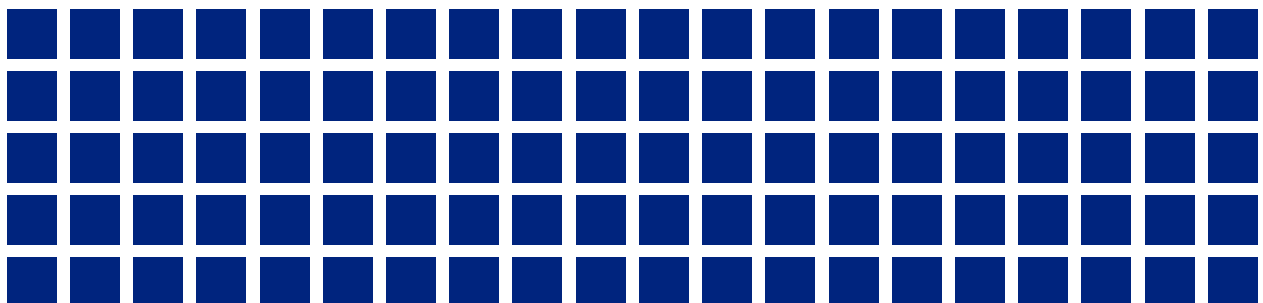




Tigerbuy Training: Updating Your Profile

THE UNIVERSITY OF
MEMPHIS[®]



Updating your Profile

Each user in the system has a unique profile which contains information specific to that user, including identification, purchasing abilities, and site accessibility. The purpose of this lesson is to better understand what information is captured in the profile and when it should be updated.

User Profile

Users have the ability to access their own profile. Selecting the profile navigation menu provides access to the user profile screen. The screen is also accessible via the profile link in the application header.

The user profile screens are grouped into tabs, each with its own set of sub-tabs, for easy viewing. Information relating to the user's settings, purchasing abilities, and permissions are all handled from this screen.

Below are a few examples of what can be captured in the user profile:

- » Roles and permissions (access to site)
- » Financial approver assignments
- » Custom field values
- » E-mail Notifications
- » Bill To and Ship To addresses

Depending on the permissions granted, the individual user profile screens may be read-only or they may be editable. Profile information is set up by an administrator and users have edit capability to many profile options.

View and Update the Profile

Once logged into Tigerbuy, there are a few methods of accessing your profile:

- » The first time that a user logs into the system, the profile displays.
- » Click on the profile link in the upper left-hand corner to the right of your username.
- » Select the profile navigation tab, if the tab is not visible select Profile from the navigation drop-down menu.

User Settings Tab Settings

User Identification Screen

Once the profile is accessed, the User Identification screen displays. The User Identification screen is a sub-tab located under the User Settings top-level tab.

The screenshot shows the 'My Profile' page in the Tigerbuy system. At the top, there is a navigation bar with 'home', 'profile', 'my favorites', 'approvals', 'settlement', and 'more >>'. Below this is a sub-navigation bar with 'User Settings', 'Purchasing', 'Permissions', and 'History'. The 'User Identification' section is active, showing a form with the following fields: First Name (Jane), Last Name (Doe), Phone Number (1 901 678-5696), E-mail Address (jdoe@memphis.edu), Department (blank), Position (blank), and User Name (jdoe). A 'Save' button is located at the bottom of the form.

Check that your first name, last name, phone number (including country code and area code) and e-mail address are correct. The University is not using the Department or Position fields at this time. Those fields are to remain blank.

After making updates select the Save button to save your changes.

Personal Settings Screen

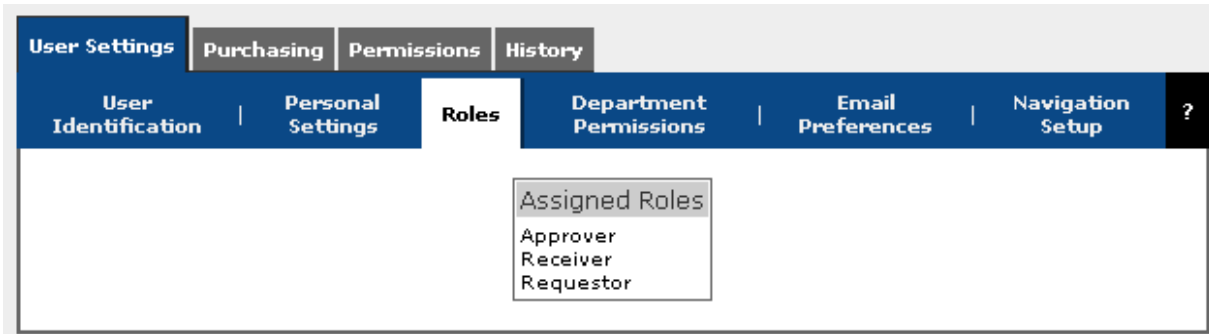
The screenshot shows the 'Personal Settings' section of the profile page. It features three dropdown menus: Country (set to United States), Time Zone (set to CDT/CST - Central Standard Time), and Color Theme (set to SciQuest New). A 'Save' button is positioned at the bottom of the form.

