

Job Aid: How to Maintain Agency Users

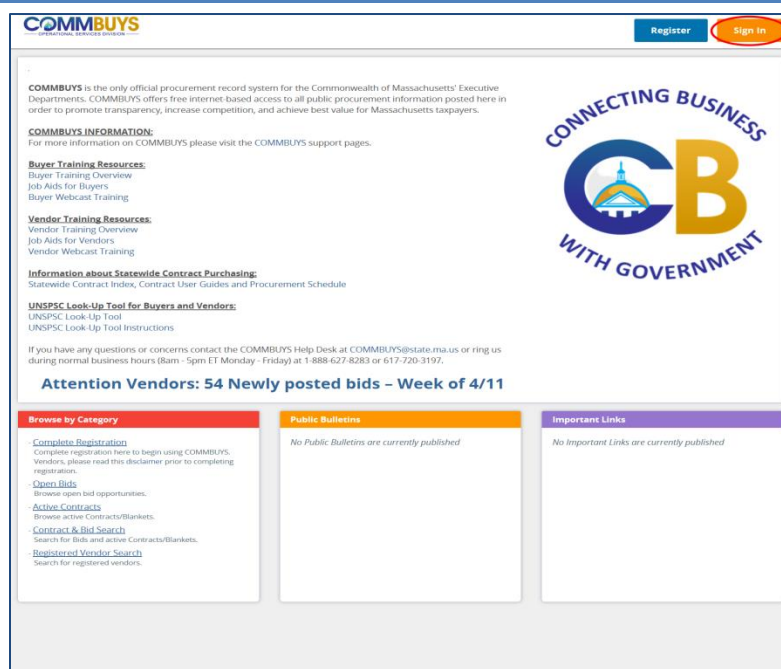
This Job Aid shows how to:

- Add or make changes to COMMBUYS users, roles and privileges.

Of Special Note:

An Organization Administrator (OA) has access to create new, modify, or inactivate users for their organization(s). A department and a location must be set up in COMMBUYS prior to adding agency users. Refer to COMMBUYS policy for guidance.

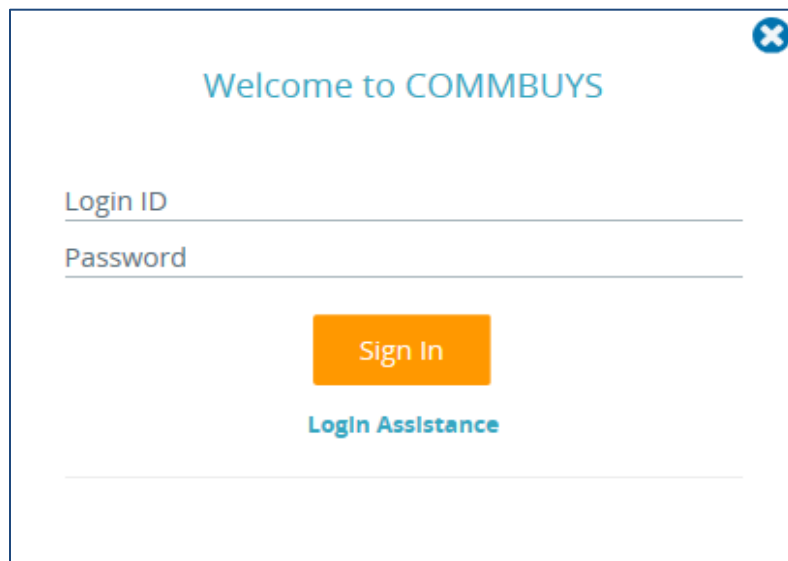
Screenshot



Directions

Step 1: Logging In

1. Launch the COMMBUYS website by entering the URL (<https://www.commbuys.com>) in the browser or by clicking the hyperlink [COMMBUYS](#).
2. Click on the orange **Sign In** button in the upper right hand corner.
3. Enter your Login ID and Password and click the **Sign In** button.

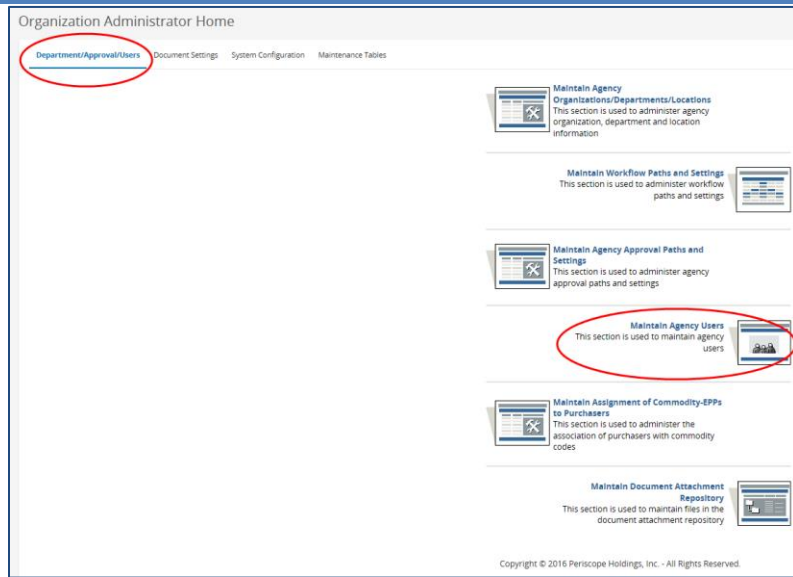




Job Aid:

How to Maintain Agency Users

Screenshot



Directions

Step 2: Opening the Maintain Agency Users Page

From your Organization Administrator Homepage, click on the **Maintain Agency Users** icon to add new users or edit current user profiles.

