

Profile Settings

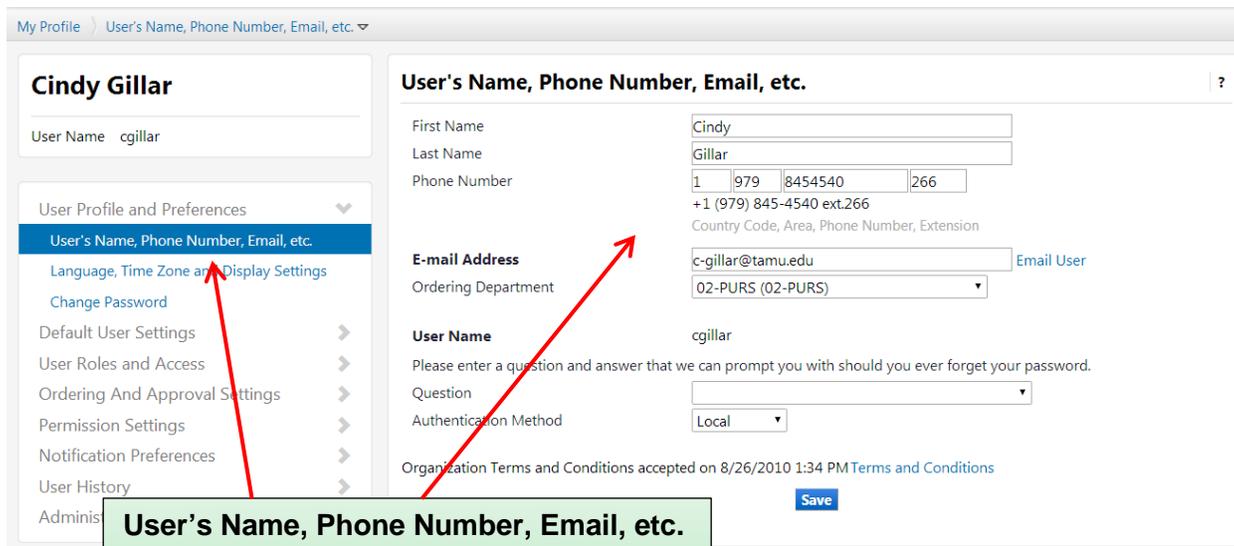
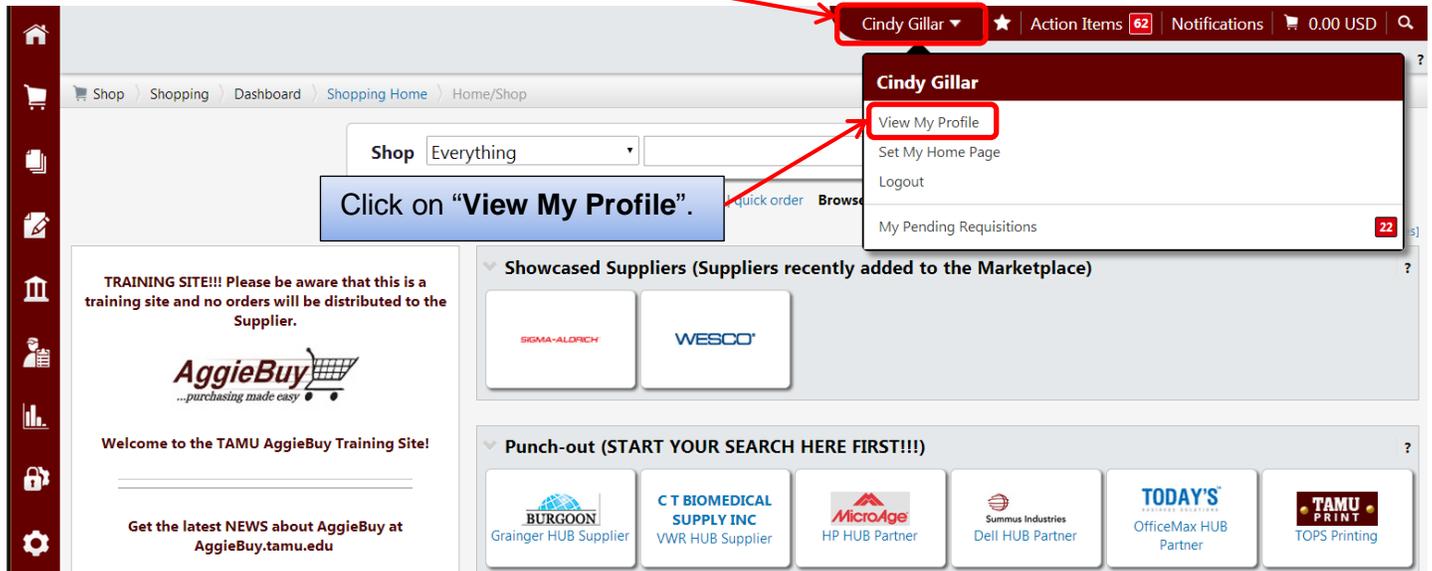
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PROFILE SETTINGS

