
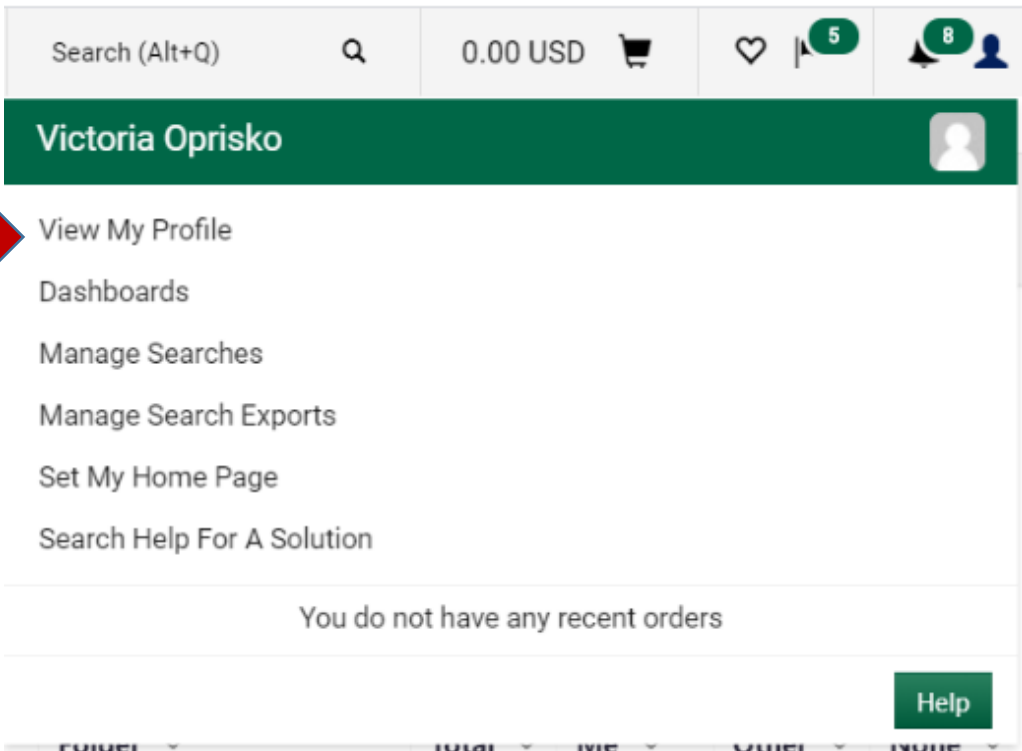




Purpose:	To define procedures for creating default user settings. Information entered in here will be placed on the Requisition. The intent is to save unnecessary and repetitive input. These values can be changed if necessary.
Navigation:	Navigate in Bull Marketplace > View My Profile
Notes:	Users must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

Steps	Section Header
1	View My Profile
	<p>1.1 Click the icon that looks like a “person” on the upper right-hand corner.</p>  <p>1.2 Click on View My Profile</p>
	 <p>1.3 The screen below appears:</p>

UNIVERSITY of SOUTH FLORIDA

My Profile ▶ User's Name, Phone Number, Email, etc.

Victoria Oprisko

User Name U32875821

User Profile and Preferences ▼

User's Name, Phone Number, Email, etc.

Language, Time Zone and Display Settings

Early Access Participation

Guided Tour Instructions

Default User Settings >

User Roles and Access >

Ordering and Approval Settings >

Permission Settings >

Notification Preferences >

User History >

Administrative Tasks >

NOTE: The information in your profile is imported from FAST. These cannot be updated in the Bull Marketplace. To change any of these information, a request must be submitted in FAST.

Default User Settings

The screenshot shows a vertical green sidebar on the left with several white icons. A dropdown menu is open to the right, listing various settings categories. The 'Default User Settings' option is highlighted with a blue border and a red arrow pointing to it from the left.

