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## System Functions - User Roles

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### Shopper

- Adds items to carts
- Assigns carts to Requisitioner

### Requisitioner

- Adds items to carts
- Updates or changes carts
- Reviews assigned carts
- Places order
- Withdraws requisitions

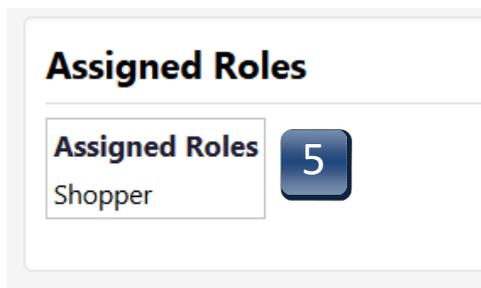
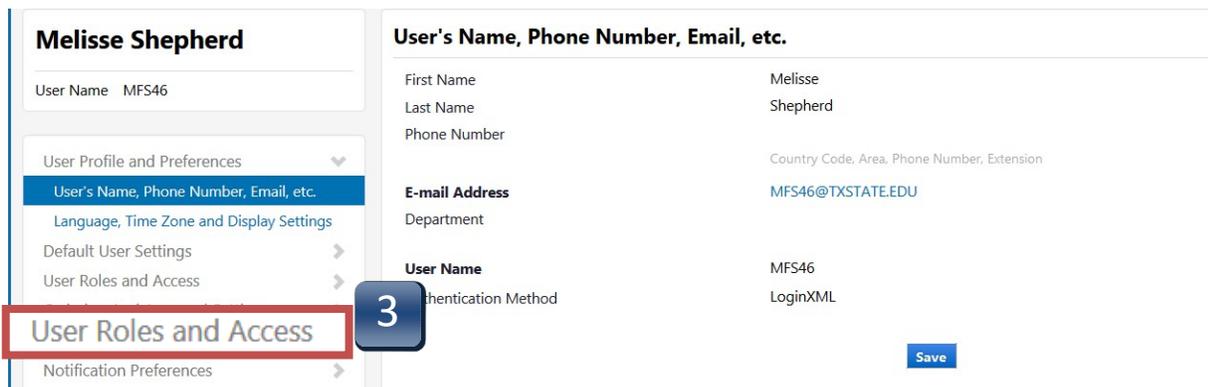
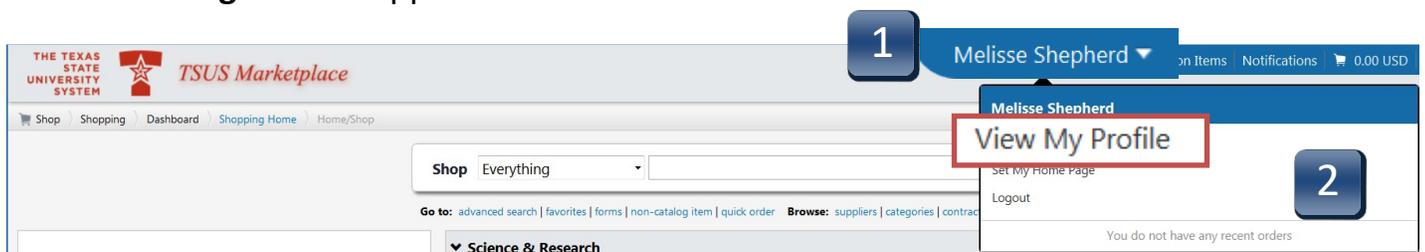
### Approver

- Approves requisitions
- Rejects lines or entire requisition

Role assignments can be changed with submission of SAP Security form to ITAC. To view your assigned role, follow instructions on the next page.

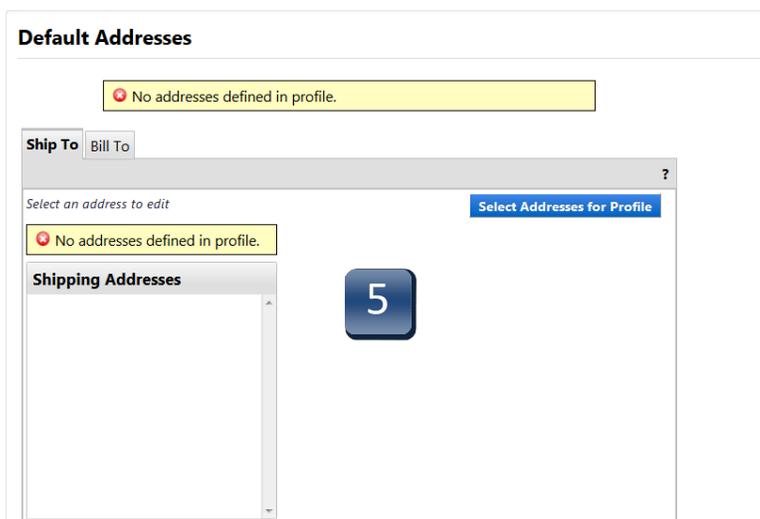
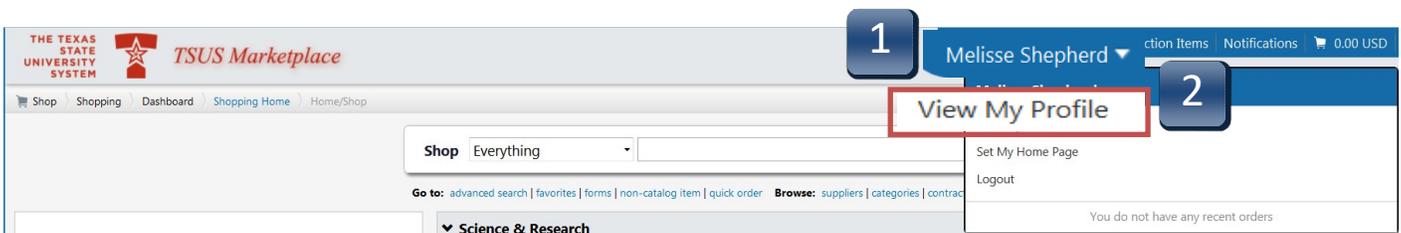
# System Functions – How to Identify User Roles

