

Setting Profiles

The UMass BuyWays **profile** is used to review and update personal user information - ranging from assigned roles, Approver information, email preferences, and more.

Upon completion of this section, you will be able to:

- Set User Identification, Email Preferences, and Ship-to Address
- Add a Requisitioner

Setting User Identification, Email Preferences, and Ship-to Address

This topic describes the procedures for updating and changing areas of your profile.

Upon completion of this topic, you will be able to view and/or set:

- User Identification
- Email Preferences
- Ship-to Address

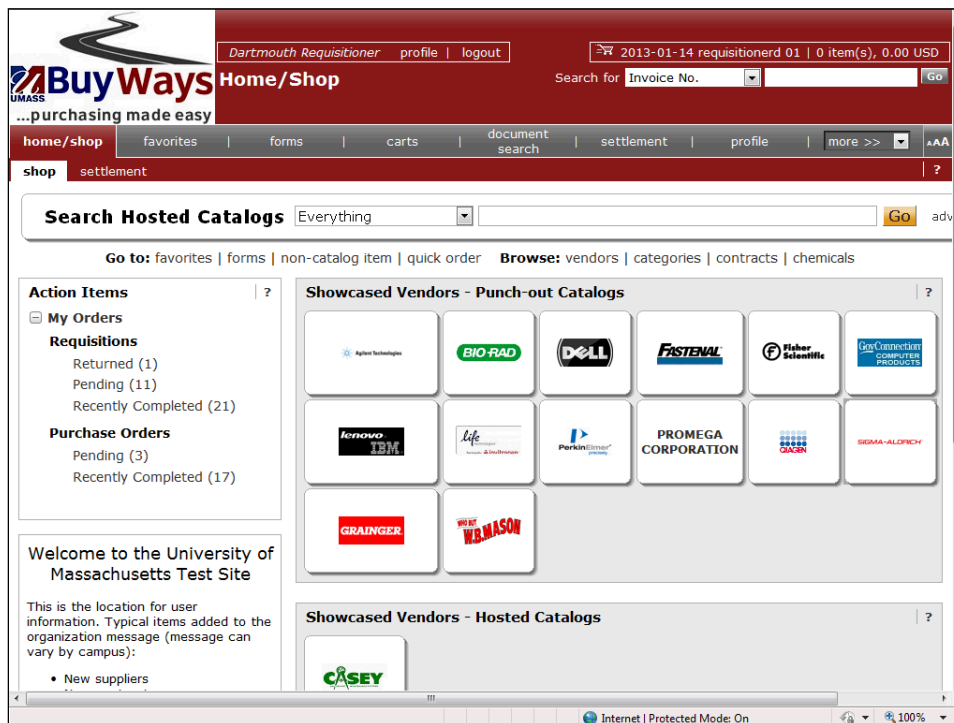
Procedure

Consider this Scenario:

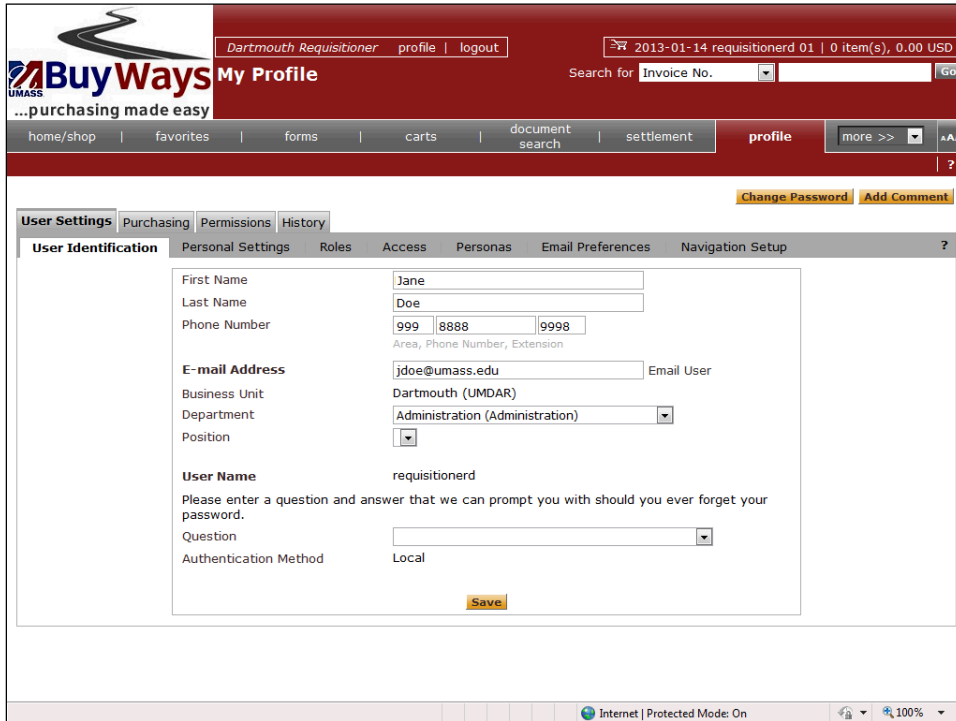
Your goal is to set User Identification, Email Preferences, and a Ship-to Address in your profile.

