



# Personalizing 100

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## Prerequisites, Overview and Module Objectives

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### Prerequisites

Prior to starting this training, we recommend that you complete the following module:

- Navigation for Shoppers (Registered Users)

This module will provide some valuable tools and helpful suggestions to assist you in learning about your settings in GoCM.

If you would like to take this module before starting *Personalizing*, please click on the **All Modules** link in the left navigation bar.

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### Module Overview

This module is designed to explain your personal settings in GoCM, and how to view or change them. The numerical menu bar above this text indicates which section of the module you are in.

1. Prerequisite, Overview and Course Objectives
2. Step-by-Step process with screen shots and demonstrations
3. Review and Try it Now
4. Helpful Tips and other Job Aids

While you can skip menu items, we recommend that you follow the natural progression of the course as it will help you better understand how to work in the GoCM.

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## Objectives of this Module

Personalizing is designed to familiarize you with the information that is saved under your profile in GoCM, and how to view or change it.

You will also learn how to identify your default settings.

A demonstration is incorporated in this module to show you how to view your default settings.

The objectives of this course are to allow users to:

- Change their GoCM Banner
- Manage their profile
- Identify default fields
- Add a new value to an attribute

This includes information on:

- Changing information, including password and email address

**Note:** You must contact the GoCM Help Desk to change your password or when changing departments/regions.

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# Step-by-Step Process with Screen Shots and Demonstrations

Updating your Personal Settings in the GoCM is very important.

It saves you time by setting default values that appear automatically in your shopping cart and/or purchase order - such as:

- Delivery Address,
- Invoicing Address, and
- Cost Centre.

It also makes the GoCM easier to use by displaying values in:

- The language of your choice
- The date and decimal and formats you prefer

**We strongly recommend checking your default Delivery Address and default Invoicing Address and default Cost Centre the first time you log in, before you create any Shopping Carts. Change them if needed.**

The following scenario will be used throughout this module to help you learn how to use your settings:

- You want to ensure that your default cost center is correct. Check your settings to make sure it is.

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## Table of Contents

- [Manage your Profile](#)
- [Changing My Settings](#)
- [Default Fields](#)
- [Adding a New Value to an Attribute](#)
- [Locate the Delivery/Invoicing Addresses available to your Department](#)
- [Changing your Portal Theme](#)

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## Manage your Profile

Click on the **Personalize** link at the top right corner of the screen.



A new browser window will open with three selections appearing on the top left:

1. Change My Settings
2. Address Finder
3. Portal Theme

Detailed Navigation

- Change My Settings
- Address Finder
- Portal Theme

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Help Links

- Administration Help (English)
- Administration Help (French)

**Personal Data**

FoA \*  F. Name \*

Academic Title  LastName \*

**Position** **User Account**

Bldg	<input type="text" value="Phase II"/>	Dept. *	PWGSC BR1 (50000007 ; PWGSC Branch 1)
Floor	<input type="text"/>	Position*	S_50000032 (50000032 ; S_50000032)
Room Number	<input type="text"/>	Leader of	
Int.Mail	<input type="text"/>	Street	
Communicatn Type	<input type="text"/>	House No.	0
Telephone	<input type="text"/>	Extension	<input type="text"/>
Fax No.	<input type="text"/>	Extension	<input type="text"/>
E-Mail Address *	<input type="text" value="user1@pwgsc.gc.ca"/>		Postal Code X9X 9X9
		City	Hull
		Ctry	Canada

**Attribute**

Attribute ?