Step 3: User Maintenance Searching

COMMBUYS opens a search box allowing you to search for an existing user with several different criteria types.

Below the search box is a list displaying existing users' Login IDs, first and last names, and user roles currently assigned to them.

If modifying a user profile, you can click on a **Login ID** from the list or enter search criteria to find the user you want. Once you click on the Login ID, this will display the current user's attributes, roles, and permissions.

- To change an existing user's information, click on the **Edit** button next to each heading title to open further detail and make changes. The information is the same as adding a new user; use the following steps as a reference.

If you are adding a new user, click on the **Add User** button either in the Search box or at the bottom of the page.

User Maintenance for: Operational Services Division

Search Using: ALL of the criteria

Search Fields:

First Name | Last Name

Login ID | Status

Department

Location

User Role

- Vendor Administrator
- Basic Purchasing
- Internal Administrator
- Agency Administrator
- Program Administrator
- Organization Administrator
- Department Access
- Inquiry
- Accounts Payable
- Inventory Administrator
- Inventory User
- Form Builder Administrator

Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
0 1 2 3 4 5 6 7 8 9 10

Find It Clear Add User

ROROURKE	Renee	O'Rourke	Active	Basic Purchasing Organization Administrator Form Builder Administrator Grant Multiorg Approval Rights
rrostamnezhad	Reann	Rostamnezhad	Active	Basic Purchasing Department Access
surato	Sara	Urato	Active	Basic Purchasing

Add User Exit

Job Aid:

How to Maintain Agency Users

Screenshot

User Information (Fields Marked With * Are Required)

Salutation:	<input type="text" value="v"/>	Alternate ID	<input type="text"/>
First Name*:	<input type="text"/>	Last Name*:	<input type="text"/>
Phone*:	<input type="text"/>		<input type="text"/>
Mobile Phone:	<input type="text"/>		<input type="text"/>
Email*:	<input type="text"/>		
Job Title*:	<input type="text"/>		
Login ID*:	<input type="text"/>	Status*:	Active <input type="text" value="v"/>
Password*:	<input type="text"/>	Verify Password*:	<input type="text"/>

Directions


Step 4: Adding a New User

The **Add New User** page is split up into four sections. User Information, User Defaults, Purchasing Rules, and Roles. To add a new user, fill in the required (*) information in the **User Information** section along with a standard password. The user will be prompted to change the password when they log in for the first time, so make the initial password something you can reuse (e.g. commbuys1).

Login IDs must be at least six (6) characters in length and are not case sensitive.

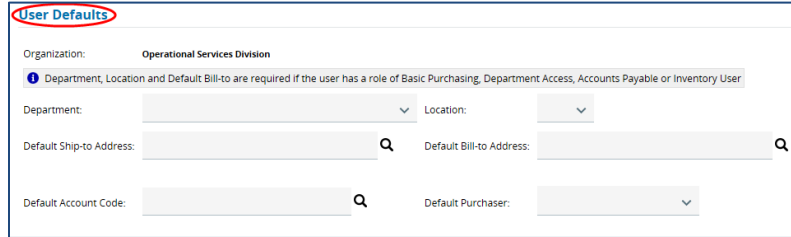
- A Login ID must be unique and can never be changed.
- Passwords are case sensitive and must be at least 8 characters in length.
- Passwords must contain both letters and numbers.

NOTE: If you need to request that a user from another organization have access to your organization, you must submit that request to the COMMBUYS Helpdesk. The request must originate from the organization that the user needs access to.

NOTE: Users can reset their own passwords using either the Account  icon and choosing **“My Account”** from the dropdown (when logged in) or by using the Login Assistance link on the Home Page (if they have forgotten the password and have access to their email account from their user profile).

Job Aid: How to Maintain Agency Users

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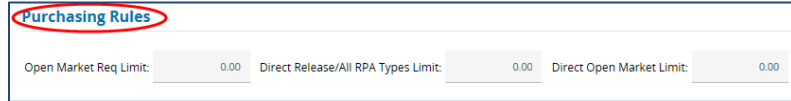
Directions

Step 5: Setting User Defaults

The **User Defaults** section is required if the user has a role of Basic Purchaser or Department Access.

- **Department:** New documents the user creates will generate with this department displayed.
- **Location:** New documents the user creates will display with this location.
- **Default Ship-to and Bill-to:** Use the magnifying glass icon to search for addresses. Only the Bill-to is required.
- **Default Account Code:** This feature is not enabled at this time.
- **Default Purchaser:** Optional. New documents the user creates will generate with this purchaser assigned to the document.