Key Information:

Select Address Template: Fairhaven KAPUT

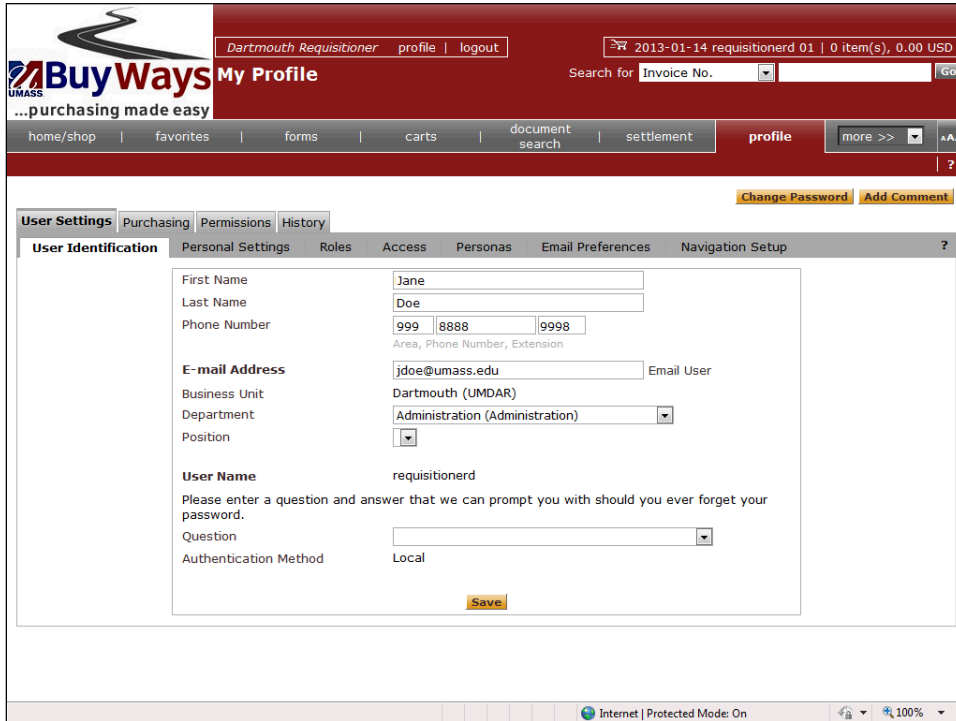


Step	Action
1.	<p>Begin by navigating to the User Identification tab.</p> <p>Click the profile link.</p> <p>profile</p>



2.	<p>The User Settings tab opens to the User Identification sub tab.</p> <p>Review and add or correct the following fields:</p> <ul style="list-style-type: none"> • First Name • Last Name • Phone Number • E-mail Address
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Step	Action
3.	If your email information is not correct, contact Access Management at x8532 to make the correction.

