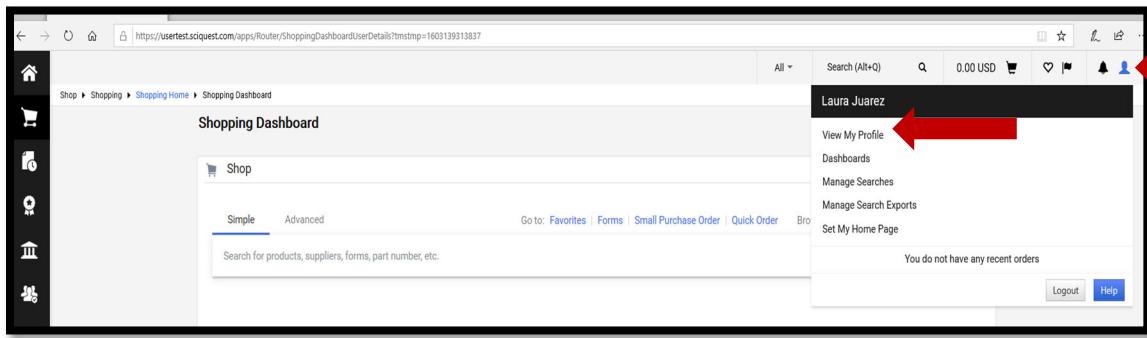


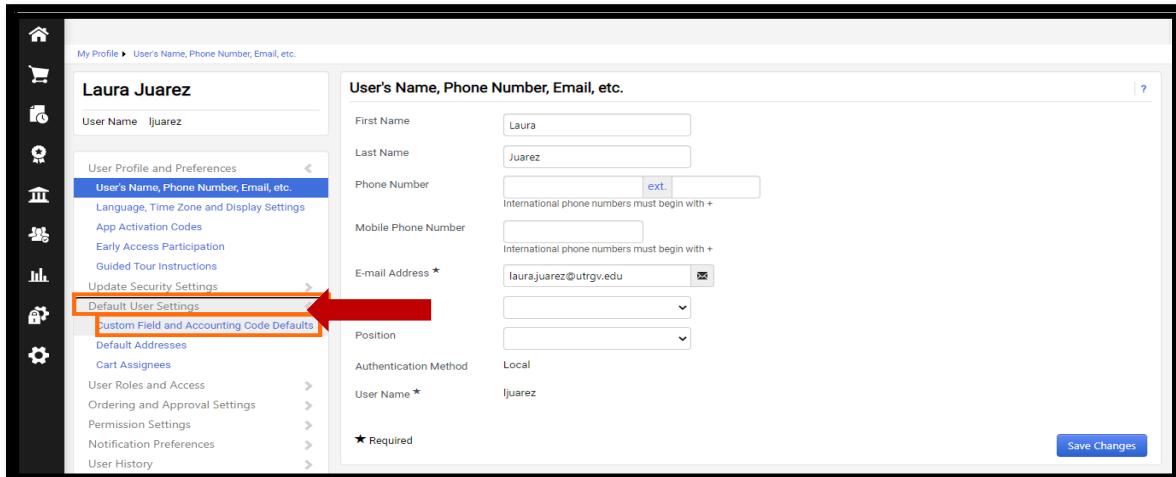
# iShopUTRGV Quick Reference Guide

## How to - Update User Profile

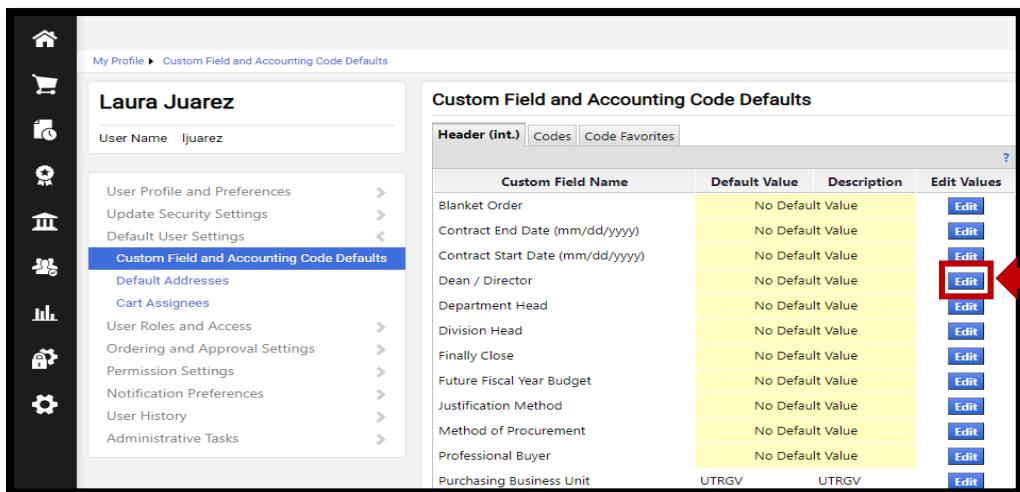
1. Click on  followed "View My Profile' under your log in name.