- User Profile and Preferences
- User's Name, Phone Number, Email, etc.
- Language, Time Zone and Display Settings
- Early Access Participation
- Guided Tour Instructions
- Default User Settings
- Custom Field and Accounting Code Defaults
- Default Addresses
- Cart Assignees
- Checkout Settings
- User Roles and Access
- Ordering and Approval Settings
- Permission Settings
- Notification Preferences
- User History
- Administrative Tasks

2.1 Click **Custom Field and Accounting Code Defaults**

Custom Field and Accounting Code Defaults

Header (int.)	Header (ext.)	Delivery	Codes	Code Favorites	Internal Information	Cart
?						
Custom Field Name	Default Value	Description	Edit Values			
PO Business Unit	No Default Value		Edit			

2.2 Header (Int) tab - select the PO Business Unit you belong to

Custom Field and Accounting Code Defaults

Header (int.) | Header (ext.) | Delivery | Codes | Code Favorites | Internal Information | Cart

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

Edit Values Close

Create New Value

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.

2.3 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.

2.4 Click Edit

2.5 Click Create New Value.

2.6 Under "Value" field enter your campus mail stop or click "Search" to look for specific location

2.6 Select specific location and click Add Values

Custom Field and Accounting Code Defaults

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

Custom Field Name	Default Value	Description	Edit Values
Location	No Default Value		Edit

Edit Values Close

Create New Value

Value	Description
<input type="checkbox"/>	svcl072

Search

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

2.7 Codes tab

- This is like a Speed Chart. We advise to leave it at “No Default Value” as user might be using a different accounting codes (chartfield string) on different transactions.

Custom Field and Accounting Code Defaults

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

Custom Field Name	Default Value	Description	Edit Values
GL Unit	USF01	USF	Edit
↳ Oper Unit	No Default Value		Edit
↳ Fund	No Default Value		Edit
↳ Account	No Default Value		Edit
↳ Dept	No Default Value		Edit
↳ Product	No Default Value		Edit
↳ Initiative	No Default Value		Edit
↳ PC Bus Unit	No Default Value		Edit
↳ Project / Activity	No Default Value		Edit
↳ Budget Reference	No Default Value		Edit

2.8 Code Favorites tab

- Here you enter chartfield string(s) you often use for requisitions. You can add and save as many “code favorites” as you want. This is like the Requisition Default field in FAST. If you do not have any saved “code favorites” you will be prompted to enter your chart field string manually every time you submit a requisition.

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

0662104400-BUDGET	WUSF-FM Community Service Gran-BUDGET
0662104500-BUDGET	WUSF: Veterans Coming Home - F-BUDGET
0662104600-BUDGET	WUSF-FM Radio Station Grant FL-BUDGET
0662104700-BUDGET	WUSF Education Innovation Plan-BUDGET
0662104701-BUDGET	WUSF Education Innovation Plan-BUDGET
0662104800-BUDGET	WUSF-FM Community Service Gran-BUDGET
0662104900-BUDGET	WUSF StoryCorps: On Small Step-BUDGET
0662105000-BUDGET	WUSF American Homefront WUNC S-BUDGET

2.9 Click "Add"

Custom Field and Accounting Code Defaults

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

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

Accounting Codes

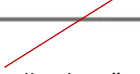
GL Unit	Oper Unit	Fund	Account	Dept	Product	Initiative	PC Bus Unit	Project / Activity	Budget Reference
no value	no value	no value	no value	no value	no value	no value	no value	no value	no value



Accounting Codes

Nickname: Default

GL Unit	Oper Unit	Fund	Account	Dept	Product	Initiative
<input type="text" value="USF01"/> <small>Select from profile values... Select from all values...</small>	<input type="text" value="TPA"/> <small>Select from all values...</small>	<input type="text" value="10000"/> <small>Select from all values...</small>	<input type="text"/> <small>Select from all values...</small>	<input type="text"/> <small>Select from all values...</small>	<input type="text"/> <small>Select from all values...</small>	<input type="text"/> <small>Select from all values...</small>



