

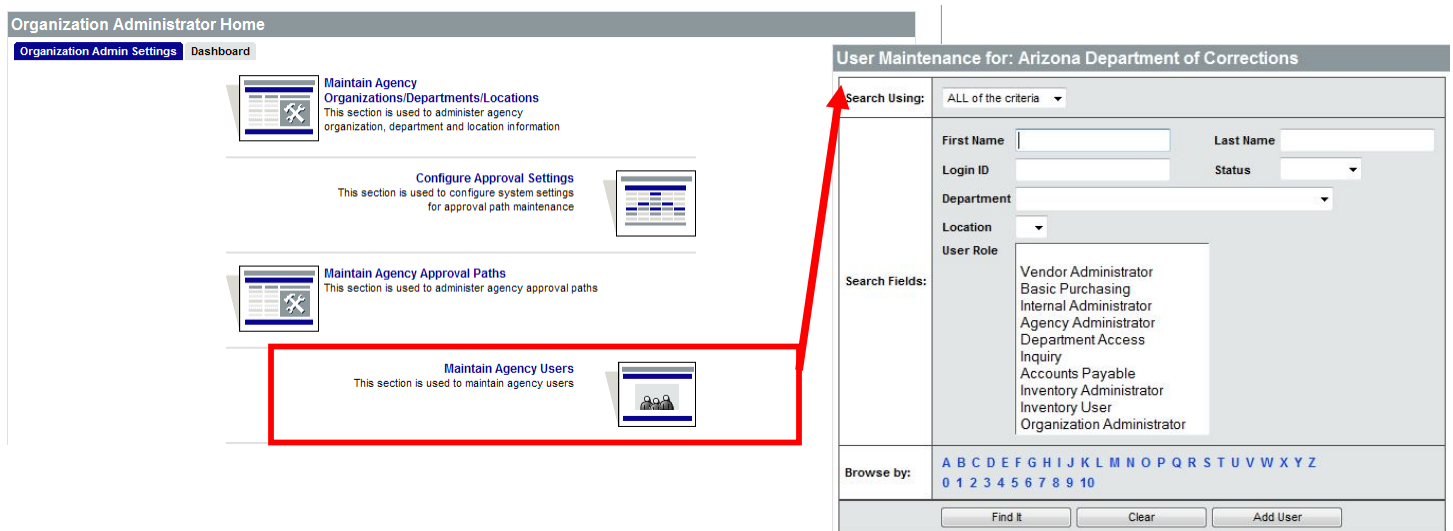
User Maintenance

New users can be created and existing users can be edited in ProcureAZ by users with the role of Organization Administrator. If you are an Organization Administrator for more than one Organization, you can select which Organization to maintain by clicking the eyeglass lookup at the top of the screen.



Accessing User Maintenance

Upon logging into ProcureAZ with your unique Login ID and Password, you can add or maintain user data by clicking on the **Maintain Agency Users** link from your Organization Administrator **Homepage**. The **User Maintenance for: (Your Organization)** screen will appear allowing you to search for a specific user to edit, or to create a new user.



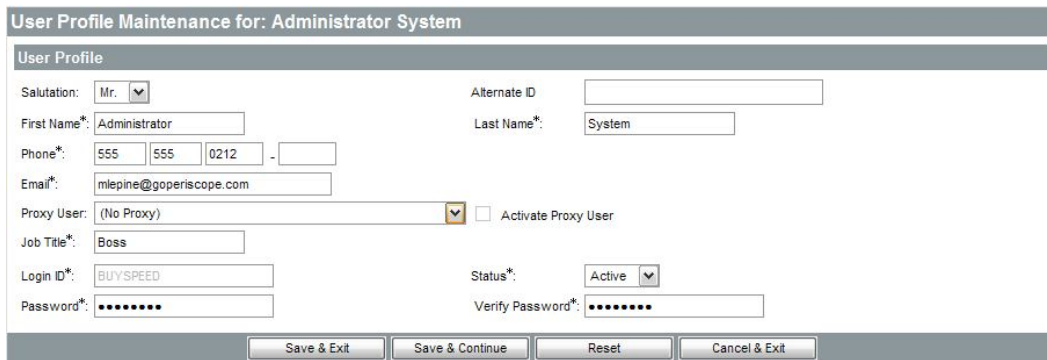
Upon selecting either **Add User**, or a user ID for a user that has already been added, you will be able to provide or edit the information in the following sections.

