

Quick Reference Guide

Updating User Profile

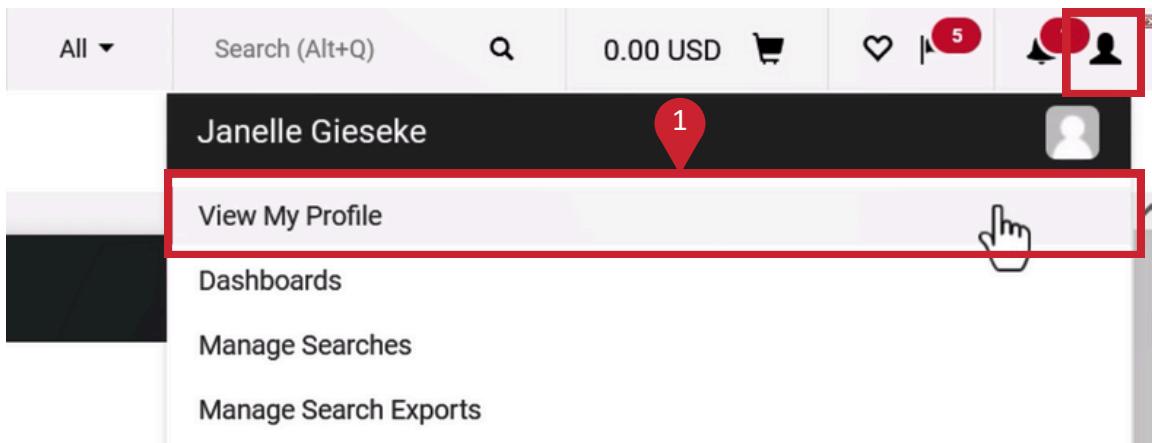


IMPACTED USER GROUPS

- All Users

How to Update User Profile in CSUBUY

1. Go to **User** dropdown menu in upper right corner of screen and select **View My Profile**.



2. The **My Profile** page has a sidebar that contains different sections of the user profile that can be adjusted.

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

First Name	Janelle
Last Name	Gieseke
Phone Number	ext.
Mobile Phone Number	
E-mail Address *	janelle.gieseke@risenow.com
Business Unit	CSU Fresno P2P (FRXNO)
Authentication Method	Local
User Name *	jgieseke

NOTE: If you don't see an option to change your name in your profile:

- Your organization's settings may restrict name edits.
- The name may be controlled by an external system (e.g., HR/ERP) and synchronized into CSUBuy meaning it can't be edited directly in the portal.

In that case, contact your local CSUBuy administrator (e.g., procurement support team within your organization) or submit a ticket through the CSUBuy support portal.

Save Changes

3. **User Profile and Preferences** allows the user to update personal information like first/last name, phone number, email, etc. Select **Save Changes** to complete.

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4. Notification Preferences allows the user to customize their CSUBUY notification settings by different document types and whether the notifications are sent via CSUBUY, email, or both. Default settings for each type of document and their specific workflow steps can be overridden via the **Edit Section** button.

Janelle Gieseke

User Name jgieseke

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- 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
 - Change Requests
 - Purchase Orders
 - Catalog Management
 - Accounts Payable
 - Receipts
 - Contracts
 - Sourcing Director
 - Supplier Management

- Form Requests

Notification Preferences: Form Requests

Form Requests

Form Request

Form Request Discussion Message ? Default Override

Form Request Pending Approval in Workflow ? Email & Notification

Form Request Workflow Notification Available ? Email & Notification

Form Request Workflow Error ? None

Form Request Potential Duplicate Supplier ? None

Form Request Approved in Workflow ? None

Form Request Rejected in Workflow ? None

Form Request Completed in Workflow ? None

Form Request Contract is Executed ? None

Sourcing Form Request Workflow Approved with Incomplete Items ? Email & Notification

Form Request Review Workflow

Edit Section

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In CSUBuy, we recommend that campuses avoid turning off notifications until they are fully familiar with the system. Notifications provide important updates about workflow items, approvals, and required actions. Turning them off too early may result in missing critical information. Please wait to adjust your notification settings until you understand what each notification is for. Failure to respond to notifications may delay the process in Procurement or Accounts Payable.

5. After selecting **Edit Section**, check the **Override** option and use the dropdown menu to set notification preferences for each step of the workflow process. Select **Save Changes** to complete.

