tigerbuy

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

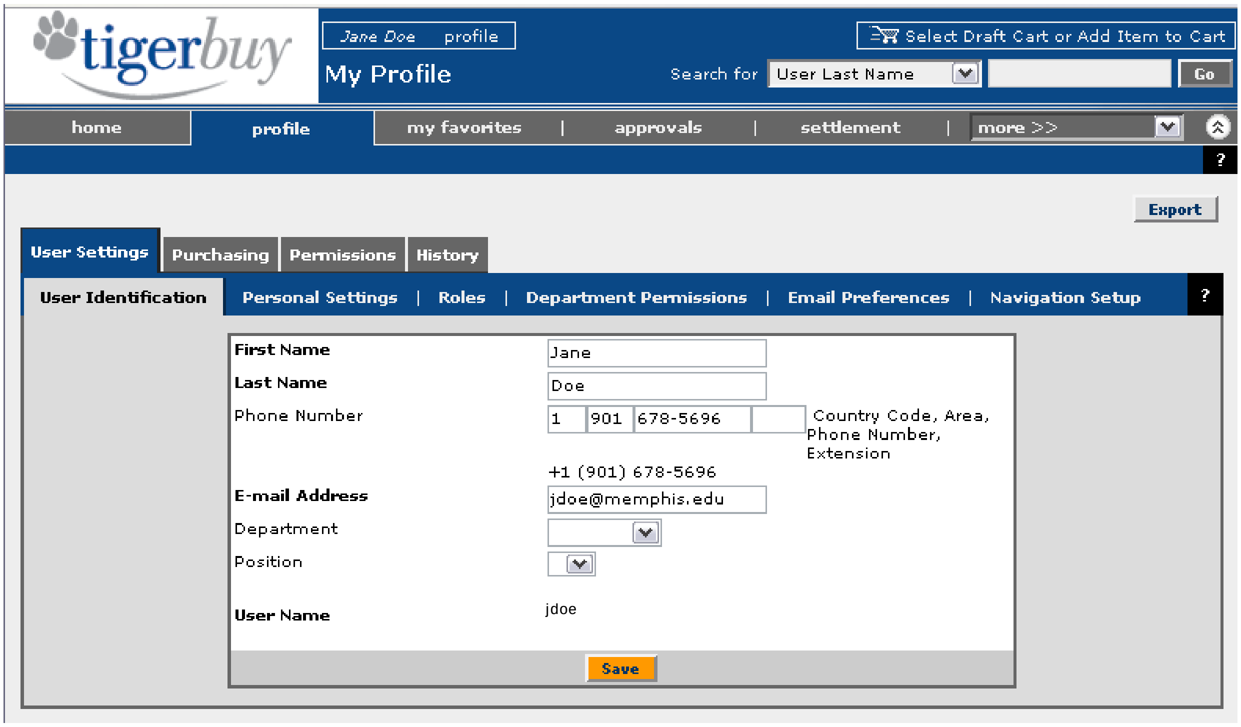
Once logged into Tigerbuy, there are a few methods of accessing your profile:

- 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

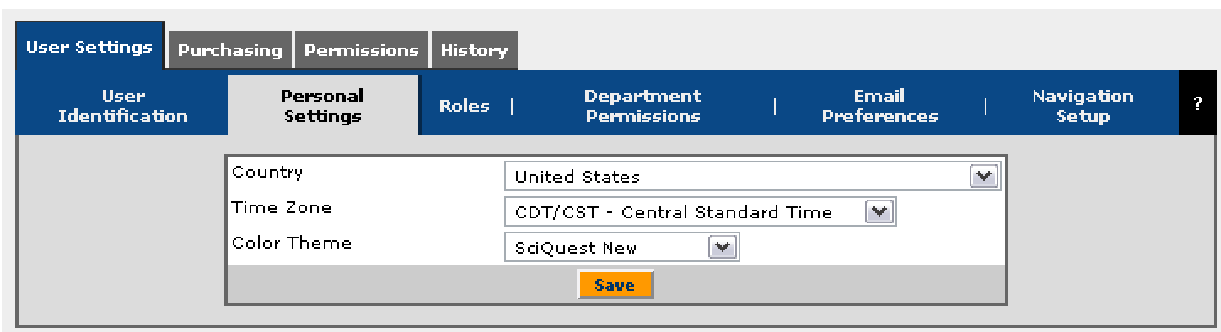
Once the profile is accessed, the User Identification screen displays. The User Identification screen is a sub-tab located under the User Settings top-level tab.



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

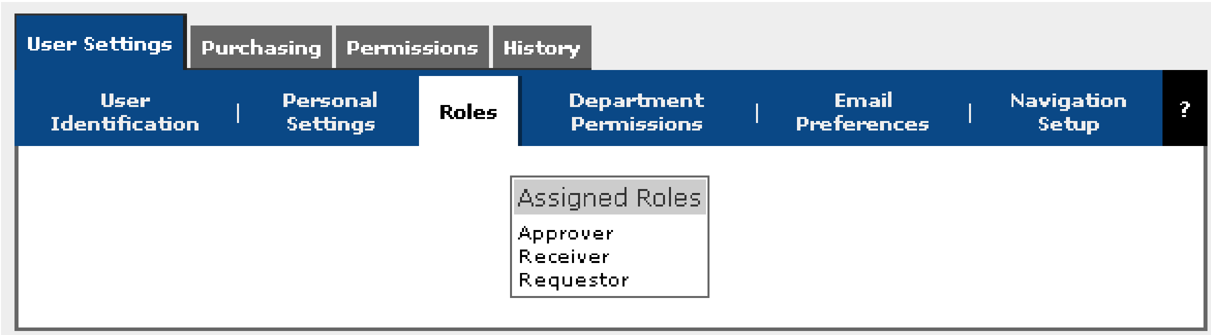


The Personal Settings screen displays the country, time-zone and color theme settings.

