

[Setting Up Your User Profile]

Use this instruction guide to set up your **User Profile** in myUF Market with information that will be easily accessible or “saved” for use in your cart’s requisition, such as your Shipping address, PO Business Unit, Billing address and ChartField information. You may also set this information as **default**, to automatically display. Set up **e-mail notifications** in the User Profile as well, to be notified by e-mail at different points during the processing of your order. **NEW in the 9.3 Upgrade:** E-mail notifications will be added automatically by role. You may override these selections in your User Profile by checking the Override box for each selection, then checking or unchecking your selection, then saving.

For a simulation of setting up your user profile, please go to <http://purchasing.ufl.edu/myufmarket/resources.html> and follow directions to use web simulations – use “Setting Up a User Profile.”

- ▶ Access myUF Market by navigating to <http://my.ufl.edu> and logging in with your Gatorlink username and password, and navigate to:
 - ▶ **My Self Service > myUF Market** for UF_N_MKT_Shopper role
 - ▶ **eProcurement > myUF Market** for UF_N_MKT_Shopper_Req role (to shop only) UF_N_MKT_Requestor and UF_N_MKT_Financial_Approver
- ▶ At the main menu, click the **Profile** link in the blue section at the top of the page, next to your name

Setting Up Ship To

- ▶ Navigate to **Purchasing > Addresses > Ship To**
 - ▶ Click the **Select Addresses for Profile** button on the top right-hand side
 - An Address Search box displays
 - Enter the Nick Name of the building, for example, “Library West”
 - Click the option button to select the one needed
 - Click the **Search** button
 - If you don’t find your Ship To, try these additional search tips:
 - Try using the asterisk * as a wildcard, such as *Rogers* to find Frazier-Rogers Hall
 - Use your address in the **Address Text** field, for example, “Belle Glade”
 - e-mail myufmarket@ufl.edu that you are having trouble locating your Ship To address and include the name of your building, your department and your college
 - ▶ The result displays the following for editing
 - The building Nick Name – which you may change in your profile
 - Check the box next to Default if you would like the system to autopopulate the Ship To section of the requisition each time with this address
 - Your name – you may enter a different one for shipping purposes
 - Building and Room
 - Shipping address
 - ▶ Click the **Save** button



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Setting Up Bill To

- ▶ Navigate to **Purchasing > Addresses > Bill To**
 - ▶ Click the **Select Addresses for Profile** button on the top right-hand side
 - An Address Search box displays
 - Enter the Nick Name of the unit or Department name
 - Click the Search button
 - If you don't find your Bill To, try PO Box or city in the **Address** field instead
 - Try using the asterisk * as a wildcard, such as *115250* to find PO Box 115250, and enter into the **Address Text** field
 - e-mail myufmarket@ufl.edu that you are having trouble locating your Bill To address and include the name of your building, your department and your college
 - ▶ The result displays the following for editing
 - The unit or department Nick Name
 - Check the box next to Default if you would like the system to autopopulate the Ship To section of the requisition each time with this address
 - Your name – you may enter a different one for billing purposes
 - Building and Room
 - Billing address
 - ▶ Click the Save button

Optional - Setting Up Distribute By (for Requestors)

- ▶ Navigate to **Purchasing > Custom Fields > Header**
- ▶ Click the **Edit** button to default to Distribute By Quantity or Amount
 - ▶ Click the Create New Value button
 - ▶ Click the checkbox of Quantity or Amount
 - ▶ Click the Add Values button
 - To set as default, click the link of the saved value
 - Check the default box and Save

Setting PCard as Default Payment Option

Note: To use your PCard in myUF Market, it must be added to your profile by the PCard Team in Purchasing Services. After logging in at least once, go to http://www.purchasing.ufl.edu/main_purchasingcards.asp and click the myUF Market icon. Enter your information to request your PCard added to your profile.

If you would like to have it default for use on all your requisitions,

- ▶ Navigate to **Purchasing > Payment Options**
 - ▶ Click the card in the **My Cards** box
 - ▶ Check the **Default** box
 - ▶ Click **Save**

Otherwise, the PCard will be a payment option with option to assign to each requisition.

