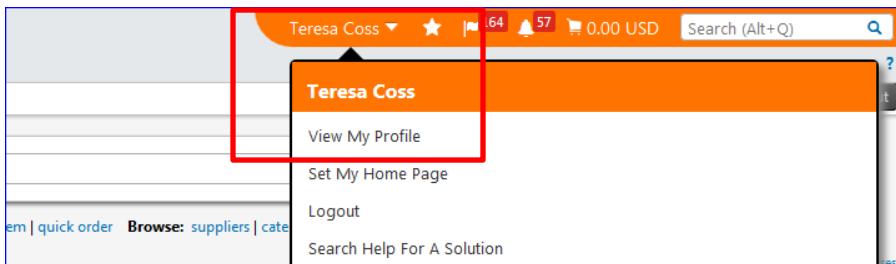


# User Profile

## Profile Settings

To set up your default profiles settings click on your name in the upper left corner of the Homepage. Select View My Profile to access the profile settings.



Click on Default User Settings. To set up a default speedchart and account, select Custom Field and Accounting Code Defaults. On the right select the Codes tab and then Edit from the value you want to set.

A screenshot of a web page titled 'Custom Field and Accounting Code Defaults'. The page has a sidebar on the left with a list of user settings. The 'Custom Field and Accounting Code Defaults' link is highlighted with a red box. The main content area shows a table of default values for various fields. The 'Codes' tab is selected in the top navigation bar. The table has columns: 'Custom Field Name', 'Default Value', 'Description', and 'Edit Values'. The 'Edit Values' column contains blue 'Edit' buttons. The 'Speedchart' row is highlighted with a red box. The table data is as follows:

Custom Field Name	Default Value	Description	Edit Values
Business Unit GL	BGSUN	BGSUN	<a href="#">Edit</a>
Speedchart	No Default Value		<a href="#">Edit</a>
Fund	No Default Value		<a href="#">Edit</a>
Dept	No Default Value		<a href="#">Edit</a>
Project/Grant	No Default Value		<a href="#">Edit</a>
Activity	No Default Value		<a href="#">Edit</a>
Function	No Default Value		<a href="#">Edit</a>
PC Business Unit	No Default Value		<a href="#">Edit</a>
Account	53100	Office Supplies*	<a href="#">Edit</a>
Program	No Default Value		<a href="#">Edit</a>
Budget Reference	No Default Value		<a href="#">Edit</a>

Header (int.) Header (ext.) **Codes** Code Favorites Internal Information ?

Custom Field Name	Default Value	Description	Edit Values
Speedchart	No Default Value		<input type="button" value="Edit"/>

Business Unit GL BGSUN

Value	Description

\* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

**Search For Value**

Field Name: Speedchart

Value:

Description:

Results Per:

Page:

Click Create New Value. Enter your 6 digit department number in the Value field and click on Search.

Results **Values**  
Per Page  Found  Page 1 of 3 ?

Select	Value	Description
<input checked="" type="checkbox"/>	7000000OPCK	Res Life Conklin -OPCK
<input type="checkbox"/>	7000000OPCN	Res Life Centennial-OPER
<input type="checkbox"/>	7000000OPFH	Falcon Heights-OPER
<input type="checkbox"/>	7000000OPFN	Res Life Founders-OPFN
<input type="checkbox"/>	7000000OPHM	Res Life Harshman-OPHM

Select the speedchart by clicking on the box.  
Select Add Values.

Value	Description
7000000OPCK	Res Life Conklin -OPCK

\* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

**Edit Existing Value**

Value:

Description:

Default

Status:

Click on the Value you just added (7000000OPCK), checkmark Default and Save. You can continue to add multiple speedtypes to your list.

## Custom Field and Accounting Code Defaults

Header (int.) Header (ext.) **Codes** Code Favorites Internal Information

Click on the Codes tab to add a default Account (53100).

Under Default User Settings select Default Addresses. From the Ship To tab, click on Select Addresses for Profile.

**Teresa Coss**

User Name TLCOSS

User Profile and Preferences

Update Security Settings

**Default User Settings**

Custom Field and Accounting Code Defaults

**Default Addresses**

Cart Assignees

User Roles and Access

Ordering and Approval Settings

**Default Addresses**

Ship To Bill To

Select an address to edit

No addresses defined in profile.

