

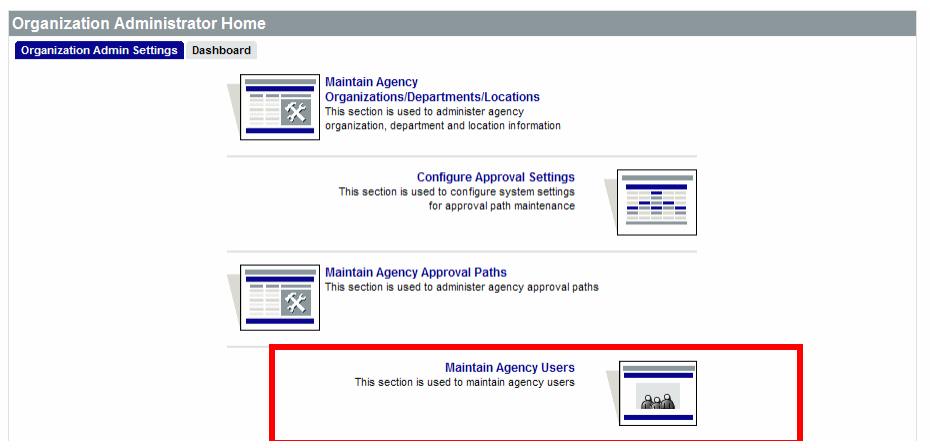
Adding or Maintaining Agency Users

New users can be created in Procure.AZ 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

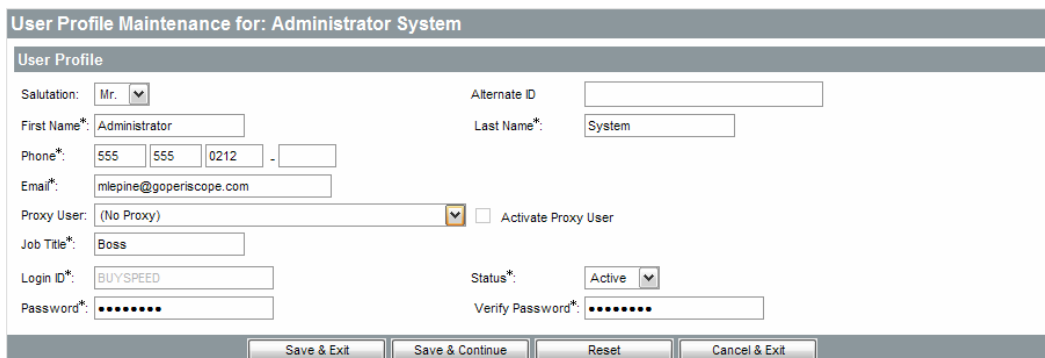
Upon logging into ProcureAZ with your unique Login ID and Password, you can add or maintain user data by clicking on the **Maintain Agency Users** link from your Organization Administrator **Homepage**.



User Profiles

The User Profile Maintenance section is the user information. All fields marked with an asterisk are required. Please enter the user's email address as 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. Procure.AZ does not automatically notify users that their account has been created.



The screenshot shows the 'User Profile Maintenance for: Administrator System' form. The form contains the following fields and options:

- Salutation: Mr. (dropdown)
- Alternate ID: (text field)
- First Name*: Administrator (text field)
- Last Name*: System (text field)
- Phone*: 555 555 0212 (text field)
- Email*: mlepine@goperiscope.com (text field)
- Proxy User: (No Proxy) (dropdown) Activate Proxy User
- Job Title*: Boss (text field)
- Login ID*: BUYSPEED (text field)
- Status*: Active (dropdown)
- Password*: (password field)
- Verify Password*: (password field)

At the bottom of the form, there are four buttons: 'Save & Exit', 'Save & Continue', 'Reset', and 'Cancel & Exit'.

Adding or Maintaining Agency Users

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

i 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*: LBY1A - Address One

Default Account Code: Phreddy
100 Main
Austin, TX 78701

Default Purchaser: System, Administrator

User Purchasing Rules

The **User Purchasing Rules** maintenance section controls the dollar limit of documents that the user can create. If a document 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: 0.00 Direct Release/RPA Limit: 56000.00 Direct Open Market Limit: 0.0

Save & Exit Save & Continue Reset Cancel & Exit

NOTE: For Phase I, only Direct Release/RPA limit will be used. This field restricts the dollar value of individual contract releases a user can issue.

User Roles

The **User Roles** section is used to maintain what roles the user has in Procure.AZ. Only the following roles should be established for users in Phase 1:

- **Basic Purchasing** – Procurement Officers/Buyers who are authorized to manage solicitations and contracts for statewide (SCC) usage or for the Department of Economic Security (“DES”). NOTE: Basic Purchasing users must be authorized by the State Procurement Office.
- **Department Access** – End user with ability to create requisitions, as follows:
 - **Requisitioner** – Provides ability to create requisitions to initiate statewide or DES solicitations and contracts
 - **Contract Shopper** – Authorized to create releases against statewide contracts.
 - **Superusers** – Authorized to edit another user's document if necessary
 - **Approver** – Makes user eligible to be on approval paths
- **Organization Administrator** – User has rights to edit departments, locations, users, and approval paths for an organization

Adding or Maintaining Agency Users

Roles*

Vendor Administrator
 Basic Purchasing
 Internal Administrator
 Department Access
 Inquiry
 Accounts Payable
 Inventory Administrator
 Inventory User
 Organization Administrator

Can Open Formal Bids:
 Department Access Role Privilege Type:
 (A department/location superuser must be a requisitioner)
 If Department Access user, set up this user as

User is an Approver
 Allow PO Receipts for Department Access Role
 Enable Change Order Creation
 Enable Direct Open Market

Accounts Payable Role Privilege Type:
 All Sites Add Site Department: Location:

Department/Location Privileges

Users given the Department Access 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		

Copyright © 2009 Periscope Holdings, Inc. - All Rights Reserved.

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**.