Getting around in “My Profile”.

When you click on your name you will see a drop-down menu that contains View My Profile.



User's Name, Phone Number, Email, etc. will show your information that is fed in from HR Connect. If your phone number or email address need to be changed go into your HR Connect, Personal Data and make the changes there.

Assigned Roles are under User Roles and Access.

Click on “User Roles and Access” then click on “Assigned Roles”.

The image shows a user profile page for Cindy Gillar. At the top, her name is displayed in a large font, followed by her user name 'cgillar'. Below this is a menu titled 'User Profile and Preferences' with a dropdown arrow. The menu items are: 'User's Name, Phone Number, Email, etc.' (highlighted in blue), 'Language, Time Zone and Display Settings', 'Change Password', 'Default User Settings' (with a right arrow), 'User Roles and Access' (highlighted with a red box and a dropdown arrow), 'Assigned Roles' (highlighted with a red box and a left arrow), 'Access', 'Price File Approvals', 'Ordering And Approval Settings' (with a right arrow), 'Permission Settings' (with a right arrow), 'Notification Preferences' (with a right arrow), 'User History' (with a right arrow), and 'Administrative Tasks' (with a right arrow). To the right of the main menu, there is a separate box titled 'Assigned Roles' containing a list of roles: '02-Department Allocator Standard' and '02-Shopper'. A red arrow points from the 'Assigned Roles' item in the main menu to this box. Below the main menu, a green box contains the text: 'Assigned Roles shows which roles in AggieBuy you have.' A red arrow points from this green box to the 'Assigned Roles' item in the main menu.

How to configure Display Settings

Quick steps:

1. Click on the drop down next to your name (pg. 1)
2. Click **“View My Profile”** (pg. 1)
3. Click **“Language, Time Zone and Display Settings”** (pg. 3)
4. Choose Color Theme, Help on mouse over, and Preferred email format. (pg. 3)
5. Click **“Save”** (pg. 3)

Click on **“Language, Time Zone and Display Settings”**.

Cindy Gillar
User Name cgillar

User Profile and Preferences ▾
User's Name, Phone Number, Email, etc.
Language, Time Zone and Display Settings
Change Password
Default User Settings >
User Roles and Access >
Ordering And Approval Settings >
Permission Settings >
Notification Preferences >
User History >
Administrative Tasks >

Language, Time Zone and Display Settings

Select a Language English ▾
Country United States ▾
Currency USD ▾
Time Zone CDT/CST - Central Standard Time ▾
Color Theme TAMU ▾
Enable Accessibility Mode
Help on mouse over Show help on mouse over and click ▾
Preferred email format HTML ▾

Save

Choose your Color Theme

TAMU ▾
Amgen
Banana Republic
Blue and Gold
Blue and Gold 2
Blue and Gold Macs
ChemLife
Dark light blue
Grey and Red
Java Bean
LifeCycle
Old Gold and Blue
Phoenix Dark
Rainy Day
SciQuest Classic
SciQuest New
TAMU

Language, Time Zone and Display Settings

Select a Language English ▾
Country United States ▾
Currency USD ▾
Time Zone CDT/CST - Central Standard Time ▾
Color Theme TAMU ▾
Enable Accessibility Mode
Help on mouse over Show help on mouse over and click ▾
Preferred email format HTML ▾

Save

Choose email format:
HTML OR Plain Text

Click **“Save”**

Choose to:
“Show help on mouse over and click” OR “Show help only on click”.