Notification Preferences: Form Requests

Form Requests

Form Request

Form Request Discussion Message ? Default Override

None

Email

Notification

Email & Notification

Form Request Review Workflow

Form Request Pending Approval in Workflow ? Email & Notification

Form Request Workflow Notification Available ? Email & Notification

Form Request Workflow Error ? None

Form Request Potential Duplicate Supplier ? None

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Email

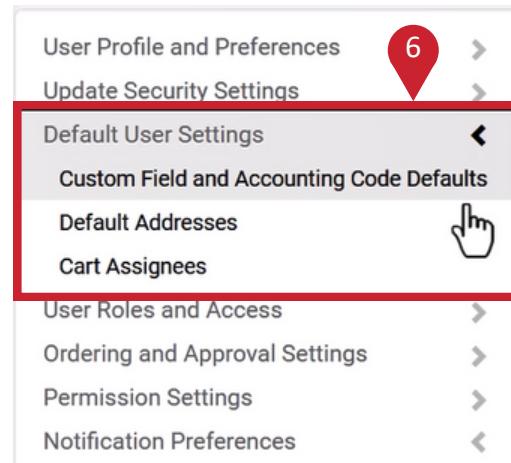
Save Changes

5

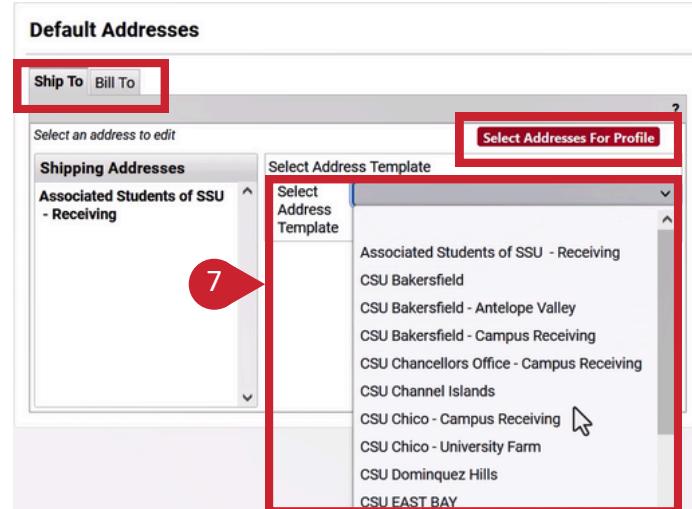
Success
Successfully Saved Changes



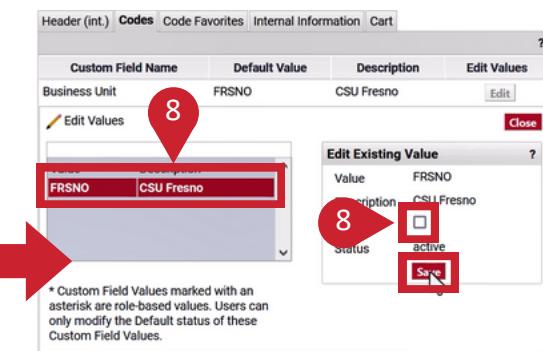
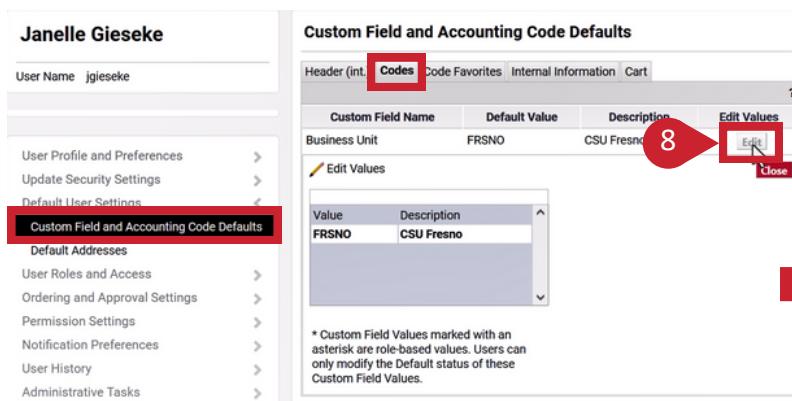
6. Default User Settings allows users to set default ship to/bill to addresses, which are required for "Punch-out" requests. This is also where the user can adjust accounting code defaults and cart assignees.



7. To set default ship to/bill to addresses, select **Default Addresses**, then **Select Addresses for Profile**. choose address template based on campus, and select **Save**. Do this for both **Ship to** and **Bill to** tabs.



8. **Accounting Code Defaults** should only be updated by users that work between multiple business units. The user must first remove the default business unit by going to **Codes** tab and selecting **Edit** on the business unit line. Select the bolded business unit and uncheck the **Default** box, then select **Save**.



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- Once the default business unit is removed, the user can use **Code Favorites** tab to set their most frequently used Chartfield combinations by navigating to **Add** > enter Chartfield info > **Save**. Favorites can be used via the **User** dropdown menu, under **Change Shopping Persona**. Current persona will be listed at the top of the page, and user can return to default profile via **Change Shopping Persona**.

Chartfield

Nickname Default

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Business Unit	Fund	DeptID	Account	Account Override	Program	Class
FRSNO <input type="button" value="Select from profile values..."/>	44105_FRSNO <input type="button" value="Select from all values..."/>	28180_FRSNO <input type="button" value="Select from all values..."/>	no value	<input type="button" value="Select from all values..."/>	0101_FRSNO <input type="button" value="Select from all values..."/>	<input type="button" value="Select from all values..."/>

- [View My Profile](#)
- [Dashboards](#)
- [Manage Searches](#)
- [Manage Search Exports](#)
- [Set My Home Page](#)
- [Change Shopping Persona](#)

Select a shopping persona from the list below

Default Profile

FRXNO - CSU Fresno

FRXTH - CSU, Fresno Athletic Corp

Cancel

① Shopping As: FRXTH - CSU, Fresno Athletic Corp Business Unit: CSU, Fresno Athletic Corp P2P