The Personal Settings screen displays the country, time-zone and color theme settings.

- » The country field should be set to United States.
- » The Time Zone field should be set to CDT/CST – Central Standard Time.
- » You may choose any color theme you prefer.

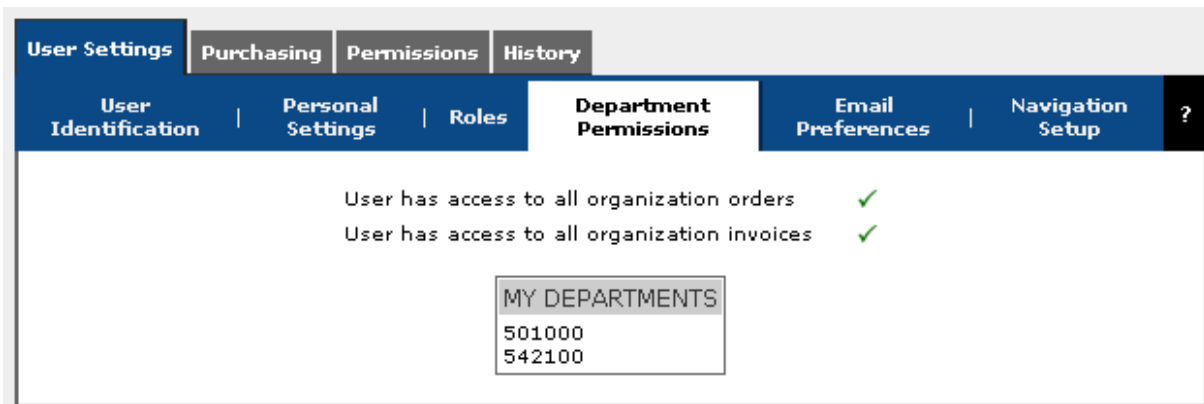
After making updates select the Save button to save your changes.

Roles



The Roles screen displays your assigned role or roles. Most Tigerbuy users will have Requestor, Receiver and/or Approver roles.

Department Permissions Screen



The Department Permissions screen displays the organization codes to which you have access. Your access to organization codes is established by the security and access you have been granted through Banner Finance. Contact Business and Finance Support Services at bfsupport@memphis.edu if you believe you are missing codes to which you need access.

E-mail Preferences Screen

New Price File pending review	<input type="checkbox"/>
PR submitted into Workflow	<input type="checkbox"/>
PR pending Workflow approval	<input checked="" type="checkbox"/>
PR Workflow Notification available	<input type="checkbox"/>
PR line item(s) rejected	<input type="checkbox"/>
PR rejected	<input checked="" type="checkbox"/>
PR Workflow complete / PO created	<input type="checkbox"/>
PO submitted into Workflow	<input type="checkbox"/>
PO pending Workflow approval	<input type="checkbox"/>
PO Workflow Notification available	<input type="checkbox"/>
PO line item(s) rejected	<input type="checkbox"/>
PO rejected	<input checked="" type="checkbox"/>
PO Workflow complete	<input type="checkbox"/>
PO Requires Receipt notice	<input type="checkbox"/>
PO sent to supplier	<input type="checkbox"/>
PO line item Backorder notice	<input type="checkbox"/>
PO line item Cancellation notice	<input type="checkbox"/>
Search Result Export Confirmation	<input type="checkbox"/>
PO Line Item Ship Notice	<input type="checkbox"/>
Cart Assigned Notice	<input type="checkbox"/>

The E-mail Preferences screen allows you to select when you would like the system to e-mail you for certain actions. For example, you may choose to have the system notify you if your purchase requisition fails for some reason, or if you are an Approver, you may choose to have the system notify you that there are requisitions pending your approval.

