QUICK STEPS FOR CREATING A USER

Who: This reference sheet was created for eVA Entity Security Officers.

What: This document is a reference sheet for you to use when creating a new user in User Management. User Management is the Portal application where you can maintain users.

With User Management it takes eight steps to create a new user.

1. Accessing User Management
2. Entering the new User's Information
3. Selecting Applications
4. Setting up Ariba
5. Setting up Quick Quote
6. Setting up Logi
7. Setting up VBO
8. Reviewing, creating and notifying the user

How: You must have an active username with access to User Management. To begin, log on to the portal, then follow the steps outlined below. The steps are intended to be performed in the order given.

Access User Management		
Step 1	Click on the **User Management** link	To access User Management, click User Management from the application menu.
Step 1a	Click on the **Create New User** button	To add a new user, click the Create New User button on the User List page or click the Create User link in the application menu.
User Setup		
Step 2		User Management displays the User Setup page where you will begin to create the new user record.
Step 2a	Enter the User's **First Name**	Enter the user's first name.
Step 2b	Enter the User's **Last Name**	Enter the user's last name. Note: No special characters – "O'kelly" should be entered as okelly for creating and then process an update to add the apostrophe, additionally for hyphenated names like Smith-Kelker should be entered as smithkelker without hyphen and then process an update to add hyphen.

		User Management automatically assigns a User ID after you create the user. The Username is generated from the first letter of the first name and the entire last name (up to the first seven letters).
Step 2c	**Status** *(bypass)*	*Active* status allows the user to access the system. It is the default for new users.
Step 2d	**Status Change Reason** *(bypass)*	This field is currently under development – Do not use this box.
Step 2e	**Organization** *(bypass)*	Default is set to "eVA"
Step 2f	Select your **Organization Unit** *(bypass)*	Select your agency from pull down list
Step 2g	**Organization Sub Unit** *(bypass)*	It is the defaulted to "No Selection"
Step 2h	Enter a temporary **Password**	The temporary/initial password for the user. The user is forced to change the password after logging in for the first time. Password must be a minimum of 8 positions and a maximum of 16 positions. Must be a combination of alpha and numeric
Step 2i	Enter User's **Email**	State or locality email address
Step 2j	Enter User's **Phone Number**	The user's phone number. Follow format: 999-999-9999. If an extension "ext123" Use dashes (do not use prentices)
Step 2k	Add notes in the **Additional Information** section.	Add your note here. This section **must** be filled out every time you make a change to a user. Comments should be added to state what action is being taken (include date MMDDYY and initials JBE). Example: "New user created per MM 072414 jbe" This field holds up to 150 characters, so older actions will need to be removed as needed for space. Use underscore (_) to create desired space. Do not do a hard return (i.e. hit enter) or use periods (.) commas (,) or Colons (:) or semicolons (;)

Step 2l	Click **Next**	Click Next to go to the next page
Application Setup		
Step 3	Select required **Applications** *(You <u>must</u> select at least one application)*	Check the boxes of the applications to be granted. You are only authorized to grant Ariba/eMall (aka Shop Now, Quick Quote, Report and Resources Center/aka Logi Reports, and VBO Buyer. These applications have additional setup pages that must be completed if a user is assigned to the application. Defaulted by system – Portal, Support and Default Advantage.
Step 3a	Select **Ariba/eMall/ Shop Now** *(Optional)*	This tool is used to create and approve Purchase Requisitions.
Step 3b	Select **Quick Quote** *(Optional)*	This tool is used to request bids and receive electronic responses.
Step 3b	Select **Report and Resource Center/Logi** *(Optional)*	This tool is used to generate reports.
Step 3d	Select **VBO Buyer** *(Optional)*	This tool is used to electronically and publicly post procurements (i.e. RFPs, and IFBs) as well as bid openings, solicitation documents, bid meeting notes, award decisions.
Step 3e	**Additional Applications** *These applications must be requested through your DPS AE.	**You may <u>NOT</u> grant the following applications to any entity users; Administration, Catalog Administration, Contractor Management, Customer Care Reports, Data Management, Full Advantage and/or VSS Administration. Please contact your DPS Account Executive to request access to these applications.**
Step 3f	Click **Next**	Click Next to go to the next page
Ariba Setup		
Step 4	Select a **BuysenseOrg**	Also known as a Department Select your agency from pull down list A User can have one and only one BuysenseOrg value. If additional BuysenseOrgs are required for any User, additional