Adding Department and Accounting Codes

Quick steps:

1. Click on the drop down next to your name (pg. 1)
2. Click **“View My Profile”** (pg. 1)
3. Click **“Default User Settings”** (pg.1)
4. Click **“Custom Field and Accounting Code Defaults”** (pg. 4)
5. Click on the **“Codes”** tab (pg. 5)
6. Click on the second blue **“Edit”** button (Department Code line) (pg. 5)
 - a. Click **“Create New Value”** button (pg. 5)
 - b. Enter the Member ID and department code (for example, 02-PURS) in the Value field. If you do not know the department code, enter the department name in the Description field which is just below the Value field. (pg. 5)
 - c. Click **“Search”** (pg. 5)
 - d. Select all the department codes needed. (pg. 5)
 - e. Click **“Add Values”** button. (pg. 5)
 - f. To make one of the department codes the default, click the department code value in the left hand box. Then click the box next to “Default” and click **“Save”**. (pg. 6)
 - g. Click **“Close”** (pg. 6)
7. Click on the third blue **“Edit”** button (Account Code Line) (pg. 6)
 - a. If you have more than one Department Code select from the drop-down list the one you will be working with. (pg. 6)
 - b. Click **“Create New Value”** button (pg. 6)
 - c. If your department has only a few accounts then they will appear on a selectable list. Otherwise, enter the Member ID and part of the Account Code (for example, 02-130) or leave it blank and choose 50 from the “Results per Page” drop-down. (pg. 7)
 - d. Click **“Search”** (pg. 7)
 - e. Select all the Accounting codes you need from the first page and click the **“Add Values”** button. If there are multiple pages of results, repeat the process through as many pages as necessary. (NOTE: When you “Add Values” from any page of results, an equal number of Account Codes from the top of following page will move to the page you originally selected from.) (pg. 7)
 - f. To make one of the accounting codes the default; click the accounting code value in the left hand box. Then click the box next to “Default” and click **“Save”**. (pg. 7-8)
 - g. Click **“Close”** (pg. 8)

Cindy Gillar
User Name cgillar

- User Profile and Preferences >
- Default User Settings >
- Custom Field and Accounting Code Defaults**
- Default Addresses
- Financial Approvers
- User Roles and Access >
- Ordering And Approval Settings >
- Permission Settings >
- Notification Preferences >
- User History >

Custom Field and Accounting Code Defaults

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

Custom Field Name	Default Value	Description	Edit Values
Bypass Dept A		lue	Edit
Check Date (M		lue	Edit
Check Number		lue	Edit
Contract Workforce	No Default Value		Edit
Create Asset Manually	No Default Value		Edit
Do Not Encumber	No Default Value		Edit
Emergency (attach justification)	No Default Value		Edit
End Date	No Default Value		Edit
Non-Compliant	No Default Value		Edit

Click on **“Custom Field and Accounting Code Defaults”**.

To Add/Change Department Codes

Custom Field and Accounting Code Defaults

Click on the "Codes" tab.

Custom Field Name	Default Value	Description	Edit Values
Member ID	02	Texas A&M University	Edit
Department Code	No Default Value		Edit
Account Code	No Default Value		Edit
Executive Code	No Default Value		Edit
Division Code	No Default Value		Edit
College Code	No Default Value		Edit
Special Routing1	No Default Value		Edit
Department Code Final Approver	No Default Value		Edit
Fund Type	No Default Value		Edit
Fiscal Year	2014		Edit

Click the "Edit" button next to the Code you are wanting to set-up/change. The Department Code has to be set-up first then you can edit the Account Code.

Custom Field and Accounting Code Defaults

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

Custom Field Name	Default Value	Description	Edit Values
Department Code	No Default Value		Edit

Member ID: 02

[Create New Value](#)

Value	Description

Click "Create New Value".

Custom Field and Accounting Code Defaults

Header (int.) | Header (ext.)

Department Code

Member ID: 02

[Create New Value](#)

Search For Value

Field Name: Department Code

Value: 02-purs

Description:

Results per Page: 5

[Search](#)

Enter the department code. Be sure to put your campus code (02- or 10-) before your department code. If you don't know the department code type in the department name in the Description field.

Click "Search".

Results per page: 5

1

Select	Value	Description
<input checked="" type="checkbox"/>	02-PURS	02-Procurement Services

[Add Values](#) | [Back to Search](#)

Click box next to the department code(s) you need. Then click "Add Values".

