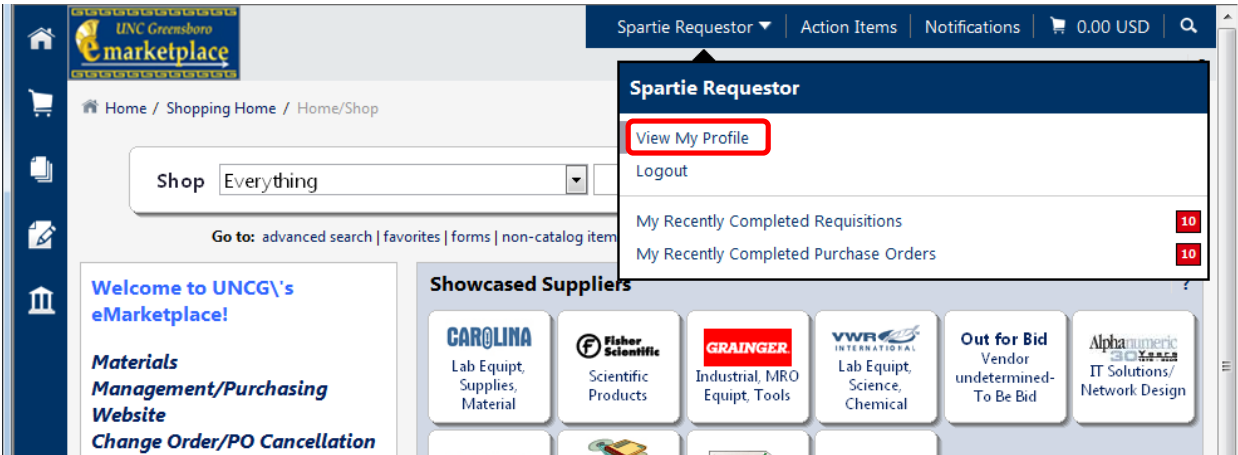


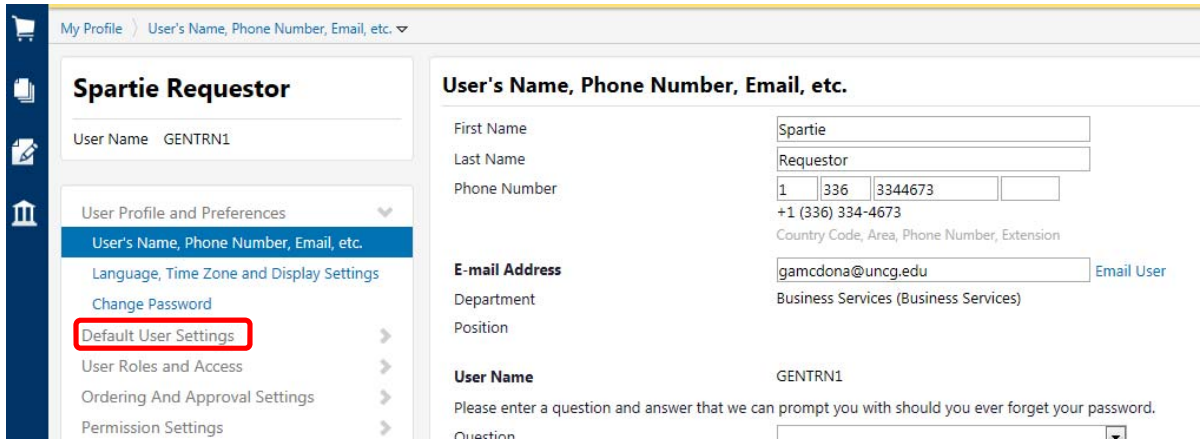
Adding/Defaulting Index/Funds

To add Index (Fund) Numbers to Profile and Set a Default Fund....