You may select as many of the e-mail options as you wish. After making updates select the Save button to save your changes.

Navigation Setup Screen

Please select the desired top-level navigation using the drop down lists provided below. Your selections will be ordered in the order displayed below. Any options that are not selected will fall under an "Other" drop down list in the navigation bar itself.

insert insert insert insert insert insert

home my favorites history approvals settlement

remove remove remove remove remove

Update Restore & Update to Defaults

The Navigation Setup screen allows you to customize which navigation tabs appear on your main navigation bar. Items that are not readily accessible on the navigation bar will appear in the navigation bar drop-down menu.

Purchasing Tab Settings

User Settings			
Purchasing			
Permissions			
History			
Custom Fields			
Purchasing/ Approval Limits			
Payment Options			
Addresses			
Product Views			
Punchout Access			
Cart Assignees			
Header (int.)			
Codes			
Custom Field Name	Default Value	Description	Edit Values
Account	74500	Supplies	<input type="button" value="Edit"/>
Activity	No Default Value		<input type="button" value="Edit"/>
Chart	U	University of Memphis	<input type="button" value="Edit"/>
Fund	110001	Undesignated E and G	<input type="button" value="Edit"/>
Location	No Default Value		<input type="button" value="Edit"/>
Organization	542000	Procurement Services	<input type="button" value="Edit"/>
Program	4650	Gen Admin and Logistical Services	<input type="button" value="Edit"/>

The Purchasing settings allow you to update your personal FOAPAL lists, view and update your *Ship To* address and view other pertinent purchasing information.

Custom Fields Screens

The first screen, Custom Fields has two sub-tabs associated with it: Header and Codes. The Header screen is used by the Procurement Services Office to manage custom fields.

The Codes screen displays and allows you to manage your Banner FOAPAL information.

The ability to customize or create your own personal lists of FOAPAL information is provided as a convenience. When you complete a purchase requisition there is an accounting area where your FOAPAL information is required. If you have created your own personal lists of codes in your profile you will not have to search through the University’s entire codes directory to find the codes you use every day, you simple choose codes from your profile.

When a code has a default value associated with it, that value is automatically populated in the associated field on your purchase requisition. Even though a value is populated on the purchase requisition, you can always change it to something else. The ability to set a default value is merely another convenience. Codes that are highlighted yellow do not have a default values assigned.

Add/Edit Codes

To add or edit codes in your Profile, select the **Edit** button to the right of the FOAPAL element you wish to update.

To add a code value to your profile, select the **Create New Value** button.

Header (int.)
Codes
?

Custom Field Name	Default Value	Description	Edit Values
Organization	542000	Procurement Services	<input type="button" value="Edit"/>

✎ Edit Values

Value	Description
542000	Procurement Services

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

The Search for Value box appears on the right. There are two text fields to which you may enter search criteria. The Value field is used to enter all or part of the code value (i.e. 5, 50, 501, etc.). The description field is used to enter all or part of a code's text description (i.e. Eng, English, etc.). The system is not case sensitive. The Results per Page drop-down box allows you to choose how many results you wish to appear on the screen when you perform a search. Once you enter search criteria select the **Search** button to perform the search.

User Settings
Purchasing
Permissions
History

Custom Fields
Purchasing/Approval Limits
Payment Options
Addresses
Product Views
Punchout Access
Cart Assignees
?

Header (int.)
Codes
?

Custom Field Name	Default Value	Description	Edit Values
Organization	542000	Procurement Services	<input type="button" value="Edit"/>

✎ Edit Values

Value	Description
542000	Procurement Services

Search For Value

Field Name Organization

Value

Description

Results per Page 5

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

Any results found by the system will be displayed. Click on the checkbox next to the value(s) you wish to add to your profile and then select the **Add Values** button. You may add as many values as you like to your profile.

The screenshot shows the 'Codes' sub-tab in the 'Header (int.)' section. It features a table with columns: Custom Field Name, Default Value, Description, and Edit Values. The table contains one entry: Organization (542000) with Description Procurement Services. Below the table is an 'Edit Values' section with a 'Close' button and a 'Create New Value' button. A search results panel titled 'Search Results : Org Values' is open, showing a list of values with checkboxes. The values are: 500000 (VP Business and Finance), 500100 (Asst to VP Business and Finance), 501000 (Business & Finance Support Servs_te), 502000 (Conference and Planning Operations), and 503000 (Police Services). There are 'Add Values' and 'Back to Search' buttons at the bottom of the search results. A note at the bottom states: '* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.'

