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System Functions - User Roles

**Shopper**
- Adds items to carts
- Assigns carts to Requisitioner

**Requisitioner**
- Adds items to carts
- Updates or changes carts
- Reviews assigned carts
- Places order
- Withdraws requisitions

**Approver**
- Retrieves requisitions for approval
- Approves requisitions
- Rejects lines or entire requisition

Role assignments can be changed with submission of SAP Department form to ITAC. To view your assigned role, follow instructions on the next page.
System Functions - User Roles

STEP 1: Select your name from the top banner.

STEP 2: Select View My Profile. My Profile page appears.

STEP 3: Select Assigned Roles to view role.

STEP 4: Assigned Role appears.
STEP 1: Select your name from the top banner.

STEP 2: Select View My Profile. My Profile page appears.

STEP 3: Select Default Addresses.

STEP 4: Default Addresses menu opens.
STEP 5: Under the **Ship To** tab, click **Select Addresses for Profile** button.

STEP 6: From **Select Address Template** drop-down menu, choose your shipping location. (Most San Marcos users will select **UDC**—University Distribution Center.)
STEP 7: Once selected, location will populate the **Nickname** field.

STEP 8: Enter your **Room** and **Building**.

STEP 9: Click **Save**.

STEP 10: Newly saved address will populate **Shipping Addresses** menu.
**STEP 1:** Select your name from the top banner.

**STEP 2:** Select View My Profile. My Profile page appears.

**STEP 3:** Select Default Addresses.

**STEP 4:** Default Addresses menu opens.
STEP 5: Under the Bill To tab, click Select Addresses for Profile button.

STEP 6: From Select Address Template drop-down menu, choose BillTo. Construction is for Facilities only.

STEP 7: Once selected, BillTo will populate the Nickname field.

STEP 8: Click Save.

STEP 9: Newly saved address will populate Shipping Addresses menu.
STEP 1: Select your name from the top banner.

STEP 2: Select View My Profile. My Profile page appears.

STEP 3: Select Custom Field and Accounting Code Defaults.

STEP 4: Custom Field and Accounting Code Defaults code tabs appear.
STEP 5: Select Codes tab.

STEP 6: To set a default or favorite value, select the Edit button in the Edit Values column for the Custom Field Name you want to change. The next pages will show you how to set up the above outlined fields.
**STEP 1:** Select **Create New Value**. Values selection menu appears.

**STEP 2:** Make selections according to your funding type. (**A, F, K, or S** — *Do not use P/WBS*)
Select multiple values to generate a drop-down selection list when creating requisitions. Only one category can be selected as Default. Follow STEPS on next page to select a Default.

**STEP 3:** Click **Add Values**.

**STEP 4:** Value is added to the table.
**STEP 1:** Click the hyperlinked Description of the value you added to the table. *Edit Existing Value* menu appears.

**STEP 2:** Check the **Default** box to set this category as the default value for this field.

**STEP 3:** Click **Save**.

**STEP 4:** New default value has been saved.

**STEP 5:** Click **Close** to return to Codes tab screen.
System Functions - Profile Setup - Funding

STEP 1: Select Create New Value. Values selection menu appears.

STEP 2: If known, enter Fund number in the Value field and click Search. If unknown, just click Search.

STEP 3: Select your fund. Select multiple values to generate a drop-down selection list when creating requisitions. Only one category can be selected as Default. Follow STEPS on next page to select a Default.

STEP 4: Click Add Values.

STEP 5: Value is added to table.
System Functions - Profile Setup - Funding

**STEP 1:** Click the hyperlinked Description of the value you added to the table. **Edit Existing Value** menu appears.

**STEP 2:** Check the **Default** box to set this number as the default value for this field.

**STEP 3:** Click **Save**.

**STEP 4:** New default value has been saved.

**STEP 5:** Click **Close** to return to Codes tab screen.
**System Functions - Profile Setup - Funding**

**STEP 1:** Select Fund from the drop-down and then select Create New Value. New Value & Search for Value menus appear.

**STEP 2A:** If known, enter Cost Center into the Value field in the New Value menu. Check the Default box to set this number as the default value for this field. Only one number can be selected as the Default. If you want to type in multiple Cost Center numbers, proceed to **STEP 3** then repeat STEPS 1, 2A and 3 for each value.

**STEP 2B:** If Cost Center is unknown, just click Search from the Search for Value menu, make selections, then Add Values. Select multiple values to generate a drop-down selection list when creating requisitions. To designate a Default value when using the Search for Value menu, follow the STEPS on the next page then proceed to **STEP 3**.

