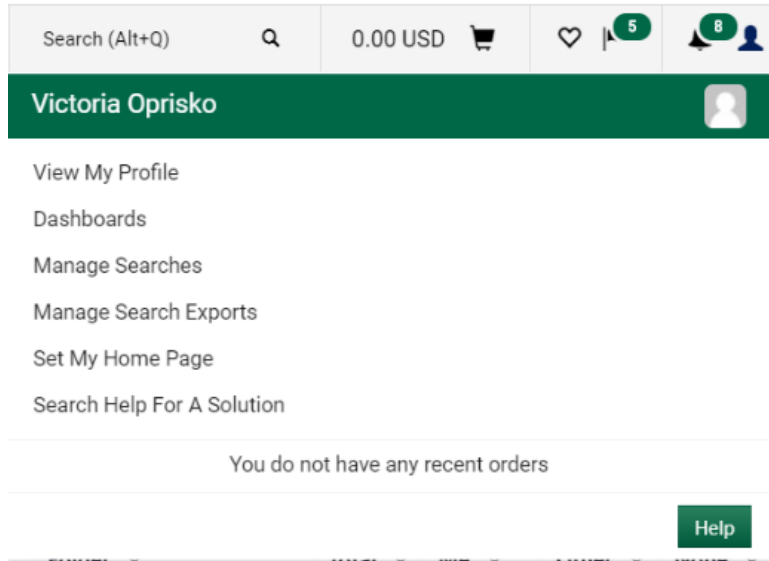


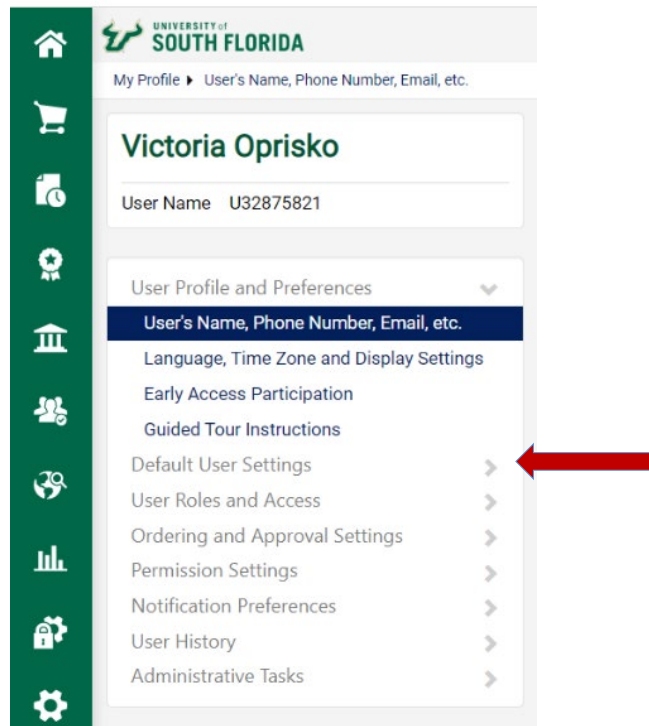
Purpose:	To define procedures for creating default user settings. Information entered in here will be placed on the Requisition. The intent is to save unnecessary and repetitive input. These values can be changed if necessary.
Navigation:	Navigate in Bull Marketplace > View My Profile
Notes:	Users must have a valid Net ID to be able to navigate the system

View My Profile

1. Click the icon that looks like a “person” on the upper right-hand corner and select **VIEW MY PROFILE**



2. Some fields you’ll be able to update, others you won’t. For example, your User name is imported from FAST and therefore needs a FAST update to change this information. This guide focuses on **DEFAULT USER SETTINGS**



- User Profile and Preferences >
- Default User Settings <
- Custom Field and Accounting Code Defaults ←
- Default Addresses**
- Cart Assignees
- Checkout Settings

3. Custom Field and Accounting Code Defaults

- a. **Header:** PO Business Unit information can be edited to save time when entering chartfield information.
 - i. **Click Edit**
 - ii. **Click Create New Value**
 - iii. **Select and “Add Values”**

Custom Field and Accounting Code Defaults

Custom Field Name	Default Value	Description	Edit Values
PO Business Unit	No Default Value		Edit ←

Custom Field and Accounting Code Defaults

Custom Field Name	Default Value	Description	Edit Values
PO Business Unit	No Default Value		Edit

Edit Values **Close**

Create New Value

Value	Description

Values ?