- » 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.

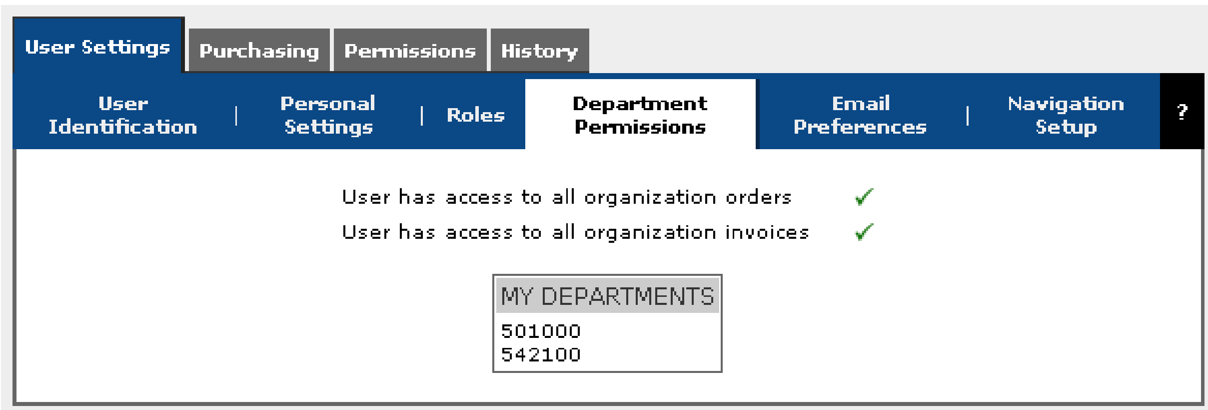
After making updates select the Save button to save your changes.

Roles



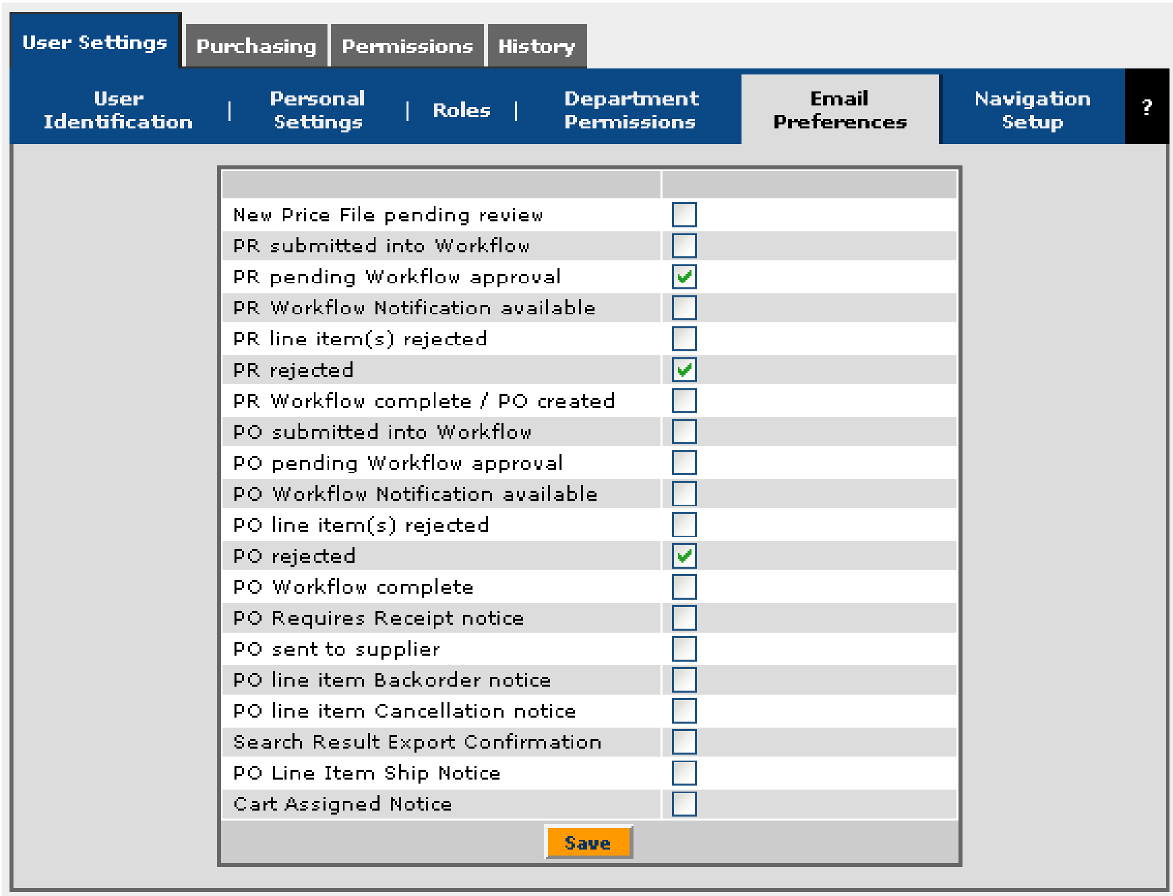
The Roles screen displays your assigned role or roles. Most Tigerbuy users will have Requestor, Receiver and/or Approver roles.

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.