Member ID: 02

[Create New Value](#)

Value	Description
02-PURS	02-Procurement Services

* Custom Field Values

Search For Value

Field Name: Department Code

Value: 02-purs

Description:

Results per Page: 5

[Search](#)

Click on the department code you would like to make your Default.

NOTE: If you need to add more department codes click "Back to Search"

Edit Existing Value

Value	02-PURS
Description	02-Procurement Services
Default	<input checked="" type="checkbox"/>
Status	active

Buttons: Save, Remove

Callout: Click box next to Default then click "Save".

Custom Field Name	Default Value	Description	Edit Values
Department Code	02-PURS	02-Procurement Services	Edit

Buttons: Create New Value, Close, Save, Remove

Callout: NOTE: Once a default Department Code has been designated you will see it here.

Callout: After you have selected all the department codes needed, click the "Close" button.

You are now back at the Codes screen. If you saved a Department Code as a default it will show up here.

To Add/Change Account Code

Custom Field and Accounting Code Defaults

Custom Field Name	Default Value	Description	Edit Values
Member ID	02	Texas A&M University	Edit
Department Code	02-PURS	02-Procurement Services	Edit
Account Code	No Default Value		Edit
Executive Code	No Default Value		Edit

Callout: Click the "Edit" button on the Account Code line.

Callout: Click "Create New Value".

Callout: If you have more than one Department Code it will show up here. Click the "Department Code" you want to work with.

Custom Field Name	Default Value	Description	Edit Values
Account Code	No Default Value		Edit

Account Code: 02-120406-00000, Description: Student Life

Value: 02-120406-00000, Description: Student Life

Default:

Status: active

Buttons: Save, Remove, Close

Custom Field Name	Default Value	Description	Edit Values
Member ID	02	Texas A&M University	Edit
Department Code	02-STAF	02-Student Life	Edit
Account Code	02-120406-00000	Student Life	Edit
Executive Code	No Default Value		Edit
Division Code	No Default Value		Edit
College Code	No Default Value		Edit

Click box next to Default then click **Save**.

After you have selected all the account codes needed, click the **Close** button.

You can only have one default department code and from that department code you can only have one account code. When you start a requisition in AggieBuy your default department code and account code will automatically be filled in. If you only defaulted your department code then only the department code will automatically be filled in and you will need to choose your account code.

How to configure a Default Address

Quick steps:

1. Click on the drop down next to your name (pg. 1)
2. Click **“View My Profile”** (pg. 1)
3. Click **“Default User Settings”** (pg 1)
4. Click **“Default Addresses”** (pg. 9)
5. The next screen defaults to the **“Ship To”** tab
 - a. Click the blue **“Select Addresses for Profile”** button. (pg. 9)
 - b. Enter in **“02-“** followed by your FAMIS address code OR enter in your department name (pg. 9)
 - c. Click **“Search”** (pg. 9)
 - d. Click the **“radio button”** next to the address you wish to add (pg. 10)
 - e. There are two lines that can be changed the **“Attn”** line and the **“ROOM”** line (pg. 10)
 - f. Click **“Save”** (pg. 10)
 - g. Repeat b-f if you need to add more than one address (pg. 10)
 - h. The first address you add will be the default address. To change this click the address you would like to be the default address and check the box next to Default.
6. Now you can set the Bill To address
 - a. Click **“Bill To”** tab (pg. 11)
 - b. Click **“Select Addresses for Profile”** (pg. 11)
 - c. Click the drop down box (pg. 11)
 - d. Click **“02-TAMU Bill-To”** or **“10-TAMUG Bill-To”** (pg. 11)
 - e. Click **“Save”** (pg. 11)

Setting up Ship To Address

Cindy Gillar

User Name cgillar

User Profile and Preferences >

Default User Settings >

Custom Field and Accounting Code Defaults

Default Addresses

Financial Approvers

User Roles and Access >

Ordering And Approval Settings >

Permission Settings >

User History >

Administrative Tasks >

Click **“Default Addresses”**

Default Addresses

Click **“Select Addresses for Profile”**

No addresses defined in profile.

Ship To Bill To

Select an address to edit

No addresses defined in profile.

Shipping Addresses

Address Search

Nickname / Address Text

Results per Page 10

Search

Click **“Search”**

Enter in **“02-“** followed by your FAMIS 3 digit address code. If you do not know your address code you can enter in your department name or mail stop.

