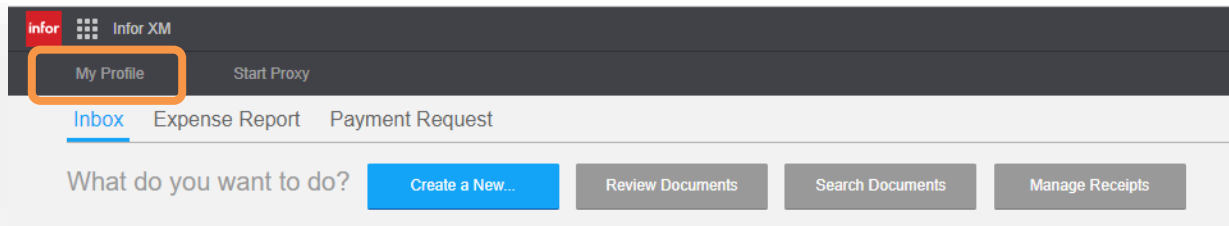


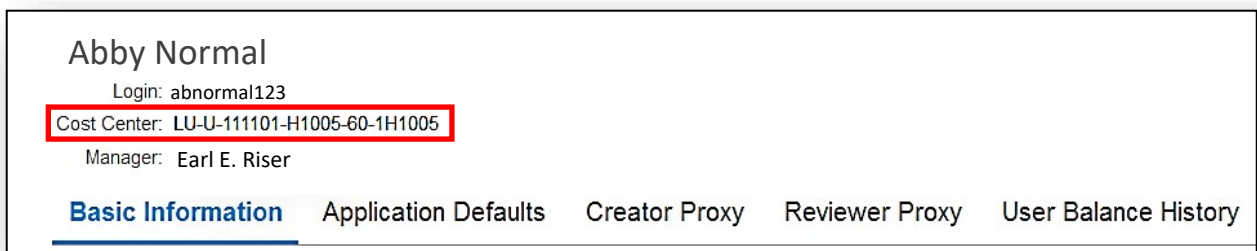
## Basic Information – Getting Started with Infor

### Setup User Profile

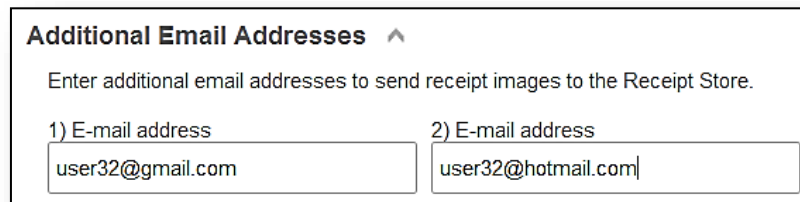
Before getting started with Infor, users should first setup their user profile. The user profile is located in the upper left-hand corner beneath the Infor logo.



1. Select 'My Profile'.
2. Verify employee information is accurate.

A screenshot of the 'My Profile' page for a user named Abby Normal. The page displays the following information: Name: Abby Normal; Login: abnormal123; Cost Center: LU-U-111101-H1005-60-1H1005 (highlighted with a red box); Manager: Earl E. Riser. Below the information are five navigation tabs: 'Basic Information' (underlined), 'Application Defaults', 'Creator Proxy', 'Reviewer Proxy', and 'User Balance History'.

- o The FOAPAL listed should be the home department of the employee.
  - o The Manager listed is the Budget Manager of the home department or the next level of approver if the employee is on the approval chain for the department.
3. Add additional email addresses if the employee will email receipts from an address other than their Liberty email.

A screenshot of the 'Additional Email Addresses' form. The title is 'Additional Email Addresses' with an upward arrow. Below the title is the instruction: 'Enter additional email addresses to send receipt images to the Receipt Store.' There are two input fields labeled '1) E-mail address' and '2) E-mail address'. The first field contains 'user32@gmail.com' and the second field contains 'user32@hotmail.com'.

4. Assign Proxies to submit/review documents on behalf of employee.
  - o **Creator Proxy** – Select application and assign a user id.
    - Expense Report: To reconcile P-card transactions
    - Payment Request: (no longer used)

**Note:** Check the boxes to 'Allow creator proxies to submit' if you wish to allow proxies to submit documents to the approval process on your behalf.

○ Reviewer Proxy –

Basic Information Application Defaults **Creator Proxy** Reviewer Proxy User Balance History

To add a creator proxy, enter all the required information and click Add Proxy.

\* Application Expense Report \* Proxy User ID username

Add Proxy

Allow creator proxies to submit  Expense Report  Payment Request

Update

- Select an application and assign a user id.
  - Expense Report: To approve P-card transactions
  - Payment Request: (no longer used)

Basic Information Application Defaults Creator Proxy **Reviewer Proxy** User Balance History

To add a reviewer proxy, enter all the required information and click Add Proxy.

\* Application Expense Report \* Proxy User ID username

Only when out of office

Add Proxy

Allow reviewer proxies to submit  Expense Report  Payment Request  Travel Plan  Timesheet

Update

- Add additional parameters, if desired
  - Select the 'Only when out of office' option to limit proxy review to specified time periods.
    - \*Note: Users must specify these time periods by checking the 'Out of office' box on the 'Basic Information' tab
  - Select the 'Allow reviewer proxies to submit' option to allow proxies to review AND approve documents.
  - Do not select the 'Allow reviewer proxies to submit' option to allow proxies to review documents but not approve.
  - This option should be used by managers who want to review and approve all p-card transactions but rely on a Budget Coordinator to review some details, such as FOAPAL.