

Setting up Your User Profile

Overview

Use this instruction guide to set up or modify your User Profile in myUF Marketplace with information saved for use later when completing a cart, requisition, or invoice. This saves you from retyping items like **Billing, Shipping** address and PO Business Unit. Set this information as **default** to automatically display. Set up **ChartFields** and **e-mail notifications** to be notified during the processing of your transaction. Your User Profile includes information such as your phone number, department and to whom you report as well as your roles. If you need this information updated or corrected, please contact the department below:

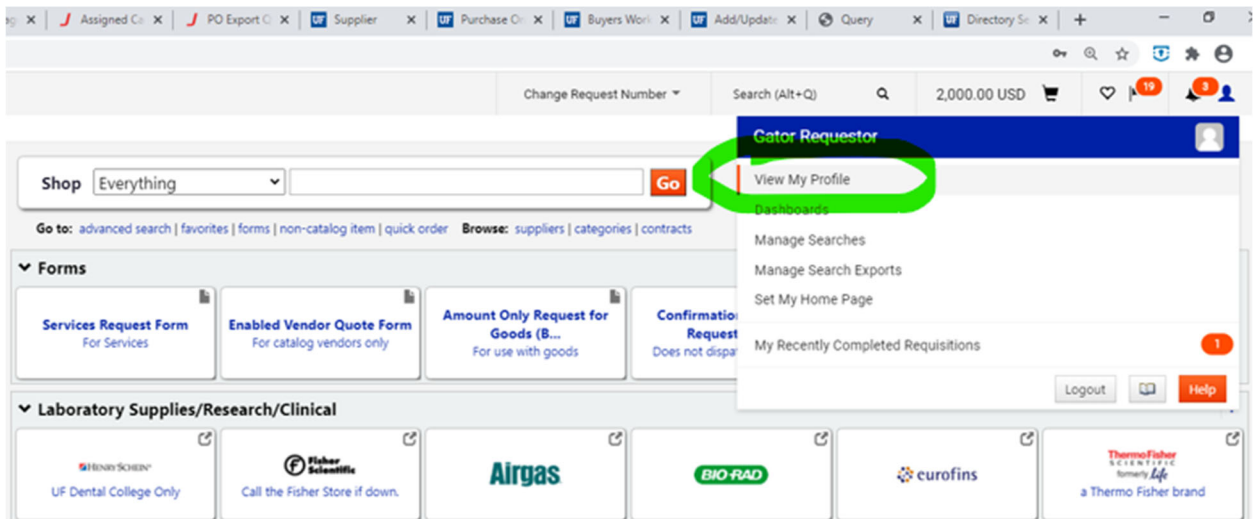
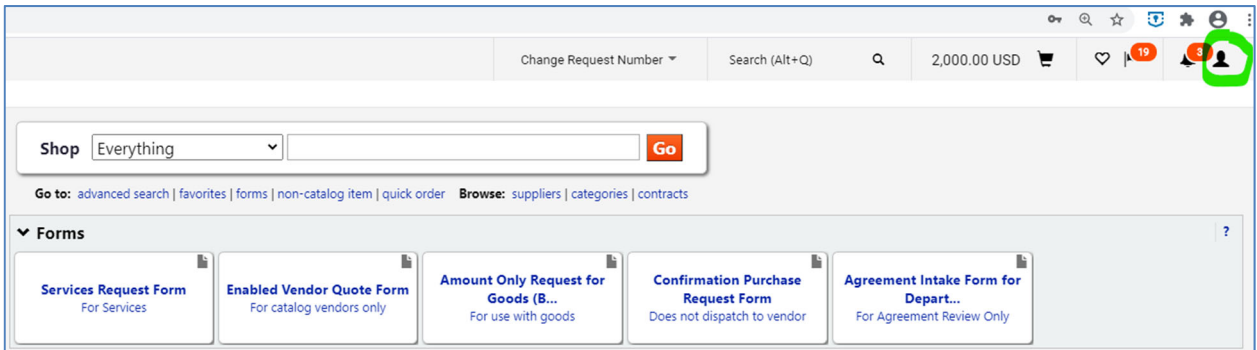
Attribute	Contact or Navigation to make change
Phone	myUFL: Main Menu > My Account > Update My Directory Profile
Department Association	Contact your Department HR Office Manager – the Primary department in myUF Marketplace is set by the department with the highest FTE for you.
Reports To	Contact your Department HR Office Manager to submit an ePAF for you using the Updating Supervisor ID Instruction Guide . The HR Classification and Compensation Office can assist them.
Legal Name	Please use this guide: Name and/or Gender Change Request Form Instruction Guide
Business Email	Please contact your Department Identity Coordinator or call the UF Help Desk at 392-HELP.
Security Roles	Ask your Department Security Administrator DSA