2.10 Click "Select from all values"

2.11 Type the information in the "Value" or "Description" field (if you know it) or click Search for more options

Custom Field Search

Value:

Description:

Accounting Codes

Nickname: Furniture Default

GL Unit	Oper Unit	Fund	Account	Dept	Product	Initiative
USF01 <small>Select from profile values... Select from all values...</small>	TPA <small>Select from all values...</small>	03904 <small>Select from all values...</small>	no value <small>Select from all values...</small>	025100 <small>Select from all values...</small>	000000 <small>Select from all values...</small>	0000000 <small>Select from all values...</small>

2.12 Make sure you assign a “nickname” to your code favorites. Click Save when done.

Accounting Codes ?

GL Unit	Oper Unit	Fund	Account	Dept	Product	Initiative	PC Bus Unit	Project / Activity	Budget Reference
Furniture <input type="button" value="Edit"/> <input type="button" value="Delete"/>									
USF01 USF	TPA USF TAMPA	03904 PURCHASED UTILITIES AUXILIARY	no value	025100 UTILITIES	000000 NO PRODUCT - BUDGET	0000000 No Initiative	no value	no value	no value
Health Science <input type="button" value="Edit"/> <input type="button" value="Delete"/>									
USF01 USF	HSC USF HEALTH	18300 RESEARCH F&A DISTRIBUTION	no value	615500 NEUROSCIENCES CTR FOR AGING	000000 NO PRODUCT - BUDGET	0073644 Borlongan, C.	no value	no value	no value

NOTE: DO NOT ENTER AN ACCOUNT NUMBER
Account numbers may vary depending on the Commodity Code.

2.13 Code Favorites for Check Requests & Invoices

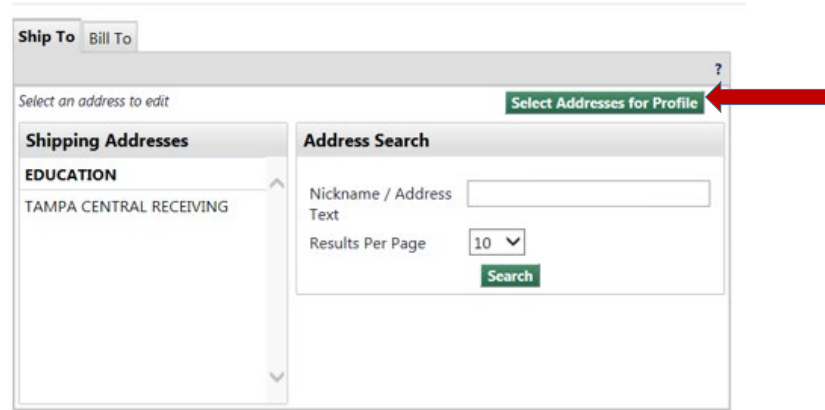
- This is intended for Payment Request Form chartfield information. You can also add and save as many “code favorites” as you want. To add more “code favorites” repeat Steps 2.9 – 2.12.

3 Default Addresses

- Shipping Address

3.1 Click Select Addresses for Profile

Default Addresses

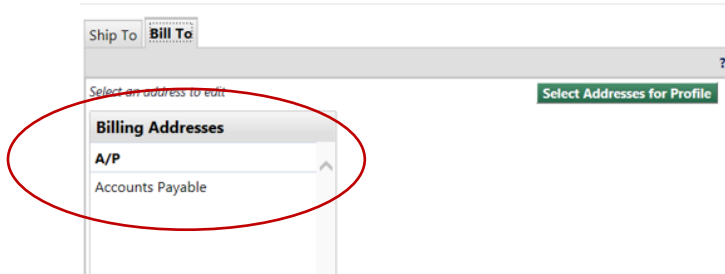


NOTE: For addresses outside the campus us “One Time Address”

- Billing Address

NOTE: This is always defaulted to Payment Services

Default Addresses



4

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.