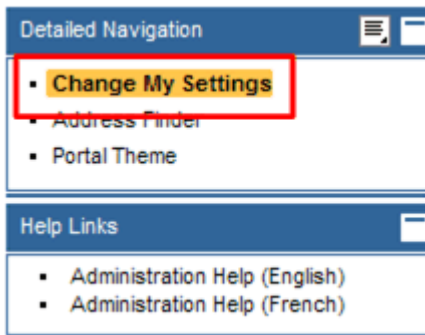
Change values

Standard Val.	Inherit	Action
No values found		

1. Select Change My Settings to change:
  - Your Language
  - Your Date format
  - Your Decimal notation
  - Your Time Zone
  - Your default Delivery Address
  - Your default Invoicing Address
  - Your default Cost Centre
  - or to view settings such as your e-mail address and contact information
2. Select Address Finder to locate:
  - Delivery addresses and invoicing addresses available to your department.
3. Select Portal Theme to change:
  - Your GoCM Banner from English to French or vice versa. If you ever decide to switch languages and would like your GoCM Banner displayed in a different language, select Portal Theme.

## Changing My Settings

After selecting **Personalize** from the GoCM main screen, click **Change My Settings** at the top left of the Personalizing Window.



Notice in the window that appears, a block labelled **Personal Data**. Also notice there are two tabs. The **Position** tab is highlighted by default.

Save Check Undo

**Personal Data**

FoA  F. Name   
Academic Title  LastName

**Position** **User Account**

Bldg	<input type="text" value="2220"/>	Dept.	PWGSC BR1 ( 50000007 ; PWGSC Branch 1 )
Floor	<input type="text" value="2"/>	Position	S_50000054 ( 50000054 ; S_50000054 )
Room Number	<input type="text" value="1000"/>	Leader of	
Int.Mail	<input type="text" value="99/OTT"/>	Street	
Communicatn Type	<input type="text"/>	House No.	0
Telephone	<input type="text" value="613 555 1212"/> Extension <input type="text"/>	Postal Code	X9X 9X9
Fax No.	<input type="text" value="613 555 2121"/> Extension <input type="text"/>	City	Hull
E-Mail Address	<input type="text" value="frank.bell@dept.ca"/>	Ctry	Canada

**Attribute**

Attribute

Change values

Standard Val.	Inherid	Action
No values found		

Use the **Personal Data** section to change the way your name appears on documents created within the GoCM:

1. Change the Form of Address (Mr., Ms). **Note:** Since this field is mandatory, you will be forced to provide this information the first time you access Change My Settings.

2. Change your First Name
3. Change your Last Name
4. We do not recommend using the Academic Title field

Use the **Position** tab to:

1. Change your default delivery address, using the attribute field
2. Change your default invoice address, using the attribute field
3. Change your default cost centre, using the attribute field
4. View your company code, using the attribute field. This can only be changed by the GoCM Help Desk.

Use the **User Account** tab to:

1. Change your Time Zone
2. Language
3. Decimal Notation
4. Date Format

Go to the **Position** tab, below the **Personal Data** section.

Here in the **Position** tab, as noted in the graphic below, you will find pre-loaded information about you.

**Note:** Fields marked with an asterisk (\*) are mandatory and must be populated.

If you need to make a change, you may do so in any of the white, or open, text fields. All greyed fields can only be changed by the GoCM Help Desk.

**Note:** We do not recommend changing the e-mail address field in the Position Tab. Your e-mail is stored in another field, under the User Account tab. Contact the GoCM Help Desk if your e-mail address changes.

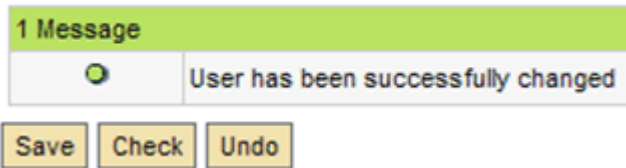
**Personal Data**  
 FoA: Ms. F. Name: Frank  
 Academic Title: Academic Title LastName: Bell

Bldg	2220	Dept. *	PWGSC BR1 ( 50000007 ; PWGSC Branch 1 )
Floor	2	Position*	S__50000054 ( 50000054 ; S__50000054 )
Room Number	1000	Leader of	
Int.Mail	99/OTT	Street	
Communicatn Type		House No.	0
Telephone	613 555 1212	Extension	
Fax No.	613 555 2121	Extension	
E-Mail Address *	frank.bell@dept.ca	Postal Code	X9X 9X9
		City	Hull
		Ctry	Canada

**Attribute**  
 Attribute ?  
 Change values  

Standard Val.	Inherd	Action
No values found		

Click on **Save** to save your changes. You will notice the **User has been successfully changed** message at the top of the screen as seen in the graphic below.