Access myUF Marketplace by navigating to <http://my.ufl.edu> and logging in with your GatorLink username and password.

Within myUFL, navigate to:

- ⇒ Nav Bar
- ⇒ Main Menu
- ⇒ My Self Service
- ⇒ myUF Marketplace

On the top Menu Bar, click **on the tiny head icon on the far right** to access a dropdown menu, then click **View My Profile**.

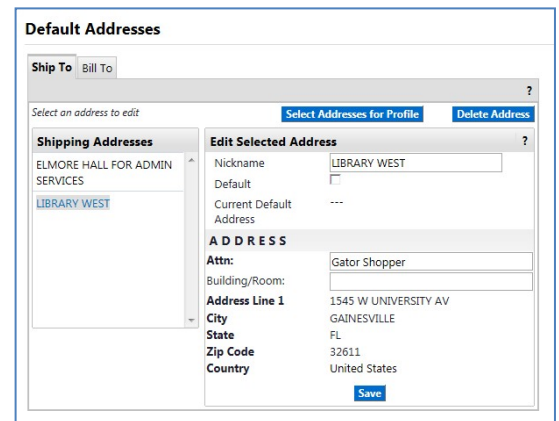


Your User Profile will display. Here is an example:

User's Name, Phone Number, Email, etc.	
First Name	Michele
Last Name	Ramsey
Phone Number	+1 352-273-9556 <input type="text" value="ext."/>
Mobile Phone Number	<input type="text"/>
E-mail Address *	mramsey@ufl.edu
Department	MD-MOLECULAR GENTCS / MIC
Position	<input type="text"/>
Reports To	<input type="text" value="-"/> <input type="button" value="Select User"/>
Authentication Method	cXMLSignOn
User Name *	<input type="text"/>

Setting up Ship To

1. In the My Profile screen, click **Default User Settings > Default Addresses**.
2. Click the **Select Addresses for Profile** button on the top right-hand side.
 - An Address Search box displays.
 - Enter the street address number only (such as “971”). Ship to address are set by street address.
 - Click the **Search** button.
3. If the address you seek is listed, click the **option button** beside the appropriate address.
4. 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 myUFMarketplace@ufl.edu that you are having trouble locating your Ship To address and include the name of your building, your department, your college, and street address
 - The result displays the following for editing:
 - The building nickname – which you may change in your profile
 - Check the box next to Default if you would like the system to auto populate 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
5. Click the **Save** button.



The screenshot shows the 'Default Addresses' window with the 'Ship To' tab selected. A list of shipping addresses is shown on the left, with 'LIBRARY WEST' selected. The 'Edit Selected Address' form on the right includes fields for Nickname (LIBRARY WEST), Default (checkbox), Current Default Address (---), and ADDRESS (Gator Shopper). The address details are: Building/Room: 1545 W UNIVERSITY AV, City: GAINESVILLE, State: FL, Zip Code: 32611, and Country: United States. A 'Save' button is at the bottom right.

