

Job Aid: How to Maintain Agency Users

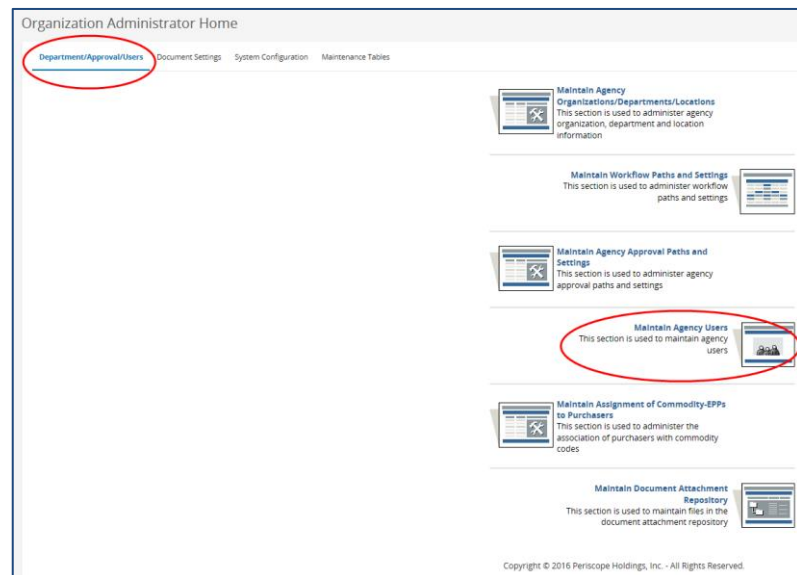
This Job Aid shows how to:

- 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.

Screenshot



Directions

Step 1: 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.

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

Step 2: User Maintenance

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.

1. 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.
2. 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 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"/>	<input type="text"/>
Mobile Phone:	<input type="text"/>	<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"/>


Step 3: 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. The user will be sent a temporary password and will be prompted to change it upon logging in for the first time.

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.

NOTE: 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 OSD Help Desk. 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 at the top right of the screen 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).

User Defaults

Organization: Operational Services Division

i Department, Location and Default Bill-to are required if the user has a role of Basic Purchasing, Department Access, Accounts Payable or Inventory User

Department: Location:

Default Ship-to Address: Default Bill-to Address:

Default Account Code: Default Purchaser:

Step 4: 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, Default Ship-to Address** and **Default Bill-to Address** for this user.

Purchasing Rules

Open Market Req Limit: 0.00 Direct Release/All RPA Types Limit: 0.00 Direct Open Market Limit: 0.00

Step 5: Setting Purchasing Rules

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

NOTE: 0.00 means there is no limit.

Roles

For a user with department access role, default requisition location privilege(s) will be added on save.
 For a department super user, default location privileges are privileges for all the locations of the user's default department.
 For a location super user or an ordinary department access user, default location privilege is privilege for the user's default location.
 Click 'Save & Maintain Location Privilege' (exists only if the user has department access role) to add the user and go to the user's location privilege maintenance page.
 Click 'Save & Maint Inv Location Privilege' (exists only if the user has inventory user role) to add the user and go to the user's inventory location privilege maintenance page.

☐ Basic Purchasing ☐ Can Open Formal Bids ☐ Can Create Demand Requisition ☐ BP Supervisor ☐ Allow Requisition Item Import ☐ Allow Contract Import ☐ Disallow Ad-Hoc Reporting ☐ Enable PO Item Upload

☐ Program Administrator ☐ Program Coordinator ☐ Program Auditor ☐ Program Approver

☐ Organization Administrator

☐ Department Access

Department Access Role Privilege Type:

If Department Access user, set up this user as

☐ User is an Approver ☐ Disallow Ad-Hoc Reporting

☐ Allow PO Receipts for Department Access Role

☐ User May Create Bids

☐ Can Open Formal Bids

☐ Enable Change Order Creation

☐ Department Buyer Enabled

☐ Allow Requisition Item Import

☐ Inquiry

☐ Accounts Payable

Accounts Payable Role Privilege Type:

☐ Disallow Ad-Hoc Reporting

☐ Inventory Administrator

☐ Inventory User

Proxy User: ☐ Activate Proxy User

☐ Grant Form Builder Rights

☐ Grant Multiborg Approval Rights

☐ Enable Req/PO Closeout

☐ System Messages Administrator

☐ Configure G2B Punctures

Step 6: Assigning Roles

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 displays 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).

Program Administrator: reserved for OSD only use at this time (administers the SBPP Program).

Organization Administrator: set-up users in the procurement process for an organization, including its Departments, Locations, Addresses, Users, and Approval Paths. It is recommended that there is a primary and backup for each.

Department Access allows the user to be either a Requisitioner or Contract Shopper.

- **Department or Location Superuser** allows the employee privileges to view and act on all requisitions within a department or location.
- **Contract Shopper** can only create release requisitions off 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 Department Access Role** must be checked if the 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.

NOTE: For both of the above roles, **Disallow Ad Hoc Reporting** removes the ability to print out reports which is shown in the upper right menu bar.

Inquiry role can view documents but are unable to create or edit them.

Grant Form Builder Rights: N/A – this feature is not enabled at this time.

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.

Marketplace Administrator: reserved for OSD only use at this time (administers catalog shopping).

After entering all the required fields, click on the **Save and Exit** button.

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	Department	Locations	Select All
1080 - Operational Services Division	OSD07 - OSD TRAINING	OSD07 - OSD TRAINING	<input type="checkbox"/>

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

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Step 7: 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**.