The changes take effect immediately. If you are finished making changes, close the Personalize Window by using the **X** at the top right corner of the window.



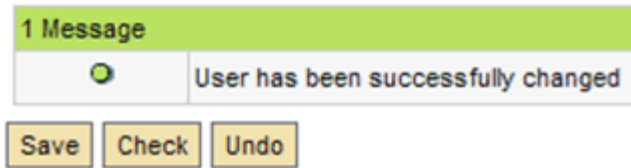
Go to the **User Account** tab, below the Personal Data section.

In the graphic below, you will find some additional details, including your user name and email address. These two fields were populated when you registered for GoCM access.



The email address displayed in this tab is the only address used by GoCM. If you wish to update your email address, contact the GoCM Help Desk.

You can also manage your preferred time-zone, language, decimal notation and date format settings. Once you have selected your preferred choices, then click on **Save** to save your changes. You will notice the **User has been successfully changed** message at the top of the screen as seen in the graphic below.



The changes for Personalizing won't take effect until you log out and log back in again. If you are finished making changes, close the Personalize Window by using the **X** at the top right corner of the window.



## Default Fields

Go back to the **Position** tab and scroll down below the email address field. Here you will find an **Attribute** section devoted to saving Company Code, Cost Centre, Delivery Address and Invoicing Address information important to you.

Position User Account

Bldg	2220	Dept. *	PWGSC BR1 ( 5000007 ; PWGSC Branch 1 )
Floor	2	Position*	S__5000054 ( 5000054 ; S__5000054 )
Room Number	1000	Leader of	
Int.Mail	99/OTT	Street	
Communicatn Type		House No.	0
Telephone	613 555 1212	Extension	
Fax No.	613 555 2121	Extension	
E-Mail Address *	frank.bell@dept.ca	Postal Code	X9X 9X9
		City	Hull
		Ctry	Canada

Attribute

Attribute	Standard	Inherid	Action
?			
Company Code*			
Cost Center*			
Delivery address*			
Invoice Recipient Address*			
Add New Line			

Default information for each of these areas is pre-assigned to your user profile, but may not be exactly what you want. You will want to check these defaults the first time you log in, and any time you change locations within your department or agency. Note that cost center is not pre-assigned.

**Note:** Your invoicing address is automatically the same as your delivery address. If you would like to change your delivery or invoicing addresses, refer to the How To on **How to locate and enter a default delivery or invoicing address**.

Select **Cost Center** as the Attribute and under for System, select **Financial**.

The code that appears next to the selected radio button is your default as seen below.

Attribute

Attribute Cost Center\* for System Financial\*

Change values

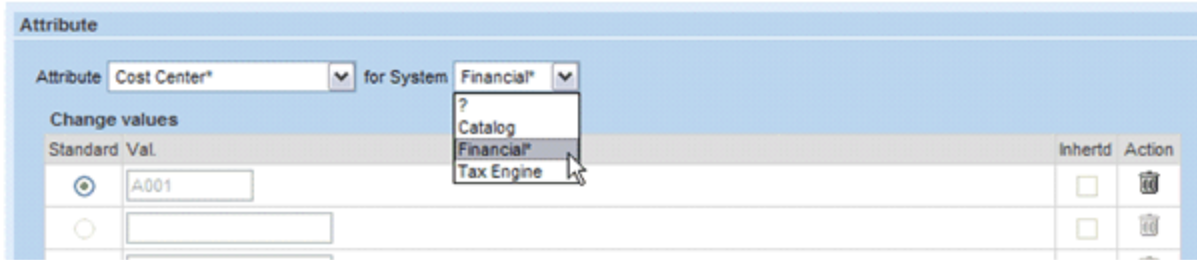
Standard	Val	Inherid	Action
<input checked="" type="radio"/>	A001	<input type="checkbox"/>	

### Adding a New Value to an Attribute

If you want to add additional values to each of the attributes, you may do so following these steps.

