Setting Personalizations – Defaults, Attributes, and Team Members

Before Shoppers and Submitters begin working in Buy@Duke, personalizations should be set. These can be set by the individual Shopper or Submitter or maybe set by a department administrator. Setting personalized defaults significantly simplifies the process of creating a shopping cart. Shoppers and Submitters are *strongly encouraged* to set *all* personalizations recommended below before creating shopping carts.

1. Select the **Buy@Duke** tab.

2. Select the **Personalization** page. This opens the **Display Document**: screen.

3. On the **Display Document**: screen, select **Edit** to switch to the edit mode.
Setting Personalization Continued…

4. Review the Personal Data section and note the following:
   - The asterisks next to certain fields indicate that you **must** enter information in those fields.
   - Confirm your email address.
   - Be sure to save the information you have entered when finished.

5. To enter the Form of Address, select the drop-down button and make the preferred selection from the list. **Required Field**

6. Check your name in the First Name and Last Name fields. If you need to change either of these, make the correct entries. **Required Fields**

7. Ensure that the Position tab is selected.

8. Notice that the Organizational Assignment fields contain defaulted values. This information was set when your user account was created. Missing information is unnecessary and does not need to be completed.

9. Verify your email address and correct the address if needed.

10. Once you’ve entered all the required fields in the Personal Data section, select the Save button.
Setting Personalization Continued…

11. Once your Personal Data fields are updated and saved, set your Attributes. Review the points below about Attributes.

- Selecting and saving values for the applicable Attributes will save you a great deal of time later.
- Attributes represent certain fields that must be entered on a shopping cart. See the table on the next page for a list of Attributes and descriptions.
- The purpose of Attributes is to create a default standard value for a field that will automatically populate that field in the shopping cart and save keystrokes.
- In addition, multiple values may be entered for some Attributes and those values will populate a Personal Value List (PVL) for the field in each shopping cart. The PVL may be accessed from a drop-down list in the field.
- Once you’ve created a cart, you may easily change the standard default value on a cart-by-cart basis to any of the other values in the PVL for the fields that were defaulted by your Attributes. The drop-down list will save keystrokes.
- In addition, you may also manually enter a value for a shopping cart field.

12. Select Edit to switch to the edit mode.

13. Select the Drop-down button in the Attributes field to display the list of available attributes. See the next page for descriptions.
Setting Personalization Continued…

14. Review the list of Attribute descriptions below to determine which Attributes to set. Then follow the steps below to set the values.

**Note:** Some values have been set at the system level, and you should not change these. Other values may have been set by your business office prior to your first use, and you should not change these either. If a value is not discussed in this table, it is not to be used and should not be maintained.

<table>
<thead>
<tr>
<th>Account Assignment Category</th>
<th>Choose a value that indicates what type of Cost Object will be used most of the time.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• <strong>Asset</strong> = used only by central administration departments</td>
</tr>
<tr>
<td></td>
<td>• <strong>Cost Center</strong> = indicates that the fund being used for the purchase is a Cost Center (seven-digit numbers for University departments; nine-digit numbers for Health System departments)</td>
</tr>
<tr>
<td></td>
<td>• <strong>WBS</strong> = indicates that the fund being used for the purchase is a WBS Element/Project (restricted funds beginning with 20x–39x and Axx, as well as 7xx non-restricted funds for University departments)</td>
</tr>
</tbody>
</table>

| Company Code | DO NOT CHANGE DO NOT CHANGE THE SET VALUE. This value indicates the corporate entity to which your department belongs: Duke University = 0010 and Duke Hospital = 0030 |

| Cost Center | Enter as many lines as needed to list the cost center value(s) that may be used on a cart. Use the radio button to select one as the Standard (default). If you enter more than one cost center, others will appear as options in your PVL. Cost objects DO NOT contain a dash/hyphen. |

| Delivery Address | Enter the building number that corresponds to the delivery address. Use the drop-down to search by building name. Text must be entered with capital letters. Asterisks (*) may be used as text wild cards. For details on how to search for delivery addresses, please refer to detailed guidance found later in this document. If you cannot find your address or if it is a new address, contact the Buy@Duke Help Desk for assistance. Once you have found the appropriate delivery address, use the radio button to select one as the Standard (default). If you enter more than one delivery address, others will appear as options in your PVL. |

| Delivery Days | DO NOT CHANGE THE SET VALUE. This value will not prevent deliveries from being made as soon as a supplier is able to process the order. |

| G/L Account | Enter as many lines as needed to list the six-digit G/L Account values that may be used on a cart. Examples include 645000 for Laboratory Supplies & Materials and 646000 for Office Supplies. The text associated with the G/L Account does not display while you are adding lines; however, it will display in the shopping cart. Use the radio button to select one as the Standard (default). If you enter more than one G/L account, others will appear as options in your PVL. |
Setting Personalization Continued…