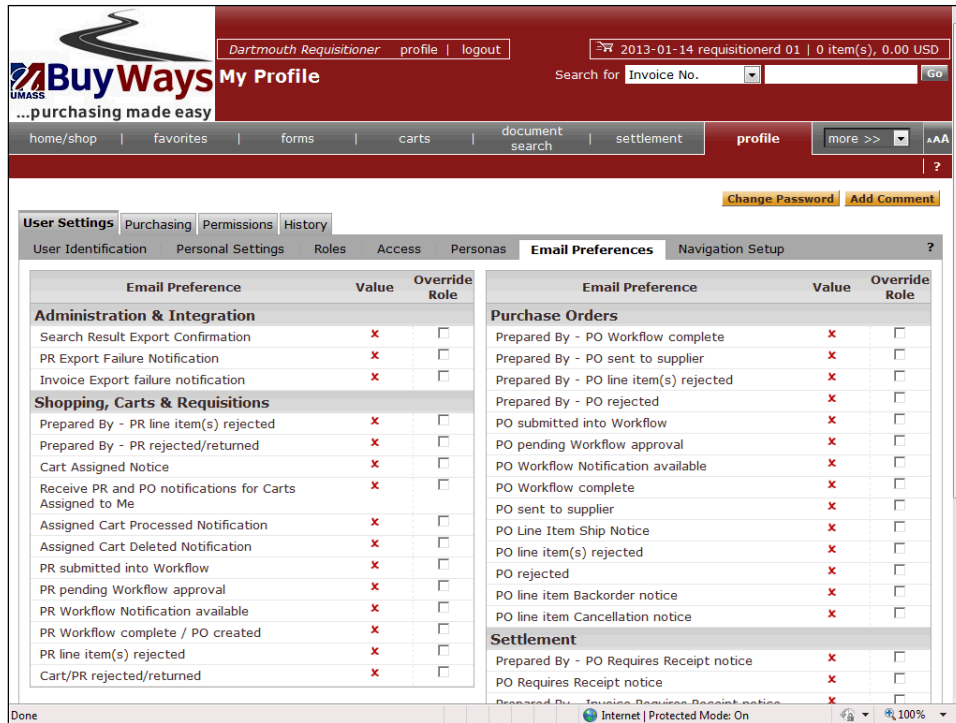


The screenshot shows the 'My Profile' page in the BuyWays system. The user is identified as 'Dartmouth Requisitioner' with a profile and logout option. The current session shows a requisition number '2013-01-14 requisitionerd 01' and a total of '0 item(s), 0.00 USD'. A search bar is available for 'Invoice No.'. The navigation menu includes 'home/shop', 'favorites', 'forms', 'carts', 'document search', 'settlement', and 'profile'. The 'User Settings' section is active, with 'User Identification' selected. The form contains the following fields:

- First Name:** Jane
- Last Name:** Doe
- Phone Number:** 999 8888 9998 (Area, Phone Number, Extension)
- E-mail Address:** jdoe@umass.edu (Email User)
- Business Unit:** Dartmouth (UMDAR)
- Department:** Administration (Administration)
- Position:** [Dropdown menu]
- User Name:** requisitionerd
- Question:** [Dropdown menu]
- Authentication Method:** Local

A 'Save' button is located at the bottom of the form. The browser status bar at the bottom indicates 'Internet | Protected Mode: On' and a zoom level of 100%.

Step	Action
4.	To view email preferences, click the Email Preferences link.

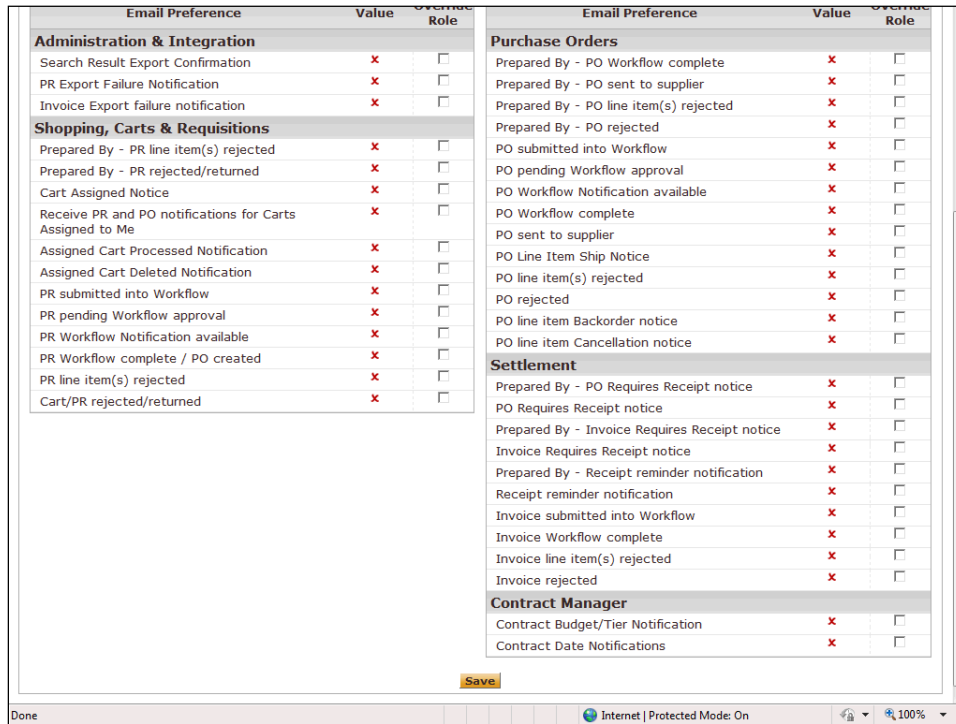


5.	The Email Preferences screen reflects preferences that have been pre-set for you. It is recommended that these not be changed initially. You may find that as you continue to use the system, you may want to modify these settings.
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Step	Action
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6. If user permission allows, adjust the values.

