

User Profile Management

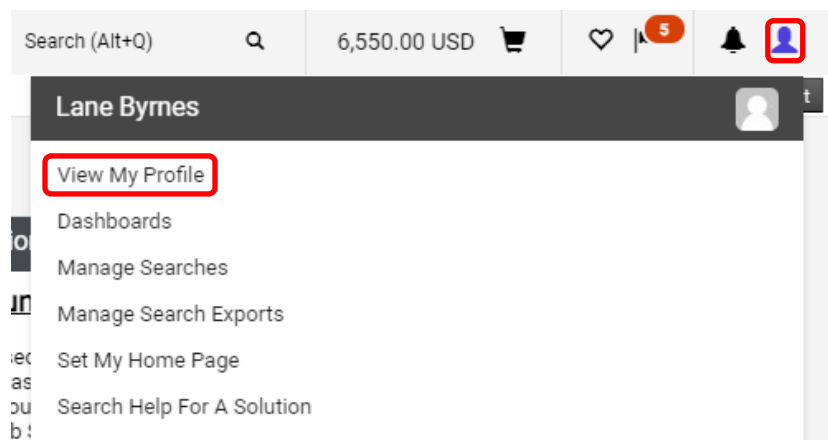
What's My User Profile?

Profiles in BennyBuy help make the buying and paying process more efficient by allowing user to customize and save specific information to their profile such as shipping/billing addresses, accounting codes, cart assignees and more.

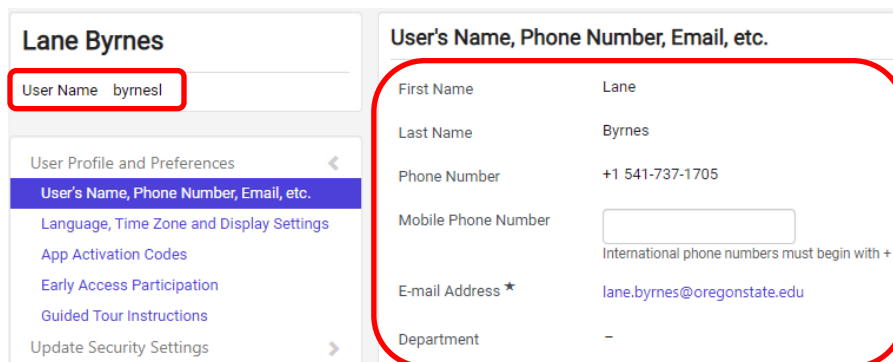
Please note that some of the values in your profile are maintained administratively and cannot be changed –these include user roles, permissions, order settings and approval settings.

Setting User Name, Phone Number, and Email

1. From the BennyBuy home page, select the user icon in the upper right hand corner and then select **View My Profile** from the drop down menu.



1. Once you are directed to the **My Profile** page, click on **User Profile and Preferences** on the left side panel. Select **User's Name, Phone Number, Email, etc.** Within this menu, you can View your basic information including your first name, last name, phone number, and email address. Changes cannot be made on this screen.



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Setting Default Accounting Codes

1. Once you are directed to the **My Profile** page, click on **Default User Settings** on the left side panel. Select **Custom Field and Accounting Code Defaults** and click on **Code Favorites** tab located along the top menu bar. To add a new accounting code string, click **Add**.

Joe Smith
User Name rleviernier

User Profile and Preferences >
Update Security Settings >
Default User Settings >
Custom Field and Accounting Code Defaults
Default Addresses
Cart Assignees
Checkout Settings
Payment Options
User Roles and Access >
Ordering and Approval Settings >
Permission Settings >
Notification Preferences >
User History >
Administrative Tasks >

Custom Field and Accounting Code Defaults

Header (int.) Codes **Code Favorites** ?

Use Code Favorites for quick access to accounting code combinations saved to your profile during checkout. You may create a new Code Favorite by clicking the "Add" button and entering a commonly used combination of accounting codes with or without splits. Code Favorites are accessed during checkout by editing the codes section or by selecting it as your default accounting codes in your profile.

Add

Accounting Codes ?

Index	Account	Activity	Fund	Organization	Program	Location
no value	no value	no value	no value	no value	no value	no value

Code Favorites for Check Requests & Invoices

Add

Accounting Codes ?