<table>
<thead>
<tr>
<th>Goods Receipt Flag</th>
<th>COMPANY 0010 USERS – DO NOT SET A VALUE IN THIS FIELD. YOU MUST USE THE NON-VALUED GR FLAG.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goods Recipient</td>
<td>Enter the name of the person who should receive the ordered items (probably you). This field displays only 14 characters. Abbreviate names if needed.</td>
</tr>
<tr>
<td>Non-Valued GR Flag</td>
<td>If your business unit has directed that a goods receipt confirmation should be performed for each cart to indicate that items were received from the supplier (whether you actually perform the goods receipt or someone else in your department does), enter an upper case X in the value field. If you are unsure if your unit requires Goods Receipt, check with your business office.</td>
</tr>
<tr>
<td>Room Number</td>
<td>Enter the room number or location in a building where the goods should be delivered. Use the radio button to select one as the Standard (default). If you enter more than one room number, others will appear as options in your PVL.</td>
</tr>
<tr>
<td>Team Shopping Cart</td>
<td>For those with the Shopper role, team shopping is set as a default and cannot be changed. For those with the Submitter role, if your business unit has chosen to use the team shopping concept (with shoppers sharing carts or submitters reviewing shopper’s carts), enter an upper case X in the value for this field in Attributes.</td>
</tr>
<tr>
<td>WBS Element</td>
<td>Enter as many lines as needed to list WBS elements that may be used on a cart (cost objects beginning with 20x–39x and Axx, as well as 7xx non-restricted funds). Use the radio button to select one as the Standard (default). If you enter more than one WBS element, others will appear as options in your PVL. WBS elements DO NOT contain a dash/hyphen.</td>
</tr>
</tbody>
</table>

15. Select the Attribute you wish to edit by clicking on its title in the list. Use the scroll bar as needed. For this example, we will use Delivery address. Fields vary slightly based upon the Attribute being updated.
16. In the resulting screen showing the Attribute selected, select Add Line to add a new line with white, editable fields and follow the next steps.

17. In the Value field, enter the appropriate data. Use the search button to the right of the field to identify your preferred value or contact your business office.

18. Select the radio button in the Standard column to identify your preferred choice if you enter multiple lines. The Standard choice will default when you create a new cart. The other items will be part of your PVL.

19. Select Check to see if the data you entered is correct. If not, make the correction.

20. If the data do not contain errors, click the Save button.

   - You may enter several Attributes before clicking the Save button.
   - Each time you use the Save button, you must click the Edit button to return to the Edit mode.

21. Repeat steps 13-20 above to select other attributes from the Attributes list, enter the desired values, and check and save the data.
### Setting Personalization Continued…

22. If you are a shopper or your team uses team shopping, you must add **Team Members** (Procurement Substitutes) to your team per the next steps. Team members are colleagues in your department who may view your shopping carts. **Shoppers must add their submitters as team members.**

23. Select **Edit** to switch to the Edit mode.

24. Select the **User Account** tab.

25. In the **My Procurement Substitutes for Team Purchasing** box, select **Add Line**.

26. On the new line, select the **Name of Substitute** field using the **Search** button.
Setting Personalization Continued…

27. In the Search box, **enter the last name** of the team member you wish to add. Then select **Search**.

![Image of Search box](image)

**Note:** **Standard Settings** found on this screen **DO NOT need to be completed**.

28. In the resulting list, click on the line that contains the User ID and name of the team member.

![Image of resulting list](image)
Setting Personalization Continued…

29. To set the **Start and End date** of the team member’s access, type the date or use the calendar button to select the date for both the **Start Substitution On** and the **End Substitution On** fields. For the end date, use **12/31/9999** to leave the team members access open ended. If you wish to end the assignment in the future, you will simply **Remove** the line at that time.

30. **To continue to add Team Members, repeat steps 25-29.**

31. After you have entered all your team members, select **Save** button.