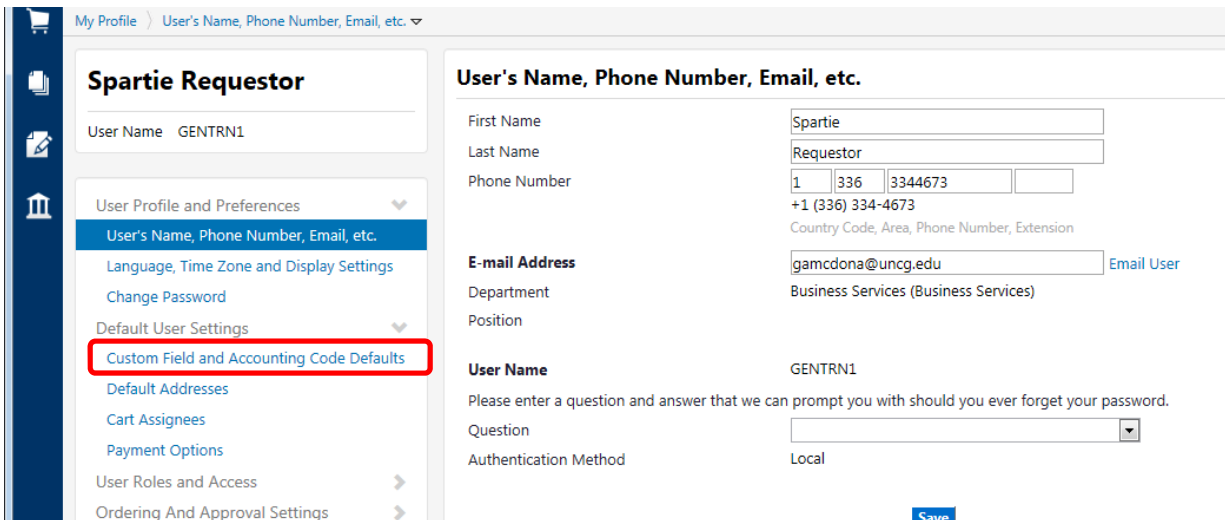
1. Click the down arrow next to your name and select 'View My Profile'.



2. Expand 'Default User Settings' from the menu on the left.



3. Select 'Custom Field and Accounting Code Defaults'.



4. Click the **Edit** button in line with the index value.

The screenshot shows the Spartie Requestor interface. On the left is a navigation menu with options like 'USER INFORMATION AND SETTINGS', 'DEFAULT USER SETTINGS', and 'Custom Field and Accounting Code Defaults'. The main area is titled 'Custom Field and Accounting Code Defaults' and contains a table with columns: Custom Field Name, Default Value, Description, and Edit Values. The 'Index' row is highlighted in yellow, and its 'Edit Values' button is circled in red.

Custom Field Name	Default Value	Description	Edit Values
Index	No Default Value		Edit
Organization	No Default Value		Edit
Activity	No Default Value		Edit
Program	No Default Value		Edit
Account	No Default Value		Edit
Location	No Default Value		Edit
Confirming Order	No Default Value		Edit

5. Click the **Create New Value** button.

This screenshot shows the 'Edit Values' dialog for the 'Index' field. It features a table with 'Value' and 'Description' columns. The 'Create New Value' button is circled in red.

Value	Description
-------	-------------

6. Select the **Field Name Value** text box.

This screenshot shows the 'Search For Value' dialog. It includes a 'Field Name' dropdown set to 'Index', a 'Value' text box (circled in red), a 'Description' text box, and a 'Results per Page' dropdown set to 5. A 'Search' button is at the bottom.