		login's will have to be created.
Step 4a	Select a **Billing Address** *(Optional)*	Default "Bill To" information can set at the user level – the default is BuysenseOrg Level. Unique ID for Billing Address Select from a list of available addresses. For Additional information, see Report 740-eVA Buyer Shipping and Billing Addresses.
Step 4b	**Catalog Controller**	User ability to see catalogs is based on the Catalog Controller. The default should be "eVA_Email" unless the agency is using their own Catalog Controller.
Step 4c	**Delegated Purchasing Authority** *(Optional)*	This is a dollar field and should remain blank unless the agency has set the DPA approver in the agency BSOs.
Step 4d	Enter a **Deliver To** Contact	Can be a Department or a User
Step 4e	**Employee Number** *(Required for Community Colleges)*	It is a seven digit number. Required for all Community Colleges and VCCS Central Office Not required for most agencies.
Step 4f	Enter an **Expenditure Limit** *(Optional)*	Maximum dollar value for Approval. If an amount is inserted, then a value must also be inserted in the next field, Expenditure Limit Approver Blank = no dollar value
Step 4g	Enter an **Expenditure Limit Approver** *(Optional)*	The field must consist of a person or Role within your Agency or Entity. Recommend assignment of an Expenditure Approver as a Role.
Step 4h	Select **Roles**	Use the Control key (Ctrl) to select multiple Roles. If you do not hold the Ctrl key while you select more values, you will lose your previous selections. ***Always assign – "eVA-Rpt-Hier" and "Axxx-AgencyQueryAll".***

		Assign – “*eVA-CreateRequistion*” to users that should be able to create requisitions. Assign – Additional agency approval roles as needed and any “eVA Roles” that are authorized. Assign – “eVA-No Supervisor” role to one user (may be more than one if special circumstances) Axxx-Agency Security is assigned by eVA Global Security Officer once designation is received
Step 4i	Select a **Ship To** address	Unique ID for shipping address Select from a list of available addresses. For Additional information, see Report 740-eVA Buyer Shipping and Billing Addresses.
Step 4j	Select a **Supervisor**	Required unless the user has “eVA-No Supervisor’ role/permission. This is not always a true employee supervisor; agencies may use the eVA Entity Security Officer as supervisor. This person monitors Users when individual User Profile Approvals are required.
Step 4k	Click **Next**	Click Next to go to the next page
Quick Quote Setup		
Step 5	Put a check in the checkbox to **Create Quick Quotes**	Enter a check in the checkbox next to Create Quick Quote Request
Step 5a	Select Yes or No if **Approval** is **required**	If the user does not require approval Select No If the user does require approval select Yes
Step 5b	Put a check in the checkbox to create **Reverse Auction**	If the user is going to create Reverse Auctions (RA) please put a check in the check box next to “Create Reverse Auction Requests”
Step 5c	Put a check in the checkbox if the **user is an Approver**	If the user is going approve Quick Quotes enter a check in the checkbox next to Approve Quick Quote Requests.

Step 5d	Add **Additional BSOs** *(Optional)*	Select any other BuysenseOrgs the user will need to access. Users have access to view requests for users within their own *buysense*Org by default.
Step 5e	Click **Next**	Click Next to go to the next page
	Logi Reporting Setup	
Step 6	**Entity Access** *(bypass)*	The system will automatically default entity access value.
Step 6a	**Standard Roles**	***Reporting Roles that default users are assigned; "R-BuyerLandingPage, R-StandardAccess, R-StandardBuyer".*** You are not authorized to grant additional Report Roles. Please contact your DPS Account Executive to request access to the other Reports.
Step 6b	**Other Roles** *(Optional)*	You are not authorized to grant the other Report Roles. Please contact your DPS Account Executive to request access to the other Reports.
Step 6c	**Report Output Row Limit**	Default value is set to ***5K***. If user requires more, please contact your DPS Account Executive.
Step 6d	Click **Next**	Click Next to go to the next page
	VBO Setup	
Step 7	Enter a **VBO Fax Number**	Fax number displayed on VBO Posting Follow format: 999-999-9999. Use dashes (do not use prentices)
Step 7a	**VBO Home Department** *(bypass)*	This field is defaulted to Home Department
Step 7b	Select **VBO Home Unit**	The standard for state agencies is ***"VBO"***
Step 7c	Uncheck **VBO Locked Out**	Leave unchecked
Step 7d	Uncheck **VBO Logging**	Leave unchecked
Step 7e	Select a **VBO Override Errors**	***Select "1"***

Step 7f	**VBO Room Number** *(bypass)*	Not used currently - Leave Blank
Step 7g	Click **Next**	Click Next to go to the next page, or Summary to go directly to the User Review page.
	User Review	
Step 8	Check for **Errors** and/or **Review** your selections	The User Review page displays the selections you have made for the user. If there are errors, such as missing required information, they will be listed in red to the right of the line that has the error.
Step 8a	Click **Submit**	After you have reviewed the user information, click Submit to save the changes.
Step 8b	Distribution of Username & Password	The User Updated page confirms that you have successfully created a user and shows the new Username. The page also displays the summary of the new user. The created Username and temporary password should be sent under separate correspondence (electronic or paper) to the original requestor. The original requestor shall provide the end user with their username, temporary password, and the eVA Acceptable User Agreement for timely completion.