- STEP 1:** Select **your name** in the top right corner of the TSUS Marketplace home page
- STEP 2:** Select **View My Profile**. **My Profile** page appears.
- STEP 3:** Select **User Roles and Access**.
- STEP 4:** Select **Assigned Roles**.
- STEP 5:** **Assigned Roll** appears.



# System Functions – Profile Setup – Default Shipping Address

- STEP 1:** Select **your name** in the top right corner of the TSUS Marketplace home page.
- STEP 2:** **View My Profile.** My Profile page appears.
- STEP 3:** Select **Default User Settings.**
- STEP 4:** Select **Default Addresses.**
- STEP 5:** **Default Address** box appears.



## System Functions - Profile Setup – Default Shipping Address

- STEP 6:** Under the **Ship To** tab, click **Select Addresses for Profile** button. The **Select Address Template** window will appear.
- STEP 7:** From **Select Address Template** drop down menu, choose your shipping location. (San Marcos users will select **UDC**—University Distribution Center. Round Rock users will use **RRHEC**—Round Rock Higher Education Center or **RRSON**—Round Rock School of Nursing).

The screenshot shows the 'Default Addresses' window with the 'Ship To' tab selected. A yellow message box at the top states 'No addresses defined in profile.' Below this, there are two more yellow message boxes, one above the 'Shipping Addresses' list and one above the 'Select Address Template' dropdown. The 'Shipping Addresses' list is empty. The 'Select Address Template' dropdown menu is open, showing a list of address codes: CHA, CRC, DHRL, ETS, FAC, FCS, HRL, KAP, MSE, OHC, RRHEC, RRSON, SBDC, SHC, SHC-P, STAR, TJCT, TSUS, and UDC. A blue circle with the number '6' is positioned over the 'Select Addresses for Profile' button. A blue circle with the number '7' is positioned over the dropdown menu. Red boxes highlight the 'RRHEC', 'RRSON', and 'UDC' options in the dropdown menu.

## System Functions - Profile Setup – Default Shipping Address

- STEP 8:** Once selected, location will populate the **Nickname** field.
- STEP 9:** Enter your **Room** and **Building**.
- STEP 10:** Click **Save**.
- STEP 11:** Newly saved address will populate **Shipping Addresses** menu.

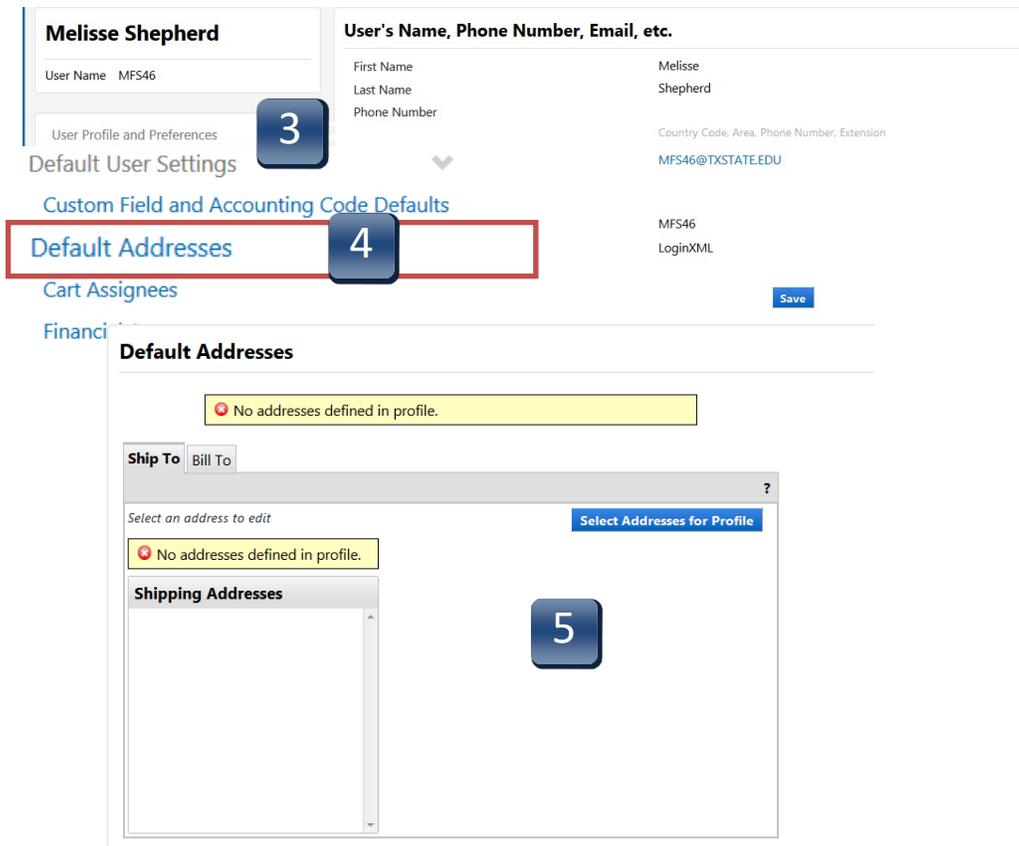
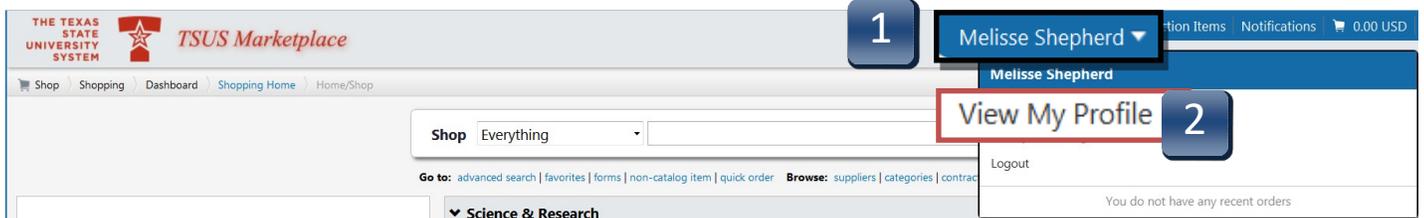
Shipping Addresses	
UDC	11