Select Addresses for Profile

Select an address to edit

Shipping Addresses

**Edit Selected Address**

Nickname: **BGSHIP TO**

Default

Current Default Address: BGSHIP TO

ADDRESS

ATTN: Teresa Coss

Bldg: 1851 N Research Drive

Room: 100

Address Line 1: Bowling Green State University

City: Bowling Green

State: OH

Zip Code: 43403

Country: United States

Save

A dropdown box will appear, select BGSHIP TO. Checkmark the Default box. Enter your building and room number. Save.

**Default Addresses**

No addresses defined in profile.

Ship To **Bill To**

Select an address to edit

No addresses defined in profile.

Select Addresses for Profile

**Billing Addresses**

Go to the Bill To tab and click on Select Addresses for Profile. Choose Accounts Payable from the dropdown.

Ship To Bill To

Select an address to edit Select Addresses for Profile | Delete Address

No addresses defined in profile.

**Billing Addresses**

Edit Selected Address	
Nickname	Accounts Payable
Default	<input checked="" type="checkbox"/>
Current Default	---
Address	
Contact Line 1	Accounts Payable
Address Line 1	1851 Research Dr
Address Line 3	http://www.bgsu.edu/offices/controller/index.html
City	Bowling Green
State	OH
Zip Code	43403
Country	United States
<b>Save</b>	

Mark as default and Save.

To add a default for your Cart Assignees, select Cart Assignees and click Add Assignee...

**Teresa Coss**

User Name: TLCOSS

User Profile and Preferences >

Update Security Settings >

Default User Settings ▼

- Custom Field and Accounting Code Defaults
- Default Addresses
- Cart Assignees**

User Roles and Access >

Ordering and Approval Settings >

**Cart Assignees**

Add Assignee...

Name	Action
------	--------

**User Search**

Last Name:

First Name:

User Name:

Email:

Department:

Results Per Page:

**Search**

From the pop up window, enter the last name of the individual you would like to assign your carts to. Search and then select the name

Clark, Jane	JHCLARK	JHCLARK@bgsu.edu	+1 (419) 372-9289	<b>[select]</b>
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## Cart Assignees

Add Assignee... 

My Cart Assignees		Action
Name		Action
Jane Clark		<input type="button" value="Set as Preferred"/> <input type="button" value="Remove"/>

Select Set as Preferred.

## Notification Preferences

The E-mail Preferences screen is used to determine when and why you will receive e-mail notifications and/or notifications in the top menu bar.

Select Notification Preferences, select Shopping, Carts & Requisitions. Click on Edit Selection in the upper right corner.

**Teresa Coss**

User Name **TLCOSS**

User Profile and Preferences 

Update Security Settings 

Default User Settings 

User Roles and Access 

Ordering and Approval Settings 

Permission Settings 

**Notification Preferences** 

**Administration & Integration** 

**Shopping, Carts & Requisitions** 

**Purchase Orders** 

Catalog Management 

Accounts Payable 

Contracts 

Form Requests 

User History 

Administrative Tasks 

**Notification Preferences: Shopping, Carts & Requisitions** 

The in-application notifications are not yet available for all Email Notifications.

Prepared By - Cart Assigned Notice 	<input checked="" type="radio"/> Default	<input type="radio"/> Override	None
Prepared By - PR line item(s) rejected 	<input checked="" type="radio"/> Default	<input type="radio"/> Override	None
Prepared By - PR rejected/returned 	<input type="radio"/> Default	<input checked="" type="radio"/> Override	<input type="button" value="Email"/>

The Default setting is None, meaning there will be no emails or notifications. Click on Override to change the setting. When done, click on Save Changes in the lower right corner.

## Notification Preferences: Shopping, Carts & Requisitions

The in-application notifications are not yet available for all Email Notifications.

Prepared By - Cart Assigned Notice 	<input checked="" type="radio"/> Default	<input type="radio"/> Override	None
Prepared By - PR line item(s) rejected 	<input checked="" type="radio"/> Default	<input type="radio"/> Override	None
Prepared By - PR rejected/returned 	<input type="radio"/> Default	<input checked="" type="radio"/> Override	<input type="button" value="Email"/>

**Save Changes** **Cancel**