User Profile

The **User Profile** section is the user's contact and login information. All fields marked with an asterisk are required. If adding a new user, please enter the user's email address as their Login ID and create a temporary password. Users will create their own password the first time they login.

NOTE: Administrators must communicate login ID and password information to users once they are created. ProcureAZ does not automatically notify users that their account has been created.

User Maintenance



User Profile Maintenance for: Administrator System

User Profile

Salutation: Mr. Alternate ID:

First Name*: Administrator Last Name*: System

Phone*: 555 555 0212 -

Email*: mlepine@goperiscope.com

Proxy User: (No Proxy) Activate Proxy User

Job Title*: Boss

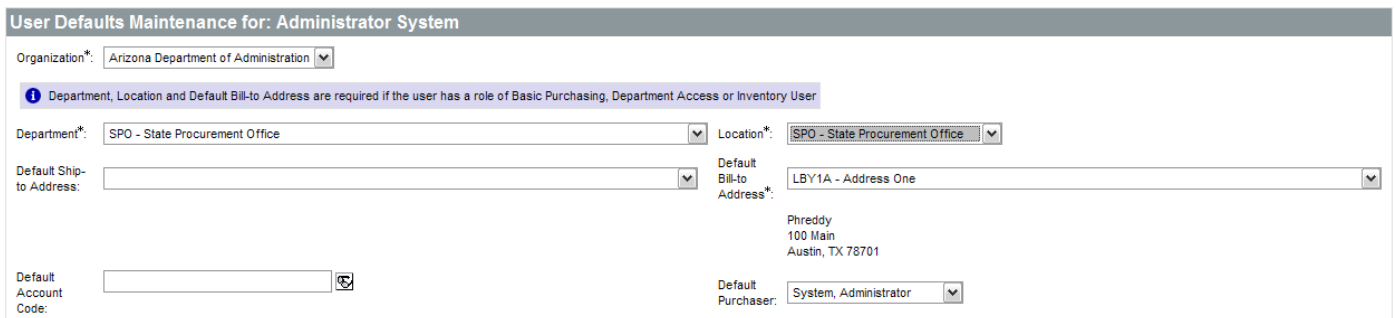
Login ID*: BUYSPPEED Status*: Active

Password*: Verify Password*:

Buttons: Save & Exit, Save & Continue, Reset, Cancel & Exit

User Defaults

The **User Defaults** maintenance section controls the information that will default for the user when a document is created. This information can be updated by the user on the document.



User Defaults Maintenance for: Administrator System

Organization*: Arizona Department of Administration

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

Department*: SPO - State Procurement Office Location*: SPO - State Procurement Office

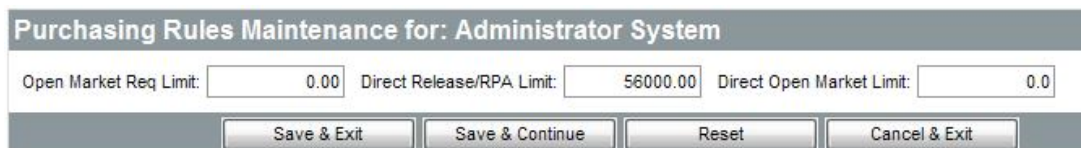
Default Ship-to Address: Default Bill-to Address*: LB'Y1A - Address One

Phreddy
100 Main
Austin, TX 78701

Default Account Code: Default Purchaser: System, Administrator

User Purchasing Rules

The **User Purchasing Rules** maintenance section controls the dollar limit of Requisitions that the user can create. If a Requisition is more than the user's limit, the document will have a red error and the user cannot submit the document until corrected.



