



Personal Profile Process Guide

A personal profile or user profile is a set of information that contains a specific user's information, preferences, and settings. When a user logs in, the system recognizes the user and displays information, according to the preferences as set in the user profile.

I. Preferences

1. Click 'Preferences' on the menu bar.

The screenshot shows the NCE-Procurement @ your service Home Dashboard. The top navigation bar includes 'Home', 'Create', 'Search', 'Manage', 'Recent', and 'Preferences' (circled). The dashboard is divided into several sections:

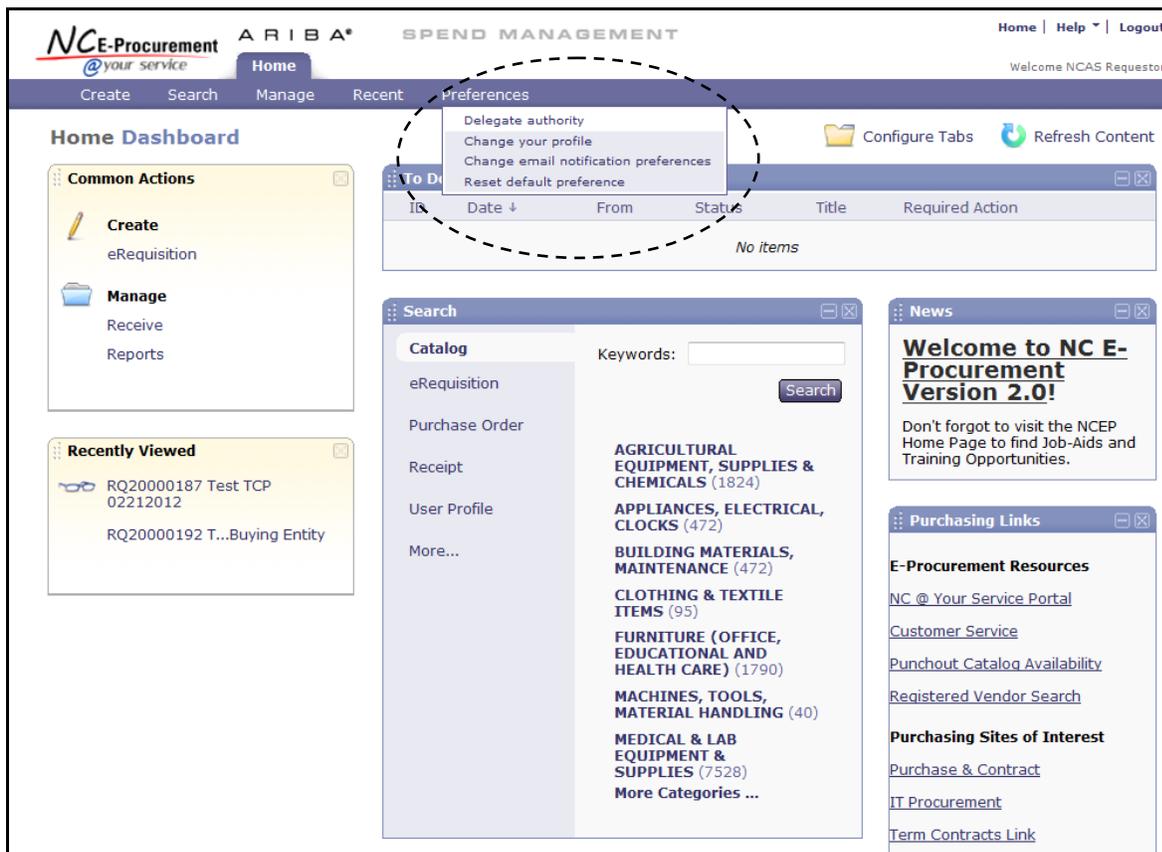
- Common Actions:** Create (eRequisition), Manage (Receive, Reports).
- Recently Viewed:** RQ20000187 Test TCP 02212012, RQ20000192 T...Buying Entity.
- To Do:** A table with columns: ID, Date ↓, From, Status, Title, Required Action. It shows 'No items'.
- Search:** A search bar with 'Keywords:' and a 'Search' button. Below it is a 'Catalog' list with categories like 'eRequisition', 'Purchase Order', 'Receipt', 'User Profile', and 'More...'. To the right of the catalog is a list of categories with item counts: 'AGRICULTURAL EQUIPMENT, SUPPLIES & CHEMICALS (1824)', 'APPLIANCES, ELECTRICAL, CLOCKS (472)', 'BUILDING MATERIALS, MAINTENANCE (472)', 'CLOTHING & TEXTILE ITEMS (95)', 'FURNITURE (OFFICE, EDUCATIONAL AND HEALTH CARE) (1790)', 'MACHINES, TOOLS, MATERIAL HANDLING (40)', 'MEDICAL & LAB EQUIPMENT & SUPPLIES (7528)', and 'More Categories ...'.
- News:** 'Welcome to NC E-Procurement Version 2.0!' with a message: 'Don't forget to visit the NCEP Home Page to find Job-Aids and Training Opportunities.'
- Purchasing Links:** 'E-Procurement Resources' with links: 'NC @ Your Service Portal', 'Customer Service', 'Punchout Catalog Availability', 'Registered Vendor Search'. 'Purchasing Sites of Interest' with links: 'Purchase & Contract', 'IT Procurement', 'Term Contracts Link'.