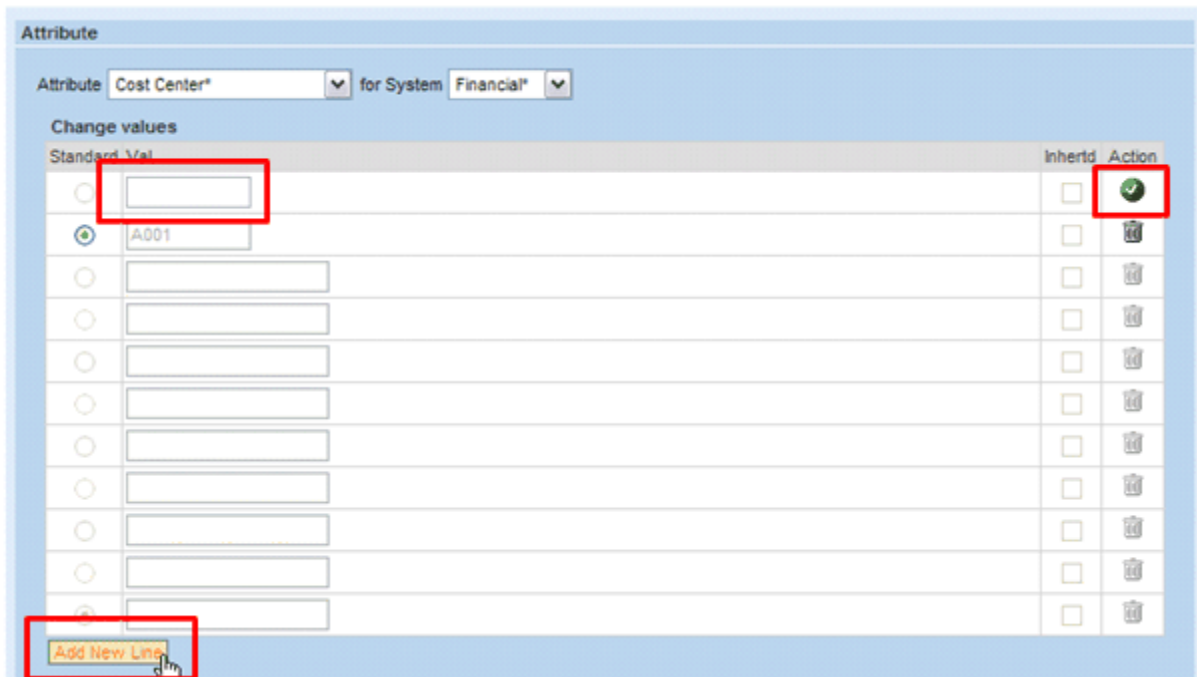
**Note:** You cannot make changes to your **Company Code**. The Company Code is a number representing your Department or Agency and can only be changed by the GoCM Help Desk.

Select the attribute you wish to add to. As in the graphic below, select **Cost Center** as the Attribute and under for System, select **Financial**.



A list will show up identifying all the values you have under **Cost Center**.

Now, to add another cost center to your list, scroll down to the bottom of the page and click **Add New Line**.