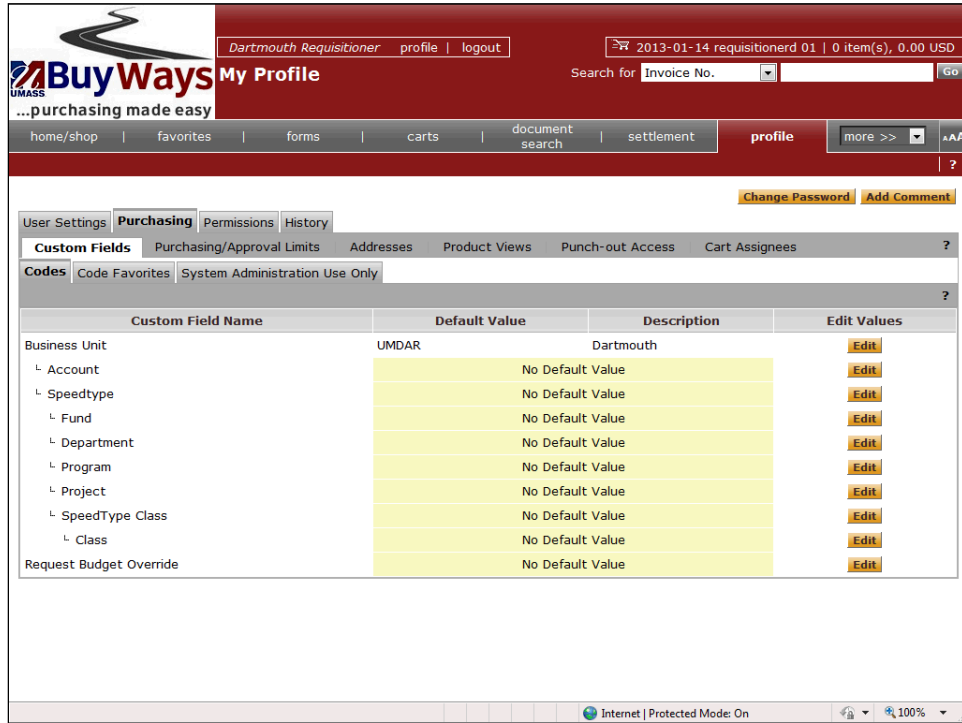
Click the **Vertical scrollbar**.



7. Click the **Save** button.



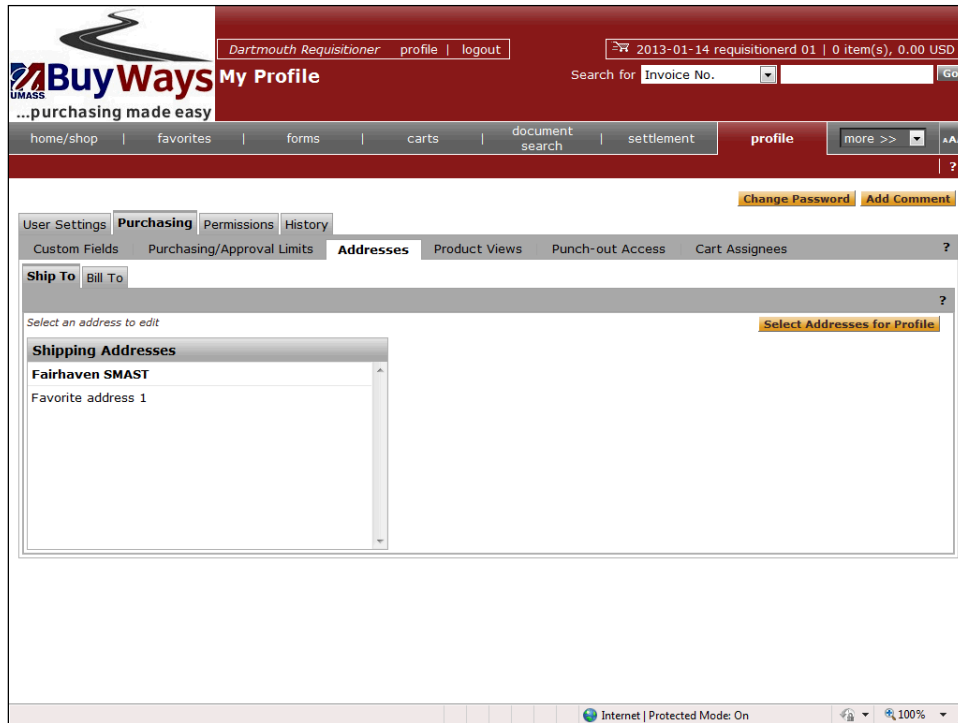
Step	Action
8.	To view or change a Ship To address, click the Purchasing link. Purchasing



