

Admin-Adding New Users and Assigning Roles

The PCard Marketplace allows a Business Unit Admin to create user profiles for their Business Unit (BU).

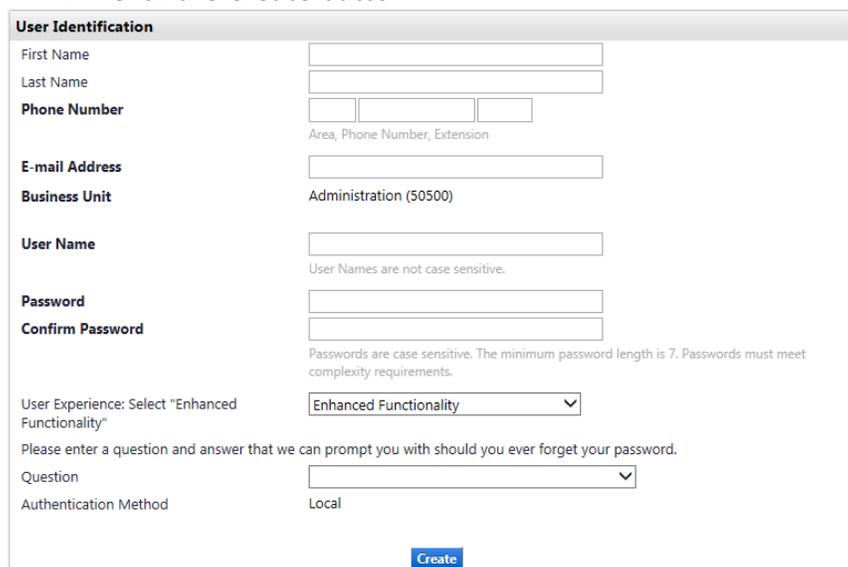
New users can be added in two different ways. Users can create an account pending approval or BU Admins can create an account for a user. This guide will focus on the steps for BU Admins to create accounts in the PCard Marketplace.

Adding New Users

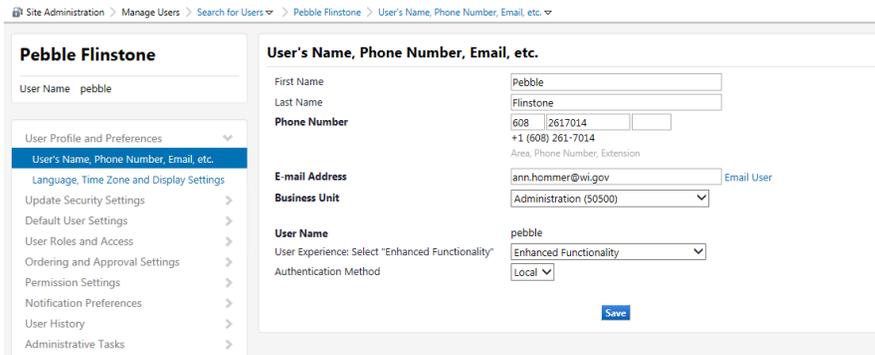
1. Select the Administrator icon in the left panel menu. Select Manage Users, and then Add New User.



2. On the User identification Screen enter the following;
 - a. User first name and last name
 - b. Phone number
 - c. Email
 - d. User name (This will be the employees login it is recommended to use their IAM id)
 - e. Enter a temporary password. (Users will be prompted to change the password once they log in)
 - f. Click the Create button



3. The user profile will be automatically approved and assigned the Purchaser Role.
 - a. The Purchase Role allows the user to purchase from all catalogs **except** IT and Medical catalogs.
4. The User profile will be displayed. BU Admins can add or change a role for a user, along with setting up the profile defaults.



Site Administration > Manage Users > Search for Users > Pebble Flinstone > User's Name, Phone Number, Email, etc.

Pebble Flinstone
User Name pebble

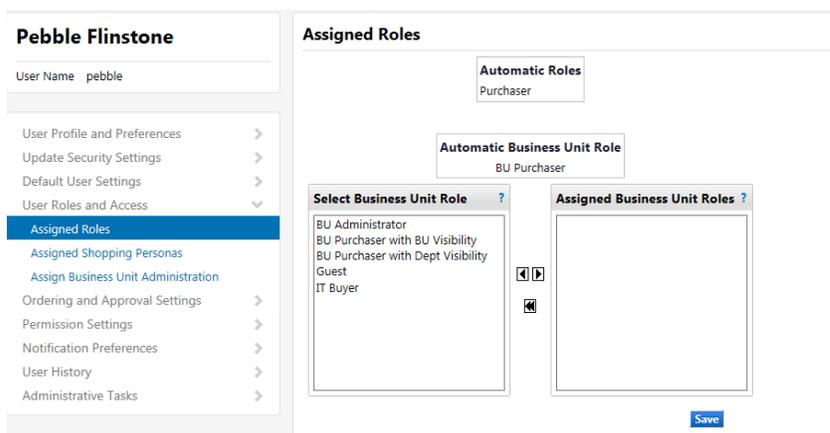
User Profile and Preferences
User's Name, Phone Number, Email, etc.
 Language, Time Zone and Display Settings
 Update Security Settings
 Default User Settings
 User Roles and Access
 Ordering and Approval Settings
 Permission Settings
 Notification Preferences
 User History
 Administrative Tasks

User's Name, Phone Number, Email, etc.