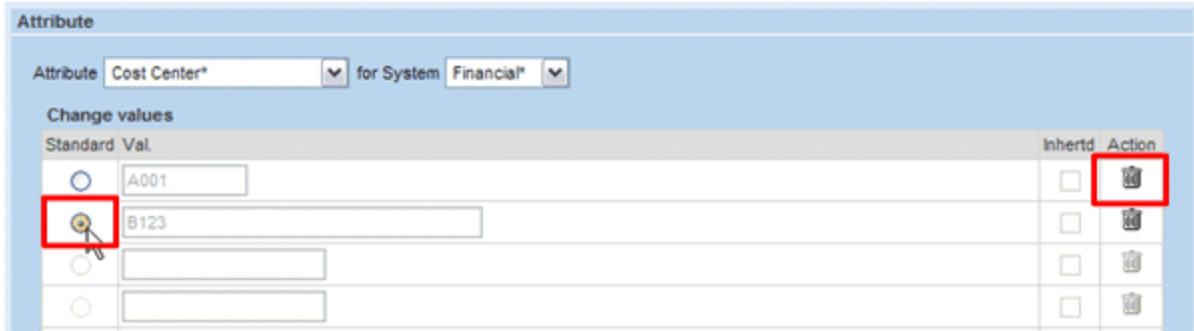


The image above shows a new field open to add a new cost center. Once you have entered the cost center in the space, click on the **Action** button to the right of that line item.

You now have a second cost center added to your list of values.

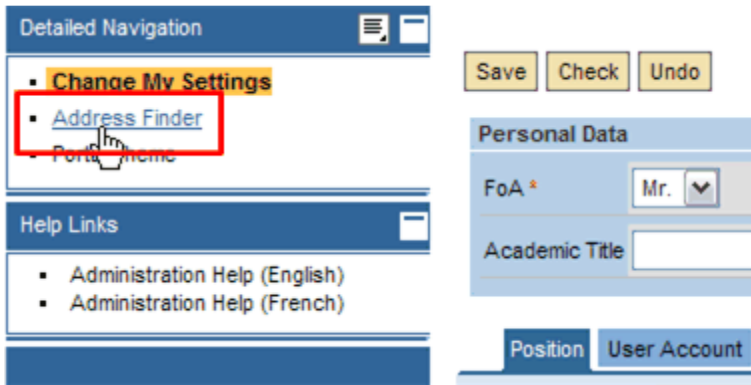
Click on the radio button to the left of the cost center to select your default cost center. This will be used for your shopping cart order.

You can also delete values by clicking on the trash can.



### Locate the Delivery/Invoicing Addresses available to your Department

After selecting *Personalize* from the GoCM main screen, click *Address Finder* at the top left of the Personalizing Window.



Fill in your report selection criteria and click the Execute button.

Notice that your department code is defaulted, so you can simply click Execute to get a list of addresses for your department.

**Tip:** If you are in a large department, you might want to improve your results by specifying a City, or selecting a Region Code such as QC or AB.

Detailed Navigation

- Change My Settings
- Address Finder**
- Portal Theme

Help Links

- Administration Help (English)
- Administration Help (French)

### Variables for Department Address Finder

Address Number / J. No d'adresse	<input type="text"/>	<input type="button" value="Copy"/>
Department Code / J. Code du ministère	127	<input type="button" value="Copy"/> Public Works and Government Services
City / J. Localité	* <input type="text"/> *	<input type="button" value="Copy"/>
City/Address Code / J. Code SIC/Code d'adresse de référence	* <input type="text"/> *	<input type="button" value="Copy"/>
Region Code / J. Code de Région	<input type="text"/>	<input type="button" value="Copy"/>
Invoice / J. Facture	<input type="text"/>	<input type="button" value="Copy"/>
Delivery / J. Livraison	X	<input type="button" value="Copy"/> Yes

The report displays the results.

Scroll down and/or page down to find your preferred Delivery Address. Write the address number down. Find your preferred Invoice Address and write that number down too.