Index	Account	Activity	Fund	Organization	Program	Location
no value	no value	no value	no value	no value	no value	no value

2. The accounting codes pop-up window should appear. Give the accounting code string a **Nickname**. You will be prompted to populate the **Index**, **Account**, or **Activity** fields. If you select the box for **Default**, this accounting code string will populate on each new order you build. Once the appropriate values are entered, click **Save**.

Accounting Codes

Nickname My Index Default

Chart Index Account Activity Fund

C Select from profile values... Select from all values... QBA207 Select from all values... 20101 Select from all values... Select from all values... Invalid value

Save **Cancel**

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- You will be returned back to the **Code Favorites** summary page, where you can view the accounting string. Use the **Edit** or **Delete** buttons as needed for codes added to your profile. To add multiple accounting strings to your profile, repeat this process as needed.

Accounting Codes									
My Index									
<div style="text-align: right;">Edit Delete</div>									
Chart	Index	Account	Activity	Fund	Organization	Program	Location	Business Center Code	Fund Type
C	QBA207	20101	no value	no value	no value	no value	no value	no value	no value
OSU	QBA -	Office &	value	value					
Chart	Procurement and Contracts	Administrative Supplies							

Setting Default Addresses

- To add shipping and billing addresses to your profile, click on **Default User Settings** on the left side panel and select **Default Addresses**. Under the **Ship-To** tab, click **Select Addresses for Profile**.

Joe Smith
User Name: revemier

User Profile and Preferences >
Update Security Settings >
Default User Settings >
Custom Field and Accounting Code Defaults >
Default Addresses
Cart Assignees
Checkout Settings
Payment Options

Default Addresses

No addresses defined in profile.

Ship To Bill To

Select an address to edit

No addresses defined in profile.

Shipping Addresses

Select Addresses for Profile

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2. Ship To addresses can be searched for multiple ways, but the easiest way is generally to search on the building name (ex. Kerr, Hovland, Cordley, etc.) Enter your search term in the **Nickname/Address Text** box and click **Search**. Click the radio button next to the address once you find your desired location.

The screenshot shows a web interface for managing shipping addresses. At the top, there are tabs for 'Ship To' and 'Bill To'. Below the tabs, there is a message: 'Select an address to edit' and a button 'Select Addresses for Profile'. A yellow warning box states 'No addresses defined in profile.' The main area is divided into two sections: 'Shipping Addresses' (currently empty) and 'Address Search'. The 'Address Search' section has a text input field labeled 'Nickname / Address Text' containing the value 'Kerr'. Below this is a 'Results Per Page' dropdown set to '10' and a 'Search' button. The search results show 'Addresses Found: 1' and 'Page 1 of 1'. A table lists the found address with a radio button selected next to the ID 'BB0074'. The address details are: Lane Byrnes, Room 1500 SW JEFFERSON AVE, Kerr Admin Bldg, CORVALLIS, OR 97331, United States.

3. You will be prompted to enter user specific data, including a **Nickname**, **Contact Line**, and **Room Number**. To save an address as your default, check the box next to **Default**. Click **Save** once completed.

The screenshot shows the 'Edit Selected Address' form. The 'Nickname' field is set to 'Kerr'. The 'Default' checkbox is unchecked. The 'Current Default Address' is shown as '---'. The 'ADDRESS' section is expanded, showing 'Contact Line 1 *' set to 'Lane Byrnes' and 'Contact Line 2' set to 'Room 123'. Other address fields include: Address Line 1 (1500 SW JEFFERSON AVE), Address Line 2 (Kerr Admin Bldg), City (CORVALLIS), State (OR), Zip Code (97331), and Country (United States). A 'Save' button is located at the bottom of the form.

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- The shipping address should now be populated under the **Shipping Addresses** box. To delete an address, click on the **Shipping Address Name** and click **Delete Address**. To add additional addresses, click **Select Addresses for Profile** and repeat the steps shown above.

Select an address to edit

Shipping Addresses

Kerr

Edit Selected Address

Nickname: Kerr

Default:

Current Default Address: ---

ADDRESS

Contact Line 1 *: Lane Byrnes

Contact Line 2: Room 123

Address Line 1: 1500 SW JEFFERSON AVE

Address Line 2: Kerr Admin Bldg

City: CORVALLIS

State: OR

Zip Code: 97331

Country: United States

Save

- To add a billing address, click the **Bill-To** tab along the menu bar and repeat these steps. When searching for billing addresses, it's recommended to search on your Business Center's acronym (ex. UABC, ASBC, HSBC, etc.) If you are unsure of what to search on, please ask your Business Center.

