

Set Up Default Profile Settings

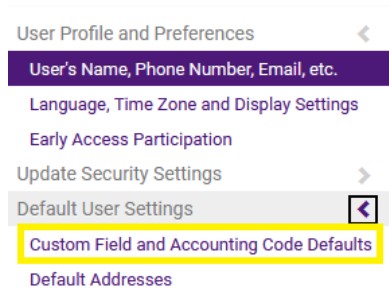
1. Log into [Jaggaer](#)
2. Edit the Default User Settings
 - a. Click the Profile icon in the upper-right of the screen.



- b. In the dropdown menu, click “View My Profile”.



- c. From the left side menu under Default User Settings, click “Custom Field and Accounting Code Defaults”.



3. Edit the Default Business Unit
 - a) Next to Business Unit, click “Edit” button.

Header (int.) Codes Code Favorites Internal Information ?			
Custom Field Name	Default Value	Description	Edit Values
Re-Issue Date	No Default Value		Edit
Business Unit	No Default Value		Edit
Services	No Default Value		Edit
Email Address	No Default Value		Edit

- b) Click “Create New Value” button.

Header (int.) Codes Code Favorites Internal Information ?			
Custom Field Name	Default Value	Description	Edit Values
Business Unit	No Default Value		Edit
Edit Values			Close
Create New Value			
Value	Description		

- c) Check the box for TCU and click “Add Values” button.

Header (int.) Codes Code Favorites Internal Information

Custom Field Name	Default Value	Description	Edit Values
Business Unit	No Default Value		Edit

Edit Values Close

Create New Value

Value	Description
TCU	Texas Christian University

Add Values

- d) Under Description, click “Texas Christian University”. This will bring up the next menu.

Header (int.) Codes Code Favorites Internal Information

Custom Field Name	Default Value	Description	Edit Values
Business Unit	No Default Value		Edit

Edit Values Close

Create New Value

Value	Description
TCU	Texas Christian University

- e) Check the box for Default and click the “Save” button.

Header (int.) Codes Code Favorites Internal Information

Custom Field Name	Default Value	Description	Edit Values
Business Unit	No Default Value		Edit

Edit Values Close

Create New Value

Value	Description
TCU	Texas Christian University

Edit Existing Value

Value TCU

Description Texas Christian University

Default ☒

Status active

Save Remove

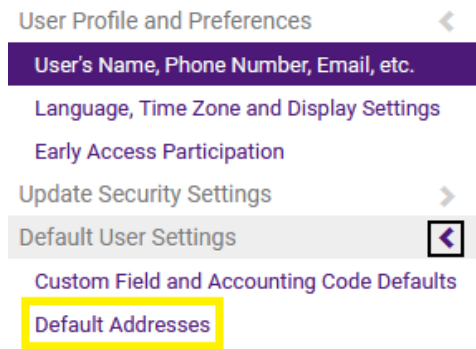
4. Edit the Default Accounting Codes – Default codes will automatically populate in all payment requests. Not setting up codes will require coding in all requests.

- a) Select the “Codes” tab to see the available defaults. Follow the same instructions as above to edit Account, GL Unit, Department and Fund.
- If you want to have multiple Code defaults you can use the “Code Favorites” tab
- Custom Field and Accounting Code Defaults**

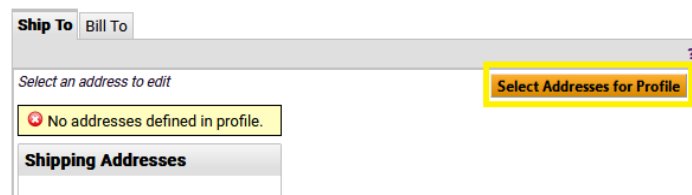
Header (int.) Codes Code Favorites Internal Information			
Custom Field Name	Default Value	Description	Edit Values
Account	6340	Equipment	Edit
GL Unit	TCU	Texas Christian University	Edit
Department	23315	Asset Mgmt and Tech Services	Edit
Fund	11000	TCU General	Edit

5. Edit the Default Shipping Address - Jaggaer requires users setup default Ship To and Bill To addresses. The Ship To address is typically based on your building name. The Bill To address is typically based on your department name. If you are unsure of your Ship To or Bill To address, leave the Nickname/Address Text box blank, increase the Results Per Page to 200, and hit Search. Results will be displayed alphabetically.

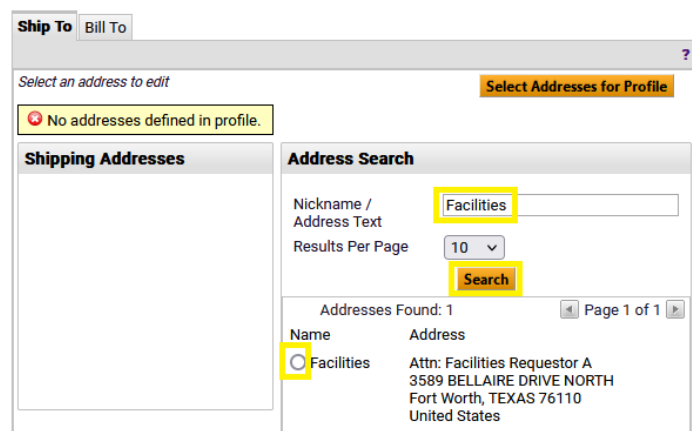
- a) From the left side menu under Default User Settings, click Default Addresses.



- b) Click the "Select Addresses for Profile" button.



- c) Type your building name in the Address Search and click the "Search" button. Select the radio button next to your building.



- d) Add your name to the Attn: field, click “Save” to finish.

Ship To **Bill To**

Select an address to edit

Select Addresses for Profile Delete Address

No addresses defined in profile.

Shipping Addresses

Edit Selected Address

Nickname Facilities

Default ☒

Current Default Address ---

ADDRESS

Attn: * Facilities Requestor A

Address Line 1 3589 BELLAIRE DRIVE NORTH

City Fort Worth

State TEXAS

Zip Code 76110

Country United States

Save

6. Edit the Default Shipping Address

- a) Select the “Bill To” tab. Use the same steps as above to select your department as your Billing Address.

Ship To **Bill To**

Select an address to edit

Select Addresses for Profile

Billing Addresses

Bill To

Address Search

Nickname / Address Text Facilities

Results Per Page 200

Search

Addresses Found: 1 Page 1 of 1

Name	Address
<input type="radio"/> TCU-Facilities	TCU-Facilities Attn: TCU Box 298320 Fort Worth, TX 76109 United States