The screenshot shows the 'BuyWays My Profile' interface. The 'Purchasing' tab is selected. Below the navigation tabs, there is a table of Custom Fields with the following data:

Custom Field Name	Default Value	Description	Edit Values
Business Unit	UMDAR	Dartmouth	Edit
↳ Account	No Default Value		Edit
↳ Speedtype	No Default Value		Edit
↳ Fund	No Default Value		Edit
↳ Department	No Default Value		Edit
↳ Program	No Default Value		Edit
↳ Project	No Default Value		Edit
↳ SpeedType Class	No Default Value		Edit
↳ Class	No Default Value		Edit
Request Budget Override	No Default Value		Edit

Step	Action
9.	Click the Addresses link. Addresses



10. The **Ship To** tab allows you to edit or add shipping addresses.

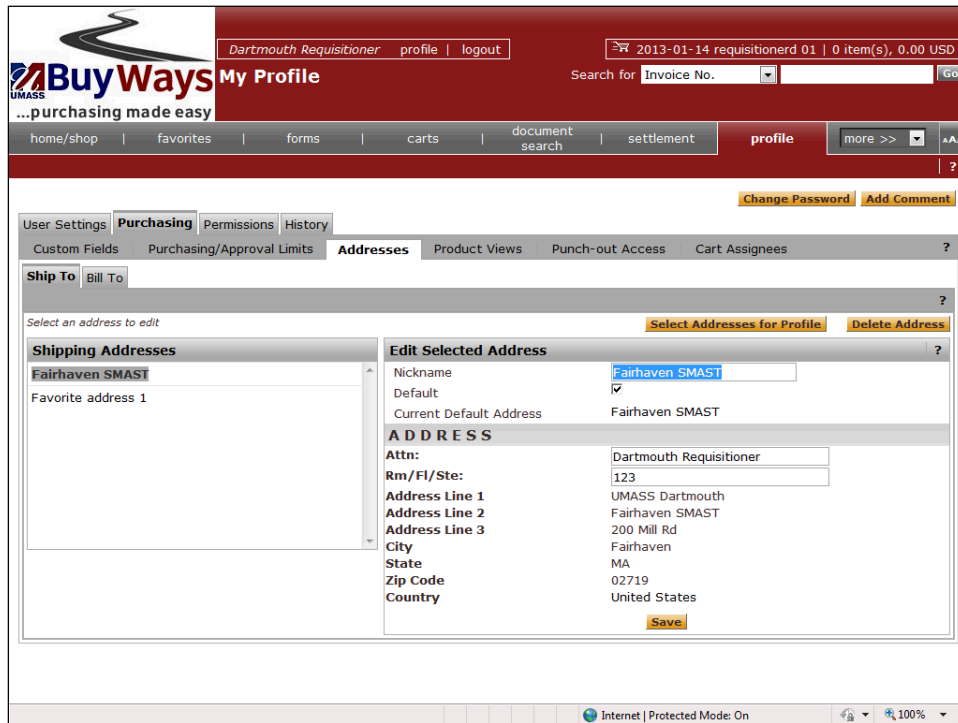
NOTE: Please default the Shipping Address to **CENTRAL RECEIVING** the first time that you log into UMass BuyWays. You may make any other additions or adjustments as the following steps indicate.

Step	Action
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11. To view or change a shipping address, select the address.