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

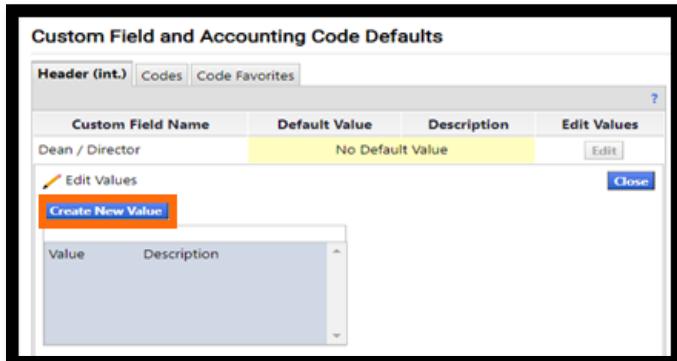


3. Click on 'Edit' next to the field you would like to change.

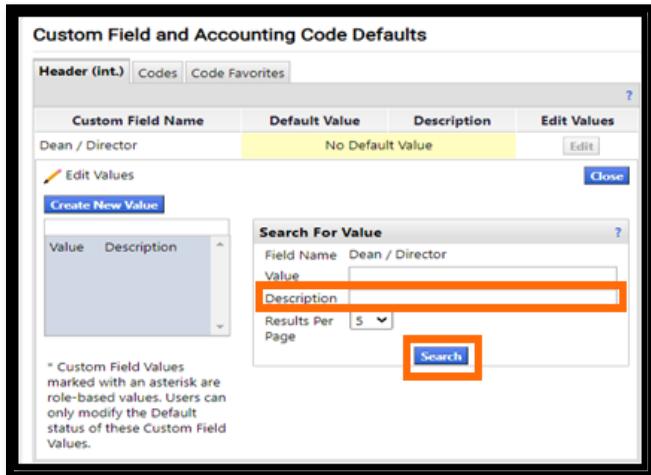


4. In most cases, there are no existing values. Note that some users may have an existing value. This is usually for users who were employed in a different department.

Click on “Create New Value”



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”



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.



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

Custom Field Name	Default Value	Description	Edit Values
Dean / Director	No Default Value		<input type="button" value="Edit"/> <input type="button" value="Close"/>

**Values Found** 1

Select	Value	Description
<input checked="" type="checkbox"/>	Procurement Office	Valdez, Jose A

\* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

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

**Custom Field and Accounting Code Defaults**

Custom Field Name	Default Value	Description	Edit Values
Dean / Director	No Default Value		<input type="button" value="Edit"/> <input type="button" value="Close"/>

**Edit Existing Value**

Value	Description
Procurement Office	Valdez, Jose A

\* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

Value: Procurement Office  
Description: Valdez, Jose A  
Default:   
Status: active

9. Click on  to set as default and click .

**Custom Field and Accounting Code Defaults**

Custom Field Name	Default Value	Description	Edit Values
Dean / Director	No Default Value		<input type="button" value="Edit"/> <input type="button" value="Close"/>

**Edit Existing Value**

Value	Description
Procurement Office	Valdez, Jose A

\* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

Value: Procurement Office  
Description: Valdez, Jose A  
Default:   
Status: active

10. iShop Should notify you changes were a success



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

A screenshot of a web-based application titled "Custom Field and Accounting Code Defaults". At the top, there are three tabs: "Header (Int.)", "Codes", and "Code Favorites". The main table has columns for "Custom Field Name", "Default Value", "Description", and "Edit Values". A row for "Dean / Director" is selected, showing "Procurement Office" as the default value and "Valdez, Jose A" as the description. An "Edit Values" button is highlighted with a red box. A modal window titled "Edit Existing Value" is open over the table, containing fields for "Value" (Procurement Office), "Description" (Valdez, Jose A), "Default" (checked), and "Status" (active). It includes "Save" and "Remove" buttons. A note at the bottom left of the table area states: "\* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.".

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

A screenshot of the same application interface. The table lists various custom fields with their current default values and descriptions. The row for "Dean / Director" is highlighted with a red box around its entire row. The "Edit" button for this row is also highlighted with a red box. Other rows include "Blanket Order", "Contract End Date (mm/dd/yyyy)", "Contract Start Date (mm/dd/yyyy)", "Department Head", "Division Head", "Finally Close", "Future Fiscal Year Budget", "Justification Method", "Method of Procurement", "Professional Buyer", "Purchasing Business Unit" (with "UTRGV" as the value), and "Supervisor". Each row has an "Edit" button to its right.