iShopUTRGV Quick Reference Guide

How to - Update User Profile

1. Click on I followed "View My Profile' under your log in name.

$\leftarrow \rightarrow$	ට බ https://usertest.sc	iquest.com/apps/Router/ShoppingDashboardUserDetails?tmstmp=1603139313837					□ ☆	L &	
â				All 👻	Search (Alt+Q) Q	0.00 USD 📜	♡ •	A 1	
	Shop + Shopping + Shopping Home +	Shopping Dashboard			Laura Juarez				
í		Shopping Dashboard			View My Profile Dashboards				
õ		Simple Advanced	Go to: Favorites Forms Small Purchase Order Quic	k Order Bro	Manage Searches Manage Search Exports				
血		Search for products, suppliers, forms, part number, etc.			You do	not have any recent or	ders	_	
4							Logout	Help	

2. Under Default User Settings, click on 'Custom Field and Accounting Codes Defaults'.

	My Profile User's Name, Phone Number, Email, etc.			
	Laura Juarez	User's Name, Phone	Number, Email, etc.	?
Ċ	User Name ljuarez	First Name	Laura	
Q.	User Profile and Preferences	Last Name	Juarez	
血	User's Name, Phone Number, Email, etc.	Phone Number	ext. International phone numbers must begin with +	
	App Activation Codes	Mobile Phone Number		
ш	Guided Tour Instructions	E-mail Address *	International phone numbers must begin with + laurajuarez©utrgv.edu	
តា	Update Security Settings		~	
~	Custom Field and Accounting Code Defaults Default Addresses	Position	~	
\mathbf{M}	Cart Assignees	Authentication Method	Local	
	User Roles and Access >	User Name *	ljuarez	
	Ordering and Approval Settings 🔰			
	Permission Settings >			
	Notification Preferences >	★ Required		Save Changes
	User History >			

3. Click on 'Edit' next to the field you would like to change.

Laura Juarez	Custom Field and Accounting	Custom Field and Accounting Code Defaults				
User Name ljuarez	Header (int.) Codes Code Favorites					
User Profile and Preferences	Custom Field Name	Default Value	Description	Edit Values		
Update Security Settings	Blanket Order	No Defau	lt Value	Edit		
Default User Settings	Contract End Date (mm/dd/yyyy)	No Defau	lt Value	Edit		
Custom Field and Accounting Code Defau	Its Contract Start Date (mm/dd/yyyy)	No Defau	lt Value	Edit		
Default Addresses	Dean / Director	No Defau	lt Value	Edit		
Cart Assignees	Department Head	No Defau	lt Value	Edit		
User Roles and Access	> Division Head	No Defau	lt Value	Edit		
Ordering and Approval Settings	> Finally Close	No Defau	lt Value	Edit		
Permission Settings	Future Fiscal Year Budget	No Defau	lt Value	Edit		
Notification Preferences	Justification Method	No Defau	lt Value	Edit		
User History	Method of Procurement	No Defau	lt Value	Edit		
Administrative lasks	>					

4. In most cases, there are no existing values. Note that some users may have an existing value. This is usually for users who were employed in a different department.

Click on "Create New Value"

Header (int.) Codes Code F	avorites		
Custom Field Name	Default Value	Description	Edit Values
Dean / Director	No Defai	ult Value	Edit
Create New Value			
Value Description	*		

5. Use the "Description" field to type a portion of the name you are wanting to add. Then click search. If no results are displayed, the user may not be listed. Delete any information you may have added to the "Description" field and leave blank, then click on "search"

Header (int.) Codes Co	ode Fa	vorites		
Custom Field Name		Default Value	Description	Edit Values
Dean / Director		No Defau	lt Value	Edit
Value Description	*	Search For Value	/ Director	?
		Value Description		
	*	Results Per 5 ¥ Page		
T Custom Field Values			Search	

6. List of users will Display; scroll until you find the corresponding field. The Department Head, Dean, and Division Head fields are maintained by IT. If the information here is incorrect, please submit a Service Request so that IT may update the system. Once they have updated it, the information will sync to iShop and you will see the correct names.

Custom Field Name	Default	Value	Description	Edit Values
Sean / Director		No Default	t Value	ALC: N
Cdit Values				Character
Constant Marson Marson				
Value Description	*	hesults her hage	Values Found (A) Page 11 5 92	r of 19 .m. 7
		Select	Value	Description
* Custom Field Values marked s	0	Planning and Analysis	Gonzalez, Juan Claudio	
only modify the Default status of Custom Field Values.	•	Procurement Office	Validez, Jose A	
		•	Recruitment and Scholarships	Castilla, Griselda C
		0	Registrar	Montes, Mrs Sofia Cristina
		•	Research Innovation and Economic Development	Sanchez, Juan Miguel
			Add Values Back to 5	lesare fe

7. Once you have found the correct value, select the checkbox to the left of the value then click 'Add Values



8. Once saved, value should display. Click on Value or Description

leader (int.) Codes	Code Fav	orites			
Custom Field N	ame	De	fault Value	Description	Edit Values
ean / Director			No Defau	It Value	Edit
Procurement Office	Valdez,		Value	Procurement Offi	ce
Value	Description	-	Edit Existing	Value Procurement Offi	?
	Jose A		Description	Valdez, Jose A	
		-	Status	active	
* Custom Field Value an asterisk are role-t	s marked w based values fy the Defau	ith L		Save Remov	e

9. Click on 🖉 to set as default and click Save

leader (int.) Codes Code Fav	orites			2
Custom Field Name	De	fault Value	Description	Edit Values
Dean / Director		No Defau	ilt Value	Edit
Value Description Procurement Office Valdez, Jose A	n	Value Description	Procurement Office Valdez, Jose A	
Procurement Office Valdez, Jose A		Value Description Default	Valdez, Jose A	
	÷	Status	Save Remove	
* Custom Field Values marked w an asterisk are role-based value	s.			

10. iShop Should notify you changes were a success



11. Value should now be set as a 'Default Value'. Click on close

Header (int.) Codes	Code Favorit	es			
Custom Field Nam	he	Defa	ult Value	Description	Edit Values
Dean / Director	Procu	remer	t Office	Valdez, Jose A	Edit
Value	Description	^	Edit Existing	Value Procurement Office	?
Create New Value		_			
Procurement Office	Valdez		Value	Procurement Office	
	Jose A		Default	valdez, Jose A	
		-	Status	active	
				Save Remove	
Custom Field Values an asterisk are role-ba	marked with				
a a	sed fordest				

12. Value should be updated under 'Custom Field and Accounting Code Defaults'.

Custom Field and Accounting Code Defaults							
Header (Int.) Codes Code Favorites	4						
			7				
Custom Field Name	Default Value	Description	Edit Values				
Blanket Order	No Default	Value	Edit				
Contract End Date (mm/dd/yyyy)	No Default	Value	Edit				
Contract Start Date (mm/dd/aaaa)	No Default	Value	1000				
Dean / Director	Procurement Office	Valdez, Jose A	Edit				
Department Head	No Default	Value	Edit				
Division Head	No Default	Value	Edit				
Finally Close	No Default	Value	Edit				
Future Fiscal Year Budget	No Default	Value	Edit				
Justification Method	No Default	Value	Edit				
Method of Procurement	No Default	Value	Edit				
Professional Buyer	No Default	Value	Edit				
Purchasing Business Unit	UTRGV	UTRGV	Edit				
Supervisor	No Default	Value	Edit				