ePurchasing User Maintenance User Guide

January, 2003

## ePurchasing User Maintenance Guide Maintain Users

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IRCHASING MAIN MENU		
L'rente new planchase reguisition by enlering order specificatione, e.g., Create e new purchese requisition by enlering order specificatione, e.g., vendor nonerbuidress, delivery deadlines, item lines, etc.	<ul> <li>Inquire on existing purchase orders.</li> <li>Search and view existing purchase orders and link to related requisitions.</li> </ul>	
Pending Requisitions From SuperCUOTE Create a regulation based on a SuperCUOTE bid	List document history. List history relates to a document including all change orders and payments.	
Nork with existing purchase requisitions. Norty existing requisitions, print requisition torms (FMIS-30) or transfer a requisition to a purchase order.	List purchase orders: (future) List purchase orders based on selection orders.	
Nork with existing purchase orders, hodry existing purchase orders or print purchase order forms (FNIS- 11).		
Process change orders. Create a purchase order change form (FMIS-32).		
Process payments. Inter payment information on purchasing documents.	Payment Attachments     Retrieve payment attachments for completion and printing.	
Rolense payments. Review and release payments to Phills	Vender Search Search FMS vendor database.	
Release DCS payments. Teview and release DCS payments.	Maintain Users     Add.update or delete eFunchssinguisers.	
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Purpose:

This feature will allow Fiscal staff to maintain user defaults within their unit. Users may be added, updated or deleted from ePurchasing.

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## ePurchasing User Maintenance Guide Select User

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Purpose:	This page will allow Fiscal staff users to access a desired user's profile. Initially a listing of all users within your unit (college or department based on FO code access) is displayed. Fiscal staff may select a user for update, select 'Add New User' to add a new user or search for a user.	
Data Field/ Instructions Action Key		
Last Name	Enter the desired user's last name.	
ITS Username	Enter the desired user's ITS username.	
FO Code	Enter the desired user's FO code.	
Records Per Screen	Select the number of records you wish to view per page.	
Search	Click on Search to display a listing of user(s) matching your search criteria.	

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ePurchasing User Maintenance Guide Select User

## Search (cont) The listing displays the user's name (last name, first name), ITS username, default FO code, and the roles assigned. To resort the listing, click on the desired heading to sort by that field. Clicking on the same heading will switch the sort from ascending to descending.

The role(s) are listed by their code: P=Preparer, R=Requisitioner, A=Approving Authority, F=Fiscal Staff, Q=DCS Custodian, I=Invoice Preparer, C=Central Procurement, D=Disbursing, V=Disbursing Support Staff, Z=System Administrator.

If only one user is found, the system will advance to the 'Enter User Information' form.

## ePurchasing User Maintenance Guide Enter User Information

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Purpose:	This page will allow Fiscal staff users to maintain a user's defaults. For existing users, the user's current profile is displayed. For new users, a blank form is displayed.
Data Field/ Action Key	Instructions
<u>User Information:</u> First Name	Enter the first name.
Middle Initial	Enter the middle initial.
Last Name	Enter the last name.
ITS Username	Enter the ITS username (UHUNIX id, @hawaii.edu email id). This field is <b>required</b> .
FMIS RACF Id	Enter the FMIS RACF Id. This field is not required to add the user but it is required for the user to log into the system.
Role(s)	Select the valid role(s). Central roles can only be assigned by a System Administrator. See Purchasing Redesign Document Flow for detailed information about the various roles in ePurchasing.
Phone	Enter the phone number.
FO Code	Enter the five-digit FO code (00nnn). If the user has access to multiple FO codes, enter the one used most frequently. This field will default on the requisition but can be overridden.
Campus	Select the default campus.
Purchasing Officer	Enter the Purchasing Officer's name.
Purchasing Officer Phone	Enter the phone number of the Purchasing Officer.
DCS Bank	Enter the DCS Bank number. Populating the DCS Bank field enables DCS as a payment option.
<u>Delivery Information:</u> Delivery Department	Enter the delivery department.

ePurchasing User Maintenance Guide Enter User Information

Delivery Address Line 1-4	Enter the delivery address lines. Each line is limited to 30 characters.
Delivery City	Enter the city for the delivery address.
Delivery State	Enter the 2-character state code for the delivery address.
Delivery Zip Code	Enter the zip code for the delivery address.
Billing Information: Billing Department	Enter the billing department.
Billing Address Line 1-4	Enter the billing address lines. Each line is limited to 30 characters.
Billing City	Enter the city for the billing address.
Billing State	Enter the 2-character state code for the billing address.
Billing Zip Code	Enter the zip code for the billing address.
Billing Phone	Enter the phone number for billing inquiries.
Save	Click on Save to save any updates to the user or to add the user.
Delete	Click on Delete to delete the user.