TechBuy User Profile

Each user in the system has a unique profile which contains information specific to that user. Elements of the profile are required for system access, while other elements are not required, but will make submission of the cart simpler. For example, by setting up a user’s ship to address, the information will be defaulted into an order and will not require selection with each purchase. This section will walk you through the basics of updating and managing your profile.

Access your user profile. You can access your user profile two different ways. You can click on the profile link in the upper left-hand corner to the right of the username or select the profile from the drop-down list at the far right of the navigation bar.

Basic Information:

Your profile should open to the User Settings tab and the User Identification sub-tab. This sub-tab houses your basic contact and log in information. Review the populated information and make changes if necessary.

The following information on this tab needs to be populated:
Select your Department from the drop-down list. It should begin with HSC followed by the title of the department.

**Email Preferences:**

The Email Preferences screen is used to determine when and why the user will receive email notifications from the system. This information is NOT inherited from the role, so this must be set up individually. There are no required notices; however, it will be important to get at least minimal notices such as line item rejection. It has been suggested to sign up for many and taper back once you determine your business needs.

You can access these options under the User Setting tab and the Email Preferences sub-tab.
Please note that the notification options listed under the Email Preferences sub-tab are dependent on a user’s permissions. You may have more or less options than those shown in the above example.

Determine in which cases you would like to receive an email. Click on the name of the email notification to display a full explanation of why and when the notification type will be sent. To enable or disable a notification, click on the checkbox. Those marked with a checkmark are enabled and you will begin receiving emails immediately (as appropriate).

Default Addresses:

Billing and shipping information is required to place orders in SciQuest. Although address information can be entered each time an order is placed, it is recommended to set up billing and shipping information in the user profile to save time and provide consistency with each order.

You can access this information by selecting the Purchasing tab and the Address sub-tab.
**Bill To Address:** Select the **Bill To** tab under the **Address** sub-tab. The billing addresses are either TTUHSC Payables or TTU Payables. This address will be defaulted for you at the time of registration based upon your department. You may want to verify that your default Bill To address corresponds to the correct paying entity.

![Image of Address Search](image1.png)

**Shipping Address:** Once you have verified your billing address, select the **Ship To** tab under the **Address** sub-tab. The shipping address identifies where the supplier should ship the item(s). Select the **Select Addresses for Profile** icon.

*If you do not locate the correct shipping address in the list, please contact the Purchasing Department!*

![Image of Address Search](image2.png)

This will open an **Address Search** window. You can enter search criteria or simply select the **Search** icon to bring in all shipping addresses. When entering search criteria,
you can simply enter the first characters of the Ship To Code or use a % or * wildcard and enter the last characters of the Ship To Code.

**Example 1: Search using no criteria**

<table>
<thead>
<tr>
<th>Name</th>
<th>Address</th>
</tr>
</thead>
</table>
| HAB001 | Contact Name Denise Sober  
Phone +806 (743) 1888 ext.224  
Email denise.sober@ttuhsc.edu  
Tx Tech Univ HSC  
12071 FM 2522  
Rm/Building  
ABILENE, TX 79601  
United States |
| HAB002 | Contact Name Denise Sober  
Phone +806 (743) 1888 ext.224  
Email denise.sober@ttuhsc.edu  
Tx Tech Univ HSC  
13055 FM 2522  
Rm/Building  
ABILENE, TX 79601  
United States |
| HAB003 | Contact Name Denise Sober  
Phone +806 (743) 1888 ext.224  
Email denise.sober@ttuhsc.edu  
Tx Tech Univ HSC  
1718 PINE ST  
Rm/Building  
ABILENE, TX 79601  
United States |
| HAB004 | Contact Name Denise Sober  
Phone +806 (743) 1888 ext.224  
Email denise.sober@ttuhsc.edu  
Tx Tech Univ HSC  
202 PINE  
Rm/Building  
ABILENE, TX 79601  
United States |
| HAM001 | Contact Name Denise Sober  
Phone +806 (743) 1888 ext.224  
Email denise.sober@ttuhsc.edu  
Tx Tech Univ HSC  
1501 S COULTER/POISON CONT CTR  
Rm/Building  
AMARILLO, TX 79106  
United States |

Notice this example returned 21 pages of addresses. Using no criteria in the search produced a list of all ship to codes listed in alphabetical order.
Example 2: Search using HLU as the criteria in the Ship To Code

<table>
<thead>
<tr>
<th>Address Search</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ship To Code</td>
</tr>
<tr>
<td>Address Text</td>
</tr>
<tr>
<td>Results per Page</td>
</tr>
</tbody>
</table>

