

FisherSci.com

Administer Users



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Version 01

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Administrator/SuperUser Functions

QuikTips offers a systematic guide for the Administrator/SuperUser whom needs to manage the day-to-day Fishersci.com purchasing activities of users within their organization. Within this guide contains information on the following topics:

- Creating and Editing a New User
- Creating and Editing the Approval Hierarchy
- Creating and Assigning Approver Selection Groups
- Editing and Deleting Approver Selection Groups

What Are "Administrator/Superuser Functions"?

These functions allow Administrators/SuperUsers to control the purchasing activities of subordinates on a user-by-user basis. Many of the powerful functions SuperUsers have access to are to add, edit, and delete subordinate profiles, including specifying credit card privileges and payment methods; assigning, editing, and deleting Fisher account numbers; and defining approval hierarchies and approval groups. Additional functions also include Dollar Rules to define and assign users to specific business rules, and to define rules for dollar and approval limits. Advanced functions allow Catalog Rules to define preferred, restricted-from-purchase and restricted-from-view products. Each may be defined by product, manufacturer, and/or commodity code using inclusive and/or exclusive relationships. Dollar and Catalog rules are addressed in their own QuikTip guide(s).

Who Can Use "Administrator Functions"?

Only registered users designated as Administrators/SuperUsers can access this function and manage the users assigned to them. An Administrator/SuperUser is defined as a customer-designated individual who controls the purchasing activities of his/her company's registered users.

Why Edit a User's Profile or Account Information?

This function allows the Administrator/SuperUser the ability to modify the user profiles and thus control the purchasing activities of subordinates on a user-by-user basis. Administrators can also delete profiles of users who are no longer subordinates. Administrators can specify credit card privileges and payment methods, assign and edit Fisher accounts, regulate e-mail order confirmations, delegate temporary or permanent approval privileges, and allow access to online quotes.

What is an Approval Hierarchy?

Administrators/SuperUsers are structured within an approval hierarchical system in order for your organization to maintain and/or mirror its appropriate approval mechanism. A system of subordinates can be set up within the approval structure so that SuperUsers will need to have approval from other SuperUsers if that is what is desired.

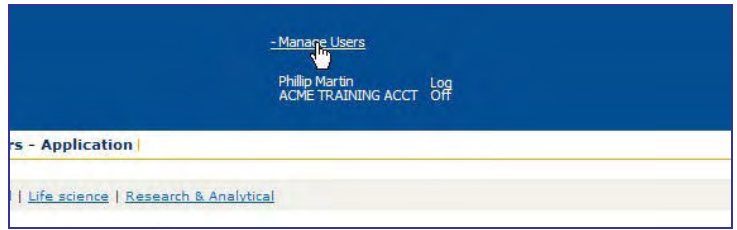
What are Approver Selection Groups?

Approver Selection Groups are Administrator/SuperUser company-defined groups of users designed or created for the purpose of a similar approval structure or policy. You can designate certain users to be "associated to" the defined group of your choice in an effort to better keep track of approval controls within your organization.

Create a New User

1. Click **Manage Users** after logging in to the site.

Note: You must have at least SuperUser privileges to create a New User



Manage Users Link

2. Click on **create a new user** under **Administer Users**. You will advance to the subordinate's profile page.



Create New User Link

3. **Complete the subordinate's profile information** taking note of all **required fields** denoted by the asterisk *.
4. (Optional) Click in the checkboxes if you want the user to have email confirmations sent for **Order Confirmation, Back Order Update Notification and Invoice Copy Notification**.
5. (Optional) Click in the checkbox next to **user must use fund tracking** if they are required to use this feature.
6. Click **Submit**

The screenshot shows the 'subordinate's profile' page. It has a title 'subordinate's profile' and a sub-header 'new subordinate's profile tips'. Below this is a form with several fields: 'name*' (first: 'Mary Helen', last: 'Mulholland'), 'username*' ('mhpens1'), 'password*' (masked), 'password (again)*' (masked), 'password hint' ('w bird'), 'phone*' ('412-490-8000'), 'email address*' ('mhh@acmecoco.com'), 'send email order confirmations' (checked), 'send the following email notifications' (checked for 'Back Order Update Notification', 'Shipment Notification', and 'Invoice Copy Notification'), 'user must use fund tracking' (checked), 'security question*' ('maiden name'), and 'security answer*' ('Smith'). A 'Submit' button is at the bottom right.