**Detailed Navigation**

- Change My Settings
- **Address Finder**
- Portal Theme

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**Help Links**

- Administration Help (English)
- Administration Help (French)

**Data Analysis**
Graphical display
Information

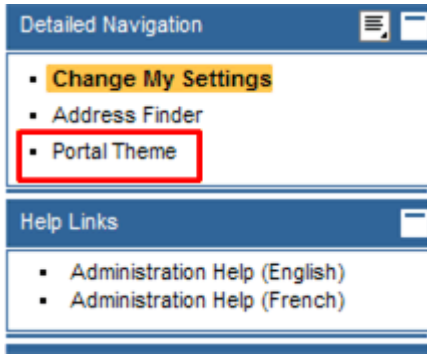
**Address Finder** Last Data Update: 10.04.2007 19:13:02

Variable Screen
Exceptions and Conditions
Export to Excel
Export to CSV

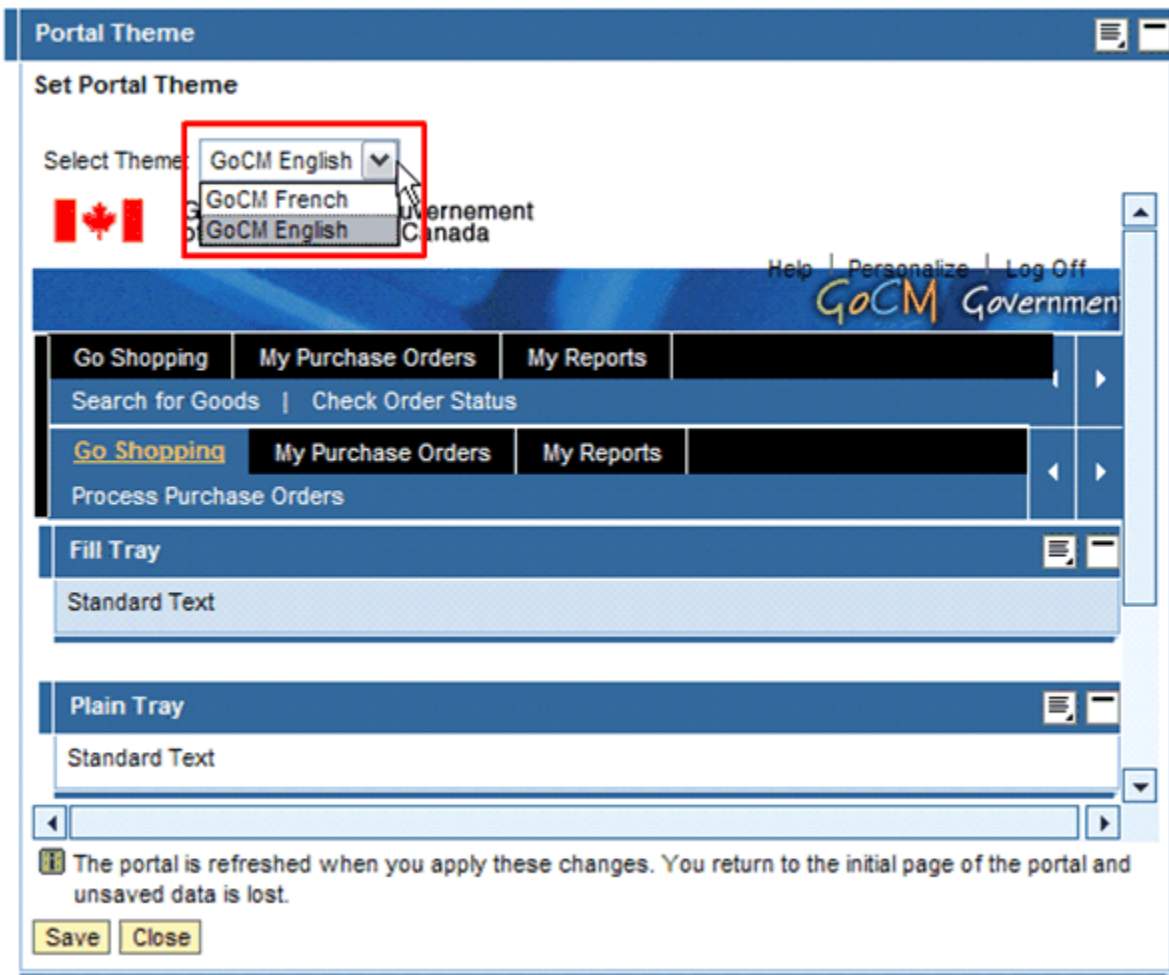
<b>Rows</b>					
Address Number / N° d'adresse				Address Number	Department Name
City / Localité				c/o CISAAddr Code	Street Prefix
Department Name / Nom du ministère				Street	
Region code / Code de région				10757	PWGSC / TPSGC EA001
Street / Rue				10758	PWGSC / TPSGC EA004
Street Prefix / Préfixe pour rue				10759	PWGSC / TPSGC EB010
Street Suffix / Suffixe pour rue				10760	PWGSC / TPSGC EB014A
