

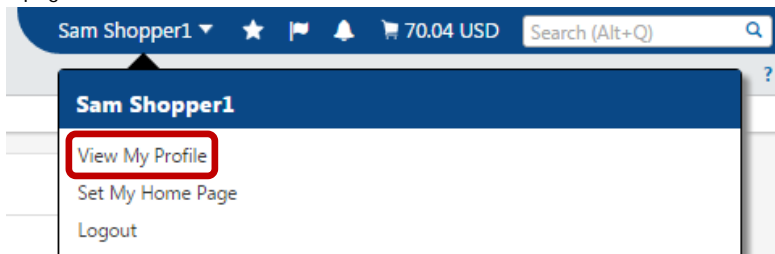
Updating your BearBuy User Profile

- ▶ This guide demonstrates how to update your user profile values and settings:
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 - Specify Code Favorites, page 2
 - Specify a User Profile Default for the Ship-To Address, page 2
 - Removing saved Values from your Profile, page 3
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 - Set up your Approval Code (to approve via email), page 5
- ▶ This guide also demonstrates how to manage your site settings:
 - Set your Homepage, page 5
 - Bookmark BearBuy Pages, page 6

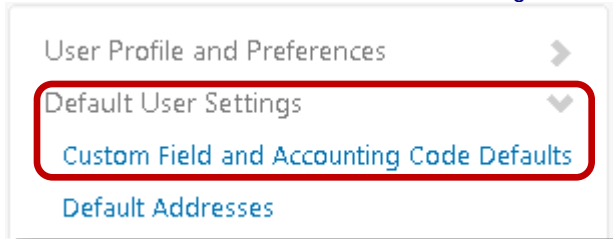
Specify a Profile Value for a Code

- ▶ The following example shows how to set up a default value for FUND; however, the basic steps to specify any of the default 'Codes' in your user profile are the same.

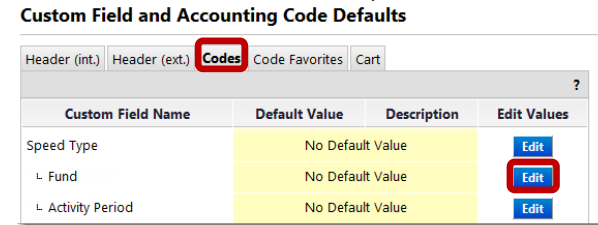
1. From the BearBuy homepage, access your profile by clicking the [profile](#) link at the top of the page.



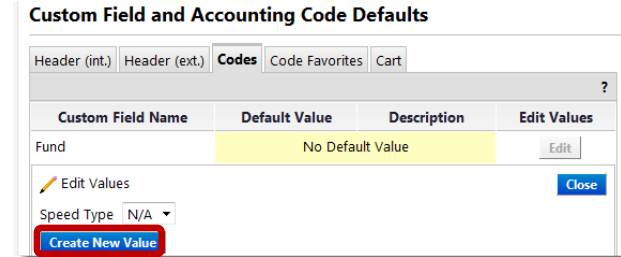
2. On the lower left side of the page, click on the [Default User Settings](#) heading to display a sub-menu. Then click on the [Custom Field and Accounting Code Defaults](#) link.



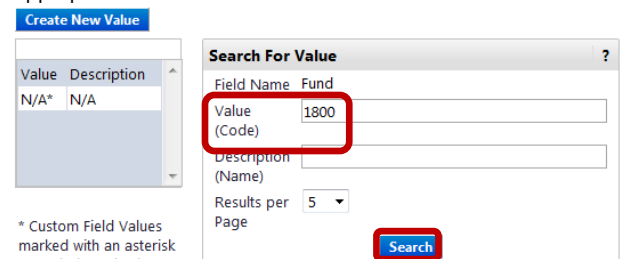
3. On the [Codes](#) tab, click the [Edit](#) button that corresponds to fund.



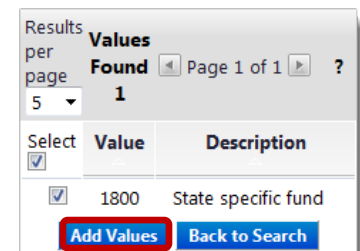
4. Click the [Create New Value](#) button. This step adds a fund to your profile. It does *not* create a new fund value.



5. Enter the appropriate [Fund](#) in the Value field. Click the [Search](#) button.



6. Check the checkboxes for the [Fund\(s\)](#) that you want. You can add multiple values to your profile. (The Funds added are available in a dropdown box during Requisition creation.)