<input type="checkbox"/>	Value	Description
<input type="checkbox"/>	SRSTA	Sarasota Campus
<input type="checkbox"/>	STPTE	St. Petersburg Campus
<input type="checkbox"/>	TAMPA	Tampa Campus

Add Values ←

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

NOTE: The PO Business Unit represents the entity for which the purchase is being made and will default in from the User’s default setup. *This value can be changed if necessary.* The available values are as follows:

- TAMPA – Tampa Campus purchases
- STPTE – St Petersburg Campus purchases
- SRSTA – Sarasota Campus purchases

The *General Ledger* Business Unit used for accounting purposes is always USF01.

- b. **Delivery** tab: This is the user's location or campus mail stop. It identifies the building and the room Code for Central Receiving to deliver the goods.
 - i. **Click Edit**
 - ii. **Click Create New Value,**
 - iii. **Enter the campus and click "Search". Select and "Add Values"**
- c. **Codes** tab: We advise to leave it at "No Default Value".
- d. **Code Favorites** tab: Enter common chartfield string(s) you often use for requisitions. You can enter and save as many favorites as you like.
 - i. **Click Add**
 - ii. **Click select from all values for each field,** you can type the information into the Value or Description field or click Search for options. **NOTE: DO NOT ENTER AN ACCOUNT NUMBER** Account numbers may vary depending on the Commodity Code.
 - iii. **Assign a "Nickname"** to your favorite codes and click **Save** when done.
 - iv. **Code Favorites for Check Requests & Invoices are for Payment Request Form payments**

Custom Field and Accounting Code Defaults

Business Units:

Use Code Favorites for quick access to accounting code combinations saved to your profile during checkout. You may create a new Code Favorite by clicking the "Add" button and entering a commonly used combination of accounting codes with or without splits. Code Favorites are accessed during checkout by editing the codes section or by selecting it as your default accounting codes in your profile.

Add

GL Unit	Oper Unit	Fund	Account	Dept	Product	Initiative	PC Bus Unit	Project / Activity	Budget Reference
no value	no value	no value	no value	no value	no value	no value	no value	no value	no value

Accounting Codes

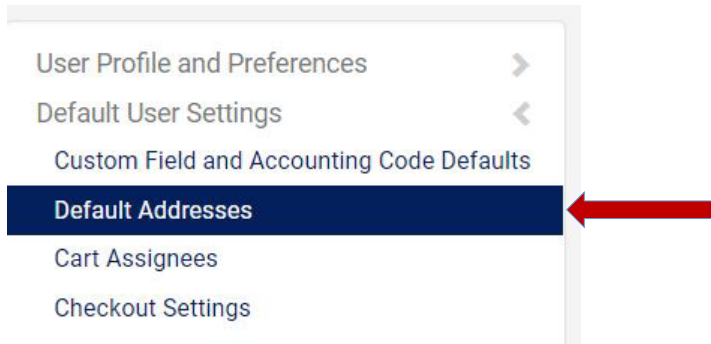
Nickname: Default

GL Unit: Oper Unit: Fund: Account: Dept: Product: Initiative:

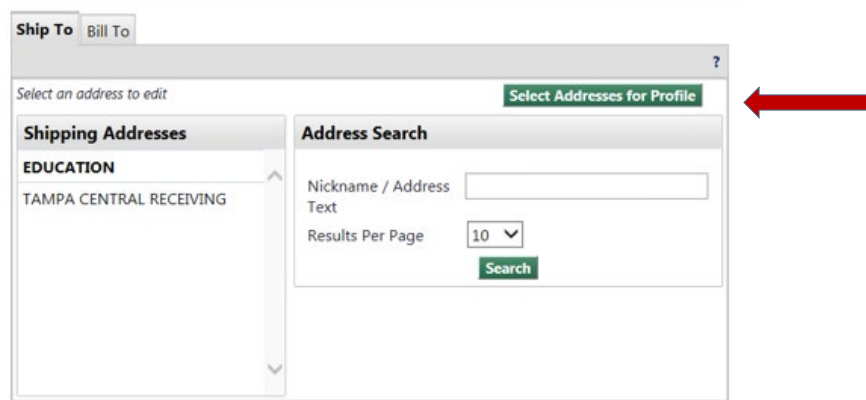
NOTE: Chartfield String – identifies where the cost of the purchase will be charged to in the General Ledger. Frequently changed chart fields are Fund, Product, and Initiative.

If a Project is being used, a PC Business Unit must be selected
 Sponsored Research projects use PC Business Unit **GRT01**
 Construction (PECO) projects use PC Business Unit **USF01**
 All projects require an Activity ID to be selected

4. **Shipping Address:** You may only update the shipping addresses. Billing address defaults to payment services.
 - a. Click Select Addresses for Profile



Default Addresses



5. **Cart Assignees:** This feature is intended for Shoppers. They can assign their cart to another Shopper (Ex: Accountable Officer for review) or to a Requestor to convert their draft cart to a Requisition
 - a. Click **Add assignee**
 - b. Enter name information and hit search
 - c. When you find your requestor's name click **"Select"**

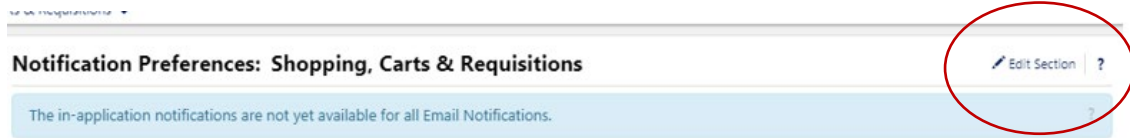
Cart Assignees



6. **User Roles and Access:** This is where you find your assigned Role. Roles are requested through FAST.
 - Shopper – assigned to any USF user without a FAST role
 - Requestor – assigned to a USF user with FAST Req Initiator role
 - Approver – assigned to a USF user with a FAST Req Approver/Req Manager role
 - Receiver – assigned to a USF user with a FAST Receiver role

7. Notification Preferences: Defaulted to Email & Notification. The intent is for the user to identify which stage or process they want to get notified. There are several sections in this field that is imperative for users to get notified (i.e. Shopping, Carts & Requisitions; Change Requests; Purchase Orders; Accounts Payable; and Form Requests)

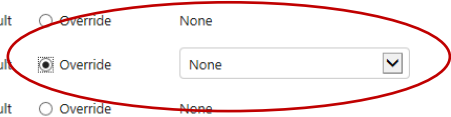
- a. You can edit Notification Preferences by selecting a field and click on “Edit Section”
- b. Select “Override”. A drop down menu will appear and will give you the option to choose an alternate setting.



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 checked="" type="radio"/> Default <input type="radio"/> Override	None
Cart Assigned Notice	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
Receive PR and PO notifications for Carts Assigned to Me	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
Assigned Cart Processed Notification	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
Assigned Cart Deleted Notification	<input type="radio"/> Default <input checked="" type="radio"/> Override	None
PR submitted into Workflow	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR pending Workflow approval	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR Workflow Notification available	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR Workflow complete / PO created	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR line item(s) rejected	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
Cart/PR rejected/returned	<input checked="" type="radio"/> Default <input type="radio"/> Override	None



Type of Notifications:

None – you won’t get any notification on the selected section

Email – an email will be sent to the email address associated to your profile

Email & Notification – you will get notified via email and also in your Bull Marketplace profile

Notification – it will appear on the upper right-hand corner of your Header marked by a bell icon

