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

STEP 1: Select your name in the top right corner of the TSUS Marketplace home page.

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

STEP 3: Select User Rolls and Access.

STEP 4: Select Assigned Rolls.

STEP 5: Assigned Roll appears.
System Functions – Profile Setup – Default Shipping Address

STEP 1:  Select your name in the top right corner of the TSUS Marketplace home page.

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

STEP 3:  Select Default User Settings.

STEP 4:  Select Default Addresses.

STEP 5:  Default Address box appears.
STEP 6: Under the **Ship To** tab, click **Select Addresses for Profile** button. The **Select Address Template** window will appear.

STEP 7: From **Select Address Template** drop down menu, choose your shipping location. (San Marcos users will select **UDC**—University Distribution Center. Round Rock users will use **RRHEC**—Round Rock Higher Education Center or **RRSON**—Round Rock School of Nursing).
System Functions - Profile Setup – Default Shipping Address

STEP 8: Once selected, location will populate the Nickname field.

STEP 9: Enter your Room and Building.

STEP 10: Click Save.

STEP 11: Newly saved address will populate Shipping Addresses menu.
System Functions - Profile Setup – Default Billing Address

STEP 1: Select your name in the top right corner of the TSUS Marketplace home page.

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

STEP 3: Select Default User Settings.

STEP 4: Select Default Addresses.

STEP 5: Default Address box appears.
STEP 6: Under the Bill To tab, click Select Addresses for Profile button. The Select Address Template window will appear.

STEP 7: From Select Address Template drop down menu, choose BillTo. Construction is for Facilities only.

STEP 8: Once selected, BillTo will populate in Nickname field.

STEP 9: Click Save

STEP 10: Newly saved address will populate in Shipping Addresses menu.
System Functions - Profile Setup – Notification Preferences

STEP 1: Select your name in the top right corner of the TSUS Marketplace home page.

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

STEP 3: Select Notification Preferences

STEP 4: Notification Preferences section is categorized by notification type, e.g. Administration & Integration, Shopping, Carts & Requisitions, Purchase Orders, etc.
System Functions - Profile Setup – Notification Preferences

STEP 5: Once you have selected which category you want to edit, click on Edit Section.

STEP 6: Select Override from each function and use the drop-down to select email & notification. By selecting Email & Notification, you will receive alerts within TSUS Marketplace as well as an email when this workflow step has been completed.

We recommend the following:

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

**Purchase Orders**
1. PO rejected

STEP 7 Scroll down to bottom of list and click Save.
System Functions - Profile Setup - Default Funding

STEP 1: Select your name in the top right corner of the TSUS Marketplace home page.

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

STEP 3: Select Default User Settings.

STEP 4: Select Custom Field and Accounting Code Defaults.

STEP 5: Custom Field and Accounting Code Defaults code tabs appear.
**System Functions - Profile Setup - Default Funding**

**STEP 6:** Select Codes tab.

**STEP 7:** 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 below outlined fields.

![Custom Field and Accounting Code Defaults](image)

Once default settings have been saved, the Codes tab should reflect them.
System Functions - Profile Setup – Default Funding

STEP 1: On the Codes tab, click on the Edit button to the right of the Account Assignment value. Values selection menu appears.
**System Functions - Profile Setup – Default Funding**

**STEP 2:** Click on the **Create New Value** button.

**STEP 3:** Make selections according to your funding type.  
*(A, F, K, or S—Do not use P/WBS)*  
Adding multiple values will generate a drop-down selection list when creating requisitions. Only one value can be selected as the default.

**STEP 4:** Click **Add Values**. Value is added to the table.
System Functions - Profile Setup – Default Funding

**STEP 5:** Click on the Description of the value you added to the table. The **Edit Existing Value** menu appears.

**STEP 6:** Check the **Default** box to set this value as the default for this field.

**STEP 7:** Click **Save**. New default value has been saved.

**STEP 8:** Click **Close** to return to Codes tab screen.

![Image of system functions setup]

*Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.*
STEP 1: On the Codes tab, click on the Edit button to the right of the Fund value. Values selection menu appears.
System Functions - Profile Setup – Default Funding

STEP 2: Click on the Create New Value button. The Search For Value box appears.

STEP 3: If known, enter Fund number in the Value field and click Search. If unknown, click Search.

STEP 4: Select your fund. Adding multiple values will generate a drop-down selection list when creating requisitions. Only one value can be selected as Default.

STEP 5: Click Add Values. Value is added to table.
STEP 6: Click the Description of the value you added to the table. Edit Existing Value menu appears.

STEP 7: Check the Default box to set this number as the default value for this field.

STEP 8: Click Save. New default value has been saved.

STEP 9: Click Close to return to Codes tab screen.
STEP 1: On the Codes tab, click on the Edit button to the right of the Cost Center value. Values selection menu appears.
System Functions - Profile Setup – Default Funding

STEP 2: If you have added multiple funds, select your fund from the drop-down menu. Adding multiple values will generate a drop-down selection list when creating requisitions. Only one value can be selected as Default.