NOTE: A Shopper can be any USF user without a FAST role. They can only order using the Punch-out Suppliers. They cannot submit the requisition (Place Order) to convert to a Purchase Order.

4.1 Click on Add Assignee



4.2 If you know your department Requestor’s name enter it in the field below and click Search.

4.3 When you find your Requestor’s name click “Select”

User Search

Last Name [?]


First Name [?]

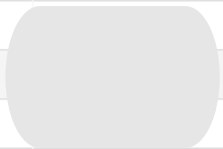

User Name [?]

Email [?]

Role [?] ▼

Results Per Page ▼

Search 

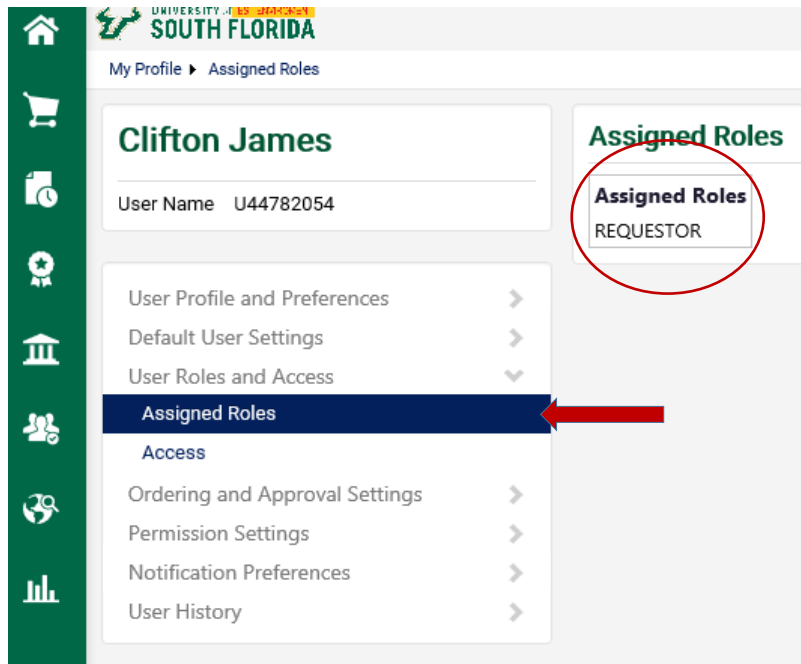
Allen, Della		tsmusf+sq@gmail.com	+1 813-974-8169	[select]
Allen, Demeda		tsmusf+sq@gmail.com	+1 813-974-7738	[select] 
Allen, Erykah		dontreply@gmail.com	+1 813-974-5748	[select]

5

User Roles and Access

- This is where you find your assigned Role. Roles are set-up in 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



UNIVERSITY OF SOUTH FLORIDA

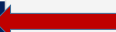
My Profile ▶ Assigned Roles

Clifton James

User Name U44782054

Assigned Roles

Assigned Roles
REQUESTOR

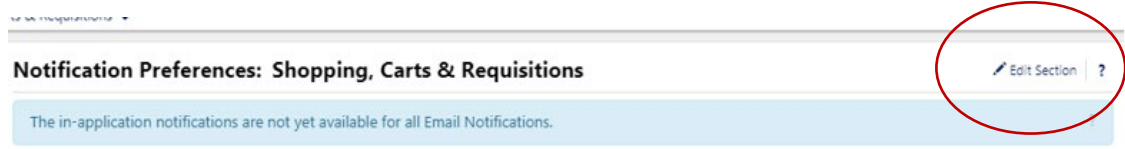
User Profile and Preferences >
 Default User Settings >
 User Roles and Access >
Assigned Roles 
 Access >
 Ordering and Approval Settings >
 Permission Settings >
 Notification Preferences >
 User History >