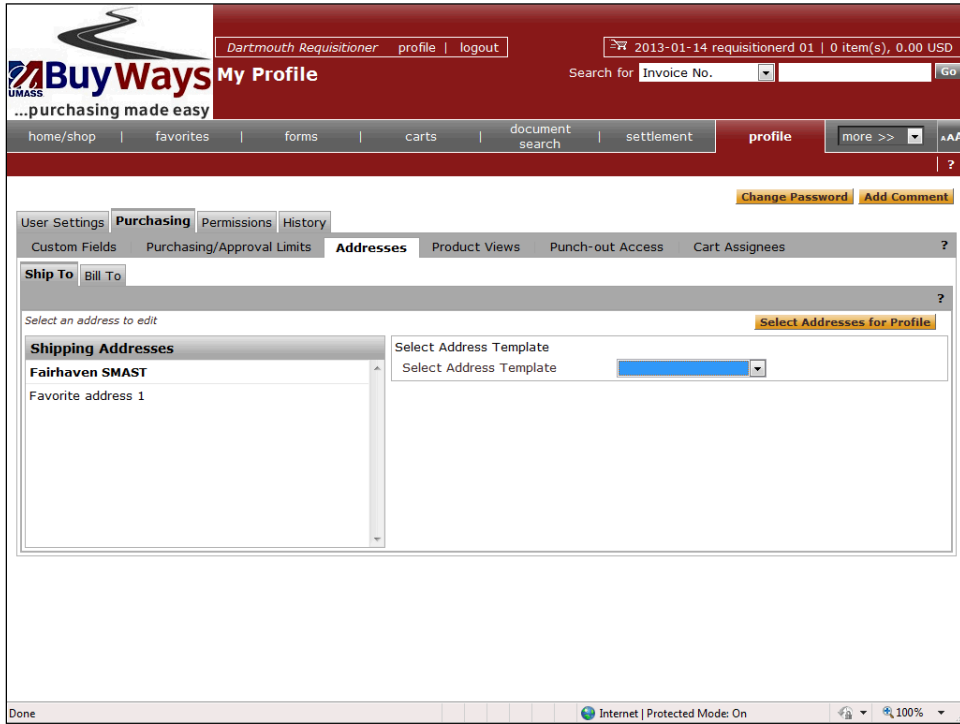
In this example, click the **Fairhaven SMAST** link.

Fairhaven SMAST



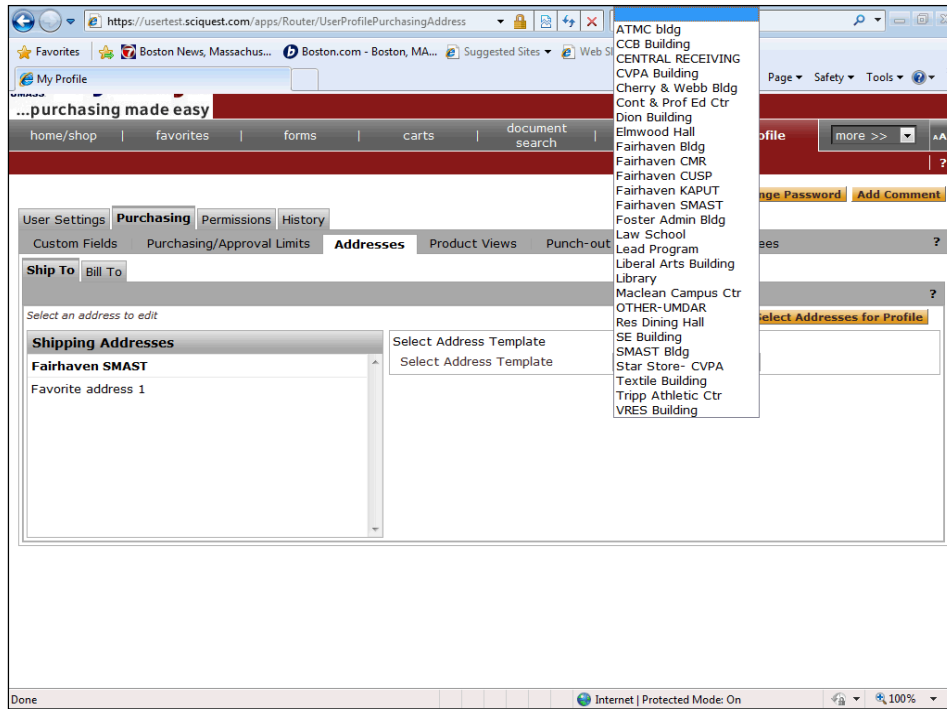
12.	Review the Ship To information and make adjustments where necessary (for example, Attn: or Rm/FI/Ste:).
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Step	Action
13.	To add a new shipping address, click the Select Addresses for Profile button.