The value that is displayed across the top of the screen and in bold in the values box is your default value. To create or change a default value click on either the value code or value description to display the **Edit Existing Values** options box. To assign the value as the default, select the **Default checkbox** and click on the **Save** button to save your changes. You may only assign one value as default.

This screenshot shows the same 'Codes' screen as above, but with the 'Edit Existing Value' dialog box open. The dialog box has fields for Value (501000), Description (Business & Finance Support Servs_te), and a Default checkbox (unchecked). The Status is 'active'. There are 'Save' and 'Remove' buttons at the bottom. The table in the background now has two entries: 501000 (Business & Finance Support Servs_te) and 542000 (Procurement Services). The value 542000 is bolded in the table. The note at the bottom is the same as in the previous screenshot.

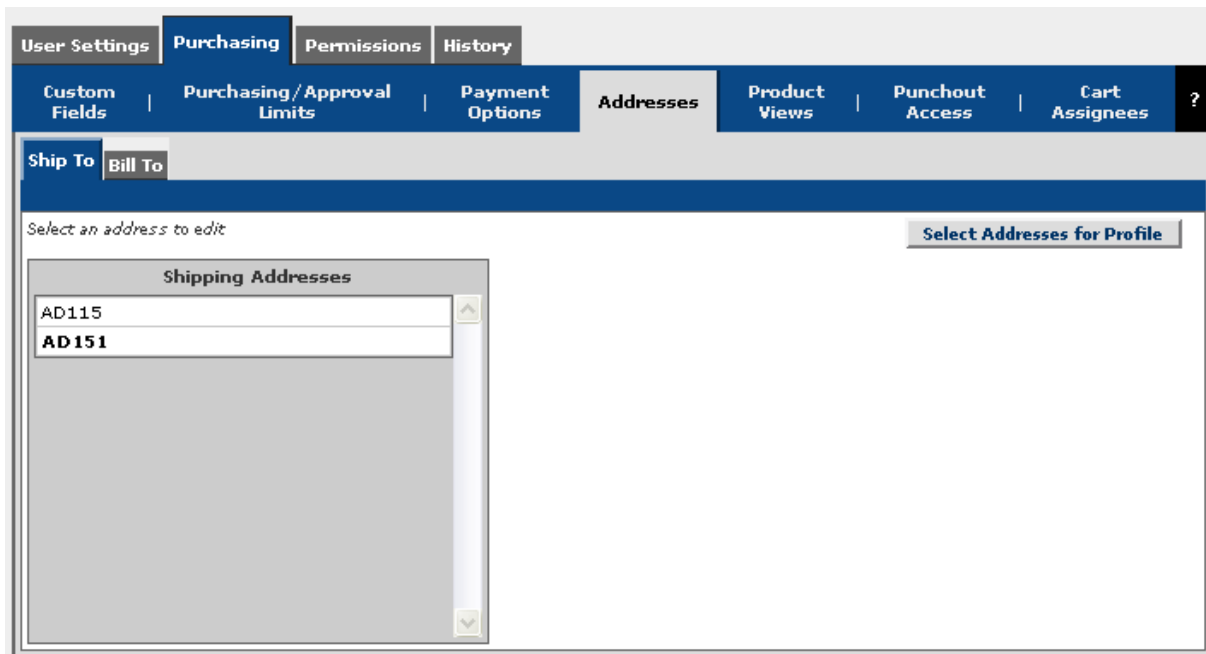
To return to the custom values screen select either the **Close** button in the right corner or click on the **Codes** sub-tab.

The **Purchasing/Approval Limits** screen is being used by Procurement Services at this time to establish a purchasing card transaction limit for each cardholder.

The **Payment Options** screen displays any Purchasing Card information you may have. For purchasing card cardholders to utilize their p-cards within Tigerbuy, a one-time request should be sent to Procurement Services. Then, Procurement Services will add the p-card information to your profile.