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

7. Type in your **Index/Fund number** in the Value field, if known and click the **Search** button.

Custom Field and Accounting Code Defaults

Codes Code Favorites

Custom Field Name	Default Value	Description	Edit Values
Index	No Default Value		Edit

Edit Values Close

Create New Value

Value	Description
-------	-------------

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

Search For Value

Field Name: Index

Value: 310013

Description:

Results per Page: 5

Search

8. Select the **check box** next to the value.

Custom Field and Accounting Code Defaults

Codes Code Favorites

Custom Field Name	Default Value	Description	Edit Values
Index	No Default Value		Edit

Edit Values Close

Create New Value

Value	Description
-------	-------------

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

Results per page: 5 **Values Found 1** Page 1 of 1

Select	Value	Description
<input checked="" type="checkbox"/>	310013	Business Services (Auxiliary)

Add Values Back to Search

9. Click the **Add Values** button.

Custom Field and Accounting Code Defaults

Codes Code Favorites

Custom Field Name	Default Value	Description	Edit Values
Index	No Default Value		Edit

Edit Values Close

Create New Value

Value	Description
-------	-------------

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

Results per page: 5 **Values Found 1** Page 1 of 1

Select	Value	Description
<input checked="" type="checkbox"/>	310013	Business Services (Auxiliary)

Add Values Back to Search

10. Make the Fund your **Default Fund** by clicking the value on the left.

Custom Field and Accounting Code Defaults

Codes Code Favorites

Custom Field Name	Default Value	Description	Edit Values
Index	No Default Value		Edit

Edit Values Close

Create New Value

Value	Description
310013	Business Services (Auxiliary)

Search For Value ?

Field Name Index

Value 310013

Description

Results per Page 5

Search

No Results Found

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom

11. Check the **Default** checkbox and click **Save**.

Custom Field and Accounting Code Defaults

Codes Code Favorites

Custom Field Name	Default Value	Description	Edit Values
Index	No Default Value		Edit

Edit Values Close

Create New Value

Value	Description
310013	Business Services (Auxiliary)

Edit Existing Value ?

Value 310013

Description Business Services (Auxiliary)

Default

Status active

Save Remove

* Custom Field Values marked with an asterisk are role-based

Notice the value is now listed above as your **Default Value** for your Index/Fund.

Custom Field and Accounting Code Defaults

Changes Saved

Codes Code Favorites

Custom Field Name	Default Value	Description	Edit Values
Index	310013	Business Services (Auxiliary)	Edit

Edit Values Close

Create New Value

Value	Description
310013	Business Services (Auxiliary)

Edit Existing Value ?

Value 310013

Description Business Services (Auxiliary)

Default

Status active

Save Remove

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom

Continue to **Search and Add Funds** as necessary (Steps 5-9).

To search for an **Index/Fund** by the name or **Description** of an Index/Fund number....

1. Click the **Create New Value** button.

Custom Field and Accounting Code Defaults

Codes Code Favorites

Custom Field Name	Default Value	Description
Index	No Default Value	

Edit Values

Create New Value

Value	Description
-------	-------------

2. Select the **Description** text box.

Custom Field and Accounting Code Defaults

Codes Code Favorites

Custom Field Name	Default Value	Description	Edit Values
Index	No Default Value		Edit

Edit Values

Create New Value

Value	Description
-------	-------------

Search For Value

Field Name Index

Value

Description

Results per Page 5

Search

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

3. Type in a portion of the **Index/Fund** name in the **Description** field then click **Search**.

Custom Field and Accounting Code Defaults

Codes Code Favorites

Custom Field Name	Default Value	Description	Edit Values
Index	No Default Value		Edit

Edit Values

Create New Value

Value	Description
-------	-------------

Search For Value

Field Name Index

Value

Description Purchasing

Results per Page 5

Search

* Custom Field Values marked with an asterisk are role-based

4. Select the **check box** next to the appropriate fund (or click **Back to Search** to search again) then click the **Add Values** button.

Custom Field Name Default Value Description Edit Values

Index No Default Value Edit

Edit Values Close

Create New Value

Value	Description
117042	Purchasing
310016	Purchasing (Auxiliary)

Results per page 5 Values Found 2 Page 1 of 1 ?

Select	Value	Description
<input type="checkbox"/>	117042	Purchasing
<input type="checkbox"/>	310016	Purchasing (Auxiliary)

Add Values Back to Search

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

- Use Steps 10 & 11 above to make the value your default.