Address Search

Nickname / Address

Text

Results per Page

Addresses Found: 3 Page 1 of 1

Name	Address
<input type="radio"/> 02-123	Attn Cynthia Gillar DEPT. OF PROCUREMENT SERVICES P. O. BOX 30013 1477 TAMU COLLEGE STATION, TX 77842-0013 United States
<input checked="" type="radio"/> 02-223	Attn Cynthia Gillar DEPT. OF PROCUREMENT SERVICES c/o CENTRAL RECEIVING ROOM STE-111 AGRONOMY RD 1477 TAMU COLLEGE STATION, TX 77845-1477 United States
<input type="radio"/> 02-782	Attn Cynthia Gillar UTILITY PLANT ROOM 2750 F&B RD PROCUREMENT LAY DOWN YARD 1584 TAMU COLLEGE STATION, TX 77843-1584 United States

Click the "radio button" next to the correct address.

Note:
If you do not see your address try entering in your Mail Stop, part of the department name, or building name.

Default Addresses

No addresses defined in profile.

Ship To

Select an address to edit

No addresses defined in profile.

Shipping Addresses

Edit Selected Address

Nickname

Default

Current Default Address ---

ADDRESS

Attn

Department: DEPT. OF PROCUREMENT SERVICES

Bldg/Rm: c/o CENTRAL RECEIVING

ROOM

Address Line 1: AGRONOMY RD

Address Line 3: 1477 TAMU

City: COLLEGE STATION

State: TX

Zip Code: 77845-1477

Country: United States

Default will already be checked if this is your first address to enter.

When you are finished with the changes click "Save".

Default Addresses

Cha

Ship To

Select an address to edit

Shipping Addresses

02-223

Edit Selected Address

Nickname

Default

Current Default Address 02-223

ADDRESS

Attn

Department: DEPT. OF PROCUREMENT SERVICES

Bldg/Rm: c/o CENTRAL RECEIVING

ROOM

Address Line 1: AGRONOMY RD

Address Line 3: 1477 TAMU

City: COLLEGE STATION

State: TX

Zip Code: 77845-1477

Country: United States

You can add more Ship To addresses by clicking "Select Addresses for Profile" and repeat steps above.

Do Not change the Nickname. This number is linked to FAMIS.

You can change the Attn Name and the Room number.

Setting up Bill To Address

Default Addresses

No addresses defined in profile.

Ship To **Bill To**

Select an address to edit

No addresses defined in profile.

Billing Addresses

Select Addresses for Profile

To set the Bill To Address, Click on the Bill To tab and then click on "Select Addresses for Profile"

Default Addresses

Ship To **Bill To**

Select an address to edit

Select Addresses for Profile

Billing Addresses

02-TAMU Bill-To

Select Address Template

Select Address Template

02-TAMU Bill-To
10-TAMUG Bill-To

Click on the drop down next to Select Address. Click either "02-TAMU Bill-To" or "10-TAMUG Bill-To".

Ship To **Bill To**

Select an address to edit

Select Addresses for Profile Delete Address

No addresses defined in profile.

Billing Addresses

Edit Selected Address

Nickname 02-TAMU Bill-To

Default

Current Default ---

Address

ADDRESS

Contact Line 1 Texas A&M University

Contact Line 2 Financial Management Operations

Contact Line 3 ATTN: Accounts Payable

Address Line 1 750 Agronomy Road - Suite 3101

Address Line 2 6000 TAMU

City College Station

State TX

Zip Code 77843-6000

Country United States

Save

Click "Save"

Default Addresses

Changes Saved

Ship To **Bill To**

Select an address to edit

Select Addresses for Profile Delete Address

Billing Addresses

02-TAMU Bill-To

Edit Selected Address

Nickname 02-TAMU Bill-To

Default

Current Default 02-TAMU Bill-To

Address

ADDRESS

Contact Line 1 Texas A&M University

Contact Line 2 Financial Management Operations

Contact Line 3 ATTN: Accounts Payable

Address Line 1 750 Agronomy Road - Suite 3101

Address Line 2 6000 TAMU

City College Station

State TX

Zip Code 77843-6000

Country United States

Save

How to Configure Email and Notification Delivery Options

As part of the new user interface some email Notifications are also available as “application” Notifications, which are accessed within AggieBuy in the Notifications section of the top banner. Many Notifications can be configured to be received by both email and within the application.