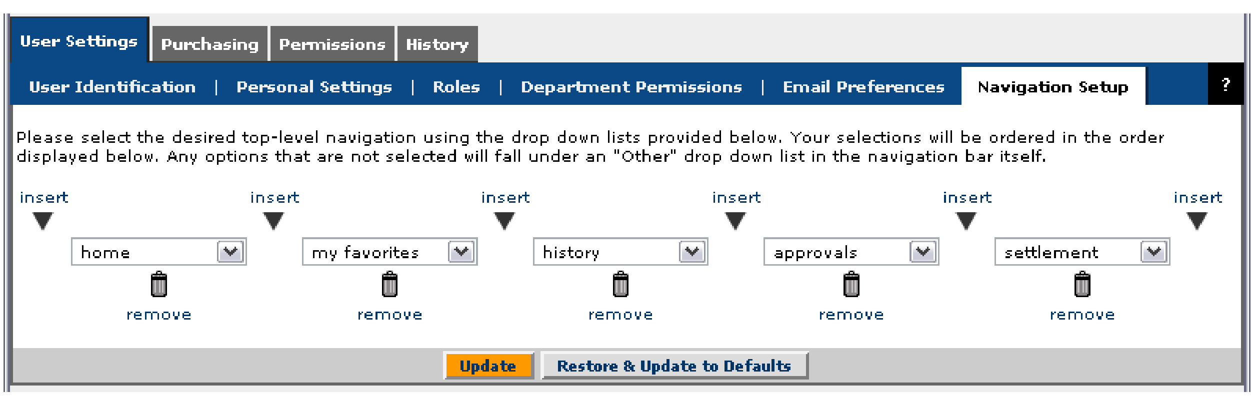
E-mail Preferences Screen



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.

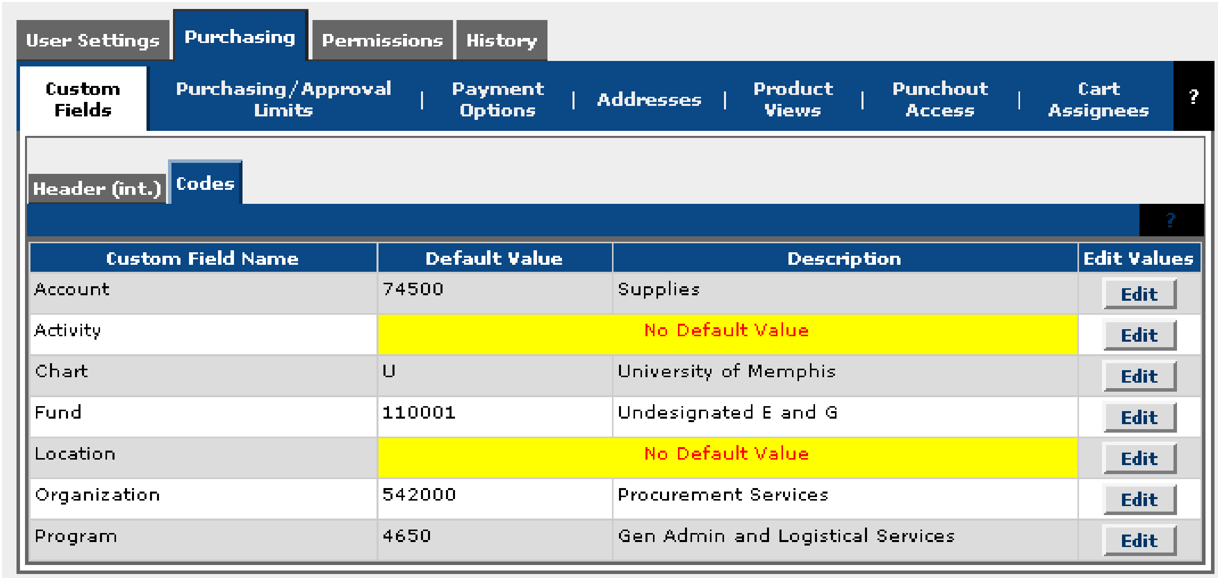
You may select as many of the e-mail options as you wish. After making updates select the Save button to save your changes.

Navigation Setup Screen



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



Custom Field Name	Default Value	Description	Edit Values
Account	74500	Supplies	Edit
Activity	No Default Value		Edit
Chart	U	University of Memphis	Edit
Fund	110001	Undesignated E and G	Edit
Location	No Default Value		Edit
Organization	542000	Procurement Services	Edit
Program	4650	Gen Admin and Logistical Services	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.

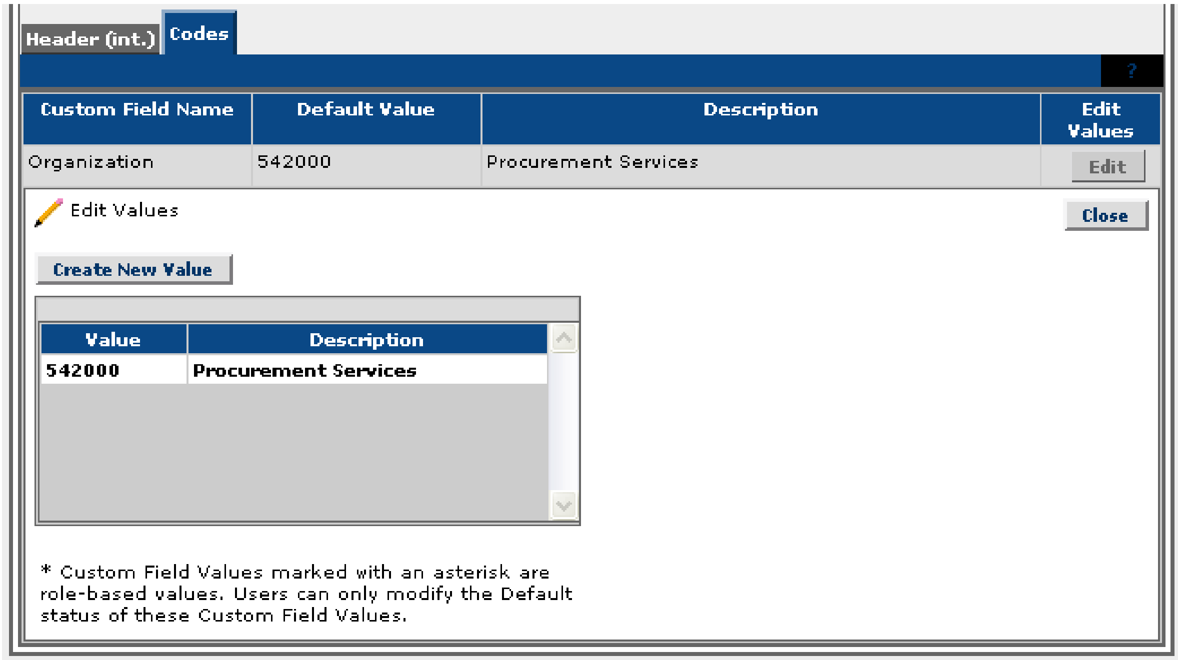
The ability to customize or create your own personal lists of FOAPAL information is provided as a convenience. When you complete a purchase requisition there is an accounting area where your FOAPAL information is required. If you have created your own personal lists of codes in your profile you will 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.

