PCard Receipt Capture User Administration

PCard Receipt Capture – User Administration

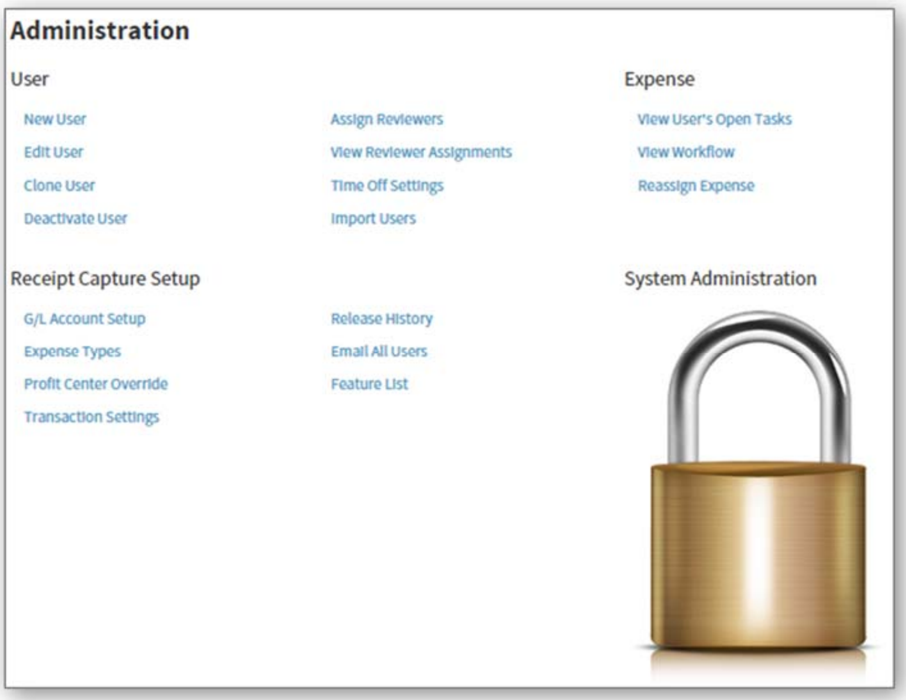
A Quick Guide for Application Administrators

Introduction

This guide is for administrators responsible for maintaining user access rights to the PCard Receipt Capture application.

Admin Options

Select **Administration** from the top of the application window to display the menu.



New User: Add a new person to application. The process requires you to define their role within the application and to assign reviewers to them.

Edit Existing User: Change an existing user's profile, roles, and/or reviewers.

Clone User: Streamlines the new user process by copying an existing user's roles and reviewer assignment into the new user's setup.

Deactivate User: Remove access rights from an existing user

Assign Reviewers: Assign or reassign reviewers and verifiers to an existing user.

View Reviewer Assignments: View reviewer and verifier assignments across the organization

Time Off Management: Use this function when you, as application administrator, will be taking time off and need to assign the admin functions to another qualified user.

Import Users: Use this function to upload a spreadsheet of new users.

PCard Receipt Capture Application User Roles

The roles defined the application are:

Cardholder: Department-level user that has a ProCard.

First Level Reviewer (Reviewer 1): Department-level user responsible for completing the Expense form to be moved forward in the approval process.

Second Level Reviewer (Reviewer 2): Department-Level user to add another layer of review if needed. Typically tracks down transactions soon to be swept and the users responsible for those transactions.

Verifier: Department-level user with authorization to spend/commit data in SAP and ultimately completing the Pro Card approval process.

Application Administrator: Department-level administrator responsible for the configuration and use of the app for their department users.

A person can have many roles. For example, a user could be a Cardholder and a First Level Reviewer.

When a new user is defined to the system, roles are assigned to them. An existing user's roles can be revised and removed as necessary.