Purchasing Rules Maintenance for: Administrator System

Open Market Req Limit: Direct Release/RPA Limit: Direct Open Market Limit:

Buttons: Save & Exit, Save & Continue, Reset, Cancel & Exit

NOTE: Purchasing rules are generally used to enforce official procurement policy or statute. If you would like to manage documents over a certain dollar amount, rather than simply disallow them, you can establish approvals paths to trigger based on the dollar amount of a Requisition.

User Roles

The **User Roles** section is used to maintain what roles the user has in ProcureAZ. Note that depending upon the role, the user may be required to attend specific ProcureAZ and State Procurement Code-related training courses. The following roles are available:

User Maintenance

- **Basic Purchasing** – Procurement Officers/Buyers who are authorized to manage solicitations and contracts, send purchase orders, receive, approve, and view and modify all documents (in an editable status) within ProcureAZ
 - **Can Open Formal Bids** – Allows the user to conduct formal solicitations within ProcureAZ
 - **BP Supervisor** – Signifies that the user is a supervisor and should be able to view the solicitations of others as they are being developed and while they are being evaluated (if selected, you must choose the other Basic Purchasing users this user is a supervisor for)
- **Department Access** – End user with one or more of the following abilities:
 - **Requisitioner** – Provides ability to create on- and off-contract Requisitions
 - **Contract Shopper** – Authorizes the user to create only on-contract Requisitions
 - **Superusers** – Enables the user to edit another user's document within their Departments or Locations
 - **User is an Approver** – Makes user eligible to be on approval paths and approve/disapprove documents
 - **Allow PO Receipts for Department Access Role** – Enables the user to receive ordered Items from their Location(s)
 - **Enable Change Order Creation** – Authorizes the user to request Change Orders to Purchase Orders (POs) they did not send to the vendor. A Basic Purchasing user must apply these Change Orders to the PO.
 - **Department Buyer Enabled** – Authorizes the user to create off-contract Requisitions (Direct Open Markets) that do not route through Procurement following approval.
- **Inquiry** – User with rights to view all documents for the Organization, but not to create or modify documents. Usually this role is held by auditors and management not involved in the procurement process
- **Organization Administrator** – User with rights to edit Departments, Locations, users, and approval paths for your Organization.

Roles*

<input type="checkbox"/> Basic Purchasing	<input type="checkbox"/> Can Open Formal Bids	<input type="checkbox"/> BP Supervisor
<input type="checkbox"/> Department Access	Department Access Role Privilege Type: <input type="text"/> <small>(A department/location superuser must be a requisitioner)</small>	
	If Department Access user, set up this user as <input type="text"/>	
	<input type="checkbox"/> User is an Approver	
	<input type="checkbox"/> Allow PO Receipts for Department Access Role	
	<input type="checkbox"/> Enable Change Order Creation	
	<input type="checkbox"/> Department Buyer Enabled	
<input checked="" type="checkbox"/> Inquiry		
<input type="checkbox"/> Accounts Payable	Accounts Payable Role Privilege Type: <input type="text"/>	
<input type="checkbox"/> Inventory Administrator	<input type="checkbox"/> All Sites	Add Site Department: <input type="text"/> Location: <input type="text"/>
<input type="checkbox"/> Inventory User		
<input type="checkbox"/> Organization Administrator		

NOTE: The other visible roles will not be utilized by the State at this time.

User Maintenance

Department/Location Privileges

Users given the Department Access role are limited to creating documents for their default Department and Location unless given access to additional Departments and Locations via the **Location Privileges** section.

Location Privileges Maintenance for: Tracy Chislet

Current Location Privileges

Department	Location
SPO - State Procurement Office	SPO - State Procurement Office

Maintain Requisition Location Privileges

You cannot remove the location privilege for a user's default department / location.

Department	Locations	Select All
SPO - State Procurement Office		

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Department Access users can be given access to all Departments and Locations within their Organization by clicking the **Add all Dept/Locs** button.

To add a specific Location within their current Department, select a Location from the Locations dropdown within the **Maintain Requisition Location Privileges** section. To add another Department and Location to the user's list of privileges, select a new Department from the Department dropdown menu, then select which Location from that Department in the Locations dropdown.

Once complete, select **Save & Exit**.