6

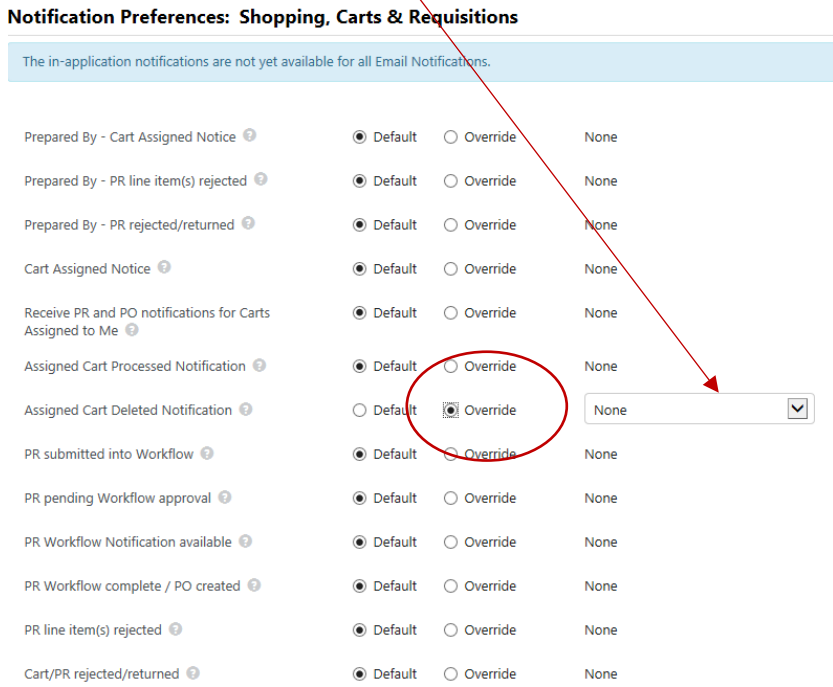
Notification Preferences

NOTE: Notification Preferences are 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).

6.1 You can edit Notification Preferences by selecting a field and click on “Edit Section”

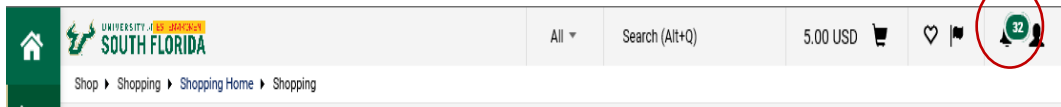


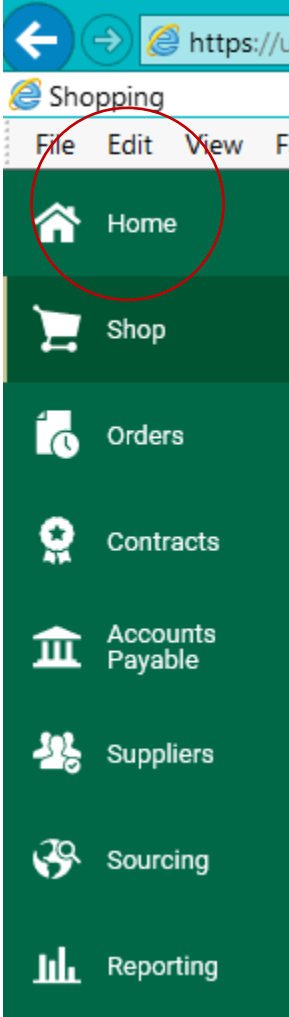
6.1 Select “Override”. A drop down menu will appear and will give you the option to choose between None; Email; Notification; or Email & Notification



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



7	<p>To go back to your Dashboard click Home from the fly-out menu</p>  <p>The screenshot shows a web browser window with a dark green fly-out menu. The menu items are: Home (with a house icon), Shop (with a shopping cart icon), Orders (with a document and clock icon), Contracts (with a star and ribbon icon), Accounts Payable (with a building icon), Suppliers (with a group of people icon), Sourcing (with a globe and magnifying glass icon), and Reporting (with a bar chart icon). The 'Home' option is circled in red.</p>