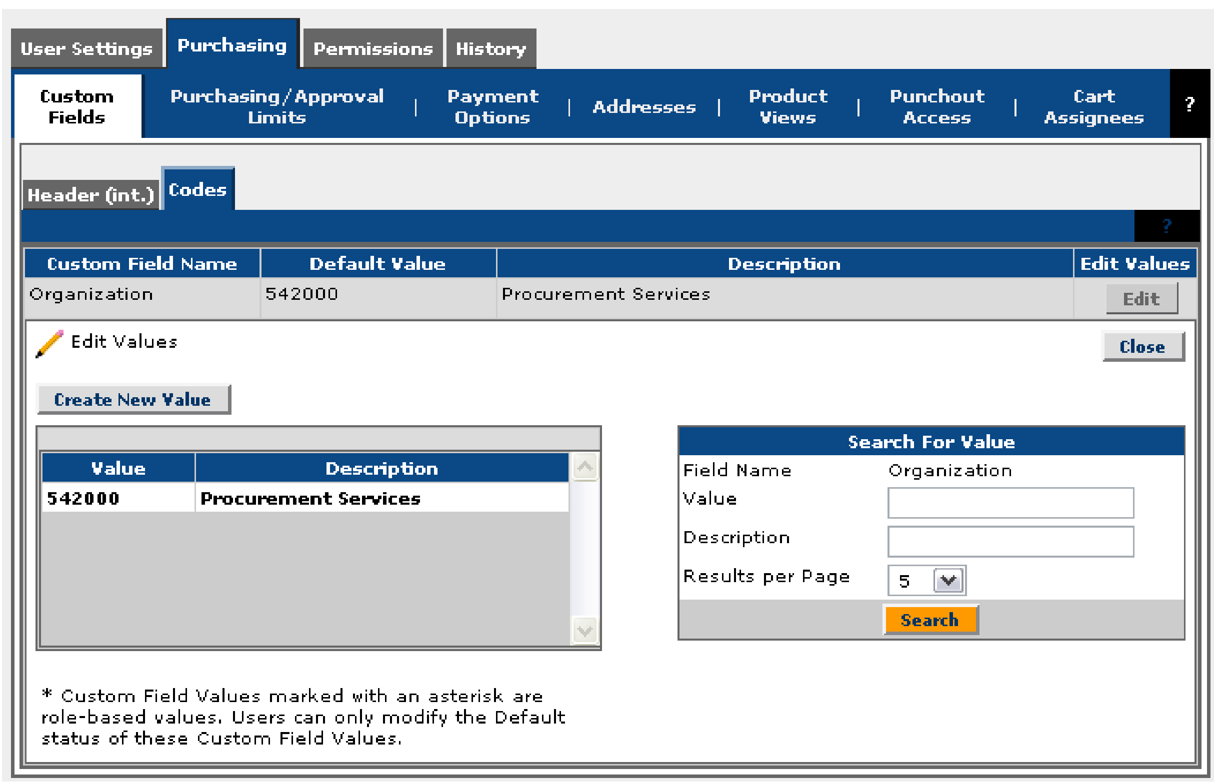
Add/Edit Codes

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

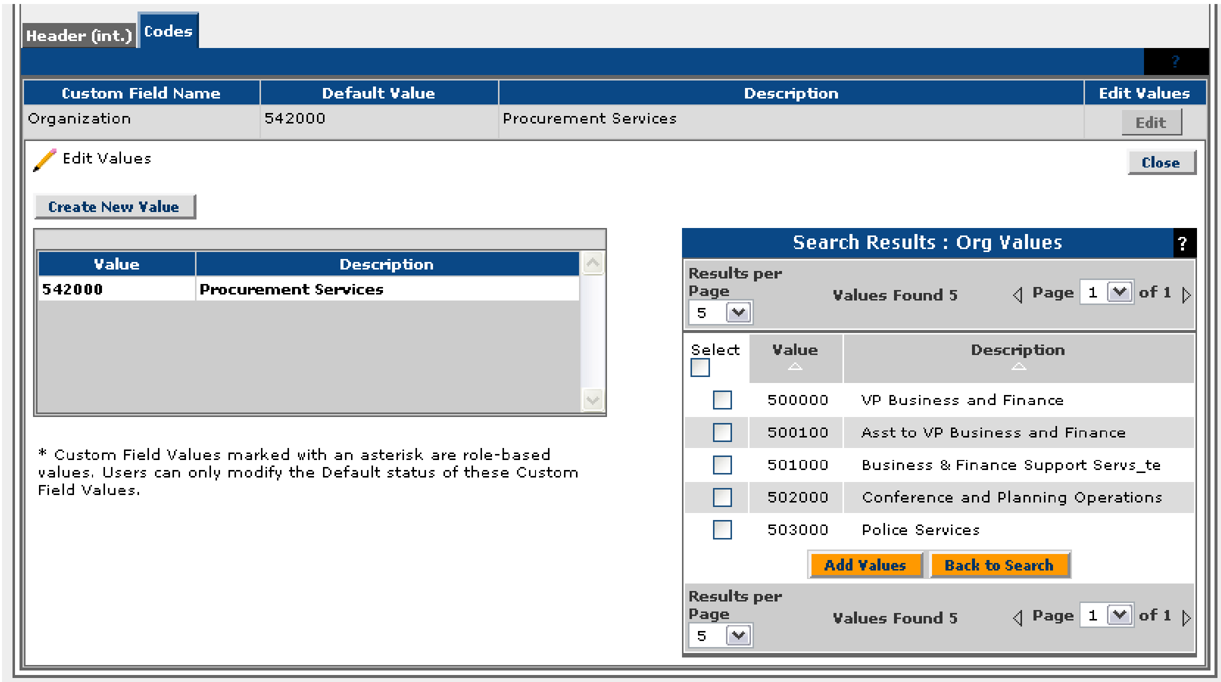
To add a code value to your profile, select the **Create New Value** button.