Subordinate's Profile Page

- (Optional steps 7-13) Click **Add/Edit Credit Card Information** link if you want to change the default payment option for this subordinate.

Subordinate's Profile
 You can edit this user's profile: [subuser profile tips](#)
 Profile assigned to: Phillip Martin (*pmartin1*)

mhpens1

first name*	Mary Helen
last name*	Mulholland
<input type="checkbox"/> User is a SuperUser	
company*	Fisher
phone*	412-490-8000
email address*	mhh@acmecocom
credit card privileges:	May choose any payment option
credit card information	Add/Edit Credit Card Information

Add/Edit Credit Card Information

- If you are electing they may never use a credit card, choose the appropriate **radio button** and click **Submit**.
- Click the **Add Credit Card** button to add a credit card.

Credit Card Information
 Below are all the credit cards in this profile. [credit card tips](#)

Credit Card Privileges
 User: mhpens1 - Mary Helen Mulholland

May choose any payment option.
 May never use a credit card.
 Must **always** use any credit card.

[Submit](#)

currently no credit card information available

[Add Credit Card](#)

Add/Edit Credit Card Button

- Enter the credit card information in all required fields denoted by an asterisk*.
- Click **Submit**

Note: Clicking Cancel will abandon the Credit Card submission process.

Credit Card Information
 Add or edit credit cards in your profile. [credit card tips](#)

* required field

alias*	MH Corp Purchasing Card
expiration date*	12 / 09
account number*	123456789812
card reference	Purchasing
type*	American Express

[Submit](#) [Cancel](#)

Credit Card Information Page

- Choose the Credit Card Privilege for this subordinate by clicking in the respective radio button. If they **Must always use this credit card**, choose the credit card from the drop down menu if multiple cards exist.
- Click **Submit**

User Credit Card Privileges

- Click **Add/Edit Account Information**

Add/Edit Account Information Link

- Choose an account from the drop down list by clicking the downward arrow next to **assign account to subordinate user**.
- Click **Go**

Registered Accounts for Subordinate Profile

17. (Optional) If you want to edit the **account alias** or **attention** field(s), type over the information in the text field provided.
18. Click **Assign**

Note: Notice the text indicates **No Accounts are associated with this user** until you click Assign.

Note: Clicking **Cancel** will abandon the account association process.

The screenshot shows a web form titled "Subordinate's Profile" with a sub-header "Registered Accounts for subordinate mhpens1". A blue button "assign account tips" is in the top right. Below, a table lists "Account Name", "Account Number", and "Account Status", with a message "No Accounts are associated with this user". A yellow bar contains the text "assign account to subordinate user." followed by a dropdown menu showing "123456-001" and a "Go" button. Below this are several input fields: "account number" (123456-001), "account alias" (ACME TRAINING ACCT), "attention" (SHIPPING DEPT), "Override PO number", "po number" (Company Default), "shipping address" (THIS IS A TEST ORDER...), and "billing address" (DATE PROCESSING...).

Assign Button

Congratulations!

You have just created a subordinate user!

Editing a User Profile

19. Click **Manage Users > User's Alias Name Link**

Administer Users Page

20. (Optional) Click the checkbox for **User is a SuperUser if the subordinate is to have this privilege.**

Note: Notice the red text on the top of the page indicating **You can edit this user's profile.**

SuperUser Checkbox

21. Click **Add/Edit Account Information**

Add/Edit Account Information

22. Click **edit** next to the account you wish to modify.

Registered Accounts for subordinate **mulholland1**

Account Name	Account Number	Account Status	
ACME TRAINING COMPANY	123456-001	VALID	edit >

assign account to subordinate user. 123456-001 Go

Edit Link Next to Account Name

23. Type over the text you wish to modify in the **account alias**, **attention** or **po number** fields. You can change the **Override PO number** radio option by clicking in the **Yes** or **NO** radio button.
24. Click **Save**. You will advance to the Subordinate's Profile page.