Edit Selected Address ?	
Nickname	UDC 8
Default	<input checked="" type="checkbox"/>
Current Default Address	---
ADDRESS	
Contact Line 1	Melisse Shepherd
Room	527 9
Bldg	JCK
Address Line 1	305 River Ridge Pkwy
Address Line 2	University Distribution Center
City	San Marcos
State	TX
Zip Code	78666
Country	United States
Save 10	

# System Functions - Profile Setup – Default Billing Address

- STEP 1:** Select **your name** in the top right corner of the TSUS Marketplace home page.
- STEP 2:** Select **View My Profile**. My Profile page appears.
- STEP 3:** Select **Default User Settings**.
- STEP 4:** Select **Default Addresses**.
- STEP 5:** **Default Address** box appears.



## System Functions - Profile Setup – Default Billing Address

- STEP 6:** Under the **Bill To** tab, click Select Addresses for Profile button. The **Select Address Template** window will appear.
- STEP 7:** From **Select Address Template** drop down menu, choose **BillTo**.  
*Construction is for Facilities only.*
- STEP 8:** Once selected, **BillTo** will populate in **Nickname** field.
- STEP 9:** Click **Save**
- STEP 10** Newly saved address will populate in Shipping Addresses menu.

Ship To **Bill To** ?

Select an address to edit

**Billing Addresses**

BillTo

Select Address Template

Select Address Template

BillTo

Construction

Select Addresses for Profile

6

7

**Billing Addresses**

BillTo 10

**Edit Selected Address** ?

Nickname BillTo 8

Default

Current Default Address BillTo

**ADDRESS**

Contact Line 1 Attn: Invoices

Address Line 1 P.O. Box 747

City San Marcos

State TX

Zip Code 78667-0747

Country United States

Save 9

# System Functions - Profile Setup – Notification Preferences

- STEP 1:** Select **your name** in the top right corner of the TSUS Marketplace home page.
- STEP 2:** Select **View My Profile**. **My Profile** page appears.
- STEP 3:** Select **Notification Preferences**
- STEP 4:** **Notification Preferences** section is categorized by notification type, e.g. Administration & Integration, Shopping, Carts & Requisitions, Purchase Orders, etc.

The screenshot shows the TSUS Marketplace user interface. At the top right, the user's name 'Melisse Shepherd' is displayed with a dropdown arrow (callout 1). Below it, a 'View My Profile' button is highlighted with a red box and callout 2. The main content area is divided into two sections. The left section, titled 'Melisse Shepherd', contains a list of menu items: 'User Profile and Preferences', 'User's Name, Phone Number, Email, etc.' (highlighted with a blue bar), 'Language, Time Zone and Display Settings', 'Default User Settings', 'User Roles and Access', 'Ordering And Approval Settings', 'Permission Settings', 'Notification Preferences', and 'User History'. The right section, titled 'User's Name, Phone Number, Email, etc.', contains a form with the following fields: First Name (Melisse), Last Name (Shepherd), Phone Number, Country Code, Area, Phone Number, Extension, E-mail Address (MFS46@TXSTATE.EDU), Department, User Name (MFS46), and Authentication Method (LoginXML). A 'Save' button is located at the bottom right of this section. Below the 'Notification Preferences' menu item, a list of notification categories is shown: Administration & Integration, Shopping, Carts & Requisitions, Purchase Orders, Catalog Management, Accounts Payable, Receipts, Contracts, Sourcing Director, Supplier Management, and Form Requests. The 'Notification Preferences' menu item is highlighted with a blue bar and callout 3, and the 'Administration & Integration' category is highlighted with a red box and callout 4.

