

Concepts

- 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.

UC Profile Management
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Profile Type: = Individual

Group Name or Calnet UID: begins with

EmpID: begins with

Student ID: begins with

Name: begins with

Description: begins with

Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

4. **Org Node:** Enter the user Org Node and check the Default and Active boxes, as appropriate.
5. **SpeedType:** Enter SpeedType Key, or click . Check Default and Active boxes, as appropriate.
6. **COA:** Enter additional values to be available in the drop down list for all chartstring fields.
7. **Ship To:** Enter default ship to location.
8. If needed also select a **Final Destination** location.
9. Enter/Search **Additional Authorizers** and **Cart Authorizers** as needed.
10. Review all values and check the **Default** and **Active** boxes for each line, as needed
11. If complete, click **Save**

Profile Management

Profile Type: Individual
Calnet UID: 124968 JENSEN,Kristen N.
Employee ID: 011317515 Student ID: 00000000
Description: JENSEN,Kristen N.

4 Org Nodes

*Tree Node	Description	Bill to Address	Description	Default	Active on Bear Buy
1	FREXM	Extramural Funds Accounting	UNIVE00030 University Hall, RM 30	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

5 Speedtypes

SpeedType Key	Description	Fund Code	Department	Program Code	ChartField 1	ChartField 2	Default	Active on Bear Buy
1	FPRSKGV000	66216	23285	72		FPGOV	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	FSACO69750	69750	23185	72			<input type="checkbox"/>	<input checked="" type="checkbox"/>

6 COA - Values are recorded individually and not as a string

Account	Default Account	Fund Code	Department	Program Code	ChartField 1	ChartField 2	Active on Bear Buy
1		69749	23180				<input checked="" type="checkbox"/>
2	55030						<input checked="" type="checkbox"/>

7 Ship To Locations

Ship To Location	Description	Default	Active on Bear Buy
1	WARRE00130 Warren Hall, RM 130	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

8 Final Destination

Location Code	Description	Default	Active on Bear Buy
1	WARRE0130E Warren Hall, RM 130E	<input type="checkbox"/>	<input checked="" type="checkbox"/>

9 Additional Authorizers

User ID	Name	Default	Active on Bear Buy
1		No	<input checked="" type="checkbox"/>

9 Cart Authorizers (Cart Assignees)

Bear Buy ID	Name	Default	Active on Bear Buy
1		<input type="checkbox"/>	<input checked="" type="checkbox"/>

Save | Return to Search | Previous in List | Next in List | Notify

Default checkbox – when checked, the value will automatically populate the corresponding field in a BearBuy shopping cart. Only one value can be designated as a default.

Active on BearBuy checkbox – when checked, the value will appear on a dropdown list in a BearBuy

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.

UC Profile Management

Find an Existing Value | Add a New Value

Profile Type: Group

Group Name:

Add

In each category, add additional lines, or delete lines, by clicking the Plus (+) or Minus (-) sign

Profile Type: Group Group: EFA DEPARTMENT Created By: _____
 Updated By: _____

5 description: _____

*Tree Node	Description	Bill to Address	Description	Default	Active on Bear Buy
1				<input type="checkbox"/>	<input checked="" type="checkbox"/>

SpeedType Key	Description	Fund Code	Department	Program Code	ChartField 1	ChartField 2	Default	Active on Bear Buy
1							<input type="checkbox"/>	<input checked="" type="checkbox"/>

COA - Values are recorded individually and not as a string

Account	Default Account	Fund Code	Department	Program Code	ChartField 1	ChartField 2	Active on Bear Buy
1							<input checked="" type="checkbox"/>

Ship To Location	Description	Default	Active on Bear Buy
1		<input type="checkbox"/>	<input checked="" type="checkbox"/>

Location Code	Description	Default	Active on Bear Buy
1		<input type="checkbox"/>	<input checked="" type="checkbox"/>

User ID	Name	Default	Active on Bear Buy
1		No	<input checked="" type="checkbox"/>

Bear Buy ID	Name	Default	Active on Bear Buy
1		<input type="checkbox"/>	<input checked="" type="checkbox"/>

Save Notify

UC Profile Management: [Group Members](#) 7

8. Enter the **UID** number for the first person in your group or click **Search** (🔍). Select individuals by name.
9. To add additional group members, click **Plus (+)** to add a line. Follow **Step 8** to add the person's name. When all Group Members have been added, click **Save**.

Group Name: EFA DEPARTMENT

People	Calnet UID	EmpID	Student ID	Name	Active on Bear Buy
1					<input checked="" type="checkbox"/>

8

Save Notify

9

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 **Search** 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**

Click here to view the existing profile values

For group profiles, click here to view the existing people in that profile

This is the profile you are copying from

This is the profile you are copying to

When copying to a group profile, you can choose to send the **Profile** and/or the **People** to the new profile

3 Copy/Merge/Delete: Copy 4 Profile Type: Individual 5 Calnet UID: 000000

6 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**

2 Copy/Merge/Delete: Merge 3 Profile Type: Group 4 Group Name: EFA Department

6 Make Changes 5 Send People:

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**

2 Copy/Merge/Delete: Delete

3 Make Changes