User Information Guidance

# Introduction

This is a guide for the Organization Administrator to create users. The following tables will provide basic detail on the required fields to create a new user. Further detail on these fields can be found at the online user manual in OregonBuys (under the “?” on the upper right corner of the screen).

# User Information

The section includes basic information about the User. The User is able to edit most information, except for the Login ID and Status.

|  |  |
| --- | --- |
| Field | Description |
| Salutation | Select from the drop-down menu. |
| Alternate ID | This field will be populated via integration with RSTARS. This should never be altered!! |
| First Name\* | The new user’s first name. |
| Last Name\* | The new user’s last name. |
| Phone\* | Contact phone number for the user. |
| Mobile Phone | Cell phone number for the user. Will be used if multi-factor authentication is turned on. |
| Email\* | Email address of the new user. |
| Job Title\* | Job title of the new user. |
| Login ID\* | Login ID of the new user. This cannot be edited later. The Login ID is their OR number. |
| Status\* | The status of the user. Users not in “Active” status will not be allowed to log into the system. |

# User Defaults

This section includes fields that are only required for a Basic Purchasing, Department Access, or Accounts Payable roles.

|  |  |
| --- | --- |
| Field | Description |
| Department\* | Assigns a default department to this user. New documents this user creates will generate with this department displayed. |
| Location\* | Assigns a default location to this user. New documents this user creates will generate with this location displayed. |
| Default Ship-to Address | Assigns a default Ship-to Address to this user. New documents this user creates will generate with this Ship-to Address. |
| Default Bill-to Address | Assigns a default Bill-to Address to this user. New documents this user creates will generate with this Bill-to Address. |

# User Roles

At least one role must be assigned to a User.

|  |  |
| --- | --- |
| Field | Description |
| Basic Purchasing | Basic Purchasing users can create procurement documents in OregonBuys including requisitions, purchase orders, and bids.    **Can Open Formal Bids**  If the agency elects to turn on formal Bid restrictions under Document and Account Settings, each BP user will need to have this field checked if they are allowed to open Bids over the threshold limit.  **Can Create Demand Requisition**  Each BP user will need to have this field checked if they are allowed to create and process Demand requisitions.  **BP Supervisor (Only if Buyer Solicitation Security is enabled)**  For more information see Buyer Solicitation Security under the Document and Account Settings. If Buyer Solicitation Security is enabled, the BP Supervisor option will appear. The list of valid BP users for the organization will be listed. The Administrator can select the users that the BP supervisor will have rights for. To select multiple users, hold down the CTRL key.    **Allow requisition item import**  If checked, this BP user will have ability to import requisition items via Excel plug in or XML utility and create in progress requisition with multiple items. BuySpeed runs this utility interactively and present import related errors for user. For more information see BP role requisition.    **Disallow Ad-Hoc reporting**  If checked, this BP user will not have ability to create ad-hoc report i.e. Ad-hoc icon invisible to BP user role on upper right corner.    **Allow Two Way Match**  If checked, this BP user will have the ability to set PO Invoice Method to “Two Way Match”. |
| Department Access | Department Access can shop from existing contracts or create requisitions and perform receiving.  **Superusers**  Superusers have rights to the entire department or location. The user can then take control of any requisition for the Dept./Location and work on it.  **Requisitioner**  Has full Department Access rights and can generate all types of requisitions.  **Contract Shopper**  Can only create release requisitions against master blankets and contracts.  **Approvals**  Gives this user approval rights and is allowed to be on approval paths.  **Allow PO Receipts for DA Role**  Must be checked if user is to do Receiving.  **User May Create Bids**  Must be checked if user is to have the ability to create bids.  **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 purchase order 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. BuySpeed runs this utility interactively and present import related errors for user. For more information see help for DA role.  **Disallow Ad-Hoc reporting**  If checked; this DA user will not have ability to create ad-hoc report i.e. Ad-hoc icon invisible to DA user role on upper right corner.  **Allow Two Way Match**  If checked, this DA user will have the ability to set PO Invoice Method to “Two Way Match”. |
| Accounts Payable | AP users create invoices for received Purchase Orders and AP Supervisors approve invoices.  **Disallow Ad-Hoc reporting**  If checked; this AP user will not have ability to create ad-hoc report i.e. Ad-hoc icon invisible to AP user role on upper right corner. |
| Organization Administrator | Organization Administrators are administrators with limited rights that allow them to maintain the organization users, approval paths, departments and settings. Ability to select this role maybe restricted to the Internal Administrator. When restricted, the checkbox is protected. |