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: <u>Name and/or Gender Change</u>
	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 <u>http://my.ufl.edu</u> 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.

*my*uf marketplace

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Your User Profile will display. Here is an example:

		User's Name, Phone	Number, Email, etc.		
		First Name	Michele		
		Last Name	Ramsey		
User Profile and Preferences	~	Phone Number	+1 352-273-9556	ext.	
User's Name, Phone Number, Email, e	tc.		International phone number		
Language, Time Zone and Display Se	ttings		(
App Activation Codes		Mobile Phone Number			
Early Access Participation			International phone number	s must begin with +	
Guided Tour Instructions		E-mail Address *	mramsey@ufl.edu		
Update Security Settings	>	Department	MD-MOLECULAR GENTCS / MIC		
Default User Settings	>	Department			
User Roles and Access	>	Position		~	
Ordering and Approval Settings	>				
Permission Settings	>	Reports To	Select User		
Notification Preferences	>		and and		
User History	>	Authentication Method	cXMLSignOn	*	
Administrative Tasks	>	User Name *	ſ		

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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".
 - <u>Contact Us</u> if 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.

Ship To Bill To			
Select an address to edit	_	Selec	t Addresses for Profile Delete Addre
Shipping Addresses		Edit Selected Add	dress
ELMORE HALL FOR ADMIN SERVICES	*	Nickname Default	LIBRARY WEST
LIBRARY WEST		Current Default Address	()(
		ADDRESS	
		Attn: Building/Room:	Gator Shopper
		Address Line 1 City	1545 W UNIVERSITY AV GAINESVILLE
		State Zip Code Country	FL 32611 United States

The Bill to address for the university is

PO Box 3357, Scranton, PA, if you need

an invoice to go to your department.

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. <u>Contact Us</u> if 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.

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.]

© 2019 Training & Organizational Development Office of Human Resources University of Florida, Gainesville, FL 32611 name of your building,

- 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

- 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.
- 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.
- 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 savedlist.
 - 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		Shopping, Carts & Requisitions		🖍 Edit Sectio	n ?
User Name ufshopper		Assigned Cart Processed Notification	Email & Notification	1	
User Profile and Preferences		Assigned Cart Deleted Notification	Email & Notification		
Default User Settings	5				
User Roles and Access	5	PR submitted into Workflow	None		
Ordering And Approval Settings	ŝ	PR pending Workflow approval	None		
Permission Settings	ŝ	1 2 11			
Notification Preferences		PR Workflow Notification available	None		
Administration & Integration					
Shopping, Carts & Requisitions		PR Workflow complete / PO created	None		
Purchase Orders		PR line item(s) rejected	None		
Settlement		FR ine item(s) rejected	None		
betternette					
User History	>	Cart/PR rejected/returned	Email & Notification		
User History Gator Shopper	>	Cart/PR rejected/returned Shopping, Carts & Requisitions	Email & Notification		?
	>		Default Override	Email & Notification	?
Gator Shopper	>	Shopping, Carts & Requisitions		Email & Notification	?
Gator Shopper		Shopping, Carts & Requisitions Assigned Cart Processed Notification Assigned Cart Deleted Notification	 Default Override Default Override 	Email & Notification	?
Gator Shopper User Name ufshopper	>	Shopping, Carts & Requisitions Assigned Cart Processed Notification	Default Override Override		2
Gator Shopper User Name ufshopper User Profile and Preferences Default User Settings	>	Shopping, Carts & Requisitions Assigned Cart Processed Notification Assigned Cart Deleted Notification	 Default Override Default Override 	Email & Notification	?
Gator Shopper User Name ufshopper User Profile and Preferences Default User Settings User Roles and Access	>	Shopping, Carts & Requisitions Assigned Cart Processed Notification Assigned Cart Deleted Notification PR submitted into Workflow PR pending Workflow approval	 Default Override Default Override Default Override Default Override 	Email & Notification	?
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Additional Assistance

myUF Marketplace – Marketplace Help Desk

Contact Us

Phone: (352) 392-1335