# System Functions - Profile Setup – Notification Preferences

**STEP 5:** Once you have selected which category you want to edit, click on **Edit Section**.

**STEP 6:** Select **Override** from each function and use the drop-down to select email & notification. By selecting Email & Notification, you will receive alerts within TSUS Marketplace as well as an email when this workflow step has been completed.

**We recommend the following:**

## Shopping, Carts & Requisitions

1. Assigned Cart Processed
2. PR Workflow complete/ PO Created
3. Cart/ PR rejected/ Returned
4. PR submitted into Workflow
5. For Approvers: PO Pending Workflow approval

## Purchase Orders

1. PO rejected

**STEP 7** Scroll down to bottom of list and click **Save**.

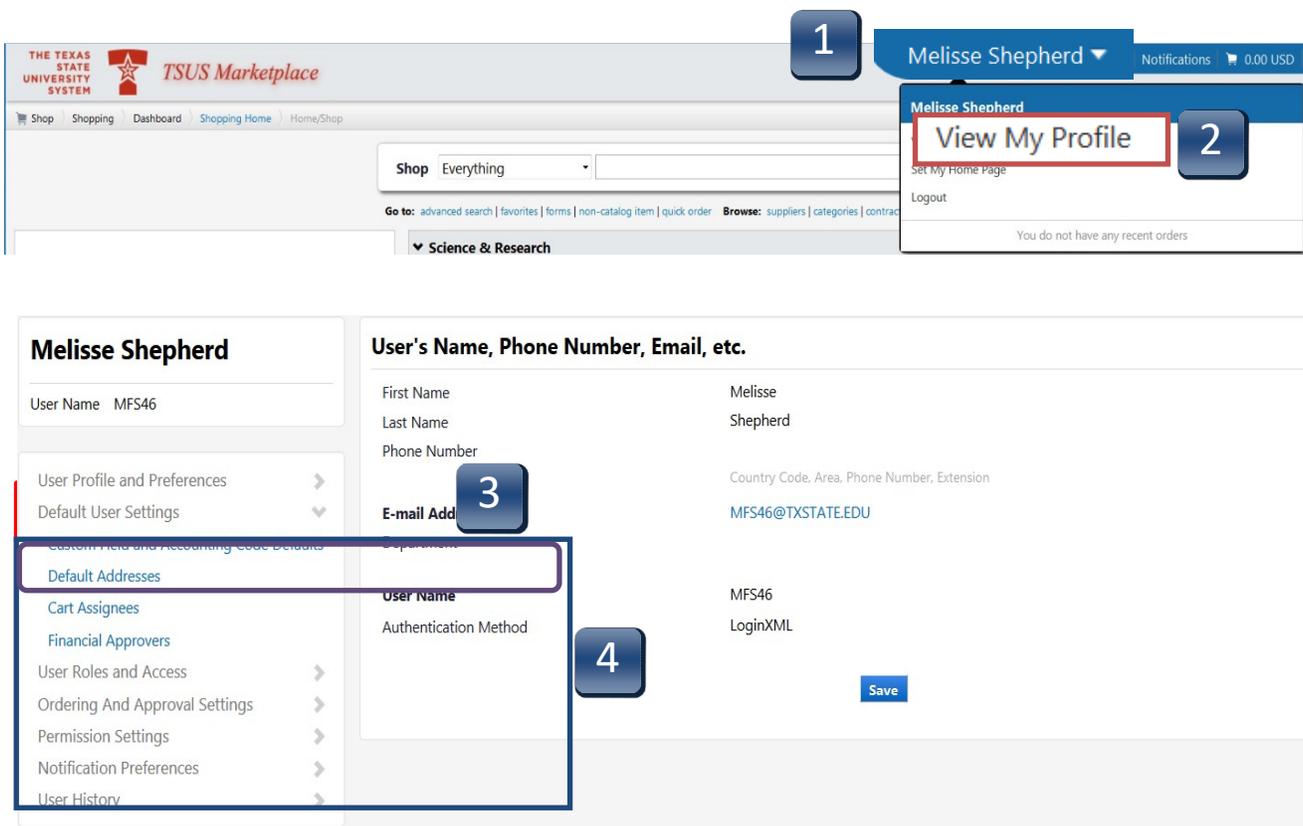
**Notification Preferences: Shopping, Carts & Requisitions**

Assigned Cart Processed Notification	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
Assigned Cart Deleted Notification	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR submitted into Workflow	<input type="radio"/> Default <input checked="" type="radio"/> Override	None
PR pending Workflow approval	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR Workflow Notification available	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR Workflow complete / PO created	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR line item(s) rejected	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
Cart/PR rejected/returned	<input checked="" type="radio"/> Default <input type="radio"/> Override	None

Save Save Changes

# System Functions - Profile Setup - Default Funding

- STEP 1:** Select **your name** in the top right corner of the TSUS Marketplace home page.
- STEP 2:** Select **View My Profile**. My Profile page appears.
- STEP 3:** Select **Default User Settings**.
- STEP 4:** Select **Custom Field and Accounting Code Defaults**.
- STEP 5:** **Custom Field and Accounting Code Defaults** code tabs appear.



## Custom Field and Accounting Code Defaults



## System Functions - Profile Setup - Default Funding

**STEP 6:** Select **Codes** tab.

**STEP 7:** To set a default or favorite value, select the **Edit** button in the **Edit Values** column for the **Custom Field Name** you want to change. The next pages will show you how to set up the below outlined fields.