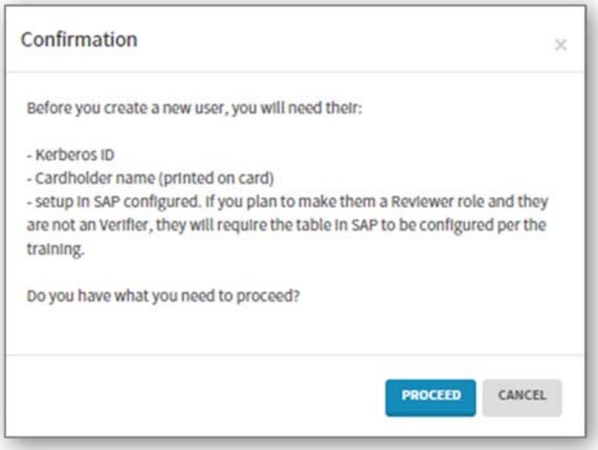
New User

Perform the following steps to setup a new user in the system. To be set up, a new user must

- Have a Kerberos ID, MIT email address
- Have a Cardholder Name established for them in SAP.

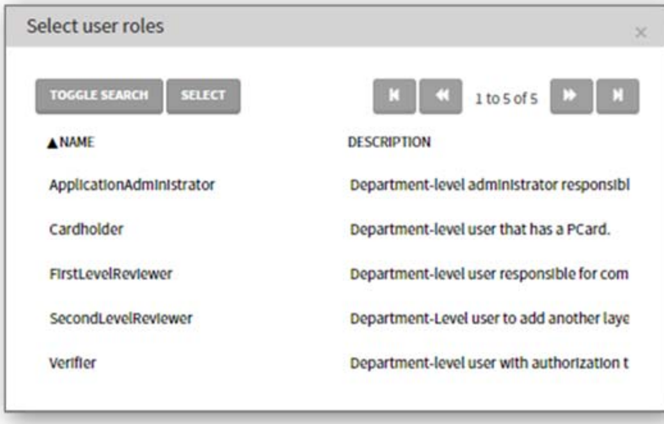
Get Started!

1. Click **New User** from the Administration menu.



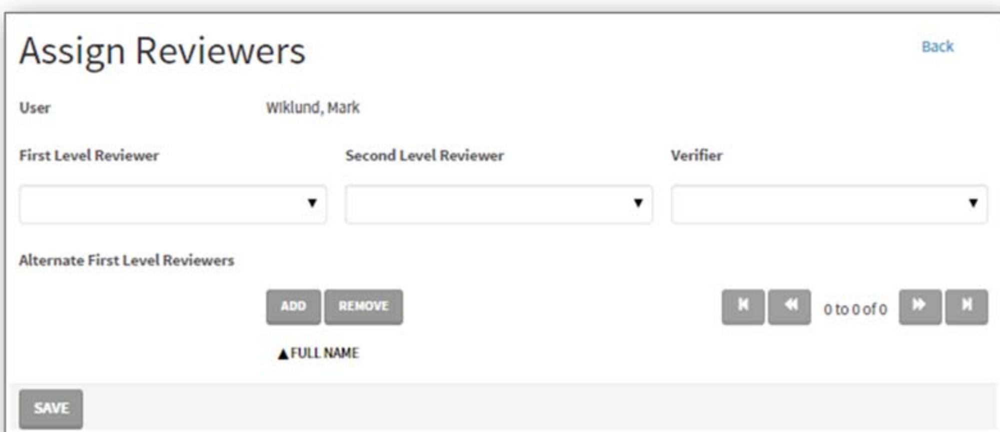
2. Click **Proceed**.

3. Enter the new user's **First Name**, **Last Name**, **Keberos ID**, and **E-mail address**.
4. Be sure to enter the user's **Cardholder Name** exactly as it exists in SAP.
5. Click the User Role's **Add** button.



The dialog lists the roles that can be selected. The Toggle Search button lets you filter this list.

6. Click on each role the user will fill. You can select one or many.
7. Click **Select** to apply your selection to the new user. You'll return to the New Account widow. The selected role(s) will display. If you made a mistake, you can Remove a role.
8. If the new user is **Responsible for JV**, click the selection box.
9. By default, the new user is deemed an **Active** user of the PCard Capture application and (once you establish their account) will be able to access the system. Blank means the new user will not be allowed to access or use the system.
10. Click **Next**. The system now displays the **Assign Reviewers** window.