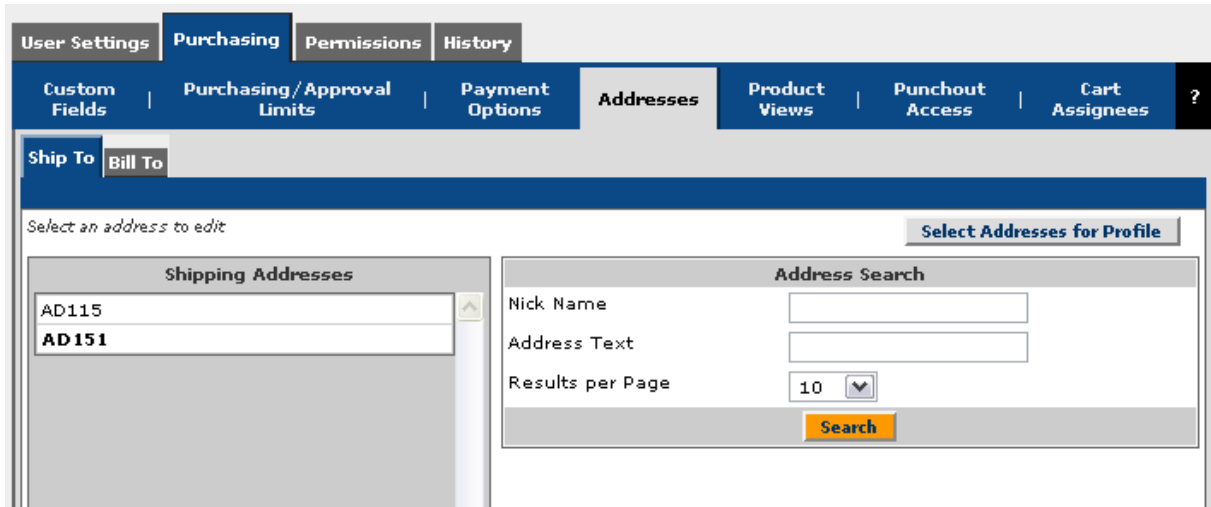
Addresses Screen

The addresses screen has two address options: Ship To and Bill To. To add a Ship To address to your profile select the button on the right **Select Addresses for Profile**. The Address Search box will appear.



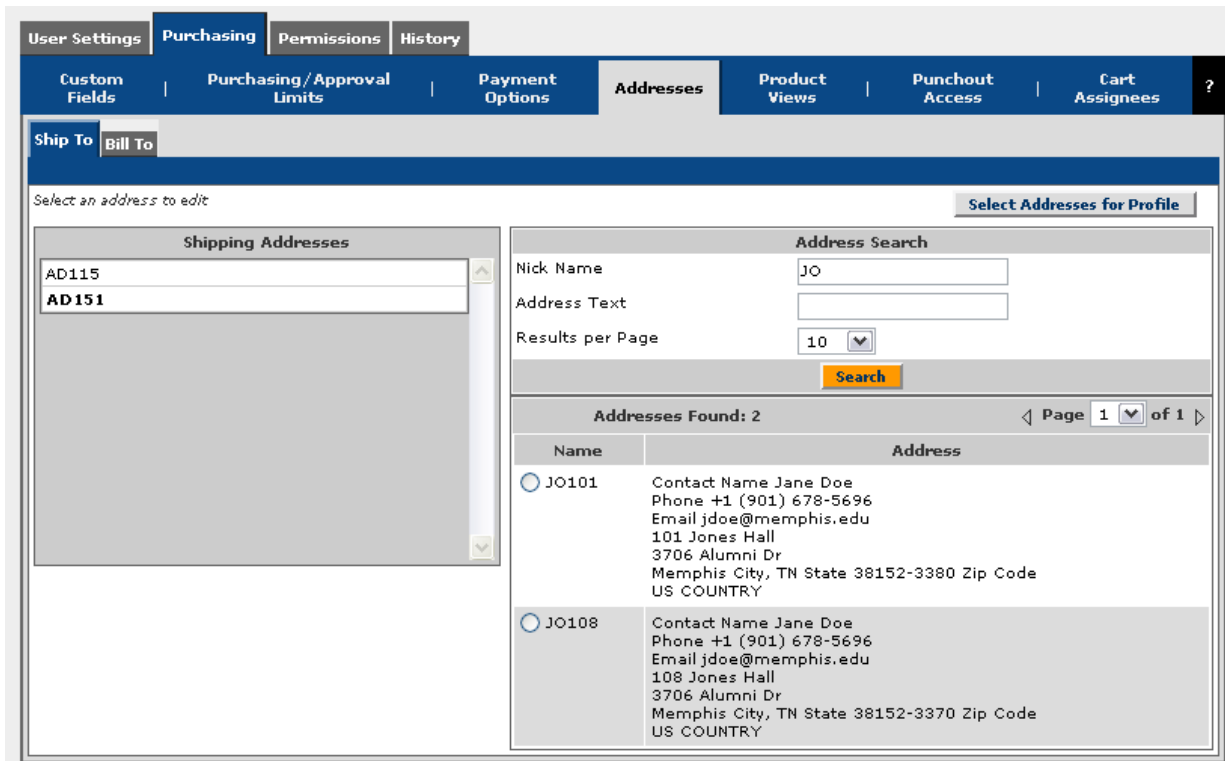
The screenshot shows the Tigerbuy user interface for the 'Addresses' section. The top navigation bar includes 'User Settings', 'Purchasing', 'Permissions', and 'History'. Below this, a secondary navigation bar contains 'Custom Fields', 'Purchasing/Approval Limits', 'Payment Options', 'Addresses', 'Product Views', 'Punchout Access', and 'Cart Assignees'. The 'Addresses' section is active, and the 'Ship To' tab is selected. A 'Select Addresses for Profile' button is visible on the right. The main content area displays a 'Shipping Addresses' list with two entries: 'AD115' and 'AD151'. The 'AD151' entry is highlighted. A search box and a 'Search' button are also present.