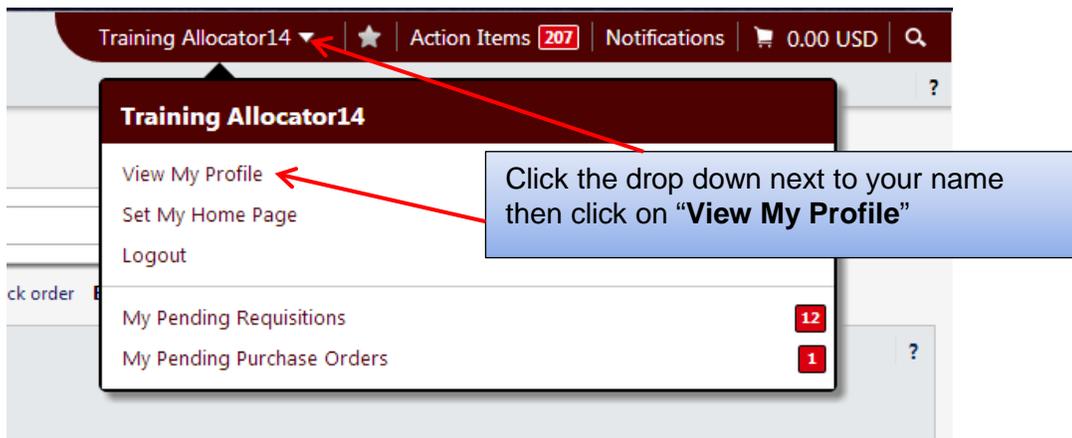
Quick-Steps

To Configure Email and Notification Delivery Options

1. Click on the drop down next to your name (pg. 12)
2. Click “**View My Profile**” (pg. 12)
3. Click “**Notification Preferences**” (pg. 13)
4. Click on the document type or category you wish to change (pg. 13)
5. Click the “**Edit Section**” link in the upper right corner of the screen (pg. 14)
6. Select Override next to the notification you wish to change (pg. 14)
7. Click on the drop down (pg. 15)
8. Select the way you want wish to be notified (pg. 15)
9. Click “**Save Changes**” (pg. 15)

To view Notifications

1. Click “**Notifications**” in the Top Panel (pg. 16)
2. Click on the Document to bring it up or you can delete the notification by clicking on the “**x**”.
(pg. 16)



- User Profile and Preferences >
- Default User Settings >
- User Roles and Access >
- Ordering And Approval Settings >
- Permission Settings >
- Notification Preferences** >
- Administration & Integration
- Shopping, Carts & Requisitions
- Purchase Orders
- Settlement
- User History >
- Administrative Tasks >

Click "**Notification Preferences**" then choose the document type or category you wish to change.

Shopping, Carts & Requisitions

 Edit Section ?

The in-application notifications are not yet available for all Email Preferences. ?

Prepared By - Cart Assigned Notice ? None

Prepared By - PR line item(s) rejected ? None

Prepared By - PR rejected/returned ? None

Cart Assigned Notice ? None

Receive PR and PO notifications for Carts Assigned to Me ? None

Cart Shared Notice ? None

PR submitted into Workflow ? Notification

PR pending Workflow approval ? None

PR Workflow Notification available ? None

PR Workflow complete / PO created ? Email & Notification

PR line item(s) rejected ? Email

Cart/PR rejected/returned ? Email

Receive PR and PO notifications for shared carts I am a participant of ? None

To change the setting click "Edit Section".

NOTE:
Notification - will only show up when you are in AggieBuy
Email - the system will email the notification to the address in your AggieBuy profile.
Email & Notification - you will receive a notification within AggieBuy and an Email.
None - you will not receive any type of notification.

For more information about a specific notification click the "?".

PR Workflow complete / PO created ? Email & Notification

PR line item(s) rejected ?

Cart/PR rejected/returned ?

Email notice that a requisition successfully completed workflow and that the system will create its purchase order(s).

Shopping, Carts & Requisitions

?

The in-application notifications are not yet available for all Email Preferences. ?