c/o CISAAddr Code / Code SIC/Code d'adresse de référence				10761	PWGSC / TPSGC EB101
<b>Columns</b>					
<b>Free Characteristics</b>					
Building Code / Code du bâtiment				10762	PWGSC / TPSGC EC015
Country / Pays				10763	PWGSC / TPSGC ED001
Default / défaut				10764	PWGSC / TPSGC ED003
Delivery / Livraison				10765	PWGSC / TPSGC ED004
Department Code / Code du ministère				10766	PWGSC / TPSGC EE010
District / Arrondissement				10767	PWGSC / TPSGC EE018
E-mail / Adresse e-mail				10768	PWGSC / TPSGC EK096
				10769	PWGSC / TPSGC EK110
				10770	PWGSC / TPSGC EN448
				10771	PWGSC / TPSGC EN449
				10772	PWGSC / TPSGC EN450
				10773	PWGSC / TPSGC EN451
				10774	PWGSC / TPSGC EN452
				10775	PWGSC / TPSGC EN453
				10776	PWGSC / TPSGC EN454
				10777	PWGSC / TPSGC EN459
				10778	PWGSC / TPSGC EP001
				10779	PWGSC / TPSGC EP002
				10780	PWGSC / TPSGC EP003
				10781	PWGSC / TPSGC EP004