7. Click the [Add Values](#) button to add the selected funds to your profile.

- If you typically use one fund, you can designate that fund as the default by selecting the **Value / Description** for the fund on the left, and then checking the **Default** checkbox on the right. **Save**. If you typically use multiple funds, do not assign a default.

- The default **Fund** displays in the **Default Value** column (default values are always in bold text). If you selected multiple **Funds** and did not designate a default, a **Default Value** will not be visible but all **Funds** added are stored in your profile.

- Click the **Close** button.

▶ Take care when processing your requisition as the default codes will automatically appear in each of your requisitions. If you forget to make any necessary changes, you may accidentally assign an incorrect code in the requisition.

Specify Code Favorites

▶ Code Favorites can be used to specify your own combination of chartfields (known as accounting codes in BearBuy). Only valid PeopleSoft values are shown. As values are changed or inactivated in PeopleSoft, they may become inactive in your selected Code Favorite.

- From the BearBuy homepage, access your profile by clicking your name at the top of the page, then the **View My Profile** link.
- Click the **Default User Settings** ⇒ **Custom Field and Accounting Code Defaults** ⇒ **Code Favorites** tab.
- In the **Accounting Code** section, click the **Add** button.

- An **Accounting Code** pop-up will appear. First, specify a **Nickname** for the set of Accounting Codes you will enter. Next, select the desired values for each of the fields.

- Add any additional distributions by clicking the **add split** link (on the far right hand side).
- When complete, click the **Save** button.
- You can add additional **Code Favorites** by repeating these steps. To modify a **Code Favorite**, click the **Edit** button or **Delete** button as appropriate.

Specify a User Profile Default for the Ship-To Address

▶ Setting up defaults for **Cart Assignees** is a similar process.

- From the BearBuy homepage, access your profile by clicking your name at the top of the page, then the **View My Profile** link.
- Click the **Default User Settings** ⇒ **Default Addresses** menu links. The **Ship To** tab appears.
- Click the **Select Addresses for Profile** button.

Select Addresses for Profile

- In the **Address Search** box (right hand side of the page) enter part of the address in the **Nickname / Address Text** field. Then click the **Search** button.

Address Search

Nickname / Address Text: 1472 Parnassus

Results per Page: 10

Search

- Typically, there will be many results for basic searches – being more specific helps. Scroll through the results or refine your **Nickname / Address Text** search.
- Once you have found the proper address, click the **radio button** next to the address.

Address Search

Nickname / Address Text: 1472 Parnassus

Results per Page: 10

Search

Addresses Found: 8 Page 1 of 1

Name	Address
<input checked="" type="radio"/> 1472-74 5th RM 100, PARNASSUS, 2029100	Attn: Ray Requester3

- Edit Selected Address** is shown. This is editing just your personal view of the address. NOT what other users will see in BearBuy.

Edit Selected Address

Nickname: 1472-74 5th RM 100, PARNASSUS

Default:

Current Default Address: ---

ADDRESS

Attn: Ray Requester3

Save Remove

- You can edit the **Nickname** with whatever is appropriate for your business needs. The **Attn:** field is defaulted to your full name, but this can be updated as well.
- If you want this Ship-To address to be the default for your Carts, check the **Default** checkbox. **Save**.

Edit Selected Address

Nickname: 1472-74 5th RM 100, PARNASSUS

Default:

Removing saved Values from your Profile

- If you no longer use an Accounting Code (chartfield) or Ship-To address in your profile, you can remove the value.

- The following example shows how remove a value for **FUND**; however, the basic steps to remove any of the default 'Codes' in your user profile are the same.

- From the BearBuy homepage, access your profile by clicking your name at the top of the page, then the **View My Profile** link.
- Under **Default User Settings**, click on **Custom Field and Accounting Code Defaults**.
- On the **Codes** tab, click the **Edit** button that corresponds to fund.
- On the left listing of saved funds, click the fund you would like to remove. The **Edit Existing Value** box appears on the right.

Edit Existing Value

Value	Description
N/A*	N/A
1800	State specific fund

Value: 1800

Description: State specific fund

Default:

Status: active

Save Remove

- Click the **Remove** button. The value is now removed from your profile.

- The following example shows how to remove a saved address from your profile.