STEP 3: Click on the Create New Value button. The New Value box appears.

STEP 4: 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 2 and repeat the above steps for each value.

STEP 5: Click Save. Value is added to table.

STEP 6: Click Close to return to Codes tab screen.
System Functions - Profile Setup – Default Funding

STEP 7: If Cost Center is unknown, click **Search** from the **Search for Value** menu, make selections, then click on the **Add Values** button. Select multiple values to generate a drop-down selection list when creating requisitions.

STEP 8: To designate a **Default** value when using the **Search for Value**, click the description of the value you wish to make the default. **Edit Existing Value** menu appears.

STEP 9: Check the **Default** box to set this number as the default value for this field.

STEP 10: Click **Save**. New default value has been added.

STEP 11: Click **Close** to return to Codes tab screen.
STEP 1: On the Codes tab, click on the Edit button to the right of the Internal Order value. Values selection menu appears.
STEP 2: If you have added multiple funds, select your fund from the drop-down menu. Adding multiple values will generate a drop-down selection list when creating requisitions. Only one value can be selected as Default.

STEP 3: Click on the Create New Value button. The Search For Value box appears.

STEP 4: Type Internal Order into the Value field in the Search For Value box and click Search. If unknown, or you will be entering multiple values, leave the Value field blank and click Search. Values selection menu appears.

STEP 5: Select your Internal Order. Select multiple values to generate a drop-down selection list when creating requisitions. Click Add Values. Value(s) are added to the table.
System Functions - Profile Setup – Default Funding

STEP 6: To set a default Internal Order, click on the Description of the value you wish to make Default. **Edit Existing Value** menu appears.

STEP 7: Check the **Default** box to set this number as the default value for this field.

STEP 8: Click **Save**. New default value has been saved.

STEP 9: Click **Close** to return to Codes tab screen.
STEP 1: On the Codes tab, click on the Edit button to the right of the G/L Account value. Values selection menu appears.
System Functions - Profile Setup – Default Funding

STEP 2: Select Create New Value. Search For Value menu appears.

STEP 3: Type a G/L code into the Value field and click Search. If unknown, or you will be entering multiple values, leave the Value field blank and click Search. Values selection menu appears.

STEP 4: Select your G/L code. Select multiple values to generate a drop-down selection list when creating requisitions. If you choose to have a default G/L, click the Default check box. You can also select multiple values to generate a drop-down selection list when creating requisitions. Click Add Values. Value(s) are added to the table.

STEP 5: 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 TSUS Marketplace. This field has the potential to change with every purchase.**
STEP 1: On the **Codes** tab, click on the **Edit** button to the right of the **Storage Location** value. Values selection menu appears.

<table>
<thead>
<tr>
<th>Custom Field Name</th>
<th>Default Value</th>
<th>Description</th>
<th>Edit Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fund</td>
<td>No Default Value</td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>- Cost Center</td>
<td>No Default Value</td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>- Internal Order</td>
<td>No Default Value</td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>- WBS Element</td>
<td>No Default Value</td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>G/L Account</td>
<td>No Default Value</td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>Asset</td>
<td>No Default Value</td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>Storage Location</td>
<td>No Default Value</td>
<td></td>
<td><strong>Edit</strong></td>
</tr>
<tr>
<td>Asset Sub-Number</td>
<td>No Default Value</td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>Account Assignment Category</td>
<td>No Default Value</td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>PO Type</td>
<td>BC</td>
<td>Bobcatalog Local</td>
<td>Edit</td>
</tr>
<tr>
<td>Limit</td>
<td>No Default Value</td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>Expected Value</td>
<td>No Default Value</td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>Overall Limit</td>
<td>No Default Value</td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>Valid Start Date (Enter MMDDYYYY)</td>
<td>No Default Value</td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>Valid End Date (Enter MMDDYYYY)</td>
<td>No Default Value</td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>Purchasing Group</td>
<td>CPO</td>
<td>Central Purchasing Office</td>
<td>Edit</td>
</tr>
</tbody>
</table>
STEP 2: Select Create New Value. Search for Value menu appears.

STEP 3: Type a Storage Location code into the Value field.

STEP 4: If you want this value to be the default value, check the Default box.

STEP 5: Click Save. Value added to the table. Click Close to return to Codes tab screen.
STEP 6: If Storage Location is unknown, or you will be entering multiple values, click Search from the Search for Value menu, make selections, then click on the Add Values button. Select multiple values to generate a drop-down selection list when creating requisitions.

STEP 7: To designate a Default value when using the Search for Value, click the description of the value you wish to make the default. Edit Existing Value menu appears.

STEP 8: Check the Default box to set this number as the default value for this field.

STEP 9: Click Save. New default value has been added.

STEP 10: Click Close to return to Codes tab screen.