Default Addresses

Ship To **Bill To**

Select an address to edit

Billing Addresses

AABC - 3

MasterBilling

Select Addresses for Profile

- After you execute your search and select the billing address, you will be prompted to enter information in Contact Line 1. Please enter either Accounts Payable or your Department name. Click **Save**.

Edit Selected Address

Nickname: UABC

Default:

Current Default Address: ---

ADDRESS

Contact Line 1 *: Accounts Payable

Contact Line 2: Email Invoices:
UABC.APIInvoiceReply@oregonstate.edu

Address Line 1: 1600 SW WESTERN BLVD

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Setting Cart Assignees

1. To add cart assignees to your profile, click on **Default User Settings** on the left side panel and select **Cart Assignees**. Click **Add Assignee**.

The screenshot shows a user profile page for 'Joe Smith'. On the left sidebar, 'Default User Settings' and 'Cart Assignees' are highlighted with red boxes. The main content area shows 'Cart Assignees' with an 'Add Assignee...' button also highlighted with a red box.

2. Search for your assignee using **Last Name, First Name, User Name** or **Email** and click **Search**.

The screenshot shows a 'User Search' form with input fields for 'Last Name', 'First Name', 'User Name', and 'Email'. A red box highlights these fields. Below them is a 'Results Per Page' dropdown set to '10' and a red 'Search' button.

3. Once you locate your assignee, click **Select**.

Name ▲	User Name ▲	Email ▲	Phone	Action
Gleason, Michael	gleasmic	michael.gleason@oregonstate.edu		[select]
Gleason, Mike	mgleason	nobody@sciquest.com		[select]

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- Once you have selected your assignee, you can click **Set as Preferred** to ensure the assignee is easily accessible when you attempt to assign a draft cart. Click **Remove** to remove a cart assignee. To add additional assignees, repeat the process by clicking on **Add Assignee**.

Name	Action
Mike Gleason	<input type="button" value="Set as Preferred"/> <input type="button" value="Remove"/>

Setting Notification Preferences

- On the **My Profile** page, click on **Notification Preferences** on the left side panel. Select the desired notification sub-category. By clicking the **question mark** icon you can find out what each notification controls. To change a notification, click **Edit Section** located in the top right corner.

Notification Event	Preference
Prepared By - PO Workflow complete	None
Prepared By - PO sent to Supplier	None
Prepared By - PO line item(s) rejected	None
Prepared By - PO rejected	None
PO submitted into Workflow	None
PO pending Workflow approval	None
PO Workflow Notification available	None
PO Workflow complete	None
PO sent to supplier	None
PO Line Item Ship Notice	None
PO line item(s) rejected	None
PO rejected	None
PO line item Backorder notice	None
PO line item Cancellation notice	None

- Select your notification preference for each line item by clicking the radio button next to **Default** or **Override**. If you click **Override**, select a notification preference from the drop down menu.
 - ❖ **Email** triggers outbound emails to your OSU email address when the event occurs.
 - ❖ **Notifications** trigger system notifications that are only viewable in the Dashboard menu under Notifications.
 - ❖ **Email & Notifications** will trigger an outbound email to your OSU email address and a system notification in your dashboard.

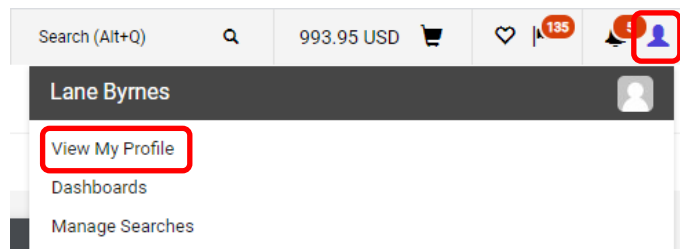
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Event	Default	Override	None
Prepared By - PO Workflow complete	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Prepared By - PO sent to Supplier	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Prepared By - PO line Item(s) rejected	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Prepared By - PO rejected	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
PO submitted into Workflow	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
PO pending Workflow approval	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
PO Workflow Notification available	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
PO Workflow complete	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
PO sent to supplier	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
PO Line Item Ship Notice	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
PO line Item(s) rejected	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
PO rejected	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
PO line Item Backorder notice	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