### Custom Field and Accounting Code Defaults

Custom Field Name	Default Value	Description	Edit Values
Account Assignment Category	No Default Value		Edit
Asset	No Default Value		Edit
Asset Sub-Number	No Default Value		Edit
Fund	No Default Value		Edit
└ Cost Center	No Default Value		Edit
└ Internal Order	No Default Value		Edit
└ WBS Element	No Default Value		Edit
G/L Account	No Default Value		Edit
Storage Location	No Default Value		Edit

Once default settings have been saved, the Codes tab should reflect them.

# System Functions - Profile Setup – Default Funding

## ACCOUNT ASSIGNMENT CATEGORY

**STEP 1:** On the **Codes** tab, click on the **Edit** button to the right of the **Account Assignment** value. Values selection menu appears.

### Custom Field and Accounting Code Defaults

Custom Field Name	Default Value	Description	Edit Values
Fund	No Default Value		<a href="#">Edit</a>
└ Cost Center	No Default Value		<a href="#">Edit</a>
└ Internal Order	No Default Value		<a href="#">Edit</a>
└ WBS Element	No Default Value		<a href="#">Edit</a>
G/L Account	No Default Value		<a href="#">Edit</a>
Asset	No Default Value		<a href="#">Edit</a>
Storage Location	No Default Value		<a href="#">Edit</a>
Asset Sub-Number	No Default Value		<a href="#">Edit</a>
Account Assignment Category	No Default Value		<a href="#">Edit</a>
PO Type	BC	Bobcatalog Local	<a href="#">Edit</a>
Limit	No Default Value		<a href="#">Edit</a>
Expected Value	No Default Value		<a href="#">Edit</a>
Overall Limit	No Default Value		<a href="#">Edit</a>
Valid Start Date (Enter MMDDYYYY)	No Default Value		<a href="#">Edit</a>
Valid End Date (Enter MMDDYYYY)	No Default Value		<a href="#">Edit</a>
Purchasing Group	CPO	Central Purchasing Office	<a href="#">Edit</a>

1

## System Functions - Profile Setup – Default Funding

**STEP 2:** Click on the **Create New Value** button.

**STEP 3:** Make selections according to your funding type.

**(A, F, K, or S--Do not use P/WBS)**

Adding multiple values will generate a drop-down selection list when creating requisitions. Only one value can be selected as the default.

**STEP 4:** Click **Add Values**. Value is added to the table.

The screenshot shows the 'Codes' configuration page with the following elements:

- Header (int.) Codes Code Favorites
- Table with columns: Custom Field Name, Default Value, Description, Edit Values
- Row: Account Assignment Category, No Default Value, Edit
- Buttons: Edit Values, Close
- Buttons: Create New Value (2), Add Values (4)
- Table: Values (3) with columns: Value, Description
- Table: Values (3) with columns: Value, Description
- Table: Values (4) with columns: Value, Description
- Text: \* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

Custom Field Name	Default Value	Description	Edit Values
Account Assignment Category	No Default Value		Edit

Value	Description
K	Cost Center

Value	Description
<input type="checkbox"/>	A Asset
<input type="checkbox"/>	F Internal Order
<input checked="" type="checkbox"/>	K Cost Center
<input type="checkbox"/>	P WBS
<input type="checkbox"/>	S Statistical Internal Order

## System Functions - Profile Setup – Default Funding

- STEP 5:** Click on the Description of the value you added to the table.  
**Edit Existing Value** menu appears.
- STEP 6:** Check the **Default** box to set this value as the default for this field.
- STEP 7:** Click **Save**. New default value has been saved.
- STEP 8:** Click **Close** to return to Codes tab screen.

Account Assignment Category: No Default Value

Edit

Edit Values

Create New Value

Value	Description
K	Cost Center

5

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

**Edit Existing Value** ?

Value: K

Description: Cost Center

Default:  6

Status: active

Save 7 Remove

Close 8

# System Functions - Profile Setup – Default Funding

## FUND

**STEP 1:** On the **Codes** tab, click on the **Edit** button to the right of the **Fund** value. Values selection menu appears.

**Custom Field and Accounting Code Defaults**

Header (int.) **Codes** Code Favorites

Custom Field Name	Default Value	Description	Edit Values
Fund	No Default Value		Edit
└ Cost Center	No Default Value		Edit
└ Internal Order	No Default Value		Edit
└ WBS Element	No Default Value		Edit
G/L Account	No Default Value		Edit
Asset	No Default Value		Edit
Storage Location	No Default Value		Edit
Asset Sub-Number	No Default Value		Edit
Account Assignment Category	No Default Value		Edit
PO Type	BC	Bobcatalog Local	Edit
Limit	No Default Value		Edit
Expected Value	No Default Value		Edit
Overall Limit	No Default Value		Edit
Valid Start Date (Enter MMDDYYYY)	No Default Value		Edit
Valid End Date (Enter MMDDYYYY)	No Default Value		Edit
Purchasing Group	CPO	Central Purchasing Office	Edit

1

## System Functions - Profile Setup – Default Funding

- STEP 2:** Click on the **Create New Value** button. The **Search For Value** box appears.
- STEP 3:** If known, enter **Fund** number in the **Value** field and click **Search**. If unknown, click **Search**.
- STEP 4:** Select your fund. Adding multiple values will generate a drop-down selection list when creating requisitions. Only one value can be selected as Default.
- STEP 5:** Click **Add Values**. Value is added to table.