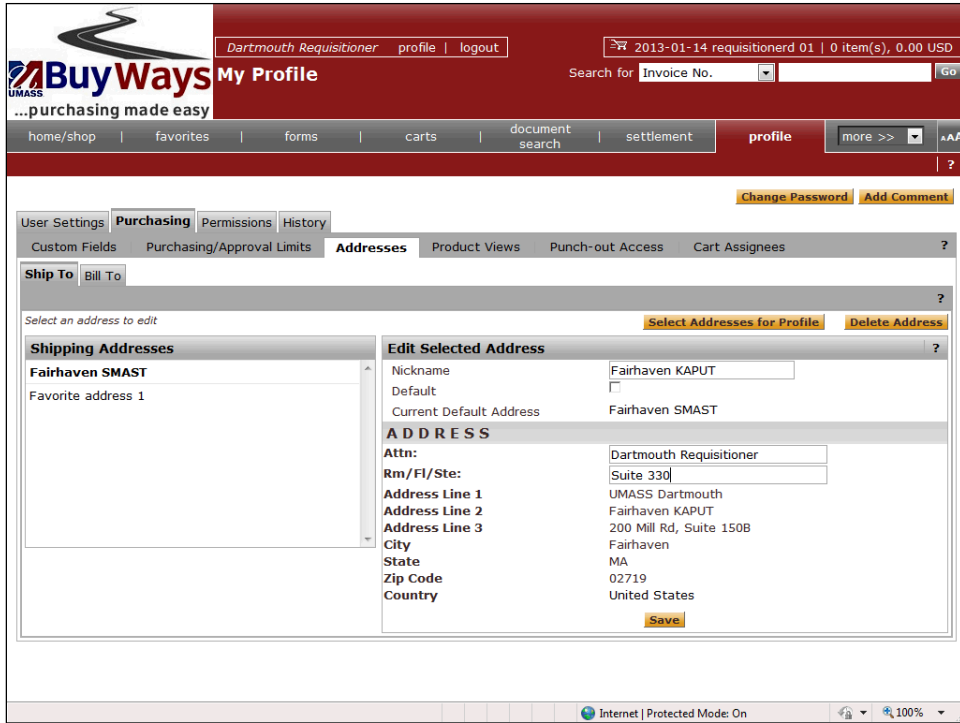


Step	Action
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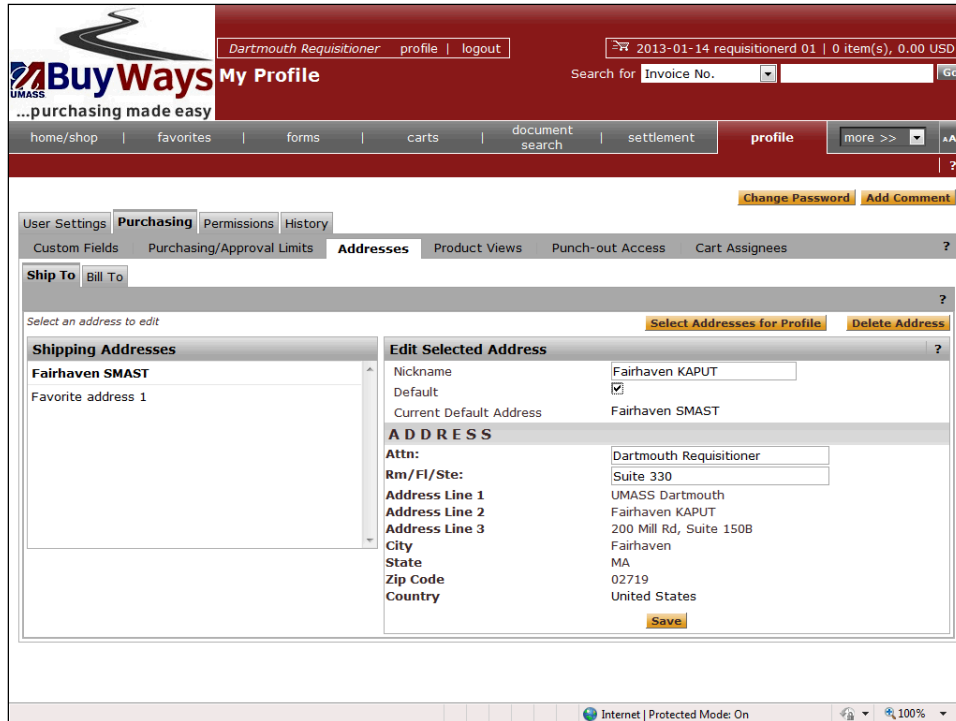
14.	Click the Select Address Template list.
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Step	Action
15.	For this example, click the Fairhaven KAPUT list item. <div style="border: 1px solid black; padding: 2px; display: inline-block;">Fairhaven KAPUT</div>