- From the BearBuy homepage, access your profile by clicking your name at the top of the page, then the **View My Profile** link.
- Click the **Default User Settings** ⇒ **Default Addresses**. The **Ship To** tab appears.
- Find the address you would like to remove from the **Shipping Addresses** list. Click on the address. The selected address appears on the right.

4. Click the **Delete** button to remove the address from your profile.

Removing default Values from your Profile

- ▶ If you no longer need an Accounting Code (chartfield) or address to be defaulted in your profile, you can remove the default.
 - ▶ The following example shows how to remove a default for FUND; however, the basic steps to specify any of the default 'Codes' in your user profile are the same.
1. From the BearBuy homepage, access your profile by clicking your name at the top of the page, then the **View My Profile** link.
 2. Click the **Default User Settings ⇒ Custom Field and Accounting Code Defaults ⇒ Codes** tab.
 3. On the **Codes** tab, click the **Edit** button that corresponds to fund.
 4. On the left listing of saved funds, click the fund you would like to remove the default. The **Edit Existing Value** box appears on the right.

5. Uncheck the **Default** checkbox. Click the **Save** button.

- ▶ The following example shows how to remove a saved address from your profile.
1. From the BearBuy homepage, access your profile by clicking your name at the top of the page, then the **View My Profile** link.
 2. Click the **Default User Settings ⇒ Default Addresses**. The **Ship To** tab appears.
 3. Find the address you would like to remove from the **Shipping Addresses** list. Click on the address. The selected address appears on the right.

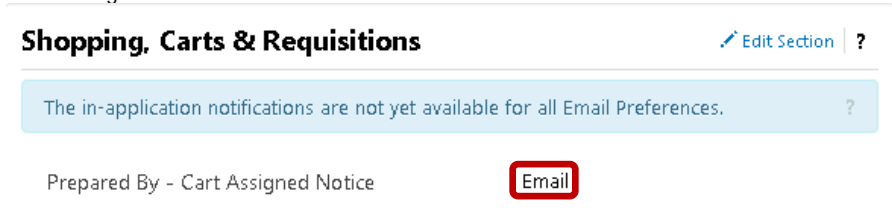
4. Uncheck the **Default** checkbox. Click the **Save** button.

Set Up your Notification Preferences

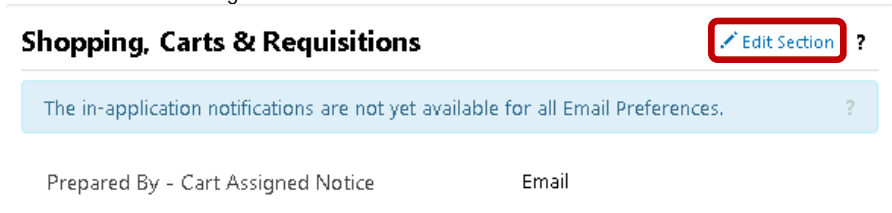
- ▶ By default, BearBuy provides notifications when different parts of the purchase request process are completed. For instance, a Shopper or Requester will be notified when a Cart/Requisition is returned to them because the email preference of *PR rejected/returned* is active by default.
- ▶ These notifications can be sent via email, accessed through the Notifications top menu in the site, or both. Notifications can also be completely turned off.
- ▶ Shoppers, Requesters, and Approvers may be interested in activating additional email notifications.

1. From the BearBuy homepage access your profile by clicking your name at the top of the page, then the **View My Profile** link.
2. Click the **Notification Preferences** header. Categories of notifications display.
3. Click on a category name to display a listing of that type of preferences.
 - a. The various email preference categories that are most relevant to users are **Shopping, Carts & Requisitions, Purchase Orders, and Settlement**. The *Administration & Integration* section is generally reserved for BearBuy administrators.

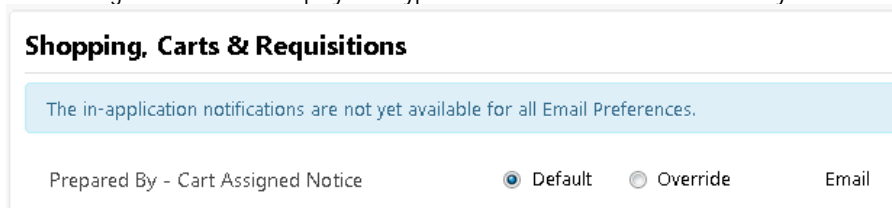
4. The name of each email notification message is listed in each of the categories.
5. To learn more about a particular notification preference, click the “?” to see a description of each email.
6. Current notification settings appear next to the notification name.
 - a. **Email** – receive a notification via an email alert only.
 - b. **Notification** – receive a notification via the Notifications menu in BearBuy.
 - c. **Email & Notification** – receive a notification both through email and via the Notifications menu in BearBuy.
 - d. **None** – turn off the notification so no notification will be generated.
 - e. The Notification and Email & Notification option is not available for every notification setting.