The screenshot displays the 'Custom Field Name' table with the following data:

Custom Field Name	Default Value	Description	Edit Values
Fund	No Default Value		Edit

Below the table is an 'Edit Values' section with a 'Close' button. A 'Create New Value' button (1) is highlighted. The 'Search For Value' dialog (2) is open, showing 'Field Name' as 'Fund' and 'Value' as '2000011020' (3). The 'Search' button (3) is highlighted. The 'Results' dialog (4) shows 'Values Found' as 1, with a table listing the result:

Select	Value	Description
<input checked="" type="checkbox"/>	2000011020	Des Method

The 'Add Values' button (5) is highlighted. A note at the bottom left states: '\* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.'

## System Functions - Profile Setup – Default Funding

- STEP 6:** Click the Description of the value you added to the table. **Edit Existing Value** menu appears.
- STEP 7:** Check the **Default** box to set this number as the default value for this field.
- STEP 8:** Click **Save**. New default value has been saved.
- STEP 9:** Click **Close** to return to Codes tab screen.

Custom Field Name	Default Value	Description	Edit Values
Fund	No Default Value		Edit

 Edit Values **9** 

**Create New Value**

Value	Description
2000011020	Des Method

**6**

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

### Edit Existing Value ?

Value:

Description:

Default:  **7**

Status: active

**8**  

# System Functions - Profile Setup – Default Funding

## COST CENTER

**STEP 1:** On the **Codes** tab, click on the **Edit** button to the right of the **Cost Center** value. Values selection menu appears.

### Custom Field and Accounting Code Defaults

Custom Field Name	Default Value	Description	Edit Values
Fund		No Default Value	Edit
└ Cost Center		No Default Value	Edit
└ Internal Order		No Default Value	Edit
└ WBS Element		No Default Value	Edit
G/L Account		No Default Value	Edit
Asset		No Default Value	Edit
Storage Location		No Default Value	Edit
Asset Sub-Number		No Default Value	Edit
Account Assignment Category		No Default Value	Edit
PO Type	BC	Bobcatalog Local	Edit
Limit		No Default Value	Edit
Expected Value		No Default Value	Edit
Overall Limit		No Default Value	Edit
Valid Start Date (Enter MMDDYYYY)		No Default Value	Edit
Valid End Date (Enter MMDDYYYY)		No Default Value	Edit
Purchasing Group	CPO	Central Purchasing Office	Edit

1

## System Functions - Profile Setup – Default Funding

- STEP 2:** If you have added multiple funds, select your fund from the drop-down menu. Adding multiple values will generate a drop-down selection list when creating requisitions. Only one value can be selected as Default.
- STEP 3:** Click on the **Create New Value** button. The **New Value** box appears.
- STEP 4:** Enter Cost Center into the **Value** field in the New Value menu. Check the **Default** box to set this number as the default value for this field. Only one number can be selected as the Default. If you want to type in multiple cost center numbers, proceed to **Step 2** the repeat the above steps for each value.
- STEP 5:** Click **Save**. Value is added to table.
- STEP 6:** Click **Close** to return to Codes tab screen.

Custom Field Name	Default Value	Description	Edit Values
Cost Center	1410140000	Procurement	<input type="button" value="Edit"/>

 Edit Values

Fund  2

3

Value	Description
1410140000	Procurement

5

**Edit Existing Value** ?

Value  4

Description

Default

Status active

5

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

6

## System Functions - Profile Setup – Default Funding

- STEP 7:** If Cost Center is unknown, click **Search** from the **Search for Value** menu, make selections, then click on the **Add Values** button. Select multiple values to generate a drop-down selection list when creating requisitions.
- STEP 8:** To designate a **Default** value when using the **Search for Value**, click the description of the value you wish to make the default. **Edit Existing Value** menu appears.
- STEP 9:** Check the **Default** box to set this number as the default value for this field.
- STEP 10:** Click **Save**. New default value has been added.
- STEP 11:** Click **Close** to return to Codes tab screen.

The first screenshot shows the 'Search For Value' dialog box. The 'Field Name' is set to 'Cost Center'. There are input fields for 'Value' and 'Description', and a 'Results Per Page' dropdown set to '5'. A blue 'Search' button is highlighted with a blue circle containing the number 7.

The second screenshot shows the 'Results' dialog box. It displays 'Values Found' as 1 and 'Page 1 of 1'. A table lists the results:

Select	Value	Description
<input checked="" type="checkbox"/>	1410140000	Procurement

An 'Add Values' button is highlighted with a blue circle containing the number 7.

The screenshot shows the 'Edit Existing Value' dialog box. At the top, a table lists the current state:

Custom Field Name	Default Value	Description	Edit Values
Cost Center	No Default Value		Edit

Below this, there is an 'Edit Values' section with a 'Fund' dropdown set to '2000011020' and a 'Create New Value' button. A table shows the selected value:

Value	Description
1410140000	Procurement

A blue circle with the number 8 is placed over this table. To the right, the 'Edit Existing Value' form is shown with the following fields:

- Value: 1410140000
- Description: Procurement
- Default:  (highlighted with a blue circle containing the number 9)
- Status: active

A blue 'Save' button is highlighted with a blue circle containing the number 10. A blue 'Close' button is also visible in the top right corner.