Setting Up PO Business Unit and ChartFields

- ▶ Navigate to **Purchasing > Custom Fields > Codes**
- ▶ The page displays all ChartFields including the PO Business Unit on the left
- ▶ To add a default value, click the **Edit** button on the right for the selected ChartField
 - ▶ Only edit the ones you choose – even if it is just one

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- ▶ Click the **Create a New Value** button
- ▶ The system displays a Search box to search for the values you need
- ▶ Click the **Add Values** button after checking your selections
- ▶ The system will add the ones selected to a dropdown for easy access within the requisition
- ▶ To select a default value that will autopopulate, click a value to select it from the saved list
- ▶ In the Edit Existing Value box, check the Default box for this value
- ▶ Click the Save button

Setting Up Default Cart Assignees

- ▶ Navigate to **Purchasing > Cart Assignees**
- ▶ Click the **Add Assignees** button to search for requestors and add to the list
- ▶ Click the **Preferred** radio button to have an assignee as a default assignee
- ▶ Now you will not have to search for a requestor every time you need to assign a shopping cart

E-mail Notifications – **New features in 9.3 November 2009 Upgrade!**

- ▶ Navigate to **My Profile > User Settings > E-mail Preferences**
- ▶ In the 9.3 November 2009 upgrade, the system displays a list of e-mail notifications, some of which
 - ▶ You have already selected
 - ▶ The system automatically assigns per your user role; for example, UF_N_MKT_Requestor role will have certain e-mails checked automatically
- ▶ You may change your selections and override the automatic selections

To override automatic selections, click the checkbox in the **Override Role** column for the notification, then click the checkbox that appears in the **Value** column to select or deselect. Then click the Save button. The Override Role checkbox will turn green checks (automatic selections) or red x's into checkable boxes.

The screenshot shows the 'myuf market' user interface. The user is logged in as 'Marianne Preisler'. The page title is 'My Profile'. The navigation menu includes 'home/shop', 'favorites', 'forms', 'carts', 'history', 'profile', and 'customize'. The 'User Settings' section is active, with sub-tabs for 'Purchasing', 'Permissions', and 'History'. The 'Email Preferences' tab is selected, showing a list of email preferences. The table has three columns: 'Email Preference', 'Value', and 'Override Role'. The 'Value' column contains red 'X' marks or green checkmarks, and the 'Override Role' column contains checkboxes. A 'Save' button is at the bottom. Two arrows point from the text above to the 'Override Role' checkboxes for 'Receive PR and PO notifications for Carts Assigned to Me' and 'PR line item(s) rejected'.

Email Preference	Value	Override Role
Administration & Integration		
Search Result Export Confirmation	X	<input type="checkbox"/>
PR Export Failure Notification	X	<input type="checkbox"/>
Shopping, Carts & Requisitions		
Cart Assigned Notice	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Receive PR and PO notifications for Carts Assigned to Me	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Assigned Cart Processed Notification	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PR submitted into Workflow	X	<input type="checkbox"/>
PR Workflow complete / PO created	X	<input type="checkbox"/>
PR line item(s) rejected	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PR rejected/returned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Purchase Orders		
PO submitted into Workflow	X	<input type="checkbox"/>
PO Workflow complete	X	<input type="checkbox"/>
PO sent to supplier	X	<input type="checkbox"/>
PO Line Item Ship Notice	X	<input type="checkbox"/>
PO line item(s) rejected	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PO rejected	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PO line item Backorder notice	X	<input type="checkbox"/>
PO line item Cancellation notice	X	<input type="checkbox"/>
Settlement		
PO Requires Receipt notice	X	<input type="checkbox"/>

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Listing of Assigned per Role E-mail Notifications and Recommended E-mails:

Shopper and Shopper Req Assigned E-mails	Requestor Assigned E-mails	Financial Approver Assigned E-mails
Assigned Cart Processed Notification	Receive PR and PO Notifications for Carts Assigned to Me	Assigned Cart Processed Notification
PR rejected/returned	Assigned Cart Processed Notification	PR pending Workflow approval
	Cart Assigned Notice	PR rejected/returned
	PR rejected/returned	
Recommended E-mails	Recommended E-mails	Recommended E-mails
PR Submitted into Workflow	PO Rejected	PR Line Items Rejected
PR Line Items rejected	PR Line Item Rejected	

For further assistance, e-mail myufmarket@ufl.edu or contact Purchasing Services at 392-1331 or visit <http://www.purchasing.ufl.edu/myufmarket>