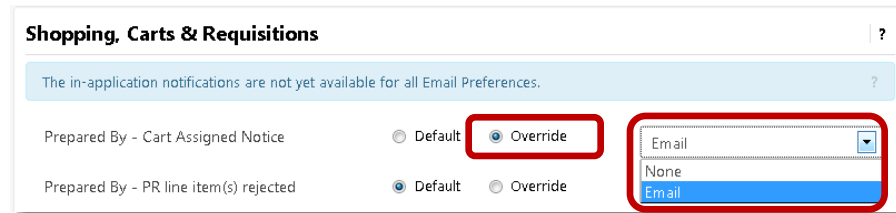
7. To change your notification settings, Click “**Edit Section**” link in the upper right above email/notification settings.



8. Radio buttons appear.
 - a. The leftmost radio button indicates if the email/notification setting is the default system setting.
 - b. The right most column displays the type of email/notification that is currently set.



9. If not already selected, click the **Override** radio button for a corresponding notification. The right most column becomes a dropdown menu.



10. Click on the notification setting’s dropdown menu to view all options available and choose the type of notification you would like to receive, if any.
11. After editing all desired notifications on the page, click the **Save Changes** button at the bottom of the page.

Set Up your Approval Code (optional)

► The approval code enables Requisition Approvers to approve a Requisition without logging into BearBuy.

1. From the BearBuy homepage access your profile by clicking your name at the top of the page, then the **View My Profile** link.
2. Click the **Update Security Settings** header ⇒ **Change Email Approval Code**.
3. Enter your password in the **Email Approval Password** box. The email approval password can be alphanumeric and must be at least 6 characters.

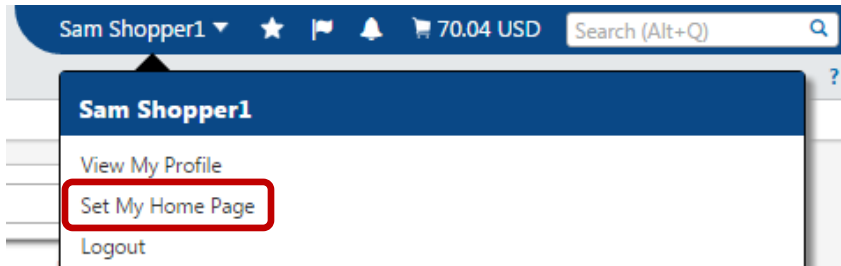


4. Click the **Save** button.
5. The next time you receive emails requesting your approval on a Requisition, you will have the option to be directed to an interim page to approve the Requisition using the approval code.

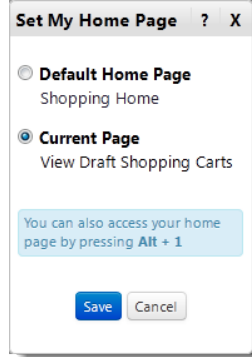
Set your Home Page

► The home page is the page displayed to a user after logging in to the application. Users can set their own home page.

1. Navigate to the page you wish to set as the homepage.
2. Click on your name in the top navigation menu.
3. In the menu, select the **Set My Home Page** link



- The **Set My Home Page** window appears. The current page is listed as the desired home page. Click the **Save** button to set the current page as your home page.

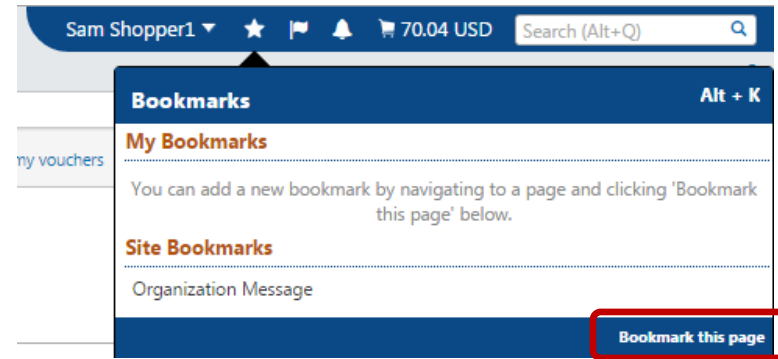


- The next time you log into BearBuy or navigate to the home page, the new page will appear.
 - Only pages accessible from the menus are available to be set as a user's home page.

