

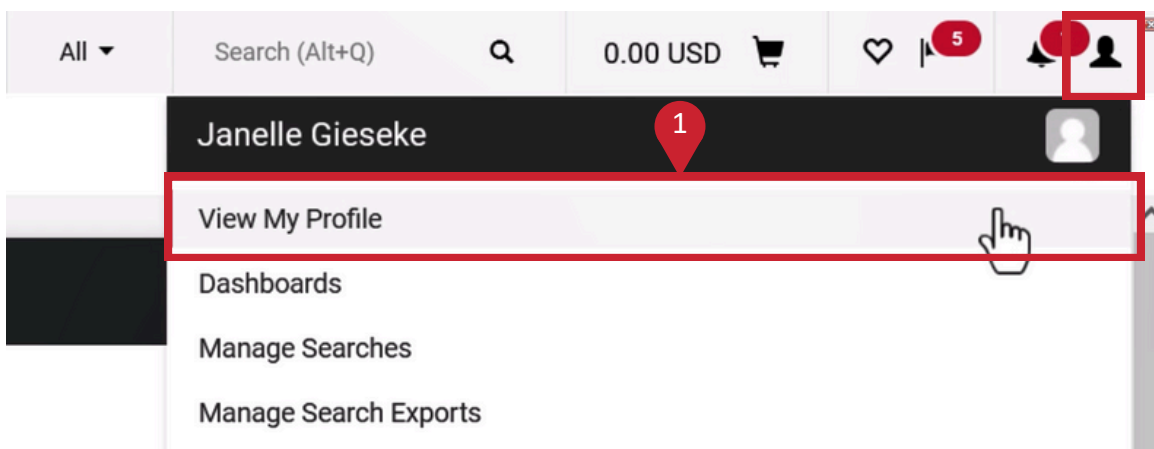


IMPACTED USER GROUPS

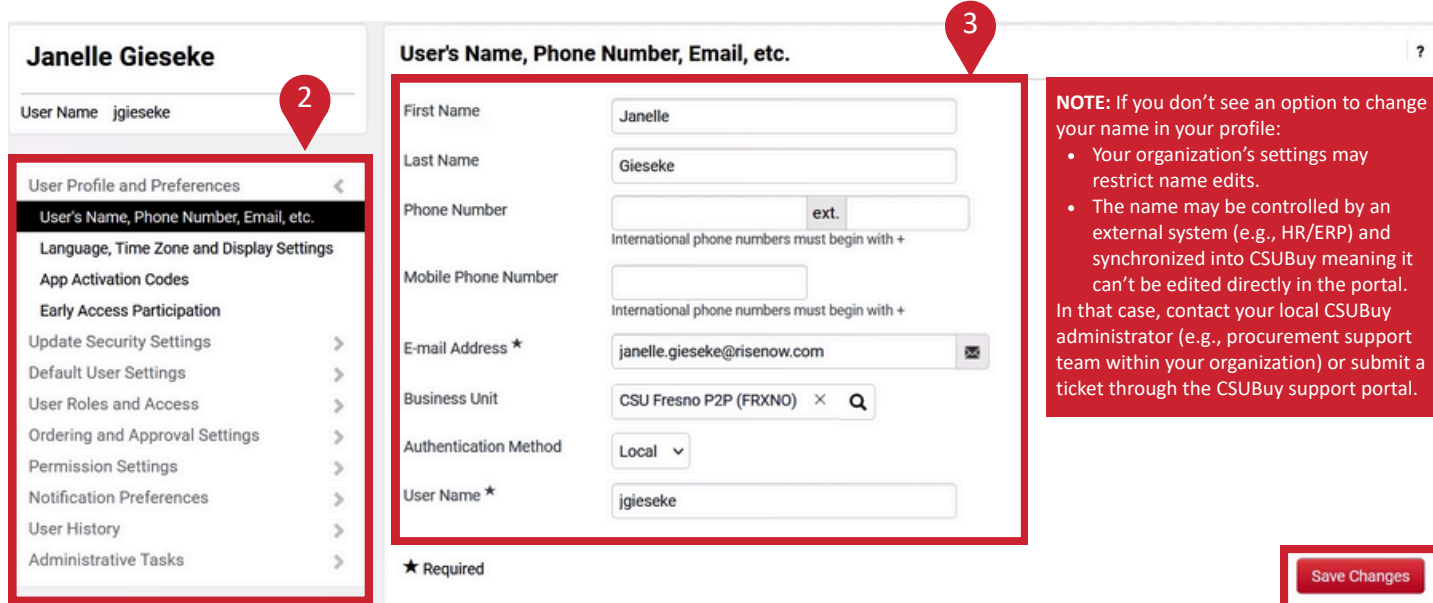
- All Users

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.



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.