The Nick Name field is used to enter the abbreviated building name for your building address (i.e. AD for Administration Building, WT for Wilder Tower, etc.). The Address Text field is used to enter all or part of the address description. The Results per Page drop-down box allows you to choose how many results you wish to appear on the screen when you perform a search. Once you enter search criteria select the **Search** button to perform the search.



Any results found will appear on the screen. Your name and contact information are automatically populated for all the possible rooms that meet your selection criteria, regardless of whether you actually work in those rooms.

Select the radio button next to the address you wish to add to profile. The screen will refresh and display the room information upon which you may click on the **Save** button to save your changes.



Ship To **Bill To**

Select an address to edit

Select Addresses for Profile Delete Address

Shipping Addresses	Edit Selected Address
AD115	Nickname: JO101
AD151	Default: <input type="checkbox"/>
	Current Default Address: AD151
	ADDRESS
	Contact Name: Jane Doe
	Phone: +1 (901) 678-5696
	Email: jdoe@memphis.edu
	Address Line 1: 101 Jones Hall
	Address Line 2: 3706 Alumni Dr
	City: Memphis
	State: TN
	Zip Code: 38152-3380
	Country: United States
	Save

The Bill To tab should have one address associated with it named **Memphis Billto**. If you do not see this address, click on the button on the right **Select Addresses for Profile**.

User Settings **Purchasing** Permissions History

Custom Fields | Purchasing/Approval Limits | Payment Options | **Addresses** | Product Views | Punchout Access | Cart Assignees ?

