

[Setting Up Your User Profile]

Use this instruction guide to set up your **User Profile** in myUF Market with information saved for use in your cart's requisition, such as your Shipping address, PO Business Unit, Billing address, ChartField information and ChartField String Favorites. Set this information as **default**, to automatically display. Set up **e-mail notifications** to be notified by e-mail during the processing of your order. E-mail notifications contain additional information such as cart name, ID number and who submitted the cart.

- ▶ Access myUF Market by navigating to <http://my.ufl.edu> and logging in with your Gatorlink username and password, and navigate to:
 - ▶ **Click My Self Service > Click myUF Market** for UF_N_MKT_Shopper role
 - ▶ **Click eProcurement > Click myUF Market** for the UF_N_MKT_Shopper_Req role (to shop only), the UF_N_MKT_Requestor and UF_N_MKT_Financial_Approver roles.
- ▶ 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

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



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- 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 <https://www.fa.ufl.edu/apps/purchasing/market/> 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 > Code Favorites** to set up and save ChartField strings for use in requisitions. See the instruction guide, "Using ChartField String Favorites."
- ▶ Navigate to **Purchasing > Custom Fields > Codes** to set up and save individual ChartField values
 - ▶ 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
 - 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

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- 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

- ▶ Navigate to **My Profile > User Settings > E-mail Preferences**
- ▶ 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 'Email Preferences' configuration page. The page is divided into two main sections: 'Administration & Integration' and 'Shopping, Carts & Requisitions'. Each section contains a table of email preferences with columns for 'Email Preference', 'Value', and 'Override Role'. The 'Value' column contains red 'X' marks or checkmarks, and the 'Override Role' column contains checkboxes. Arrows point from the text above to the 'Override Role' and 'Value' columns in the 'Shopping, Carts & Requisitions' table.

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		
Prepared By - Cart Assigned Notice	X	<input type="checkbox"/>
Prepared By - PR line item(s) rejected	X	<input type="checkbox"/>
Prepared By - PR rejected/returned	X	<input type="checkbox"/>
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 type="checkbox"/>	<input checked="" type="checkbox"/>
Assigned Cart Deleted Notification	X	<input type="checkbox"/>
PR submitted into Workflow	<input type="checkbox"/>	<input checked="" type="checkbox"/>
PR Workflow complete / PO created	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PR line item(s) rejected	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cart/PR rejected/returned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Email Preference	Value	Override Role
Purchase Orders		
Prepared By - PO Workflow complete	X	<input type="checkbox"/>
Prepared By - PO sent to supplier	X	<input type="checkbox"/>
Prepared By - PO line item(s) rejected	X	<input type="checkbox"/>
Prepared By - PO rejected	X	<input type="checkbox"/>
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		
Prepared By - PO Requires Receipt notice	X	<input type="checkbox"/>
PO Requires Receipt notice	X	<input type="checkbox"/>

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Listing of E-mail Notifications per Role:

If you are a Shopper and you would like to be notified when:	Select or keep email notification:	Stage of Requisition Process:
Your requestor returns a cart to you	Cart PR rejected/returned	Assigning Cart
A cart you assigned is submitted as a requisition for approval	PR Submitted into Workflow	Requisition Approval
The requisition is rejected or returned	PR Line Items Rejected	Requisition Approval
The requisition has become a purchase order	PR Workflow Complete / PO Created	PO Approval
The PO is rejected or line items on PO are rejected	PO rejected or PO line item rejected	PO Approval
The PO is sent to the supplier	PO sent to supplier	PO sent to Supplier
If you are a Requestor and you would like to be notified when:	Select or Keep Email Notification:	Stage of Process:
A cart has been assigned to you	Prepared By - Cart Assigned Notice	Assigning Cart
Line items are rejected	Prepared By - PR line item(s) rejected	Requisition Approval
If the entire Requisition is rejected or returned	Prepared By - PR rejected/returned	Requisition Approval
If any PO lines are rejected	Prepared By - PO line item(s) rejected	PO Approval
If the entire PO is rejected	Prepared By - PO rejected	PO Approval
When the PO has completed workflow (fully approved)	Prepared By - PO Workflow complete	PO Approval
When the PO is sent to the Supplier	Prepared By - PO sent to supplier	PO sent to Supplier
If you are an Approver and would like to be notified when:	Select or keep email notification:	Stage of Process:
A requisition has been submitted to me for approval	PR pending workflow approval	Requisition Approval
There are new workflow notifications in my approval folder	PR workflow notification available	Requisition Approval

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