Registered Accounts for subordinate **mulholland1**

Account Name	Account Number	Account Status	
ACME TRAINING COMPANY	123456-001	VALID	edit >

To assign new account: [click here](#)

account number: 123456-001

account alias: ACME TRAINING COMPA what would you like to call this account?

attention: TRAINING DEPT

Override PO number: Yes No

po number: 14567

shipping address: FSCO TEST
THIS IS A TEST ORDER
DO NOT SHIP
PITTSBURGH, PA 15235

billing address: THIS IS A TEST ACCOUNT
DATE PROCESSING
USE ONLY
PITTSBURGH, PA 15219

Save Delete Cancel

Subordinate's Profile Page

25. (Optional) Click **click here** to assign this user to another account if an alternate account exists.
26. Follow the steps from **pgs 8-9**.

Account information updated.

Registered Accounts for subordinate **mulholland1**

Account Name	Account Number	Account Status	
ACME TRAINING COMPANY	123456-001	VALID	edit >

To assign new account: [click here](#)

Click Here Link to Assign to Another Account

27. Click the checkbox next to **required approvals** if you must approve all of the subordinates' requisitions.
28. Click the checkbox next to **copy approved email confirmations** if you want to be copied via email.
29. Click the **Currently out-of-office substitute** checkbox if your Approver is currently out-of-office and enter the **user name** in the text field of the substitute Approver.
30. Click the checkbox next to **can view restricted quotes** if this user is permitted this function.
31. Click **Submit**

For Approvers Edit Section

TO EDIT A CREDIT CARD INFORMATION:

1. Click **Manage Users > User Name Alias > Add/Edit Credit Card Information Link** (previously illustrated).

Add/Edit Credit Card Information Link

2. Click **edit** next to the credit card you need to modify.

Edit Credit Card Information Link

3. Type over the text you need to modify in the **alias**, **expiration date**, **card reference field(s)** and/or **type** drop down menu.
4. Click **Submit**

Note: Clicking **Cancel** will abandon the editing process.

Credit Card Information Page

5. Click one of the **Credit Card Privileges** radio buttons if you want to modify this option. If you are choosing the last radio button, **Must always use this credit card**: make a selection from the drop down menu if more than one card exists.
6. Click **Submit**

Note: Clicking the **delete** link will delete the credit card information. *Be certain you want to do this before proceeding with this option.*

Note: You cannot edit the account number information as it masked for security reasons. To modify this, delete the credit card and add a new one again following steps on pgs. 7-13.

alias	reference	type	expiration date	edit	delete
MH Corp Purchasing Card	EDIT EXAMPLE	American Express	12/2009	edit >	delete >

Editing the Credit Card Privileges

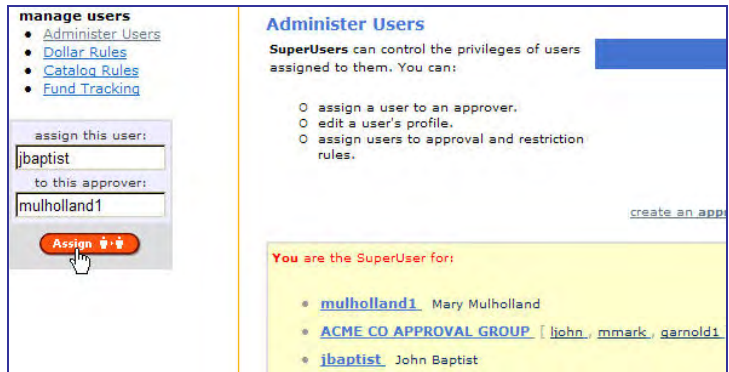
Creating the Approval Hierarchy – Assign Users