2. **Delegate Authority** – Users can delegate the authority to approve eRequisitions to another NC E-Procurement user within their agency. This may be helpful if a user will be out of the office for a period of time. This functionality is covered in more detail in the **'Delegating Approval Authority'** Process Guide.
3. **Change Your Profile** – Users can change personal information in their profile including supervisor's name, and default **'Ship To'** and **'Bill To'** values.

NOTE: Name and email address must be changed by your NCID DA in NCID. Once updated, the information will populate in NC E-Procurement when you click **'Change Your Profile.'**

4. **Change Email Notification Preferences** – This option allows users to set the frequency of which email notifications are received from NC E-Procurement. Individuals may also turn off notifications they do not wish to receive. For more information on changing email notification preferences, reference the **'Email Notifications'** process guide.
5. **Reset Default Preferences** – This option will allow the user to view, and reset, if preferred, their default preferences for NC E-Procurement. This includes what page navigation confirmation settings, whether catalog items are displayed as thumbnails or details, and whether line items are displayed with details on the **'Checkout'** page. For more information on updating or resetting default preferences, reference the **'Reset Default Preferences'** job aid.





II. Change Your Profile

1. Click 'Change Your Profile.'

The screenshot shows the NCE-Procurement ARIBA Spend Management interface. The top navigation bar includes 'Home', 'Create', 'Search', 'Manage', 'Recent', and 'Preferences'. The 'Preferences' dropdown menu is open, with 'Change your profile' circled in black. The main dashboard features several sections: 'Common Actions' (Create eRequisition, Manage Receive Reports), 'Recently Viewed' (RQ20000187 Test TCP 02212012, RQ20000192 T...Buying Entity), 'Search' (Catalog, eRequisition, Purchase Order, Receipt, User Profile, More...), 'News' (Welcome to NC E-Procurement Version 2.0!), and 'Purchasing Links' (E-Procurement Resources, NC @ Your Service Portal, Customer Service, Punchout Catalog Availability, Registered Vendor Search, Purchasing Sites of Interest, Purchase & Contract, IT Procurement, Term Contracts Link).



2. Changes to a Bill To and Supervisor can be made on the Personal Info page.

Note: The name and email address fields cannot be edited on this page. To update these fields, contact your NCID DA and request that the information be changed in NCID. Once the changes have been made in NCID, the information will update automatically when you click '**Change Your Profile.**' You will need to submit the User Profile change in NC E-Procurement in order for the update to take place.

Note: When a supervisor change is made through the personal profile, the user's existing supervisor as well as the new supervisor must approve the request before the change is made in the system. If the supervisor listed has left the agency, please contact the agency Security Administrator to make this update. The Security Administrator can make this change without approvals being required.

Note: Groups, Roles and Permissions can only be updated by a Security Administrator or EPLite Administrator via a UserMaintenance eForm.

