

# QUICK STEPS FOR DEACTIVATING 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 deactivating an existing user in User Management. User Management is the Portal application where you can maintain users.

With User Management it takes five steps to deactivate a user.

1. Accessing User Management
2. Editing User's Information
3. Deselecting Applications
4. Re-configuring Ariba
5. Reviewing and submitting the user profile changes

**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		
<b>Step 1</b>	Click on the <b>User Management</b> link	To access User Management, click User Management from the application menu.
<b>Step 1a</b>	Search for the <b>User</b>	Search for the user by username, first name, last name or email address.
User Setup		
<b>Step 2</b>		User Management displays the User Setup page where you will begin to edit the user's record.
<b>Step 2a</b>	User's <b>First Name</b> <i>(bypass)</i>	No change
<b>Step 2b</b>	User's <b>Last Name</b>	Insert "(Deactivated)" in FRONT of last name  Example: (Deactivated) Smith
<b>Step 2c</b>	Change <b>Status</b>	Change to "Deactivated".  Deactivated status denies the user to access the system.
<b>Step 2d</b>	<b>Status Change Reason</b> <i>(bypass)</i>	This field is currently under development – Do not use this box.
<b>Step 2e</b>	<b>Organization</b> <i>(bypass)</i>	No change

<b>Step 2f</b>	<b>Organization Unit</b> <i>(bypass)</i>	No change
<b>Step 2g</b>	<b>Organization Sub Unit</b> <i>(bypass)</i>	No change
<b>Step 2h</b>	<b>Password</b> <i>(bypass)</i>	No change
<b>Step 2i</b>	Change <b>Email</b> address	Change to "none.none@none.none.com"
<b>Step 2j</b>	Change <b>Phone Number</b>	Change to "NA"
<b>Step 2k</b>	Add notes in the <b>Additional Information</b> section.	<p>Add your note here. This section <b>must</b> be filled out every time you make a change to a user.</p> <p>Comments should be added to state what action is being taken (include date MMDDYY and initials JBE).</p> <p>Example: "Username deactivated per MM 072414 jbe"</p> <p>This field holds up to 150 characters, so older actions will need to be removed as needed for space.</p> <p>Use underscore (_) to create desired space.</p> <p>Do not do a hard return (i.e. hit enter) or use periods (.) commas (,) or Colons (:) or semicolons (;)</p>
<b>Step 2l</b>	Click <b>Next</b>	Click Next to go to the next page
<b>Application Setup</b>		
<b>Step 3</b>	Remove <b>Applications</b>	<p>Uncheck the boxes of the application to be removed.</p> <p><b>Remove:</b>  Administration  CustomerCareReports  Data Management  Logi Reporting  Quick Quote  VBO Buyer  VSS</p>

<b>Step3a</b>	Leave <b>Applications</b>	Ariba Full ADVANTAGE  System Defaults remain - Portal, Support and Default Advantage.
<b>Step 3b</b>	Click <b>Next</b>	Click Next to go to the next page
<b>Ariba Setup</b>		
<b>Step 4</b>	<b>Ariba/eMall/ Shop Now</b>	Do <i><b>NOT</b></i> Remove access to this application. This tool is used to create and approve Purchase Requisitions.
<b>Step 4a</b>	Complete <b>step 4f</b> first	Complete step 4f and then return to step 4b
<b>Step 4b</b>	Change <b>BuysenseOrg</b>	Also known as a Department  Change to "AXXX-Deactivated Users"
<b>Step 4c</b>	<b>Billing Address</b> <i>(bypass)</i>	No change
<b>Step 4d</b>	<b>Catalog Controller</b> <i>(bypass)</i>	No change
<b>Step 4e</b>	Remove <b>Delegated Purchasing Authority</b>	Remove
<b>Step 4f</b>	Change <b>Deliver To</b>	Change to the old BSO name (i.e. "AXXX-XXXXXX")
<b>Step 4g</b>	Remove <b>Employee Number</b>	Remove number
<b>Step 4h</b>	Change the <b>Expenditure Limit</b>	Change to "0"
<b>Step 4i</b>	Select an <b>Expenditure Limit Approver</b>	Assign "eVA-PCR-AELEAD" Role
<b>Step 4j</b>	Select <b>Role</b>	Select "No Selection"  Note:  If assigned eVA-No Supervisor this must be reassigned to an active

		<p>user</p> <p>If assigned approval roles they may need to be reassigned to an active user.</p> <p>If Assigned Axxx-Agency Security a new designation must occur and the agency security role will be reassigned by the eVA Global Security Officer once designation is received.</p>
<b>Step 4k</b>	<b>Ship To</b> address <i>(bypass)</i>	No change
<b>Step 4l</b>	Select a <b>Supervisor</b>	This is not always a true employee supervisor; agencies may use the eVA Entity Security Officer as supervisor. This person who monitors Users.
<b>Step 4m</b>	Click <b>Next</b>	Click Next to go to the next page
<b>Advantage Setup</b>		
<b>Step 5</b>	<b>No Change</b>	Make no changes to this page
<b>Step 5a</b>	Click <b>Next</b>	Click Next to go to the next page
<b>User Review</b>		
<b>Step 8</b>	Check for <b>Errors</b> and/or <b>Review</b> your selections	<p>The User Review page displays the selections you have made for the user.</p> <p>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.</p>
<b>Step 8a</b>	Click <b>Submit</b>	After you have reviewed the user information, click Submit to save the changes.
<b>Step 8b</b>	Final Summary Page	The User Update page confirms that you have successfully updated the user.