11. Select **First Level Reviewer**, **Second Level Reviewer**, and **Verifier** from the drop-downs.
12. To identify Alternate First Level Reviewers, click the **Add** button.

13. Click on the alternate reviewer's name and then click **Select**. (If you select the wrong person, you can Remove them). You now return to the Assign Reviewers window.
14. Click **Save** to save your work and add the new user to system. The person can now access and use the system per the roles you accorded them.

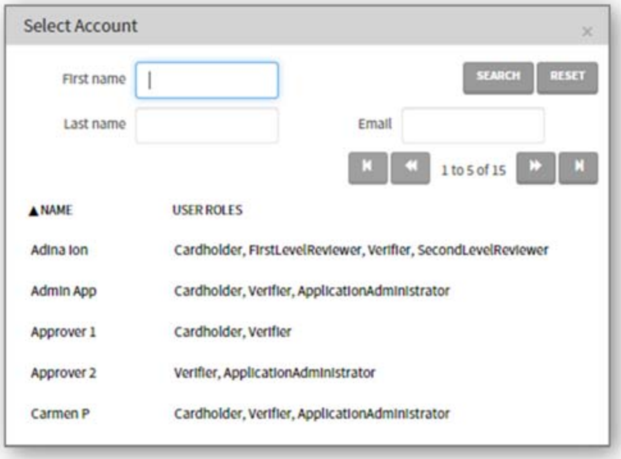
Edit Existing User

You can change an existing users:

- First Name and Last Name
- User Name (Kerberos) and Email address
- Responsible for JV indicator
- Blocked Indicator – blank means they can access the system, selected means that while they are define to the system, they are blocked from accessing it.
- Active Indicator – Selected means the person is active user of the system, blanks means they cannot do access the system.
- User Roles assigned to the person. If you remove a user's roles, the system will move their expenses back to the previous person in the workflow history.
- Reviewers and Verifier assigned to them
- Password that allows them to sign into the system. Most commonly, you will do this to reset a forgotten password.

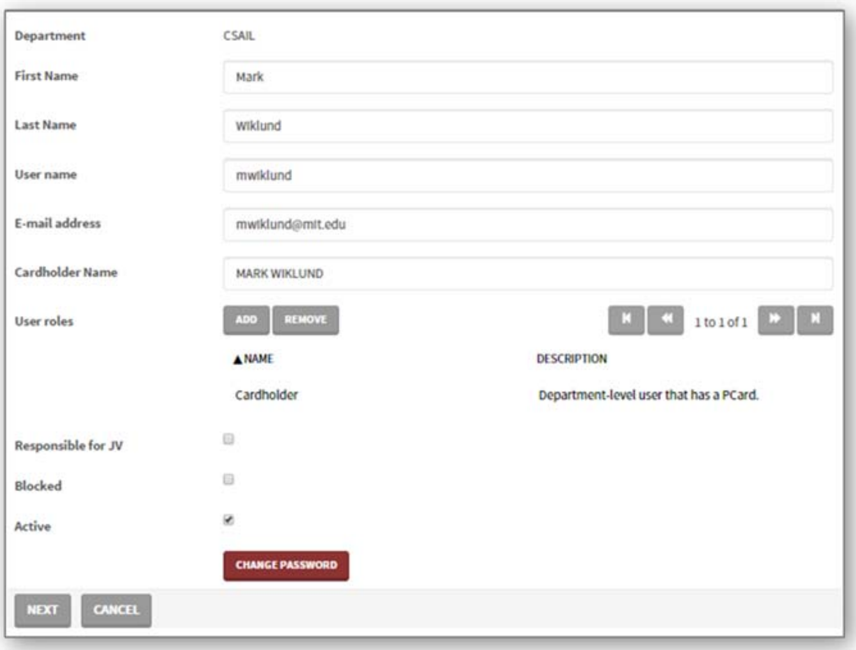
Here's how:

1. Select **Edit User** from the Administration menu.



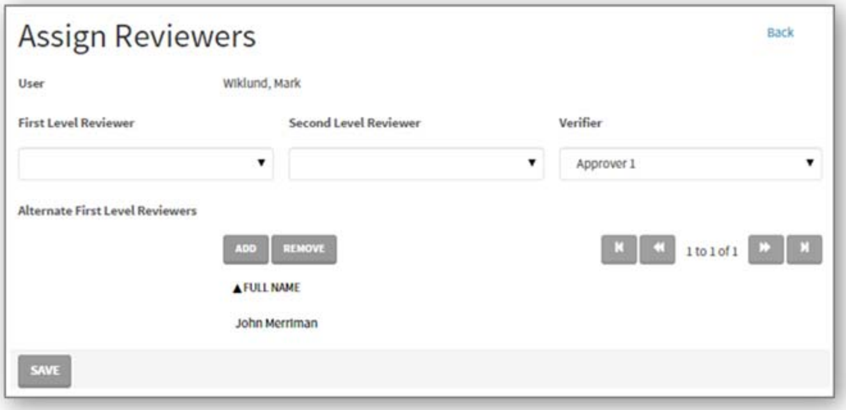
2. Search for the user. You can use the arrow buttons to move through the list. You can also enter the user's first or last name and click **Search** to find the person.

3. Click on the user name – this brings you to the profile window:



4. Make your changes (if there are any to be made here).

5. Click **Next** to continue to the Assign Reviewers screen.

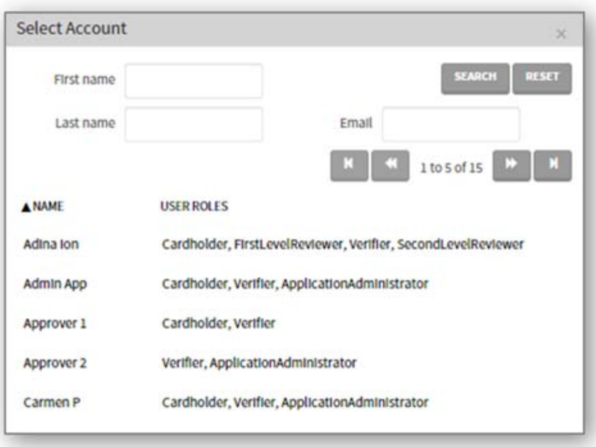


6. Make your changes (if there are any to be made here).
7. Click **Save** to save your work and return to the Administration menu.

Clone User

Perform these steps to create a new user based on an existing user's profile. Cloning only copies the current person's user roles and assigned reviewers. It does not copy their personal information.

1. Select **Close User** from the Administration menu.



2. Search for the user to be cloned from. You can use the arrow buttons to move through the list. You can also enter the user's first or last name and click **Search** to find the person.
3. Clicking on a person displays the New Account window. Note that the User Roles will have been copied.

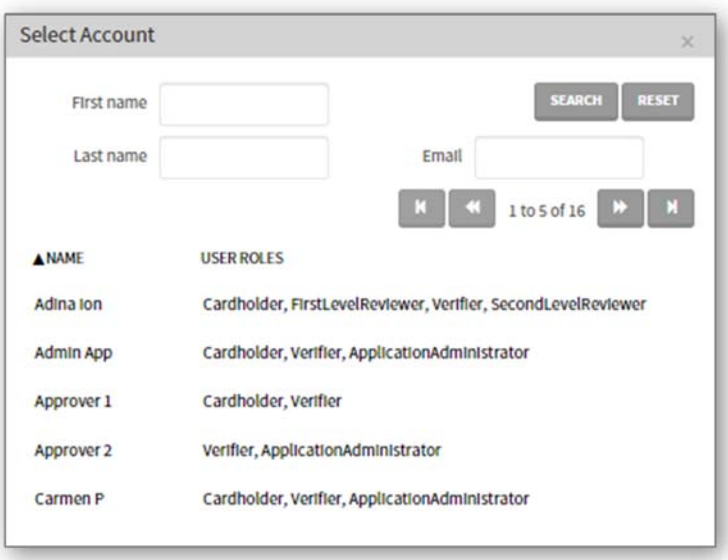
4. Enter the new user's **First Name**, **Last Name**, **Keberos ID**, and **E-mail address**.
5. Be sure to enter the user's **Cardholder Name** exactly as it exists in SAP.
6. Review the **User Roles** to be sure these are correct. Revised them as necessary.
7. If the new user is **Responsible for JV**, click the selection box
8. By default, the new user is deemed an **Active** cardholder. Blank means they do not yet or are no longer an active cardholder.
9. Click **Next** to display the Assign Reviewers window.
10. Review the assignments to be sure they are correct. Revise them as necessary.
11. Click **Save** to save your work. The new user will be added to the system. You are returned to the Administration menu.