3. Click '**Next.**'

The screenshot displays the 'Personal Profile' page for a user named 'UP802: NCAS Requestor'. The page includes a navigation menu with options like 'Home', 'Create', 'Search', 'Manage', 'Recent', and 'Preferences'. The main content area is titled 'PERSONAL PROFILE INFORMATION - USER PROFILE' and contains the following fields:

- Name: * NCAS Requestor
- Business Email Address: * NCAS.Requestor@ncep.accenture.com
- Supervisor: NCAS Approver (dropdown menu)
- Bill To: 41PT (dropdown menu)
- Groups: (no value)
- Roles: NCAS Requestor
- Permissions: (no value)

Two yellow callout boxes provide instructions:

- The first callout points to the 'Supervisor' dropdown and says: "Select the name of the new supervisor from the 'Supervisor' dropdown box. Select 'Search for more...' to search for a supervisor."
- The second callout points to the 'Bill To' dropdown and says: "Select the new Bill To from the 'Bill To' dropdown box. Select 'Search for more...' to search for a Bill To."

The 'Next' button is circled in the top right corner of the page.

- Default eRequisition values for accounting, shipping and delivery information can be set on the Account/Ship page.

Note: The entity cannot be updated on this page. Please refer to the 'Entity Change' Process Document for instructions on how to change the entity.

Note: The values set in the personal profile are **default** eRequisition values. These values can be changed on individual eRequisitions. The default ship-to address is a required field within the user's profile; however, users do not have to specify default account information.

Note: The 'Company' and 'Center' fields shown in the example above are specific to NCAS agencies. For School Systems and Community Colleges, the 'Accounting' field is a free text field.

- Click 'Next' to go to the 'Justify Changes' page.

Note: In addition to using 'Next' or 'Prev,' you can also navigate through the profile change using the navigation field on the left side of the screen.

The screenshot displays the 'Personal Profile' page for 'UP802: NCAS Requestor'. The page is titled 'Personal Profile' and includes a sidebar with five steps: 1. Personal Info, 2. Account/Ship, 3. Justify Changes, 4. Approval Flow, and 5. Review Changes. The 'Account/Ship' section is active, showing the following information:

- ERP Organization: NCAS
- Entity: 41
- Company: (none selected) [dropdown]
- Center: (none selected) [dropdown]

The 'Shipping and Delivery' section includes:

- Ship To: * NCAS Ship To [dropdown]
- Deliver To: NCAS Requestor [text field]

Two callout boxes provide additional information:

- The 'Company,' 'Center,' and 'Ship To' fields can be selected from the dropdown boxes. Select 'Search for more...' to search for an option not visible in the dropdown box.
- The 'Deliver To' field is a free text field. This value will appear on the purchase order for the supplier to view.

(*) indicates a required field



6. Users can add comments and/or attachments on the **'Justify Changes'** page.
7. Click **'Next'** to go to the **'Approval Flow'** page. Users can view the system generated approval flow and manually add approvers, if necessary.

Note: The approval flow displayed is **not** the approval flow for eRequisitions created within NC E-Procurement. This approval flow is specific to the user profile update.

8. Click **'Next'** to review changes and submit the user profile change.

Note: Personal profile changes are applied in the system once all required approvals on the request have been completed.

The screenshot shows the 'Justify Changes' page for user profile UP981: NCAS Requester. The page has a navigation sidebar on the left with steps: 1 Personal Info, 2 Account/Ship, 3 Justify Changes (active), 4 Approval Flow, and 5 Review Changes. The main content area has a title 'UP981: NCAS Requester' and a 'Prev Next Exit' button. Below the title is a text prompt: 'Enter comments explaining why you are changing your personal profile.' This is followed by a section titled 'COMMENTS - ENTIRE USER PROFILE' containing a large text area labeled 'Comments:'. Below that is a section titled 'ATTACHMENTS - ENTIRE USER PROFILE' containing a table of attachments.

File Name	Size	Creator	
All - Personal Profile Attachment.doc	2,964.5 KB	NCAS Requester	Download Delete

Below the table is an 'Add Attachment' button. At the bottom of the page, there is a note: '(*) indicates a required field' and another 'Prev Next Exit' button.