Prepared By - Cart Assigned Notice	<input checked="" type="radio"/> Default	<input type="radio"/> Override	None
Prepared By - PR line item(s) rejected	<input checked="" type="radio"/> Default	<input type="radio"/> Override	None
Prepared By - PR rejected/returned	<input checked="" type="radio"/> Default	<input type="radio"/> Override	None
Cart Assigned Notice	<input checked="" type="radio"/> Default	<input type="radio"/> Override	None
Receive PR and PO notifications for Carts Assigned to Me	<input checked="" type="radio"/> Default	<input type="radio"/> Override	None
Cart Shared Notice	<input checked="" type="radio"/> Default	<input type="radio"/> Override	None
PR submitted into Workflow	<input type="radio"/> Default	<input checked="" type="radio"/> Override	<div style="border: 1px solid #ccc; padding: 2px;"><input type="text" value="Notification"/></div>
PR pending Workflow approval	<input checked="" type="radio"/> Default	<input type="radio"/> Override	<div style="border: 1px solid #ccc; padding: 2px;"><input type="text" value="None"/></div>
PR Workflow Notification available	<input checked="" type="radio"/> Default	<input type="radio"/> Override	<div style="border: 1px solid #ccc; padding: 2px;"><input type="text" value="Email"/></div>
PR Workflow complete / PO created	<input type="radio"/> Default	<input checked="" type="radio"/> Override	<div style="border: 1px solid #ccc; padding: 2px;"><input type="text" value="Notification"/></div>
PR line item(s) rejected	<input type="radio"/> Default	<input checked="" type="radio"/> Override	<div style="border: 1px solid #ccc; padding: 2px;"><input type="text" value="Email & Notification"/></div>
Cart/PR rejected/returned	<input type="radio"/> Default	<input checked="" type="radio"/> Override	<div style="border: 1px solid #ccc; padding: 2px;"><input type="text" value="Email"/></div>
Receive PR and PO notifications from a participant of	<input type="radio"/> Default	<input checked="" type="radio"/> Override	<div style="border: 1px solid #ccc; padding: 2px;"><input type="text" value="Email"/></div>
			<div style="border: 1px solid #ccc; padding: 2px;"><input type="text" value="None"/></div>

Click the Override radio then click the drop down arrow. Now you can select which option you would like. Just remember if you choose only Notification you have to log into AggieBuy to see the notification.

Click "Save Changes"

Save Changes

Cancel

You can see that there are two Notifications. Click on **“Notifications”**.

This screenshot shows a notification dropdown menu from a web application. The menu is titled "Notifications" and lists two items under the heading "Shopping, Carts & Requisitions". Each item includes a title, a date (Jul 17), and a delete icon (x). Callout boxes provide instructions: one points to the "Notifications" link in the top navigation bar, another points to the document information in the first notification, and a third points to the delete icon in the second notification. A link at the bottom of the menu is also highlighted with a callout.

Notifications	
Shopping, Carts & Requisitions	
A Requisition Has Been Submitted For Your Appr... 1003948 - 477.00 USD Submitted By Training Allocator14	Jul 17 x
Your Requisition Has Been Submitted For Approval 1003948 - 477.00 USD Submitted By Training Allocator14	Jul 17 x

Click **“Click here to see all notifications”**. This will take you to the Notifications page.

Click on the document information. This will bring the document up and will delete the Notification.

Clicking on the **“x”** will delete the notification.

This screenshot shows the full "Notifications" page. It includes a header with the site name "AggieBuy TEST Site" and user information. The main content area shows a list of notifications with columns for status, type, document information, and date. A sidebar on the left contains filter and action options. Callout boxes point to the "Clear All Notifications" link in the sidebar and the delete icons in the notification list.

Notifications / View All Notifications / Notifications

Notifications will be automatically removed after 30 days

Filter Notifications	Results per page	Notifications Found 2	Page 1 of 1
Status: New Type: All	20	A Requisition Has Been Submitted For Your Approval 1003948 - 477.00 USD Submitted By Training Allocator14 Shopping, Carts & Requisitions 7/17/2013 1:55 PM x	
Actions Edit Notification Preferences Clear Notifications		Your Requisition Has Been Submitted For Approval 1003948 - 477.00 USD Submitted By Training Allocator14 Shopping, Carts & Requisitions 7/17/2013 1:55 PM x	

On the Notifications page you can view the document, delete the notifications one by one or Clear All Notifications.