**STEP 3:** Click Save.

**STEP 4:** Value is added to table.

**STEP 5:** Click Close to return to Codes tab screen.
STEP 1: Click the hyperlinked Description of the value you wish to make the Default. 
*Edit Existing Value* menu appears.

STEP 2: Check the Default box to set this number as the default value for this field.

STEP 3: Click Save.

STEP 4: New default value has been saved.

STEP 5: Click Close to return to Codes tab screen.
**System Functions - Profile Setup - Funding**

**STEP 1:** Select fund from the drop-down and then select **Create New Value**. New Value & Search for Value menus appear.

**STEP 2:** Type Internal Order into the **Value** field in the New Value menu and click **Search**. If unknown, or you will be entering multiple values, just click **Search**. Values selection menu appears.

**STEP 3:** Select your Internal Order. Select multiple values to generate a drop-down selection list when creating requisitions.

**STEP 4:** Click **Add Values**.

**STEP 5:** Value(s) added to the table.

**STEP 6:** To designate a **Default** Internal Order value, follow the STEPS on the next page. Select **Close** to return to Code tabs screen.
STEP 1: Click the hyperlinked Description of the value you wish to make Default. 
*Edit Existing Value* menu appears.

STEP 2: Check the **Default** box to set this number as the default value for this field.

STEP 3: Click **Save**.

STEP 4: New default value has been saved.

STEP 5: Click **Close** to return to Codes tab screen.
**System Functions - Profile Setup - Funding**

**STEP 1:** Select Create New Value. Search for Value menu appears.

**STEP 2:** Type G/L code into the **Value** field and click **Search**. If unknown, or you will be entering multiple values, just click **Search**. Values selection menu appears.

**STEP 3:** Select your G/L code. Select multiple values to generate a drop-down selection list when creating requisitions.

**STEP 4:** Click **Add Values**.

**STEP 5:** Value(s) added to the table.

**STEP 6:** Click **Close** to return to Code tabs screen.

**It is not recommended that you set a default value if you order a variety of items on BOBCATalog. This field has the potential to change with every purchase.**
System Functions - Profile Setup - Funding

**STEP 1:** Select Create New Value. Search for Value menu appears.

**STEP 2:** Type G/L code into the Value field and click Search. If unknown, or you will be entering multiple values, just click Search. Values selection menu appears.

**STEP 3:** Select your G/L code. Select multiple values to generate a drop-down selection list when creating requisitions.

**STEP 4:** Click Add Values.

**STEP 5:** Value(s) added to the table.

**STEP 6:** Click Close to return to Code tabs screen.

**It is not recommended that you set a default value if you order a variety of items on BOBCATalog. This field has the potential to change with every purchase.**
STEP 1: Select **Create New Value**. Search for Value menu appears.

STEP 2: Type Storage Location code into the **Value** field and click **Search**. If unknown, or you will be entering multiple values, just click **Search**. Values selection menu appears.

STEP 3: Select your Storage Location. Select multiple values to generate a drop-down selection list when creating requisitions.

STEP 4: Click **Add Values**.

STEP 5: Value(s) added to the table.

STEP 6: To designate a **Default** Storage Location value, follow the STEPS on the next page. Select **Close** to return to Code tabs screen.
STEP 1: Click the hyperlinked Description of the value you wish to make Default. Edit Existing Value menu appears.

STEP 2: Check the Default box to set this code as the default value for this field.

STEP 3: Click Save.

STEP 4: New default value has been saved.

STEP 5: Click Close to return to Codes tab screen.
Once default settings have been saved, the Codes tab should reflect them.
STEP 1: Select your name from the top banner.

STEP 2: Select View My Profile. My Profile page appears.

STEP 3: Select Email Preferences.
STEP 4: **Email Preferences** selection drop-down menus appear, categorized by notification type, e.g. carts/requisitions, purchase orders. Hover over an item to display a brief description of the notification.

![Email Preferences menu]

STEP 5: Select Email from each function’s drop-down menu to receive an e-mail notification when this workflow step has been completed. By selecting Email & Notification, you will receive alerts within BOCATalog as well as receiving an e-mail.

**We recommend the following:**

**Shopping, Carts & Requisitions**
1. Assigned Cart Processed
2. PR Workflow complete / PO created
3. Cart/PR rejected/returned
4. For Approvers: PO pending Workflow approval
5. PR submitted into Workflow

**Purchase Orders**
1. PO rejected

STEP 6: Scroll down to bottom of list and click **Save**.