First Name Pebble
 Last Name Flinstone
 Phone Number 608 2617014
 +1 (608) 261-7014
 Area, Phone Number, Extension
 E-mail Address ann.hommer@wi.gov Email User
 Business Unit Administration (50500)
 User Name pebble
 User Experience: Select "Enhanced Functionality"
 Authentication Method Local

Save

5. To change a user role select User Roles and Access, then select Assigned Roles.



Pebble Flinstone
User Name pebble

User Profile and Preferences
 Update Security Settings
 Default User Settings
 User Roles and Access
Assigned Roles
 Assigned Shopping Personas
 Assign Business Unit Administration
 Ordering and Approval Settings
 Permission Settings
 Notification Preferences
 User History
 Administrative Tasks

Assigned Roles

Automatic Roles
Purchaser

Automatic Business Unit Role
BU Purchaser

Select Business Unit Role ?
 BU Administrator
 BU Purchaser with BU Visibility
 BU Purchaser with Dept Visibility
 Guest
 IT Buyer

Assigned Business Unit Roles ?

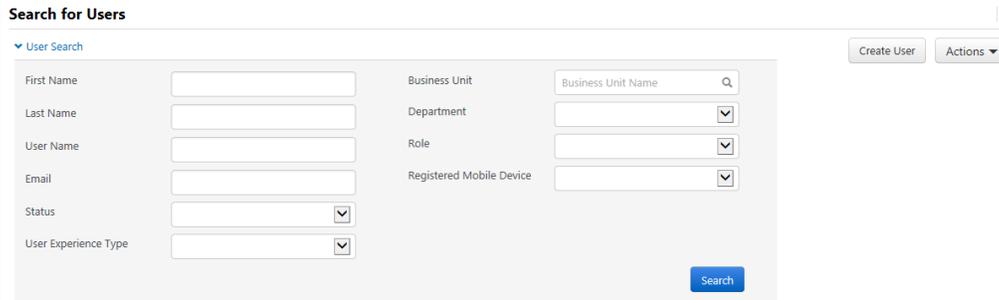
Save

6. BU Administrators can assign the following roles to a user;
 - a. **IT Buyer** – this role allows user to see IT related catalogs
 - b. **Guest** – users with the role will **not** be able to make purchases
 - c. **BU Purchaser with BU Visibility** – This allows the user to see profile information but they will not be able to change user information.
 - d. **BU Administrator** – This can be assigned to other users assisting with managing their agency access in the PCard Marketplace.
 - e. **Medical Buyer** – BU Admins will need to contact KIT staff at doawispro@wi.gov to request this role for a user.

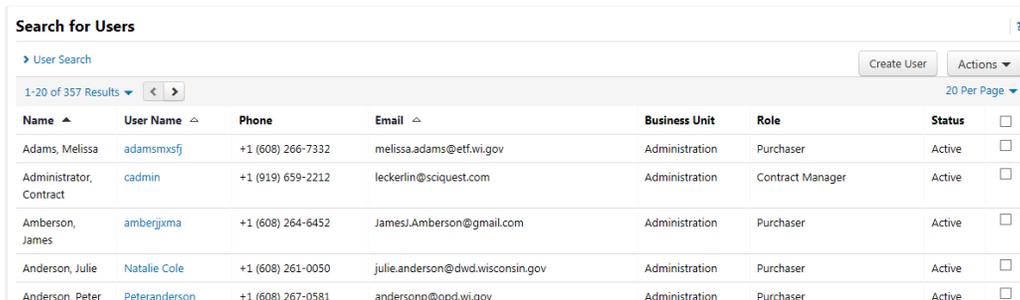
Select the role(s) for the user then click to move the role to the Assign Business Unit Roles box. After the roles have been assigned click the Save button.

Assign a Role to an existing profile

7. BU Administrator can edit or inactivate User Profiles. To search for a user profile, select Site Administration on the left menu panel. Then select Manger Users, and Search for Users.



8. Enter search criteria in any of the available fields' then click the Search button. To limit the results select a Status of Active.
9. All active users for the BU Administrator's Business Unit will be listed. Find the user profile that needs editing and click on the blue User Name.



Name	User Name	Phone	Email	Business Unit	Role	Status	
Adams, Melissa	adamsmsxfj	+1 (608) 266-7332	melissa.adams@etf.wi.gov	Administration	Purchaser	Active	<input type="checkbox"/>
Administrator, Contract	cadmin	+1 (919) 659-2212	leckerlin@sciquest.com	Administration	Contract Manager	Active	<input type="checkbox"/>
Amberson, James	amberjxma	+1 (608) 264-6452	JamesJ.Amberson@gmail.com	Administration	Purchaser	Active	<input type="checkbox"/>
Anderson, Julie	Natalie Cole	+1 (608) 261-0050	julie.anderson@dwd.wisconsin.gov	Administration	Purchaser	Active	<input type="checkbox"/>
Anderson, Peter	Peteranderson	+1 (608) 267-0581	andersonp@opd.wi.gov	Administration	Purchaser	Active	<input type="checkbox"/>

10. The user profile screen will be displayed. Make the necessary changes, and then save the profile.

For further assistance, please contact doawispro@Wisconsin.gov.