

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		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

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- 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 a software interface for managing custom field values. At the top, a table lists existing values:

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

Below the table, a 'Create New Value' button is highlighted with a blue box and a callout '2'. To its right, a 'Close' button is highlighted with a blue box and a callout '5'. Below the 'Create New Value' button, a table shows the newly added value:

Value	Description
JCKP	Purchasing

A callout '5' is placed below this table. To the right, the 'Edit Existing Value' dialog box is open, showing fields for 'Value' (JCKP), 'Description' (Purchasing), 'Default' (checked), and 'Status' (active). Callouts '3', '4', and '5' point to the 'Value' field, the 'Default' checkbox, and the 'Save' button, respectively. A 'Save' button is also visible at the bottom right of the dialog.

* Custom Field Values marked

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- 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

Results Per Page: 5

Page: 28 of 53

Values Found: 263

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

Add Values **Back to Search**

Storage Location: No Default Value

Edit

Close 10

Edit Values

Create New Value

Value	Description
JCKP	Purchasing

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* Custom Field Values marked

Edit Existing Value

Value: JCKP

Description: Purchasing

Default: 8

Status: active

Save 9