Ship To **Bill To**

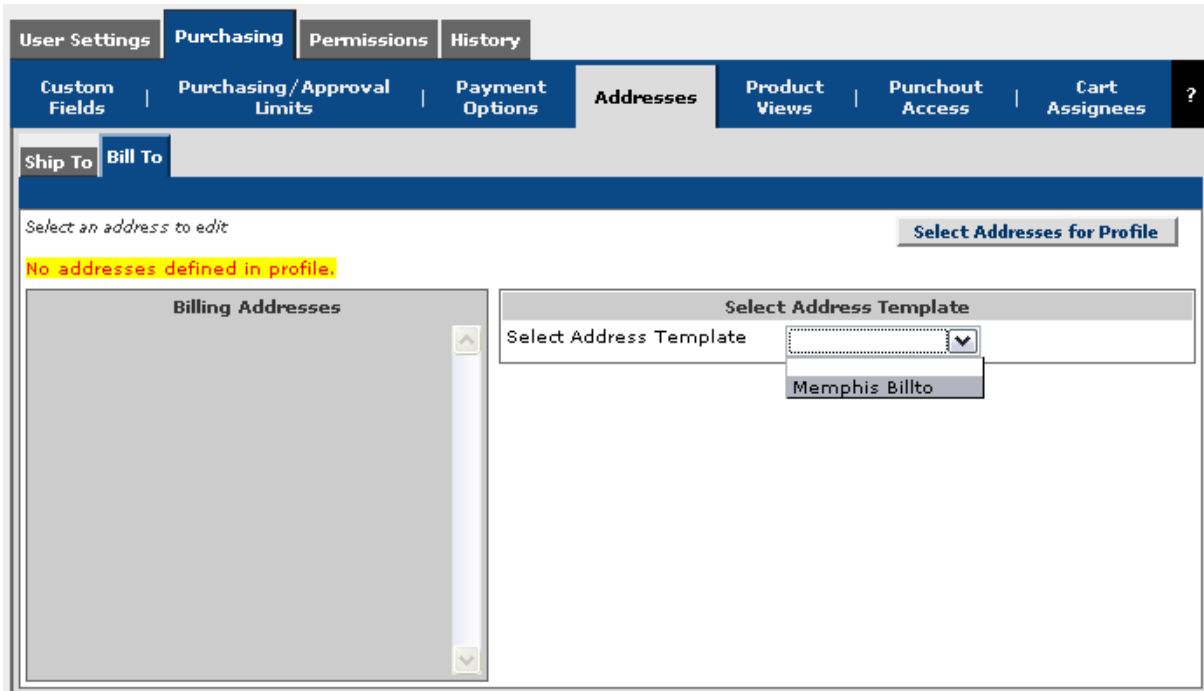
Select an address to edit

Select Addresses for Profile

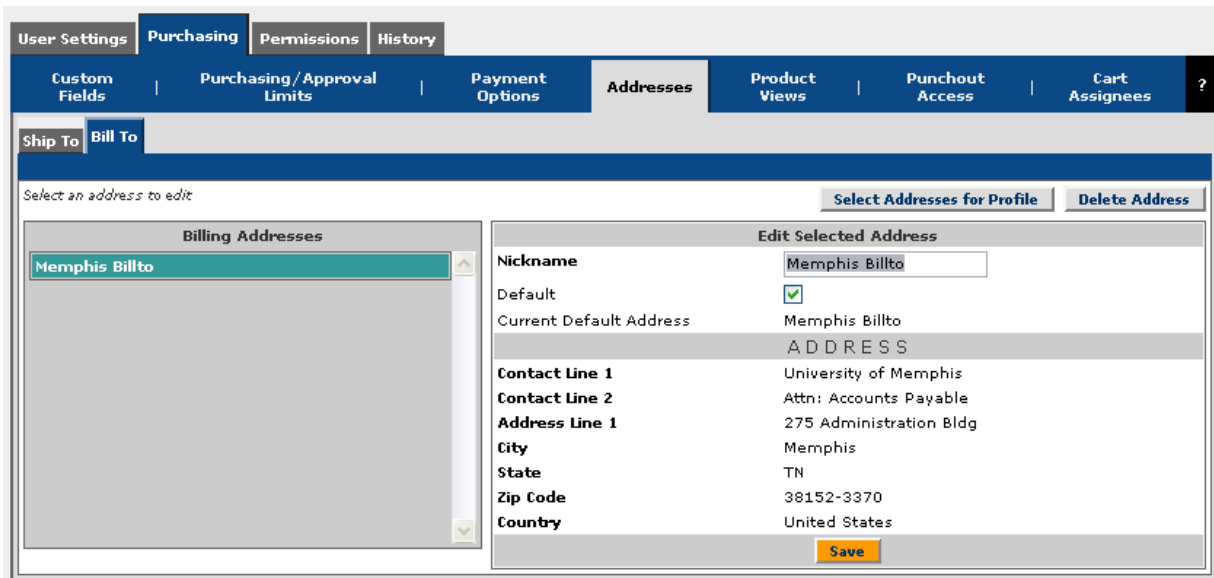
No addresses defined in profile.

Billing Addresses

In the Select Address Template drop-down box select **Memphis Billto**.



Select the default check box, when the screen refreshes, click the **Save** button to save the address in your profile.



The **Product Views** screen provides a read-only list of product view(s) assigned to you. Product views are used to control what suppliers and types of products can be viewed.

The **Punch-out Access** screen provides a read-only list of suppliers whose website can be accessed directly from your Tigerbuy application.

The University is not using the **Cart Assignees** screen at this time.

Permissions Tab Settings

Permissions determine what functions are available to you, including what navigation tabs and screens are viewable and editable. When a role is assigned to you, such as Requestor, default permissions are automatically given, but can be overridden by an administrator if necessary.

The Permissions tab contains numerous sub-tabs listing the available permissions, along with which permissions are enabled. This information is defaulted from the role-level.

History Tab

The history tab contains an audit or record of all changes made to your profile.