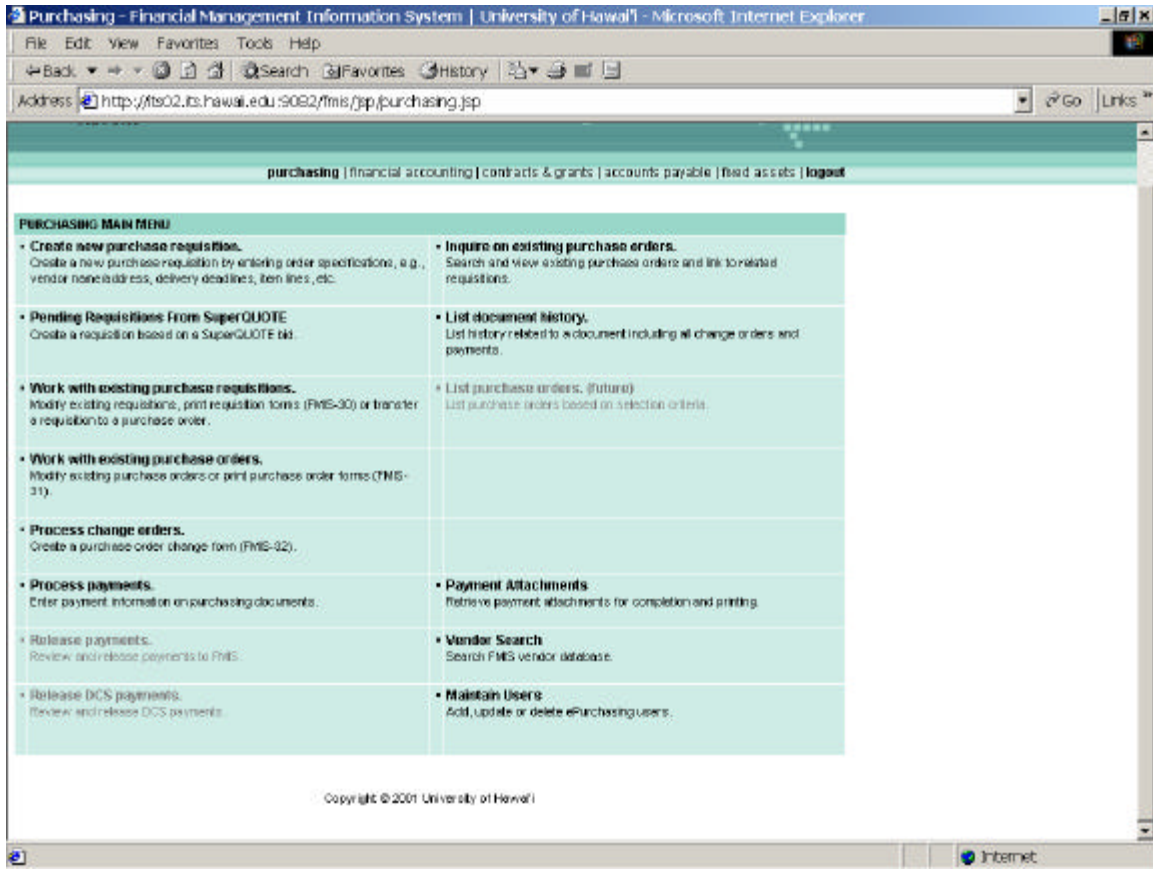


ePurchasing
User Maintenance
User Guide

January, 2003

ePurchasing User Maintenance Guide

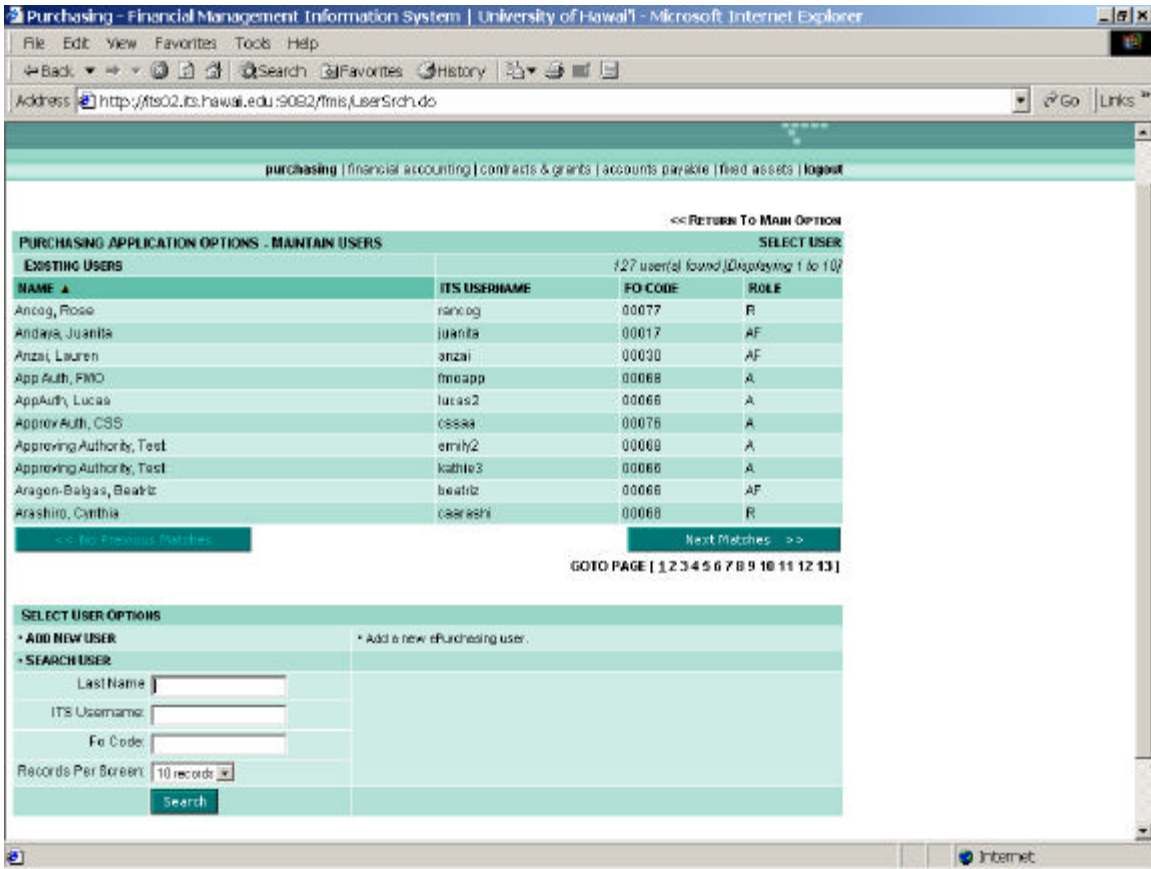
Maintain Users



Purpose:

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

ePurchasing User Maintenance Guide
 Select User



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/ Action Key	Instructions
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.

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

test site

University of Hawaii
Financial management information system

purchasing | financial accounting | contracts & grants | accounts payable | fixed assets | logout

<< RETURN TO MAINTAIN USERS << RETURN TO MAIN OPTION

PURCHASING APPLICATION OPTIONS - MAINTAIN USERS ENTER USER INFORMATION

UNIVERSITY OF HAWAII ePURCHASING USER

USER INFORMATION

First Name: Test

Middle Initial:

Last Name: Fiscal Staff

ITS Username: emilyj

FMS RACF Id: EJDORGEN

Role(s):
 Preparer Requisitioner Approving Authority DCS Custodian Invoice Preparer
 Fiscal Staff

Phone: (808) 956-7570

FO Code (Offic): 0006B

Campus: UH - System

Purchasing Officer: RUII, DONALD

Purchasing Officer Phone: (808) 956-7161

DCS Bank:

DELIVERY INFORMATION:

Delivery Department: OFFPRFM

Delivery Address Line 1: 1400 Lower Campus Road

Delivery Address Line 2: Room 15

Delivery Address Line 3:

Delivery Address Line 4:

Delivery City: Honolulu

Delivery State: HI

Delivery Zip Code: 96822

BILLING INFORMATION:

Billing Department: Financial Management Office

Billing Address Line 1: 1406 Lower Campus Road

Billing Address Line 2: Room 41

Billing Address Line 3:

Billing Address Line 4:

Billing City: Honolulu

Billing State: HI

Billing Zip Code: 96822

Billing Phone: (808) 956-7161

Save Delete

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ePurchasing User Maintenance Guide

Enter User Information

=====
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
=====

User Information:

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 required .
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.

Delivery Information:

Delivery Department	Enter the delivery department.
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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.