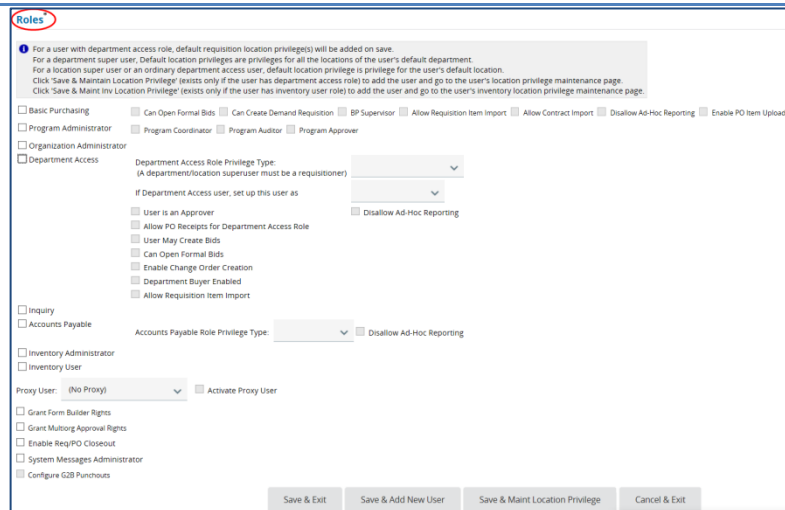
Enter a Department, Location and Default Bill-to and Ship-to for this user.



Step 6: Setting Purchasing Rules

Scroll down to **Purchasing Rules**. If a dollar amount is entered, the new user will not be able to create documents that exceed the dollar limits set.

Note: 0.00 means there is no limit.



Step 7: Setting Rules

Scroll down to the **Roles** section and check the appropriate boxes for user privileges. Roles determine what a user is permitted to access and what actions they can perform

Basic Purchasing (BP) allows the user to create Requisitions, Bids, and Purchase Orders (POs).

- BP Supervisor allows someone to work on bids a specified Basic Purchasing user has started. A dropdown will display and you will choose which BP users this supervisor will supervise.
- Enable PO Item Upload: Most appropriate for BP users managing blankets offering numerous line items for catalog ordering. Granting this user permission allows the BP user to upload/download items onto Master Blanket Purchase Orders (MBPOs).

Job Aid:

How to Maintain Agency Users

Screenshot	Directions
	<p>Department Access allows the user to be either a Requisitioner or Contract Shopper.</p> <ul style="list-style-type: none"> • Superuser allows the employee privileges to view and act on all requisitions within a department or location. • Contract Shoppers can only create release requisitions off of MBPOs and contracts. • Requisitioner can create all types of requisitions. • User is an approver, gives approval rights, and is allowed to be named on approval paths. • Allow PO Receipts for DA Role: Must be checked if user is to do receiving • User May Create Bids: N/A if Bid Security is enabled. • Can Open Formal Bids: Must be checked if user is to have the ability to open formal bids. • Enable Change Order Creation: Must be checked if user is allowed to create Open Market Change Orders • Department Buyer Enabled: Must be checked to allow user to be selected as a buyer for a requisition or PO type. • Allow requisition item import: If checked; this DA user will have ability to import requisition items via Excel plug in or XML utility and create in-progress requisition with multiple items. <p>For both above roles, Disallow Ad Hoc Reporting removes the ability to print out reports which is shown in the upper right menu bar.</p> <p>Inquiry role can view documents but are unable to create or edit them.</p> <p>Grant Form Builder Rights N/A – this feature is not enabled at this time.</p> <p>Grant Multiorg Approval Rights: allows the user to be an approver for another organization. If needed, read the Multiorg Approval Path & Multiorg Approver User job aids for more information.</p> <p>After entering all the required fields, click on the Save and Exit button.</p>



OPERATIONAL SERVICES DIVISION

Job Aid:

How to Maintain Agency Users

Screenshot

Location Privileges Edit

No requisition location privileges found for this user.

Location Privileges Maintenance for: Jackie Abbott

Current Location Privileges

No requisition location privileges found for this user.

Maintain Requisition Location Privileges

Organization: 1080 - Operational Services Division Department: OSD07 - OSD TRAINING Locations: OSD07 - OSD TRAINING

Save & Exit Save & Continue Add All Org Dept/Locs Restore User Defaults Reset Cancel & Exit

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Directions

Step 8: Setting Location Privileges

If you chose **Department Access** user, a new section titled Location Privileges will populate below the Roles section of the User Maintenance page. You can add or delete department and/or location privileges for this user.

- Department superuser – allows access to the department selected. You can then add additional departments to their profile.
- Location superuser – allows access to the location selected. You can then add additional locations within that department or a new department within your organization.

NOTE: You may also give this user the ability to buy for all departments and locations by selecting **Add All Dept/Locs**.

- You may restore user's original department and location by pressing **Restore User Defaults**.