# System Functions - Profile Setup – Default Funding

## INTERNAL ORDER/GRANT/STATISTICAL ORDER

**STEP 1:** On the **Codes** tab, click on the **Edit** button to the right of the **Internal Order** value. Values selection menu appears.

### Custom Field and Accounting Code Defaults

Header (int.) <b>Codes</b> Code Favorites ?			
Custom Field Name	Default Value	Description	Edit Values
Fund		No Default Value	<a href="#">Edit</a>
└ Cost Center		No Default Value	<a href="#">Edit</a>
└ Internal Order		No Default Value	<a href="#">Edit</a>
└ WBS Element		No Default Value	<a href="#">Edit</a>
G/L Account		No Default Value	<a href="#">Edit</a>
Asset		No Default Value	<a href="#">Edit</a>
Storage Location		No Default Value	<a href="#">Edit</a>
Asset Sub-Number		No Default Value	<a href="#">Edit</a>
Account Assignment Category		No Default Value	<a href="#">Edit</a>
PO Type	BC	Bobcatalog Local	<a href="#">Edit</a>
Limit		No Default Value	<a href="#">Edit</a>
Expected Value		No Default Value	<a href="#">Edit</a>
Overall Limit		No Default Value	<a href="#">Edit</a>
Valid Start Date (Enter MMDDYYYY)		No Default Value	<a href="#">Edit</a>
Valid End Date (Enter MMDDYYYY)		No Default Value	<a href="#">Edit</a>
Purchasing Group	CPO	Central Purchasing Office	<a href="#">Edit</a>

1

## System Functions - Profile Setup – Default Funding

- STEP 2:** If you have added multiple funds, select your fund from the drop-down menu. Adding multiple values will generate a drop-down selection list when creating requisitions. Only one value can be selected as Default.
- STEP 3:** Click on the **Create New Value** button. The **Search For Value** box appears.
- STEP 4:** Type Internal Order into the **Value** field in the **Search For Value** box and click **Search**. If unknown, or you will be entering multiple values, leave the Value field blank and click **Search**. Values selection menu appears.
- STEP 5:** Select your Internal Order. Select multiple values to generate a drop-down selection list when creating requisitions. Click **Add Values**. Value(s) are added to the table.

Custom Field Name	Default Value	Description	Edit Values
Internal Order	No Default Value		Edit

Edit Values Close

Fund: 2000011020 2

**Create New Value** 3

Value	Description
5100000009	SPF - Football

5

\* Custom Field Values

**Search For Value** ?

Field Name: Internal Order

Value: 5100000009 4

Description:

Results Per Page: 5

4 **Search**

Results Values Found: 1 Page 1 of 1 ?

Per Page: 5

Select	Value	Description
<input checked="" type="checkbox"/>	5100000009	SPF - Football

5 **Add Values** Back to Search

## System Functions - Profile Setup – Default Funding

- STEP 6:** To set a default Internal Order, click on the Description of the value you wish to make Default. **Edit Existing Value** menu appears.
- STEP 7:** Check the **Default** box to set this number as the default value for this field.
- STEP 8:** Click **Save**. New default value has been saved.
- STEP 9:** Click **Close** to return to Codes tab screen.

The screenshot shows the 'Internal Order' profile setup interface. At the top, there is a tab labeled 'Internal Order' and a yellow banner indicating 'No Default Value'. An 'Edit' button is visible in the top right corner. Below the banner, there is a section titled 'Edit Values' with a 'Fund' dropdown set to '2000011020' and a 'Create New Value' button. A table lists values with columns 'Value' and 'Description'. The first row is highlighted with a blue background and a '6' callout: Value: 5100000009, Description: SPF - Football. To the right, the 'Edit Existing Value' dialog is open, showing fields for Value (5100000009), Description (SPF - Football), Default (checked with a '7' callout), and Status (active). A 'Save' button (with an '8' callout) and a 'Close' button (with a '9' callout) are at the bottom of the dialog. A footer note reads '\* Custom Field Values marked'.

Value	Description
5100000009	SPF - Football

\* Custom Field Values marked

# System Functions - Profile Setup – Default Funding

## G/L ACCOUNT

**STEP 1:** On the **Codes** tab, click on the **Edit** button to the right of the **G/L Account** value. Values selection menu appears.

### Custom Field and Accounting Code Defaults

Custom Field Name	Default Value	Description	Edit Values
Fund	No Default Value		Edit
└ Cost Center	No Default Value		Edit
└ Internal Order	No Default Value		Edit
└ WBS Element	No Default Value		Edit
G/L Account	No Default Value		Edit
Asset	No Default Value		Edit
Storage Location	No Default Value		Edit
Asset Sub-Number	No Default Value		Edit
Account Assignment Category	No Default Value		Edit
PO Type	BC	Bobcatalog Local	Edit
Limit	No Default Value		Edit
Expected Value	No Default Value		Edit
Overall Limit	No Default Value		Edit
Valid Start Date (Enter MMDDYYYY)	No Default Value		Edit
Valid End Date (Enter MMDDYYYY)	No Default Value		Edit
Purchasing Group	CPO	Central Purchasing Office	Edit

1

## System Functions - Profile Setup – Default Funding

- STEP 2:** Select **Create New Value**. **Search For Value** menu appears.
- STEP 3:** Type a G/L code into the **Value** field and click **Search**.  
If unknown, or you will be entering multiple values, leave the **Value** field blank and click **Search**. Values selection menu appears.
- STEP 4:** Select your G/L code. Select multiple values to generate a drop-down selection list when creating requisitions. If you choose to have a default G/L, click the Default check box. You can also select multiple values to generate a drop-down selection list when creating requisitions. Click **Add Values**. Value(s) are added to the table.
- STEP 5:** Click **Close** to return to Code tabs screen.