Addresses Found: 15

<table>
<thead>
<tr>
<th>Name</th>
<th>Address</th>
</tr>
</thead>
</table>
| HLU001 | Contact Name Denise Sober  
Phone: 806 (743) 1688 ext.224  
Email: denise.sober@ttuhsc.edu  
Tx Tech Univ HSC  
3223 S LOOP 289  
Rm/Bldg:  
LUBBOCK, TX 79423  
United States |
| HLU002 | Contact Name Denise Sober  
Phone: 806 (743) 1688 ext.224  
Email: denise.sober@ttuhsc.edu  
Tx Tech Univ HSC  
3801 4TH ST  
Rm/Bldg:  
LUBBOCK, TX 79423  
United States |
| HLU003 | Contact Name Denise Sober  
Phone: 806 (743) 1688 ext.224  
Email: denise.sober@ttuhsc.edu  
Tx Tech Univ HSC  
4004 82ND  
Rm/Bldg:  
LUBBOCK, TX 79424  
United States |
| HLU004 | Contact Name Denise Sober  
Phone: 806 (743) 1688 ext.224  
Email: denise.sober@ttuhsc.edu  
Tx Tech Univ HSC  
42021 BROADWAY & UNIVERSITY  
Rm/Bldg:  
LUBBOCK, TX 79409  
United States |
| HLU005 | Contact Name Denise Sober  
Phone: 806 (743) 1688 ext.224  
Email: denise.sober@ttuhsc.edu  
Tx Tech Univ HSC  
4430 S LOOP 289  
Rm/Bldg:  
LUBBOCK, TX 79414  
United States |
| HLU006 | Contact Name Denise Sober  
Phone: 806 (743) 1688 ext.224  
Email: denise.sober@ttuhsc.edu  
Tx Tech Univ HSC  
4434 S LOOP 289  
Rm/Bldg:  
LUBBOCK, TX 79413  
United States |

Notice this example only returned two pages of addresses. Using HLU for the Ship To Code criteria searched for all addresses that start with HLU.
Example 3: Search using either a % or * wildcard (*001 or %001)

Notice how the search results using a %001 returned anything that ended in 001. This search criterion found 5 pages of addresses.
Once you have found the Ship To address you would like to default on your orders, use the radio button to the left to select the correct Ship To address.

This will open the **Edit Selected Address** window.

In the **Edit Selected Address** field, you can edit the Nickname, Contact Name, Phone, Email, and Rm/Building fields.

The **Nickname** field allows you to title the shipping address with a name that will be more meaningful to you. For example, HLU003 is the main Lubbock HSC building.

The **Contact Name**, **Phone**, and **Email** fields should all default from your User Settings. **If this information is incorrect, please correct the information in your user settings.** You can follow the instructions above under Basic Information.

The **Rm/Building** field is a required field on all requisitions and purchase orders. This should be populated with your mail stop, room number, or specific building name.

Once you have your shipping address correct, please select the **Save** icon.
Default Accounting Information: (Fund, Organization, Account, Program)

In your Profile click on the “Purchasing” tab and select “Codes”

The elements that need to be added to your profile to streamline your purchasing process are Chart, Fund, Organization and Program codes.

Select the Edit button on the right side of the screen parallel to “Chart”.

Click on “Add Account Information”
Click on the box to the left of the value “H” for Texas Tech University Health Sciences Center. Then click add.

Once the value “H” is visible in the Add Account Information Box, click on the value “H”. A new box opens up, “Edit Existing Value”. To make the value a default value, click in the “Default” radio button and the click on “Save”.
Click on the “Close” button on the right side of the page. You will see that Chart H has been added as a default value.

Now click on the Edit button parallel to the Fund field.
Click on Add Account Information.

Enter the Fund code you wish to add to your default values and click “Search” or you can just search for a value. If you search for a value, you will be given a list to choose from. Click in the radio button beside the value you wish to add then click on “Add Values”.

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Once you see the value appear in the “Add Account Information” box on the left, click on the value.

When the “Edit Existing Value” box opens on the right side, click in the “Default” radio button and click “Save”.

* Custom Field values marked with an asterisk are role-based values. Users can only modify the default status of these Custom Field values.
Click on “Close” on the right side of the screen. You will see that the fund that you selected shows up as a default now.

Follow the same steps for Account and Program.

**Tip:** Only default the Account (type of expense or purchase) if you *always* purchase or order the same things such as office supplies or clinical supplies.

After you have defaulted your Fund, Organization and Program codes your default values should reflect those defaults.
If you have set up defaults for your Ship To, Billing Address and at least your Fund, Organization and Program you have completed the recommended default set up. This information will default into every order you submit and will save you time when ordering.