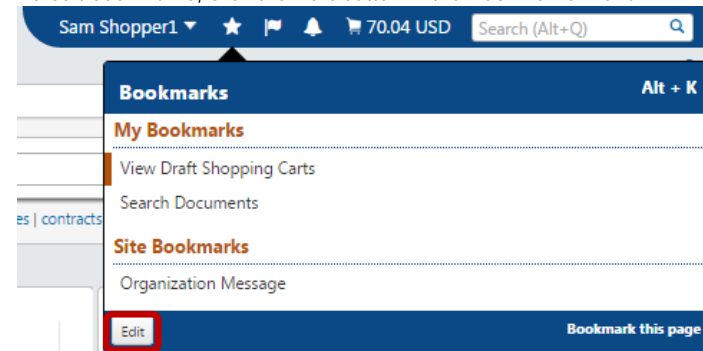
Bookmark BearBuy Pages

▶ Bookmarks can be configured for quick access to commonly used pages that users can add, remove and/or reorder at any time.

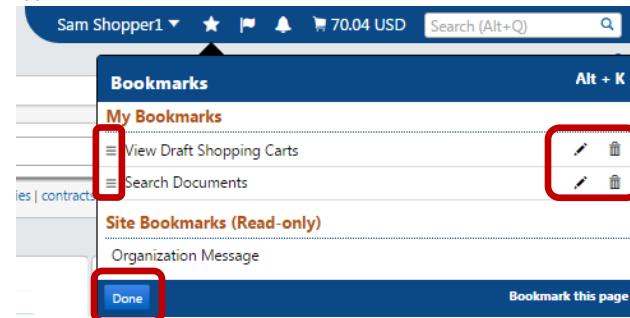
- Navigate to the page you wish to save as a bookmark
- Click on the **My Bookmarks** menu represented by the star icon from the top navigation menu.



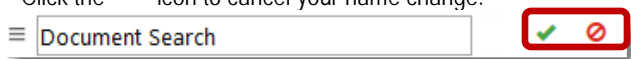
- Click the **Bookmark this page** link in the bottom right corner of the Bookmarks menu.
- To edit bookmarks, click the **Edit** button in the Bookmarks menu.



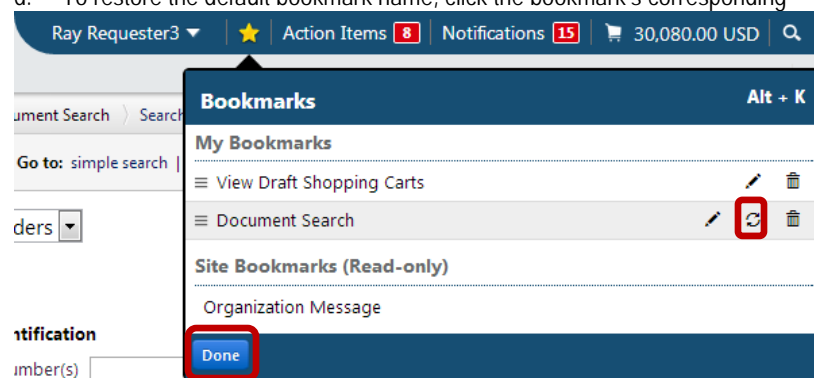
- To change the order of the bookmarks, click on the icon and move the bookmark up and down the list.
- To remove a bookmark from the list, click on the bookmark's corresponding icon.



- c. To edit a bookmark name, click on the bookmark's corresponding icon.
 - i. Enter a name for the bookmark in the text box.
 - ii. Click the checkmark to save the name of the bookmark.
 - iii. Click the icon to cancel your name change.



- d. To restore the default bookmark name, click the bookmark's corresponding icon.



- e. Click the **Done** button when edits are complete.
- ▶ Only pages accessible from the menus are available to be set added as bookmarks.
- ▶ To access the bookmarked page, click on the link in the My Bookmarks menu.
- ▶ The Organization Message bookmark at the end of the bookmarks listing is a default bookmark that cannot be edited or removed. This bookmark brings you to the BearBuy Organization Message that contains important BearBuy news and resources.