20/30 Webinar Series: #7 Profile Management
How it works and why it’s beneficial for everyone to use!
Agenda

1. About this Session
2. Profile Management
   • What is it?
   • How it works
   • Added Benefits
3. Resources & Support
4. Question and Answer
About this Session

- All users
- 30 Minutes
- Profile Management
- Question and Answer
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Profile Management
Profile Management is a BFS tool that is used to maintain BearBuy user profiles. A Profile Management Admin can set Org Nodes, speedtypes, chartstring values, Authorizers, Ship To addresses, etc. which will update the user profile in BearBuy.
How it works

Access

• In order to be able to access and manage profiles you must have the Profile Management role requested through the Systems Access Request Application (SARA)

• There is no restriction on who can perform this function.
  • It’s up to the department to designate a Profile Management Admin for their department/unit.
How it works cont..

The Profile Management Admin can manage user’s profile in a group setting or individual profile setting.

Group Profiles
• Departments can set up a group profile to provide a standard set of preferred values to several individuals in a unit.
• A single user with an individual profile cannot also be included in a group profile.
• A single user can only be part of one group profile.

Individual Profiles
• Departments can set up individual profiles to provide a standard set of preferred values to each individual in a unit.
• A single user included in a group profile cannot also have an individual profile.
• A single user can only be set with an individual profile or only part of one group profile.
How it works cont..

Once a profile is created (group or individual), the Profile Management Admin can set up profiles with the department's preferred or most commonly used values.

Profiles can be set up for Employees, Affiliates or Graduate/Workstudy Students
How it works cont..

All changes made by the Profile Management Admin are recorded for audit purposes.

Once profiles are created/updated in BFS and saved, the information will transmit to BearBuy. The next time the user logs into BearBuy they will see the new default settings.

In BearBuy, if there are values in a profile it does not prevent the end user from selecting from the entire set of values for the field. The option to select from profile values or select from all values will exist.

**KEEP IN MIND: BFS Profile Management will override any profile setup in BearBuy. BFS Profile Management will update BearBuy immediately when saved.**
How it works cont..

BFS Profile Management Setup Process

START

Is the Shopper's profile set up in BFS Profile Management?

YES

BearBuy Business Process

NO

Request department to set up BFS Profile Management

Enter Profile for Shopper in BFS

Create/edit profile to include:
- Org Node
- Speedtypes
- COA values
- Ship to Locations
- Final Destination Codes
- Additional Authorizers
- Cart Authorizers

Optional: Notification E-mail that BFS Profile Management is set up

BearBuy is updated immediately once BFS Profile Management is saved

END

BearBuy Business Process
Added Benefits

By using Profile Management, a department can provide their Shopper community with customized drop down lists and/or default values in BearBuy!

This results in a faster shopping experience in BearBuy:
- Less values the shopper needs to remember/populate
- Accurate Org Node and chartstring usage
- For Units that have central receiving, accurate delivery locations
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RESOURCES & SUPPORT
Training Resources

- We have developed Profile Management job aids. For first time Profile Management Admins, we recommend reviewing these job aids.
  - [http://procurement.berkeley.edu/bearbuy/instructional-resources](http://procurement.berkeley.edu/bearbuy/instructional-resources)

- BearBuy YouTube Channel
  - [youtube.com/user/BearBuyProcurement](https://youtube.com/user/BearBuyProcurement)

- Need more assistance? Contact the BearBuy help desk!
  - (510) 664-9000 Option 1, Option 2, Option 1
  - Mon-Fri 8 AM to 5PM
  - [Email BearBuy Help](bearbuyhelp@berkeley.edu)

Overview

- Glossary of Terms.pdf
- BearBuy Icons - Quick Reference.pdf
- BearBuy Purchasing Tools.pdf
- Data Privacy - Policy.pdf
- Data Privacy - Job Aid.pdf
- Profile Management Overview.pdf
- Maintain User Profile.pdf
- Combining Multiple Attachments - Job Aid.pdf
Thanks For Watching!