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

- 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 Request

Form Request Discussion Message None

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

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

Edit Section

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 Request

Form Request Discussion Message ☐ Default ☒ **Override**

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

Save Changes

Success

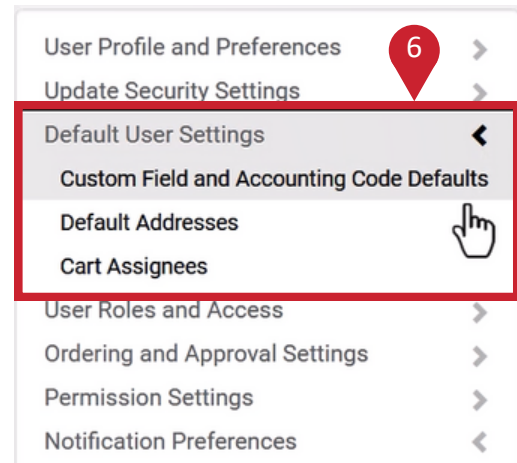
Successfully Saved Changes

Quick Reference Guide

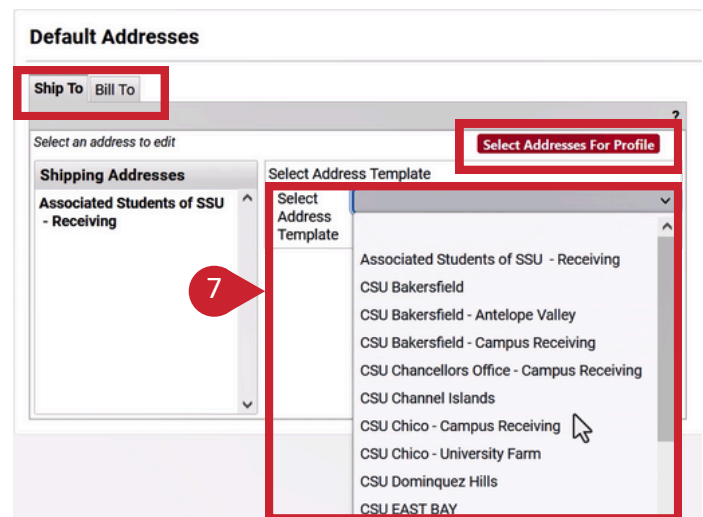
Updating User Profile



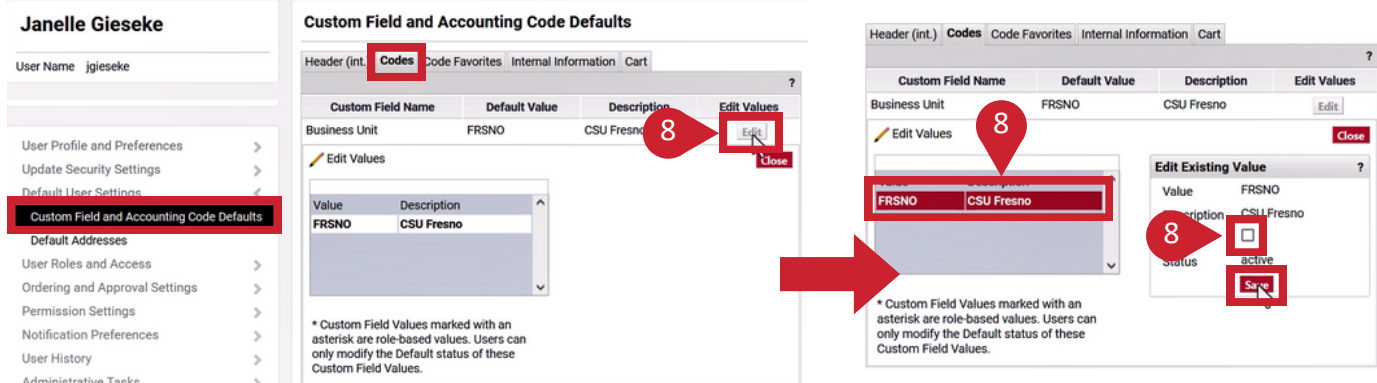
6. **Default User Settings** allows users to set default ship to/bill to addresses, which are required for "Punch-out" requests. This is also where the user can adjust accounting code defaults and cart assignees.



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**.



Quick Reference Guide

Updating User Profile



9. 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** .

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

Business Units: CSU Fresno P2P (FRXNO)

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

Chartfield

Business Unit	Fund	DeptID	Account	Account Override	Program	Class	Project
no value	no value	no value	no value	no value	no value	no value	no value

Chartfield

Nickname: Test ☐ Default

Business Unit Fund DeptID Account Account Override Program Class

FRSNO 44105_FRSNO 28180_FRSNO no value 0101_FRSNO

Select from profile values... Select from all values... Select from all values... Select from all values... Select from all values... Select from all values...

Save **Cancel**

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

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