Profile Management is a tool in BFS that is used to maintain user profiles. Preferred Org Nodes, SpeedTypes, Chartstring values, Authorizers, Ship to addresses, and final destinations can be set up with Profile Management. Access to manage user profiles in BFS is requested through the Systems Access Request Application (SARA).

I. Set Up an Individual Profile
You can set up user specific profiles with your preferred or most commonly used values. Individual profiles can be set up for Employees, Affiliates, or Graduate Students.
1. In BFS, Navigate to Main Menu>Cal Components>Profile Management>Profile Management.
2. Use the “Add New Value” tab to add profile values for an individual. Enter the individual’s UID/EID/SID/ Name in the appropriate search field.
   - Use the “find an Existing Value” tab to edit individual profile values.
3. Click Search to display the results and select the desired individual.

II. Set Up a Group Profile
Departments can set up a group profile to provide a standard set of preferred values to several individuals in a unit. NOTE: A single user with an individual profile cannot also be included in a group profile. A single user can be included in only one group profile.
1. In BFS, Navigate to Main Menu > Cal Components > Profile Management > Profile Management.
2. Use the “Add New Value” tab to add profile values for a group.
   - Use the “find an Existing Value” tab to edit group profile values.
3. Select Group from the dropdown menu
4. Enter a Group Name for your group (must be a unique name), and click Add.
5. Enter a Description for this group
6. Follow Steps I. 4-11 to set up profile values, as needed
7. Click Group Members to add users to this group.
III. Copy a Profile

The process for copying an individual or group profile is the same.

1. Select Individual from the dropdown menu, enter the UID, Employee ID, Student ID (grad students only), or Name of the individual to be copied.
2. Click to open the Profile Management Copy/Merge/Delete screen.
3. Select Copy from the Copy/Merge/Delete dropdown menu.
4. Select Individual from the Profile Type dropdown menu.
5. Enter the CalNet UID number of the new user.
6. Click Make Changes.

IV. Merge a Profile

1. Follow steps III. 1-2.
2. Select Merge from the Copy/Merge/Delete dropdown menu.
3. Select Group from the Profile Type dropdown menu.
4. Enter the name of the Group Name.
5. Check the Send People box, and/or the Send Profile box, if appropriate.
6. Click Make Changes.

V. Delete a Profile

1. Select the Individual or Group profile to be deleted as in Steps III. 1-2 above.
2. Select Delete from the dropdown menu.
3. Click Make Changes.