## Changing your Portal Theme

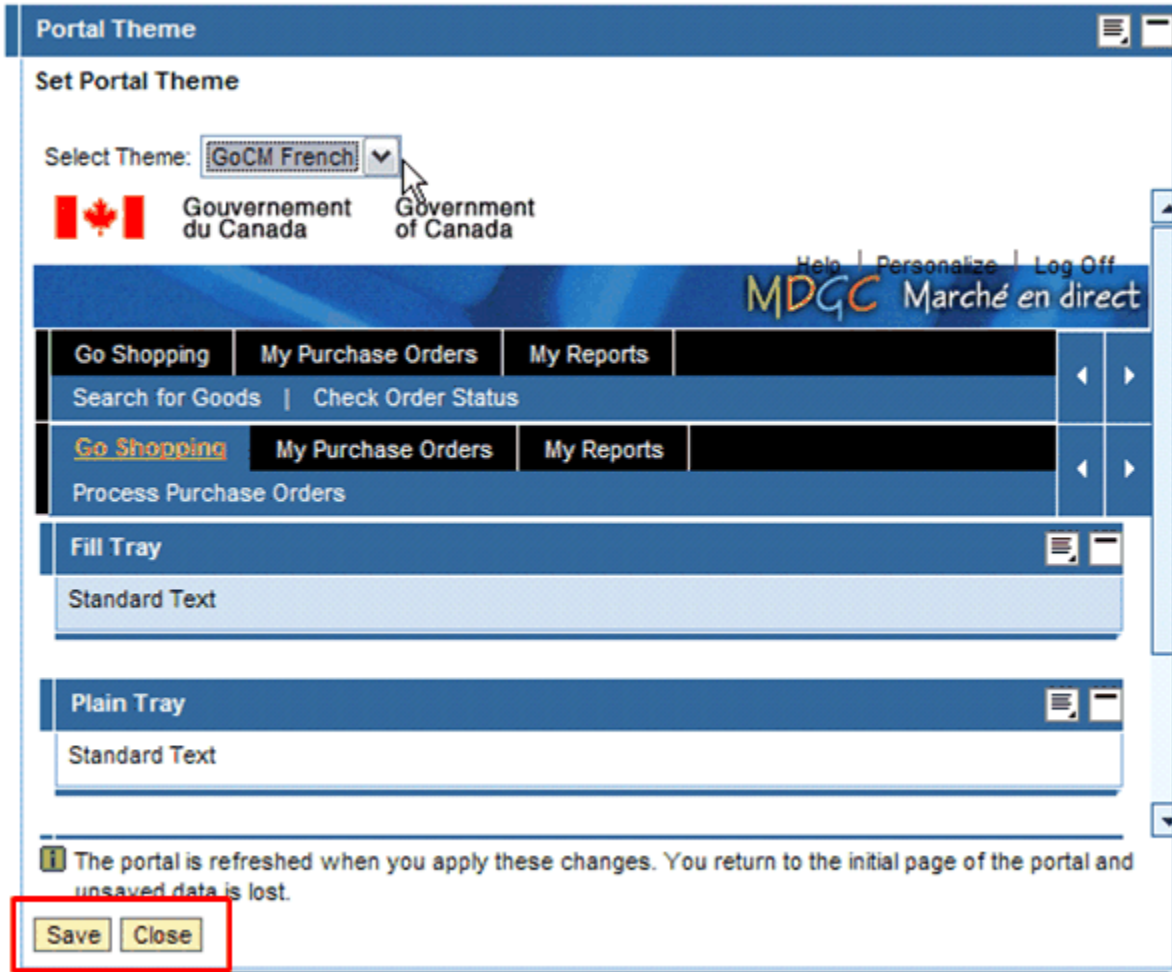
After selecting Personalize from the GoCM main screen, select Portal Theme at the top left of the Personalizing Window.



In the example below, your Banner is in English and you would like it set to French. Click on the *Select Theme* menu and select *GoCM French*.



Notice in the image below that the Banner has changed from **GOCM** to **MDGC**.



Click the **Save** button, then click the **Close** Button.

The changes take effect immediately. As you see in the graphic below of the GoCM main screen, the banner is now French. If the application language was not changed in Change My Settings, you will notice that the application language is still English. The application language can only be changed in Change My Settings.





## Review and Try it Now

### Review

In this module you learned how to view your settings in GoCM, including identifying your default settings.

You also learned how to add a new value to your cost centre, delivery and invoicing address attributes.

Additional training tips on GoCM Personalizing can be found in the next section - ***Helpful Tips and Other Job Aids***.

The information taught in this module will be valuable for your future work in GoCM. The next module, Searching the GoCM Catalog (Searching 100), will assist you in searching the GoCM catalog.

**Congratulations, you now have the skills to manage your personal settings in the GoCM!**

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### Try it Now

You now have the option to complete an exercise on your own in GoCM. Try this exercise for your personal settings.

Log on to GoCM to complete this exercise.

You want to ensure that your default Delivery Address is correct. Check your settings to make sure it is. If it isn't what you need, change it.

Do the same for your default Invoice Address.

1. Click on the ***Personalize*** link in the top right hand corner of the screen
  2. In the ***Detailed Navigation*** section, select ***Change My Settings***
  3. Under ***Attribute***, select ***Delivery Address*** from the drop down menu
  4. Your default address will be identified with the active radio button. To find out what address this code belongs to, please go see ***How to locate and enter a default delivery or invoicing address***.
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## Helpful Tips and other Job Aids

### FAQs

- How to change department or region?
  - How to change email address?
  - How to change language?
  - How to change password?
  - How to change your default cost center?
  - How to locate and enter a default delivery or invoicing address?
  - How to display company code?
-