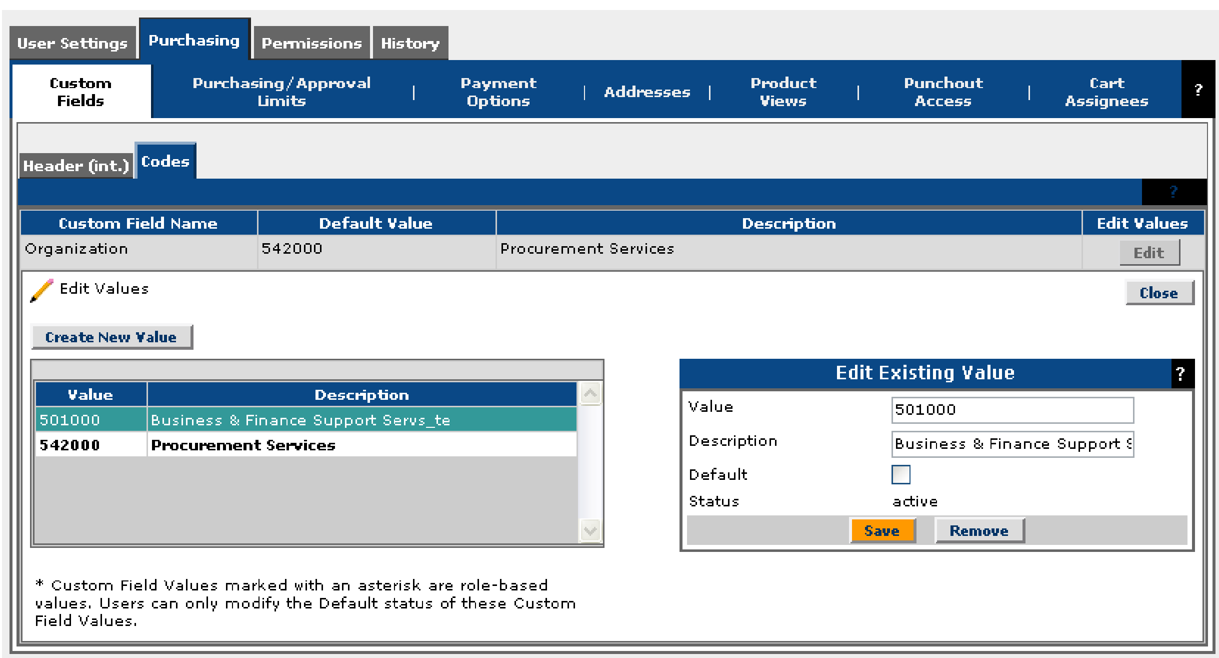
The Search for Value box appears on the right. There are two text fields to which you may enter search criteria. The Value field is used to enter all or part of the code value (i.e. 5, 50, 501, etc.). The description field is used to enter all or part of a code's text description (i.e. Eng, English, 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.



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 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.



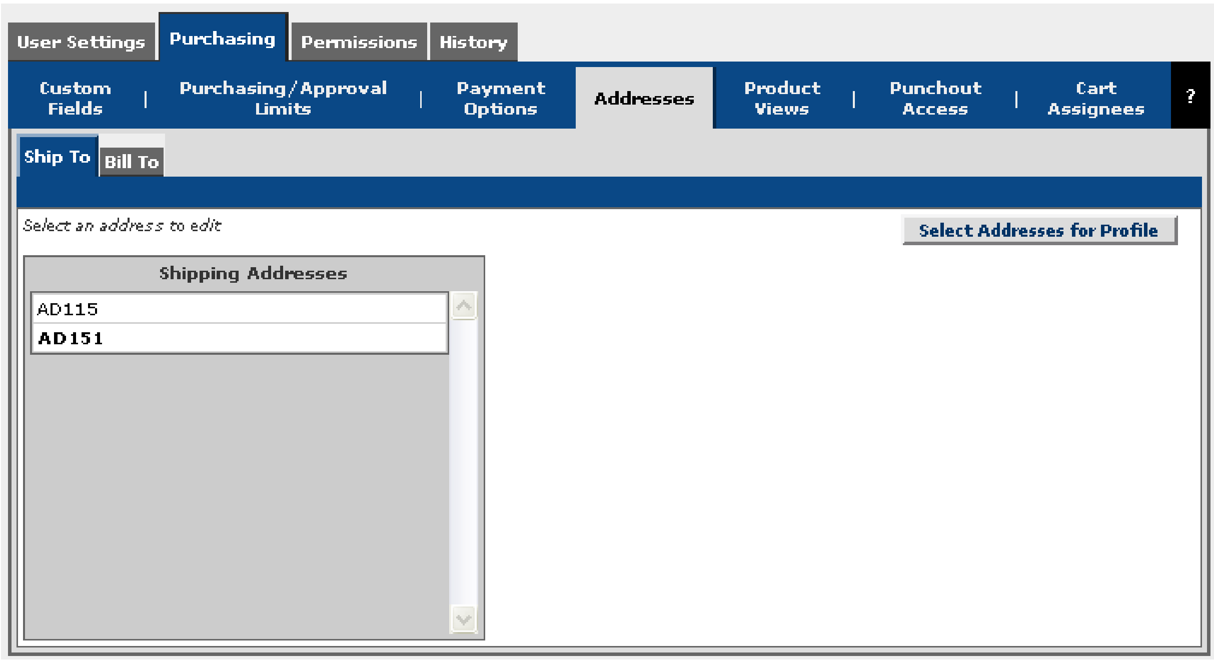
To return to the custom values screen select either the **Close** button in the right corner or click on the **Codes** sub-tab.