1. Click **Manage Users**



Manage Users Link

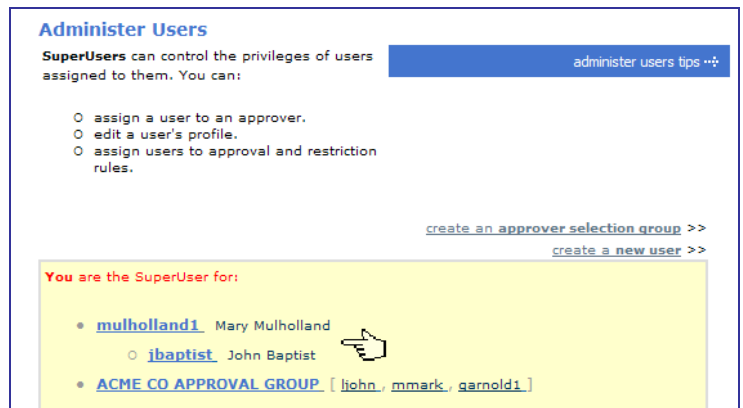
2. Enter the user name alias in the **assign this user** text field on the left side.
3. Enter the user name alias in the **to this approver** text field.
4. Click **Assign**.



Assign This User - To This Approver

Congratulations!

You have created an approver!



The Hierarchy Established

Creating/Editing Approver Selection Groups

1. Click **Manage Users > Create an approver selection group**

Administer Users

SuperUsers can control the privileges of users assigned to them. You can:

- assign a user to an approver.
- edit a user's profile.
- assign users to approval and restriction rules.

[create an approver selection group >>](#)

[create a new user >>](#)

You are the SuperUser for:

- [mulholland1](#) Mary Mulholland
- [garnold1](#) George Arnold
- [jbaptist](#) John Baptist
- [mmark](#) Matthew Mark
- [liohn](#) Luke John

Create an Approver Selection Group Link

2. Enter a title in the **approver group name** field to identify the group. *This field holds 25 characters.*
3. Click inside the checkbox next to **Allow purchaser to select "no approval required"** if you desire this exception. If not, leave blank.
4. Click in the checkbox(s) next to the **user(s)** you want to add to the group.
5. Click **Submit**

approver group

Approver Selection Groups allow purchasers to select among several approvers.

You must:

- name the approver group
- select which approvers to include in the group
- decide whether to include "does not require approval"
- use the approver group in the approval workflow

approver group name:

Allow purchaser to select "no approval required"

Select which approvers you want included in this group:

<input checked="" type="checkbox"/> Luke John	<input checked="" type="checkbox"/> Matthew Mark	<input checked="" type="checkbox"/> John Baptist
<input checked="" type="checkbox"/> George Arnold	<input type="checkbox"/> Mary Mulholland	

[Submit](#) [Cancel](#) [Delete](#)

Approver Group Page

TO EDIT AN APPROVER GROUP:

1. Click **Manage Users > Approver Group Alias** link

Administer Users

SuperUsers can control the privileges of users assigned to them. You can:

- assign a user to an approver.
- edit a user's profile.
- assign users to approval and restriction rules.

[create an approver selection group >>](#)

[create a new user >>](#)

You are the SuperUser for:

- [mulholland1](#) Mary Mulholland
- [ACME CO APPROVAL GROUP](#) [[liohn](#), [mmark](#), [jbaptist](#), [garnold1](#)]

Approver Group Alias Link

2. You can modify the title by typing over the text in the **approver group name** field, selecting or deselecting the **allow purchaser to select "no approval required"** checkbox, and/or the **user names** you want in the approver group.
3. Click **Submit**.

Note: Clicking **Delete** instead of Submit will delete your group. Be certain this is what you want before executing this task.

Note: Clicking **Cancel** will abandon the editing process.

Editing Approver Group Page

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