Set Up Default Profile Settings
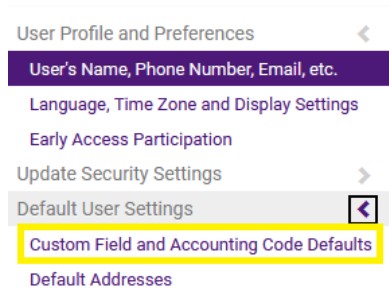
1. Log into Jaggaer

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.

    b) Click "Create New Value" button.

c) Check the box for TCU and click "Add Values" button.

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

e) Check the box for Default and click the "Save" button.

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**

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.
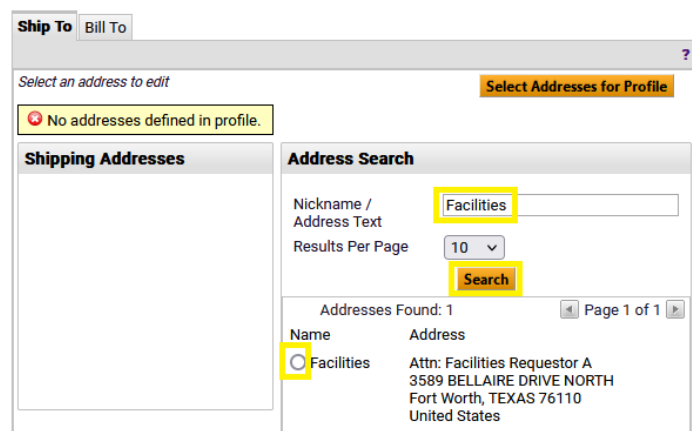
   a) From the left side menu under Default User Settings, click Default Addresses.
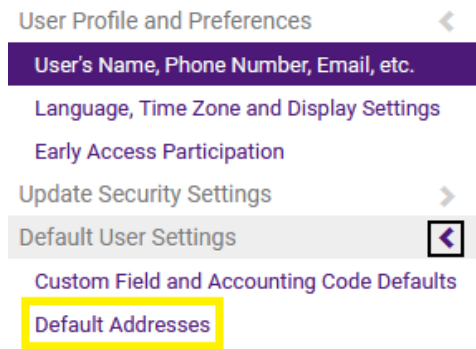
   b) Click the "Select Addresses for Profile" button.
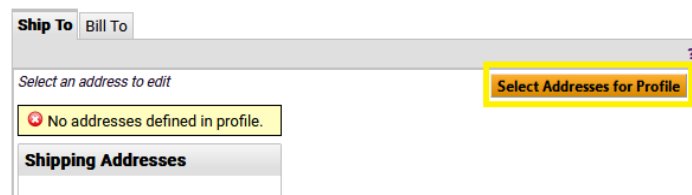
   c) Type your building name in the Address Search and click the "Search" button. Select the radio button next to your building.

d) Add your name to the Attn: field, click "Save" to finish.

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.