The screenshot displays the 'Codes' interface with the following elements:

- Header (int.) Codes Code Favorites**
- Table:**

Custom Field Name	Default Value	Description	Edit Values
G/L Account	No Default Value		Edit
- Create New Value** button (2)
- Search For Value** dialog:
  - Field Name: G/L Account
  - Value: 730000 (3)
  - Description: [Empty]
  - Results Per Page: 5
  - Search** button (3)
- Results Values Found** window:
  - Page 1 of 1
  - Results Per Page: 5
  - Found: 1
  - Table:

Select	Value	Description
<input checked="" type="checkbox"/>	730000	Consumable Supplies
  - Add Values** and **Back to Search** buttons
- Close** button (5)

**4** is also associated with the 'Add Values' button in the results window.

**\*\*It is not recommended that you set a default value if you order a variety of items on TSUS Marketplace. This field has the potential to change with every purchase.\*\***

# System Functions - Profile Setup – Default Funding

## STORAGE LOCATION

**STEP 1:** On the **Codes** tab, click on the **Edit** button to the right of the **Storage Location** value. Values selection menu appears.

### Custom Field and Accounting Code Defaults

Custom Field Name	Default Value	Description	Edit Values
Fund	No Default Value		<a href="#">Edit</a>
└ Cost Center	No Default Value		<a href="#">Edit</a>
└ Internal Order	No Default Value		<a href="#">Edit</a>
└ WBS Element	No Default Value		<a href="#">Edit</a>
G/L Account	No Default Value		<a href="#">Edit</a>
Asset	No Default Value		<a href="#">Edit</a>
Storage Location	No Default Value		<a href="#">Edit</a>
Asset Sub-Number	No Default Value		<a href="#">Edit</a>
Account Assignment Category	No Default Value		<a href="#">Edit</a>
PO Type	BC	Bobcatalog Local	<a href="#">Edit</a>
Limit	No Default Value		<a href="#">Edit</a>
Expected Value	No Default Value		<a href="#">Edit</a>
Overall Limit	No Default Value		<a href="#">Edit</a>
Valid Start Date (Enter MMDDYYYY)	No Default Value		<a href="#">Edit</a>
Valid End Date (Enter MMDDYYYY)	No Default Value		<a href="#">Edit</a>
Purchasing Group	CPO	Central Purchasing Office	<a href="#">Edit</a>

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## System Functions - Profile Setup – Default Funding

- STEP 2:** Select **Create New Value**. **Search for Value** menu appears.
- STEP 3:** Type a Storage Location code into the **Value** field.
- STEP 4:** If you want this value to be the default value, check the **Default** box.
- STEP 5:** Click **Save**. Value added to the table. Click **Close** to return to Codes tab screen.

The screenshot displays the 'Edit Existing Value' dialog box and the 'Custom Field Values' table. The dialog box has the following fields and controls:

- Value:** JCKP (Step 3)
- Description:** Purchasing (Step 3)
- Default:**  (Step 4)
- Status:** active
- Buttons:** Save (Step 5), Close (Step 5)

The 'Custom Field Values' table shows the following data:

Custom Field Name	Default Value	Description	Edit Values
Storage Location	JCKP	Purchasing	Edit

Numbered callouts indicate the steps:

- 2: Create New Value button
- 3: Value field
- 4: Default checkbox
- 5: Save and Close buttons

\* Custom Field Values marked

## System Functions - Profile Setup – Default Funding

- STEP 6:** If **Storage Location** is unknown, or you will be entering multiple values, click **Search** from the **Search for Value** menu, make selections, then click on the **Add Values** button. Select multiple values to generate a drop-down selection list when creating requisitions.
- STEP 7:** To designate a **Default** value when using the **Search for Value**, click the description of the value you wish to make the default. **Edit Existing Value** menu appears.
- STEP 8:** Check the **Default** box to set this number as the default value for this field.
- STEP 9:** Click **Save**. New default value has been added.
- STEP 10:** Click **Close** to return to Codes tab screen.

**Search For Value**

Field Name: Storage Location

Value:

Description:

Results Per Page: 5

**Search** 6

Select	Value	Description
<input type="checkbox"/>	JCKM	Tech Resources Business Services
<input type="checkbox"/>	JCKN	JCK 860 -University Marketing
<input type="checkbox"/>	JCKO	Audit and Compliance
<input checked="" type="checkbox"/>	JCKP	Purchasing
<input type="checkbox"/>	JCKQ	JCK 860 University News Service

Results Per Page: 5 Page: 28 of 53

Storage Location: No Default Value **Edit**

**Edit Values** **Close** 10

**Create New Value**

Value	Description
JCKP	Purchasing

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**Edit Existing Value** ?

Value: JCKP

Description: Purchasing

Default:  8

Status: active

**Save** 9

\* Custom Field Values marked