

Administrator Functionality

How to use the administrator functionality in
the Buyer portal in the new platform



Contents

Administrator Functionality

| | |
|--|---|
| Types of user accounts..... | 3 |
| Creating a new user..... | 3 |
| Deactivating a user..... | 4 |
| Managing user access to divisions within your organisation | 4 |
| Managing Permissions..... | 5 |
| Creating Business Units/ Divisions..... | 6 |

Administrator Functionality

Types of user accounts

To keep your profile secure, we have two levels of user permission available, each with varying levels of access. The table below gives you an overview of these permissions so that you can better understand the level that your users require.

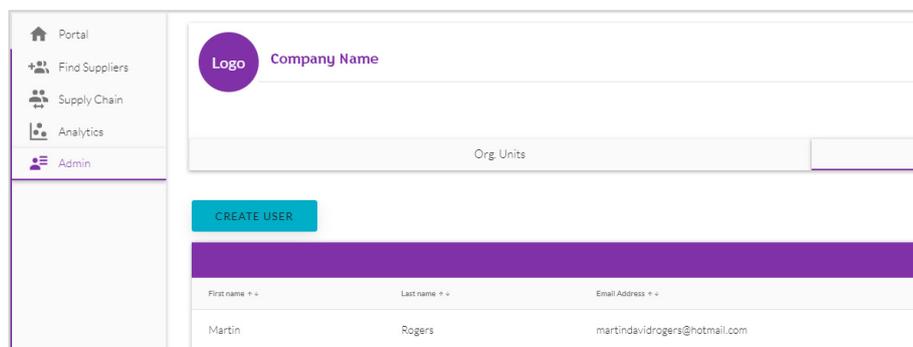
| Function | Buyer User | Organisational Administrator |
|---|------------|------------------------------|
| View our new powerful analytics engine | ✓ | ✓ |
| Find and search suppliers | ✓ | ✓ |
| Create and manage segments and projects | ✓ | ✓ |
| Create and deactivate users | | ✓ |
| Managing the user permissions | | ✓ |
| Creating business units and divisions | | ✓ |

Creating a new user

To create a new user for your organisation, please follow the below steps.

Please note, only Operational Administrators will be able to create new users within your account.

1. Go to the **Admin** option on the left-hand navigation. If you do not have this, please contact your Organisational Administrator.
2. Go to the **User** tab, this can be found on the right-hand side.
3. Select the **Create User** option at the top of the page. See below:



4. Select the first name, last name, e-mail address, the unit that user will be associated with and the level of functionality.

← Back to Organisation: Balfour Beatty

Create user

First Name

Surname

Email address

Organisation Unit

Assign to user groups:
This will assign what level of access users will have.

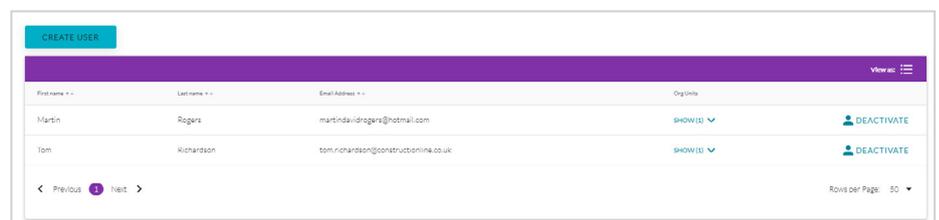
Buyer Functionality

Organisation Administrator

5. Choose their level of access:
 - Select **Buyer Functionality** for day-to-day users
 - Select both **Buyer Functionality** and **Organisational Administrator** for administrators.
6. When finished, select **Create**.
7. The user will then be sent an email asking them to create their password.

Deactivating a user

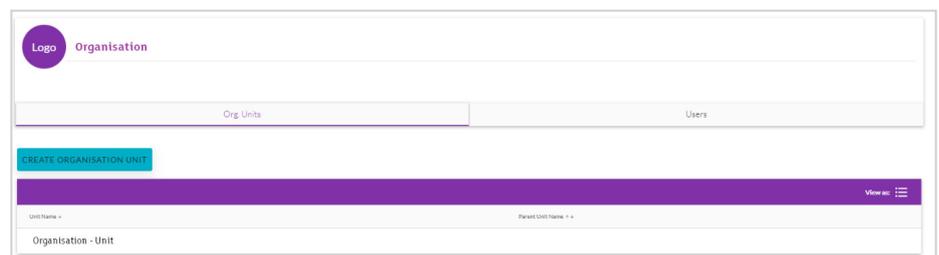
1. Go to the admin option on the left-hand navigation. If you do not have this, please contact your administrator.
2. Go to the **User** tab (right-hand side).
3. Find the user that needs to have their account deactivated.
4. Select **Deactivate** to the right-hand side.



Managing user access to divisions within your organisation

In order to allocate a user to a division or business unit within your organisation, you will need to access the division within the admin area.

1. Go to the admin option on the left-hand navigation. If you do not have this, please contact your administrator.
2. The tab **Org. Units** displays the divisions within the organisation. Select the one for which you want to manage access. This may be just one unit at this stage.



3. Go to the **Users** tab.



4. Select **Manage users**.



Please note: For users that want to change their access from one division to another, you need to make sure that you give yourself access to the division that you need to access first, you should then remove your access to the division that you no longer need to access. You should only have access to the one division now. Log out and log back in again, go to "Supply Chain" to make sure that you are now in the correct division.