Setting up Bill To

1. Click the **Bill To** tab at the top of the Default Addresses window.
2. Click the **Select Addresses for Profile** button on the top right-hand side.
 - a. An Address Search box displays.
 - b. Enter the Nick Name of the unit or Department name.
 - c. Click the **Search** button.
3. If the address you seek is listed, click the option button beside the appropriate address.
4. If you don’t find your Bill To, try these additional search tips:
 - a. 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.
 - b. E-mail myUFMarketplace@ufl.edu that you are having trouble locating your Bill To address and include the name of your building, your department and your college.
5. The result displays the following for editing.
 - a. The unit or department Nick Name.

The Bill to address for the university is **PO Box 3357, Scranton, PA**, if you need an invoice to go to your department.

Tip: [Check the box next to Default if you would like the system to auto populate the Ship To section of the requisition each time with this address.]

- b. Your name--you may enter a different one for billing purposes.
 - c. Building and Room.
 - d. Billing address.
6. Click the **Save** button.

Setting Up PO Business Unit and ChartFields

1. In the My Profile screen, click **Default User Settings > Custom Field and Accounting Code Defaults** then click the **Code Favorites** tab to set up and save ChartField strings for use in requisitions and invoices. See the [Using ChartField String Favorites](#) instruction guide for information on this process.
 2. In the My Profile screen, click **Default User Settings > Custom Field and Accounting Code Defaults** then click the **Codes** tab to set up and save individual ChartField values.
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3. The page displays all ChartFields including the PO Business Unit on the left.
 4. 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.
 - Click the **Create a New Value** button and the system displays a Search box to search for the values you need. For example, you may click Edit for Account Code; click Create New Value; enter a keyword in Description to search by, such as "Lab"; check the one(s) you use often to add to a dropdown to use later.
 - Click the **Add Values** button after checking your selections.
 - The system will add the ones selected to the menu on the left for easy access within the requisition.
 - To select a default value that will auto populate, click a value to select it from the saved list.
 - a. In the **Edit Existing Value** box, check the Default box for this value.
 - b. Click the **Save** button.

Setting Up Default Cart Assignees

1. In the Purchase Requisition screen, click **Default User Settings > Cart Assignees**.
2. Click the **Add Assignee...** button to search for requestors and add to the list by clicking the Select link by the requestor's name in the Search results.
3. Click the **Set as Preferred** button to have an assignee as a default assignee.
4. Now you will not have to search for a requestor every time you need to assign a shopping cart.

E-mail Notifications

1. In the My Profile screen, click **Notification Preferences**, then click Shopping Carts and Requisitions.
2. The menu displays a list of notification categories that have default preferences based on your user role or the results of selections you have made.
3. You may change your notification preferences and override the automatic selections.

Click the **Edit Section** link in the top right of this window. Select the **Override** radio button to make a

change. A dropdown menu with the following options will display: None, Email, Notification, and Email & Notification. Click on your selection and click the **Save Changes** button at the bottom. You may also set these up for Purchase Orders.

Gator Shopper
User Name ufshopper

- 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 >

Shopping, Carts & Requisitions Edit Section ?

Assigned Cart Processed Notification	Email & Notification
Assigned Cart Deleted Notification	Email & Notification
PR submitted into Workflow	None
PR pending Workflow approval	None
PR Workflow Notification available	None
PR Workflow complete / PO created	None
PR line item(s) rejected	None
Cart/PR rejected/returned	Email & Notification

Gator Shopper
User Name ufshopper

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- User History >

Shopping, Carts & Requisitions ?

Assigned Cart Processed Notification	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Assigned Cart Deleted Notification	<input type="radio"/> Default <input checked="" type="radio"/> Override	Email & Notification
PR submitted into Workflow	<input checked="" type="radio"/> Default <input 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	Email & Notification

Save Changes **Cancel**

Additional Assistance

myUF Marketplace – Marketplace Help Desk
 Email: myUFMarketplace@ufl.edu
 Phone: (352) 392-1335