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

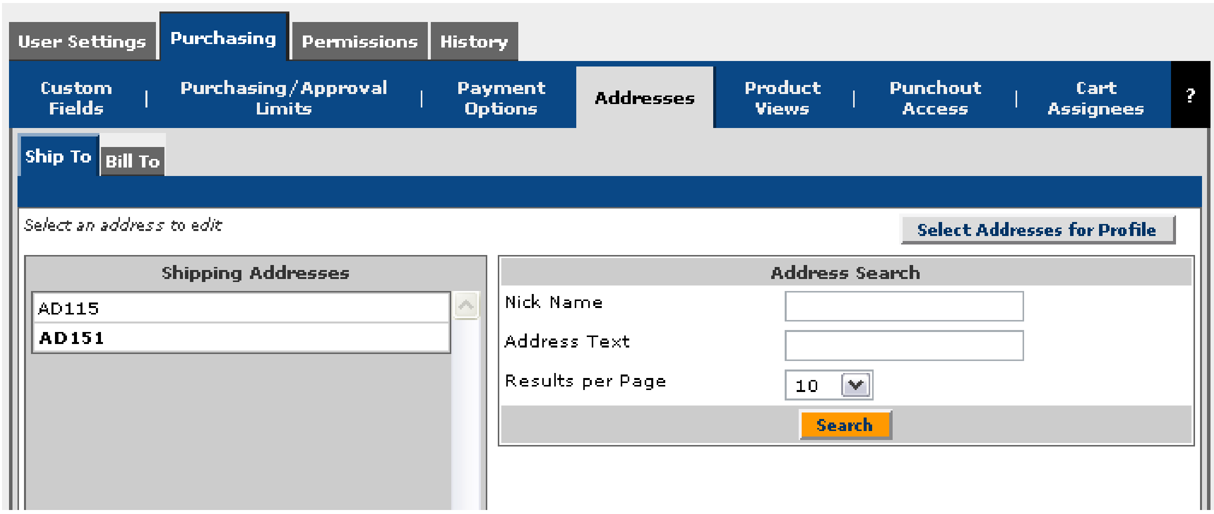
The **Payment Options** screen displays any Purchasing Card information you may have. For purchasing card cardholders to utilize their p-cards within Tigerbuy, a one-time request should be sent to Procurement Services. Then, Procurement Services will add the p-card information to your profile.

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.

