proceed to step 2.

Profile Name	Default Value	User Value
CSD: Printer Name		
CSD: Printer Required		
IEX: Fax IPP Printer Name		
IEX: Fulfilment Printer		
IEX: IPP Printer Name		
IGS: Printer Destination Name		
OTS: Default Collateral Printer Nar		
Printer	noprnt	AG_PR005101

- h) Click in the **User Value field** and the list of values icon will appear (three dots). Click on the icon.
- i) To search for the printers in your department click in the **find field** and type in your **department code** before the % (e.g ZZ%) and click on **Find**.
- j) Scroll down and highlight the printer you wish to use and click **OK**. The new printer code will appear in the User Value field.
- k) **Save** your work by clicking on the yellow disk icon.

## Step 2      Setting up number of copies for printing

The next step is to ensure the system has defaulted in the correct number of copies to be printed for your purchase orders.

- a) Put the screen back into query mode (refer to step 1c).
- b) This time type in **%CONCURRENT%** and run the query again (refer to step 1f)

Concurrent:Print on Warning		
Concurrent:Report Copies	0	1
Concurrent:Request Priority	50	
Concurrent:Request Start Time		
Concurrent:Save Output	Yes	

- a) Scroll down the list and find the **Concurrent:Report Copies** row. Click in the **User Value** field and input the number **1**. This means that every time a Non-Catalog order has been approved the system will automatically print off 1 copy for you to then fax to the supplier.
- c) **Save** your work.

### Step 3      Setting your contact details and default GL coding

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It is important to include some contact details on a purchase order so that suppliers can contact someone in the event of a query. The contact details that appear on the purchase order are determined by preferences set by the Buyer who approves that purchase order, whether via self-approval or on behalf of someone else.

- a) Search using the keyword '%CAPSA%'. Then input your **email address** (character limit of 30), **fax number** (if you have one - character limit of 20) and **telephone number** (character limit of 20) in the associated fields.

Profile Name	Default Value	User Value
CAPSA GL Cost Centre Default		
CAPSA GL Department Default		
CAPSA GL Entity Default	U	
CAPSA GL Source of Funds Defa		
CAPSA PO Email Address		john.smith@cam.ac.uk
CAPSA PO Fax No.		01223456789
CAPSA PO Queries		
CAPSA PO Telephone No.		01223765432
CAPSA WPM Delivery Finance C	U.AG.AGBA.GAAA.LAAA.C	
CAPSA: Allow WF Creation of PO	Yes	

- b) Find the **CAPSA GL Cost Centre Default** profile and enter your four-letter cost centre into the corresponding User Value field.
- c) You can repeat this process for the **CAPSA GL Source of Funds Default** value too if you wish.

**Do not change** the **CAPSA GL Entity Default** or **CAPSA GL Department Default**

### Step 4      Choose whose details appear on Purchase Orders (Buyers Only)

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- a) In the **%CAPSA%** details of the Personal Profiles section (as in Step 3), click in the **User Value field** for CAPSA PO Queries and the list of values icon will appear (three dots). Click on the icon.

CAPSA PO Fax No.		01223456789
CAPSA PO Queries		
CAPSA PO Telephone No.		01223765432

b) A window will appear allowing you to select either Buyer or Requisitioner.

- BUYER Your contact details will show on any purchase orders that you approve. If you have not entered your contact details in your personal profile then the purchase order will just show your name with no other contact details.
- REQUISITIONER The contact details of the requisition creator will pull through (be that you, another Buyer or Requisitioner). If that person has not entered any contact details then the purchase order will just show their name but no other details.

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Find %

BUYER  
REQUISITIONER

Find OK Cancel

a) Click **OK** to confirm and then **Save** the changes.