Job Aid
Profile Management

Profile Management in BFS – How to maintain user profiles

Profile Management is a new 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 in the Profile Management page in BFS, which will immediately update the user profiles in BearBuy. Access to manage user profiles will be granted via SARA.

1. From your **BFS Home** page menu, select to open the **Profile Management** search page

Set Up an INDIVIDUAL Profile

To provide a department’s Shoppers with customized dropdown lists or default values in BearBuy, you can set up user profiles with your preferred or most commonly used values. Profiles can be set up for Employees, Affiliates, or Graduate Students.

2. Use the **“Add New Value”** tab to add profile values for an individual or a new group. Use the **“Find an Existing Value”** tab to change profile values for an individual or to add users to an existing group. Enter the individual’s UID, Employee ID, Student ID (grad students only), or Name in the appropriate Search field.

3. Click **Search** to display the results. Click on the desired individual to open the Profile Management screen.

(Items 4-9 are optional)

4. **Org Node** – enter the user Org Node and check the Default and Active boxes, as appropriate.

5. **SpeedType** – enter SpeedType Key, or click **Search**. Check Default and Active boxes, as appropriate.

6. **COA** – enter additional values to be available in the drop down list for all chartstring fields. They are not recorded as a string of related values.

7. **Ship To** – enter default ship to location

8. Enter/Search **Final Destination** location, if needed

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**

**NOTE:** Bill To address in BearBuy defaults to Disbursements except Org Nodes for CP, PPCS or RSSP

**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 shopping cart.

Any Shopper can be a Cart Authorizer (employees, affiliates, grad students)

Additional Authorizers can only be PIs with active funds, or anyone with a BearBuy Req Approver role. Select Default authorizer if appropriate.

In each category, add additional lines, or delete lines, by clicking the Plus (+) or Minus (−) sign
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 – Group profiles have the following limitations:**
- 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.

12. Click on the **Add a New Value** tab

13. Select **Group** from the dropdown menu

14. Enter a **Group Name** for your group (must be a unique name), and click **Add**

15. Enter a **Description** for this group

16. Follow Steps 4-11 to set up profile values, as needed

17. Click on the **Group Members** link to add users to this group, or click the **Group Members** tab at the top of the page (not shown)

18. Enter the **UID** number for the first person in your group and hit Enter, or click on the **Search** icon to look up and select individuals by name.

**How to Find a UID?** See page 4.

19. To add each additional Group Member, click on the **Plus (+)** sign to add a line. Follow **Step 18** to add the person’s name. When all Group Members have been added, click **Save**.
Copy, Merge, or Delete a Profile

**To COPY an Individual Profile to a New User Profile**

20. From your BFS Home page menu, select **Main Menu > Cal Components > Profile Management > PM Copy/Merge/Delete**

21. Select **Individual** from the dropdown menu, enter the **UID**, **Employee ID**, **Student ID** (grad students only), or **Name** of the individual to be copied

22. Click **Search** to open the Profile Management Copy/Merge/Delete screen

**NOTE:** The process is the same for copying an Individual or a Group Profile. When copying, it must be to an individual who does not currently have a profile or to a new group that does not currently exist.

23. **Copy/Merge/Delete** – select **Copy** from the dropdown menu

24. **Profile Type** – select **Individual** from the dropdown menu

25. **CalNet UID** – enter the UID number of the new user

26. Click **Make Changes**

**To MERGE an Individual into a Group**

27. Select individual as in Steps 21-22 above

28. **Copy/Merge/Delete** – select **Merge** from the dropdown menu

29. **Profile Type** – select **Group** from the dropdown menu

30. **Group Name** – enter the name of the Group

31. Check the **Send People** box, and/or the **Send Profile** box, if appropriate

32. Click **Make Changes**

**The Merge function moves values and/or people to an existing individual or group.**

**NOTE:** To review your Copy/Merge changes, navigate back to Cal Components > Profile Management and look up the new individual or group value that was just created.
To DELETE a Profile

33. Select the Individual or Group profile to be deleted as in Steps 21-22 above

34. Select Delete from the dropdown menu

35. Click Make Changes

ADDENDUM – How Do I Find a Unique ID (UID) Number?

You can find a person’s CalNet Unique ID (UID) by searching the campus directory at http://directory.berkeley.edu

Enter the person’s name (Last Name, First Name) in the Search Term box and click Search

In the Search Results page, click on the person’s name to see additional details

The Details page includes the person’s 6-digit UID number right next to the individual’s name at the top of the page