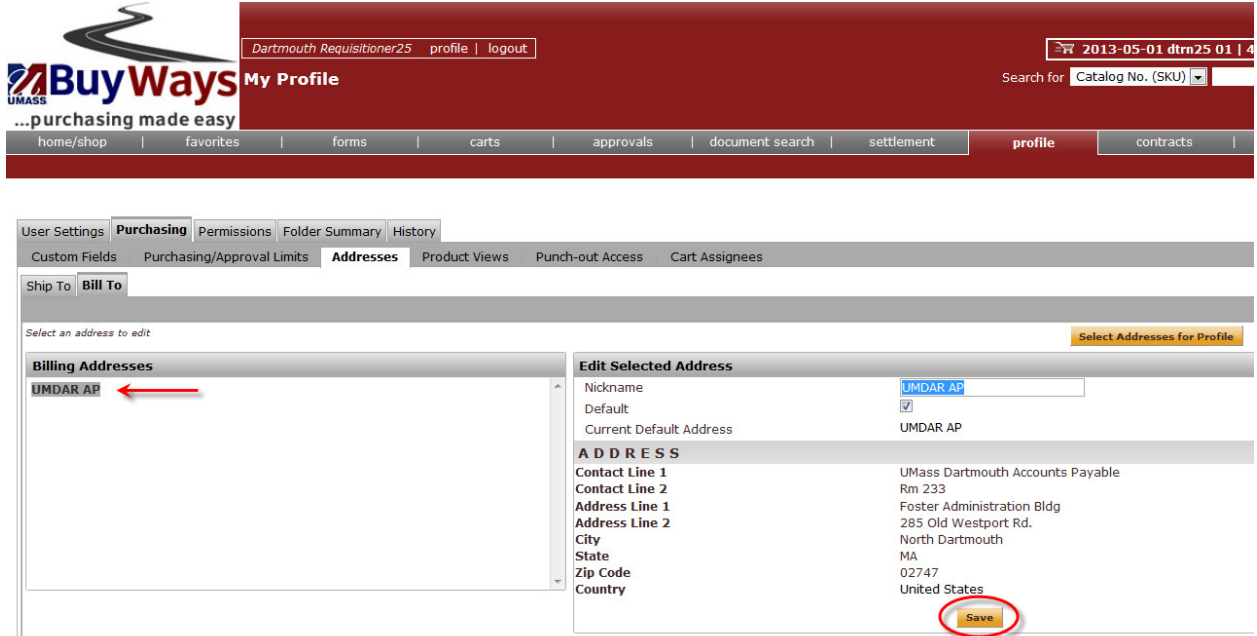


Step	Action
16.	If this is your default address, click the Default option. <input type="checkbox"/>



17.	Review the new Ship To information and make adjustments where necessary (for example, Attn: or Rm/FI/Ste:).
18.	Click the Save button. 
19.	Click the Bill To tab. The Bill To tab allows you to edit or add billing addresses. Note: The only address available for billing is UMDAR AP . This needs to be selected and saved the first time you set up your profile.
20.	To add a new billing address, click the Select Addresses for Profile button. 

Step	Action
21.	Select UMDAR AP . Click the Save button. 



The screenshot shows the 'My Profile' page in the BuyWays system. The 'Addresses' tab is active, and the 'Billing Addresses' list contains one entry, 'UMDAR AP', which is highlighted with a red arrow. The 'Edit Selected Address' form on the right shows the following details:

Nickname	UMDAR AP
Default	<input checked="" type="checkbox"/>
Current Default Address	UMDAR AP
ADDRESS	
Contact Line 1	UMass Dartmouth Accounts Payable
Contact Line 2	Rm 233
Address Line 1	Foster Administration Bldg
Address Line 2	285 Old Westport Rd.
City	North Dartmouth
State	MA
Zip Code	02747
Country	United States

A red circle highlights the 'Save' button at the bottom right of the form.

22. Congratulations! You have successfully set User Identification, Email Preferences, and Ship To/Bill To Addresses in your profile.

End of Procedure