5. Tick or untick the users who should, or should not, have access to the business unit.

Manage which users are in: Organisation - Unit

Show: All users in the organisation

| <input type="checkbox"/> | Firstname | Surname | Email Address |
|-------------------------------------|-----------|-----------------------|---------------------------------------|
| <input checked="" type="checkbox"/> | Tom | Richardson | tom.richardson@constructionline.co.uk |
| <input checked="" type="checkbox"/> | Martin | Rogers - Testing Acct | martindavidrogers@hotmail.com |

CANCEL CONFIRM

Managing Permissions

In order to allocate/ reallocate user permissions, you will need to access the division within the admin area.

1. Go to the admin option on the left-hand navigation. If you do not have this, please contact your administrator.
2. **Org. Units** displays the divisions within the organisation. Select the unit (there may just be one).

Logo Organisation

Org. Units Users

CREATE ORGANISATION UNIT

Unit Name: Organisation - Unit Parent Unit Name: View all

3. Select **User Groups**.

Org. Units Users User Groups

4. Select **Manage Users** against the permission that you want to manage.

User groups

Allocating users to groups will assign what system permissions they will have.

| | | |
|----------------------------|---------|--------------|
| Buyer | 2 users | MANAGE USERS |
| Organisation Administrator | 1 users | MANAGE USERS |

5. Select or unselect the users that should have access to that permission.

Manage users assigned to the user Group: Buyer

| <input type="checkbox"/> | Firstname | Surname | Email address |
|-------------------------------------|-----------|-----------------------|---------------------------------------|
| <input checked="" type="checkbox"/> | Tom | Richardson | tom.richardson@constructionline.co.uk |
| <input checked="" type="checkbox"/> | Martin | Rogers - Testing Acct | martindavidrogers@hotmail.com |

CANCEL CONFIRM

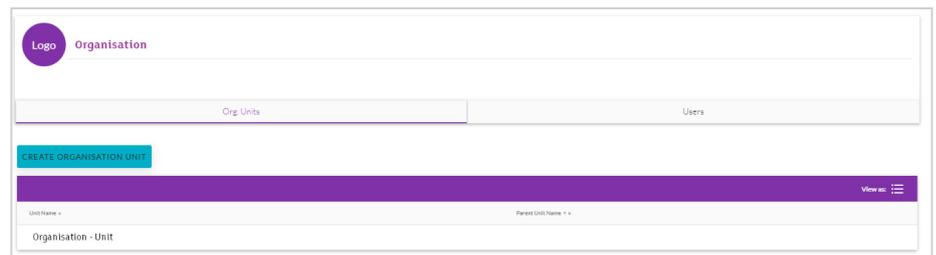
Parent organisations allow a hierarchy to be set up within an organisation. This means that the organisational tiers and sub-tiers can be configured.

Creating Business Units/ Divisions

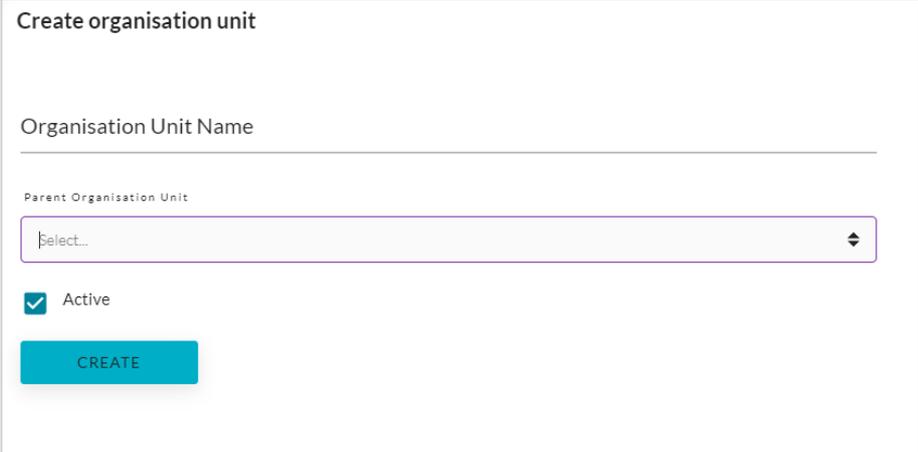
Within the new buyer portal, multiple organisation units can be set up. As a default, each organisation will be set up with one business unit (defaulted to “Organisation Name” – Unit).

When setting up a unit, you will need to understand what the structure will look like. Are there parent accounts? What is the hierarchy?

1. Go to the admin option on the left-hand navigation. If you do not have this, please contact your administrator.
2. The **Org. Units** tab displays the divisions within the organisation. Make sure you select the level of hierarchy that matches the level of the parent account, if there is no parent account simply select **Create Organisation**.



3. Enter organisation name and the parent organisation unit if one and select **Create**. Make sure that the unit is active.

A screenshot of a form titled 'Create organisation unit'. The form contains the following elements: a text input field for 'Organisation Unit Name'; a dropdown menu for 'Parent Organisation Unit' with the text 'Select...' and a downward arrow; a checkbox labeled 'Active' which is checked; and a teal button labeled 'CREATE'.