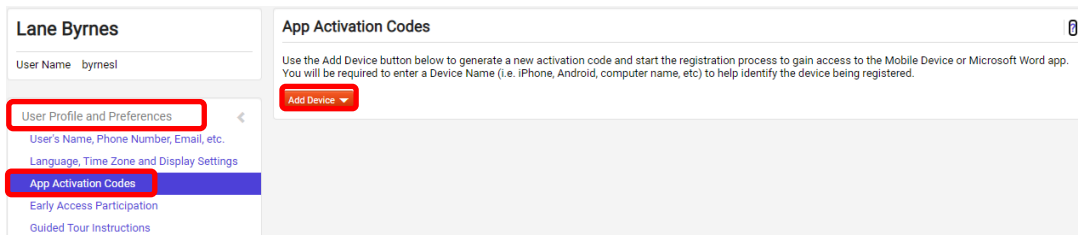
3. Click **Save Changes** at the bottom of the page to save your preferences. You will return to the **Notification Preferences** summary page, where you should see your updated preferences.

Mobile Device Setup

2. From the BennyBuy home page, select the user icon in the upper right hand corner and then select **View My Profile** from the drop down menu.

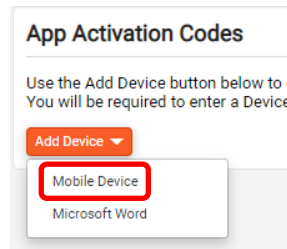


3. You will be directed to your BennyBuy profile. Click the **User Profile and Preferences** tab located on the left side panel. Select **App Activation Codes** and then click **Add Device**.

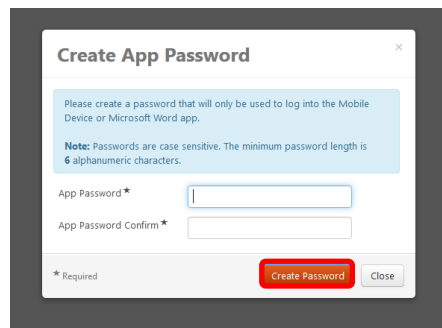


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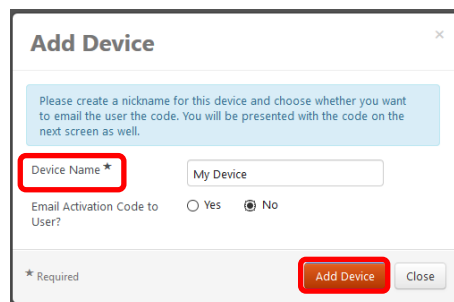
4. A drop-down menu will appear. Select **Mobile Device**.



5. You will be prompted to create your app password the first time registering a device. The password you input here will be used for all future devices. Once your password has been entered, click **Create Password**.



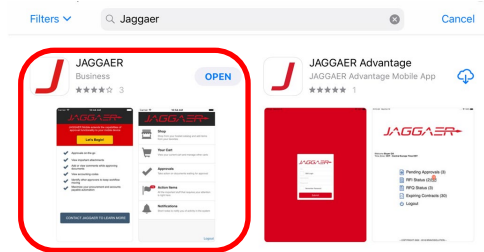
6. Provide a **Device Name** in the dialogue box. Select Yes or No if you would like the App Activation code emailed to you. Click **Add Device**. Once selected, the app activation code will appear. If yes is selected, an activation code will also be emailed to you.



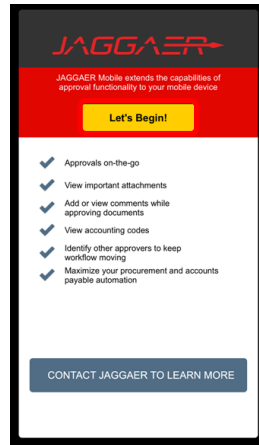
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Activating Your Mobile Device

1. Download the Jaggaer App (Business) by searching for it in your app store.



2. When you open the App, you will then be prompted to register your device. Click the **Let's Begin** button.



3. Enter the **Activation Code** provided in step 4 of the device set-up, as well as your **Password**. Click **Register Device**. Your device will now be active.