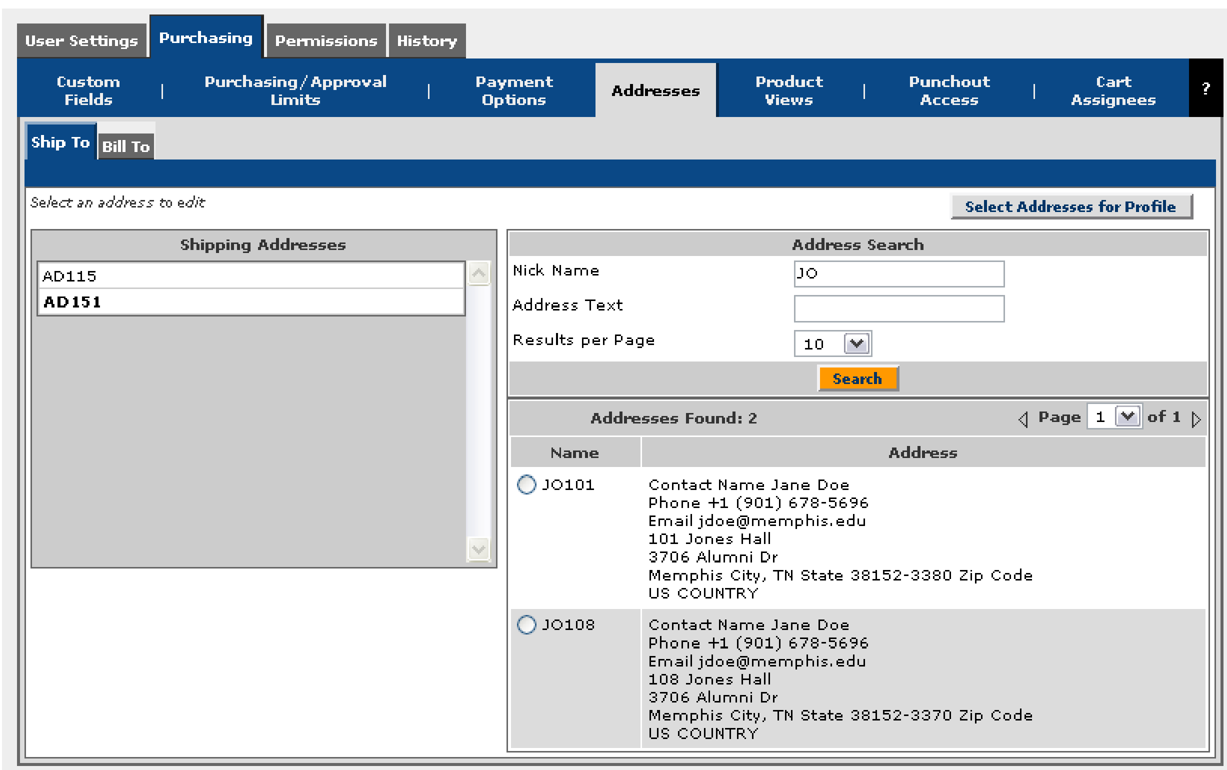


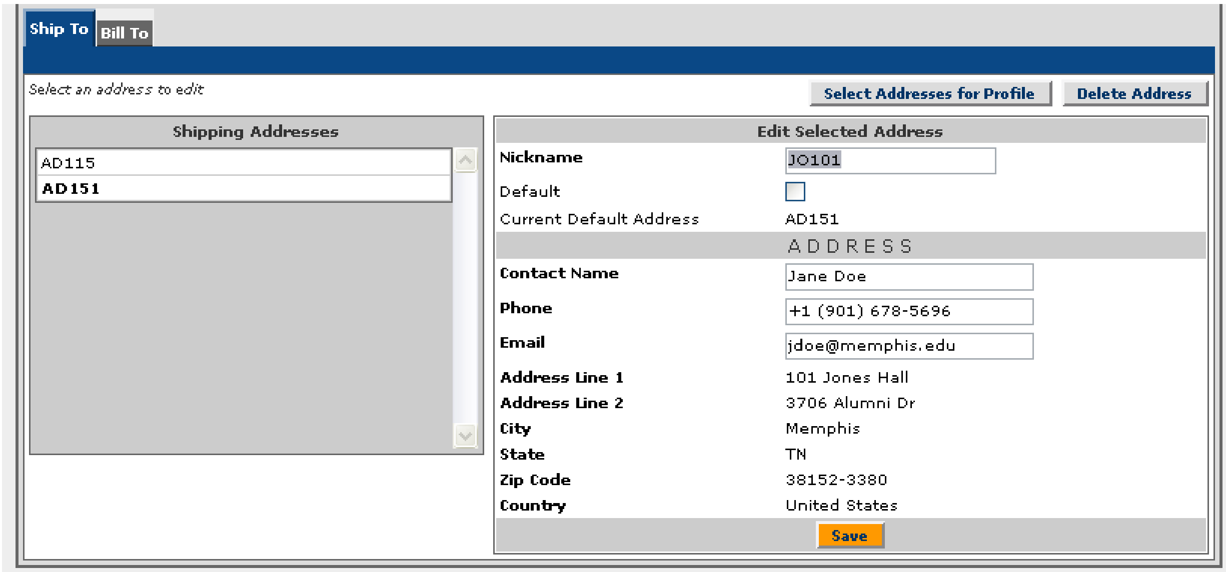
The Nick Name field is used to enter the abbreviated building name for your building address (i.e. AD for Administration Building, WT for Wilder Tower, etc.). The Address Text field is used to enter all or part of the address description. The Results per Page drop-down box allows you to choose how many 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.



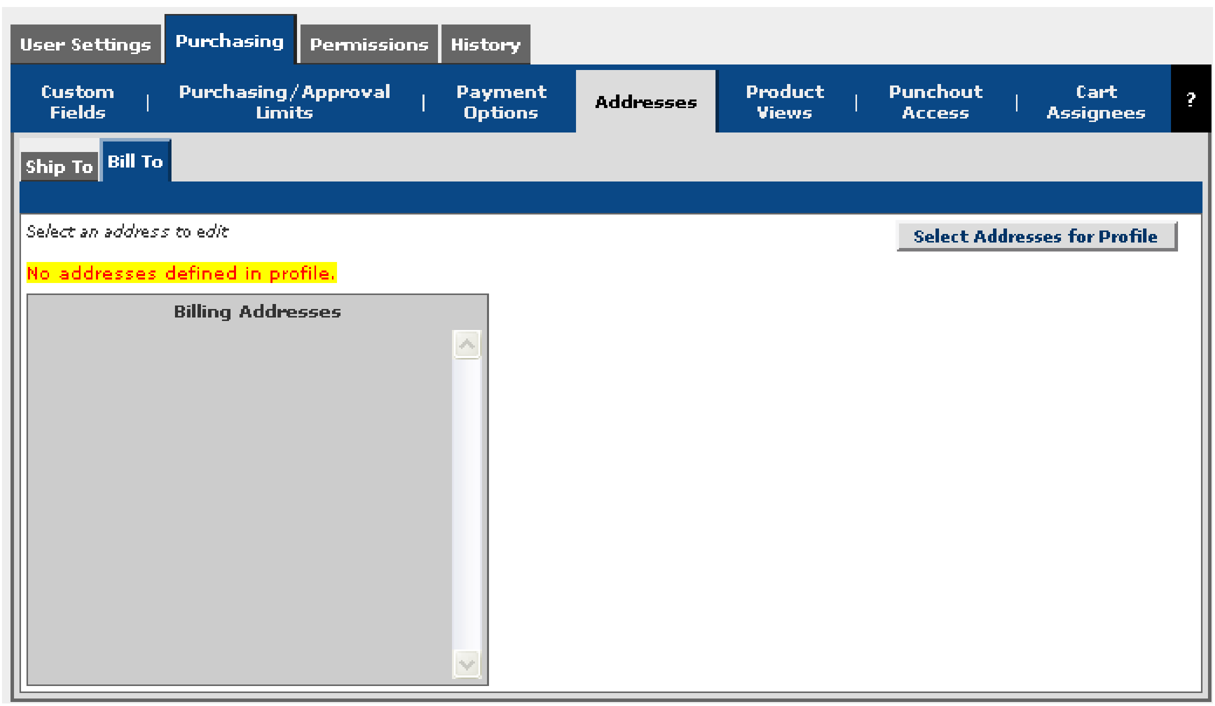
Any results found will appear on the screen. Your name and contact information are automatically populated for all the possible rooms that meet your selection criteria, regardless of whether you actually work in those rooms.

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

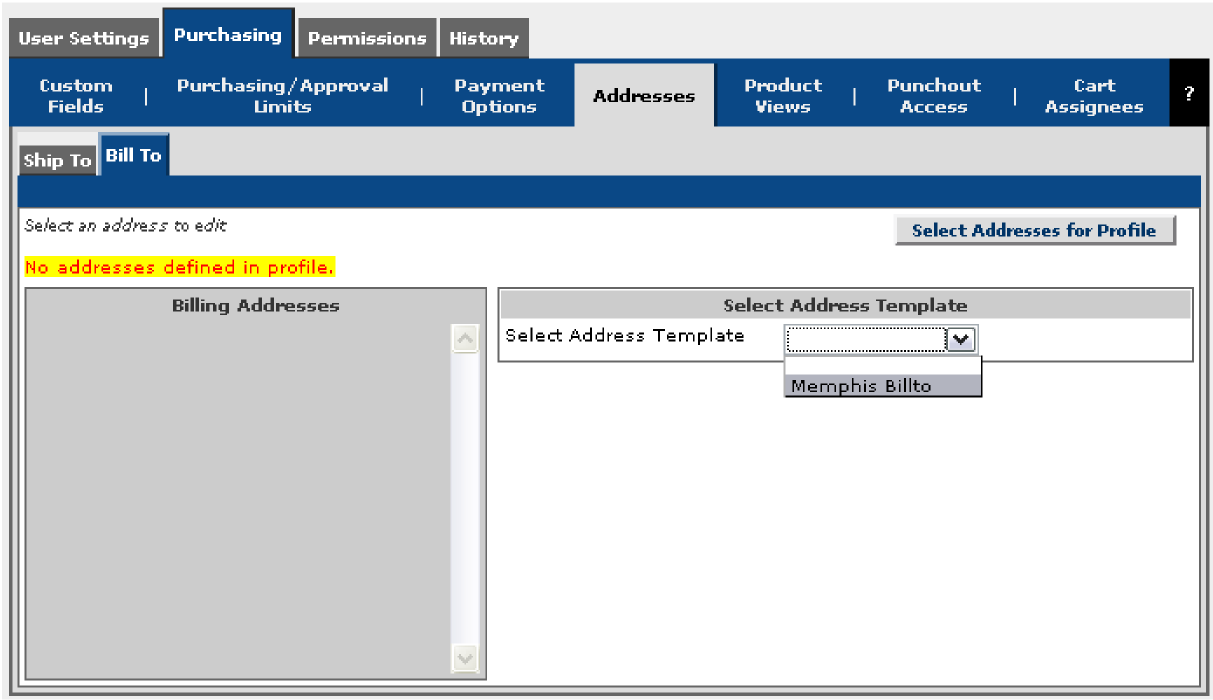




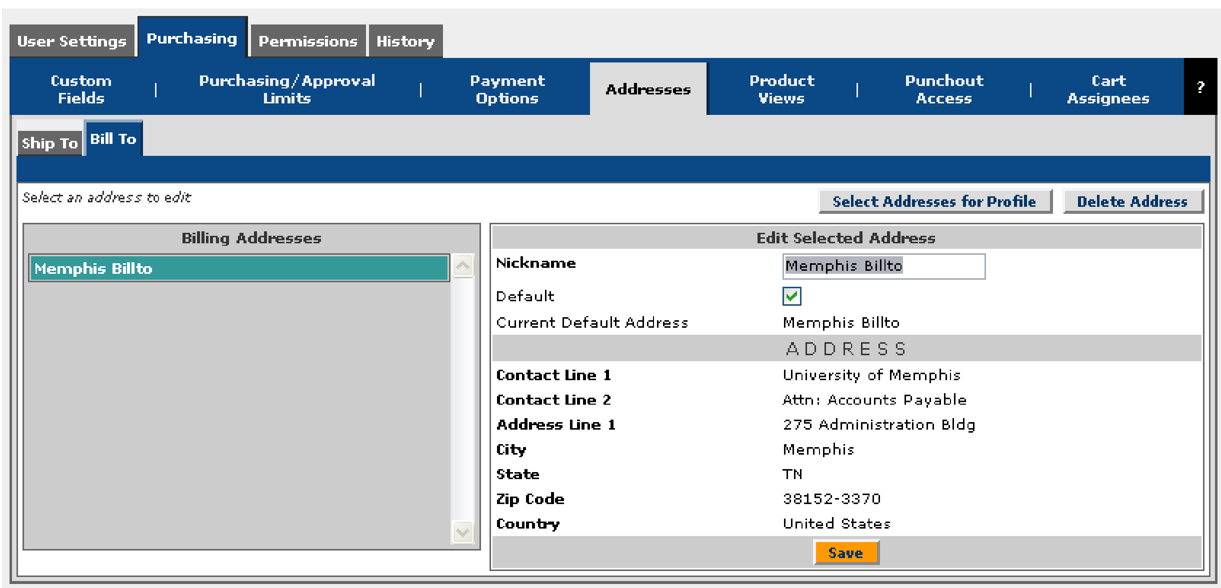
The Bill To tab should have one address associated with it named **Memphis Billto**. If you do not see this address, click on the button on the right **Select Addresses for Profile**.



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.