Deactivate User

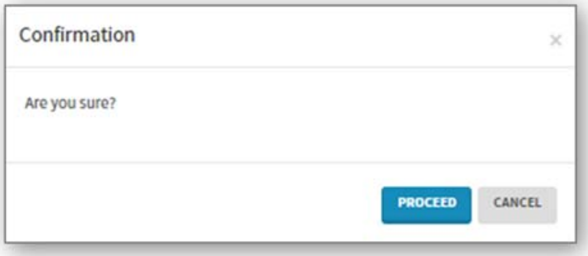
Deactivate a user to remove their access rights to the system. This does not delete the user.

During the deactivation process, the system will require you to remove the person's roles.

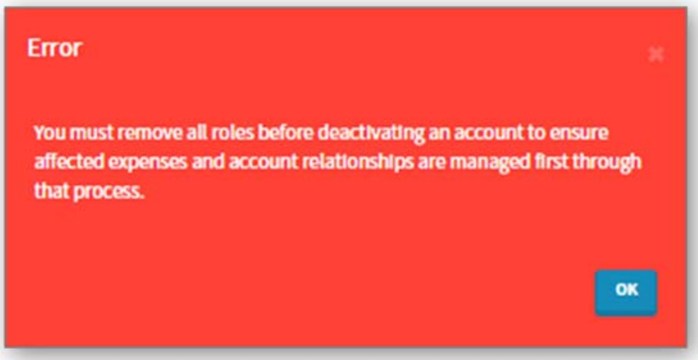
1. Click **Deactivate User** from the Administration menu.



2. Search for the user to be deactivated. You can use the arrow buttons to move through the list. You can also enter the user's first or last name and click **Search** to find the person.
3. Click on the name of the person you wish to deactivate.

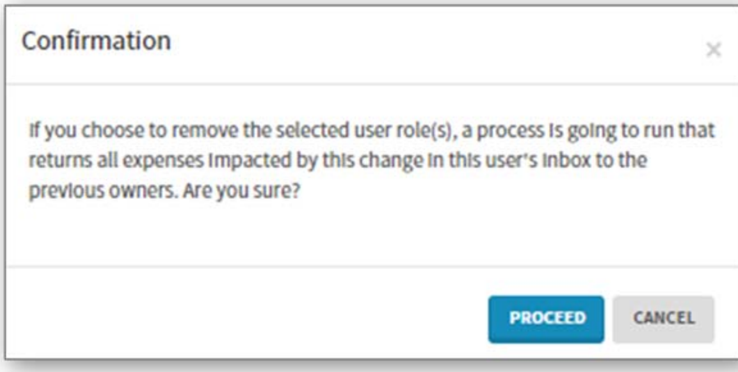


4. Click **Proceed** to deactivate the person. The following warning displays:

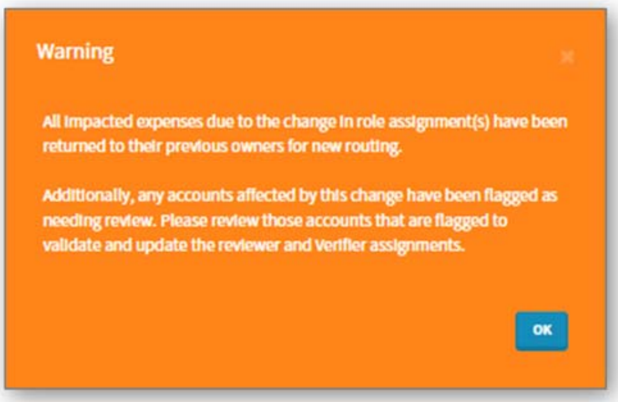


5. Click OK to acknowledge the message, and the user's profile and their roles display:

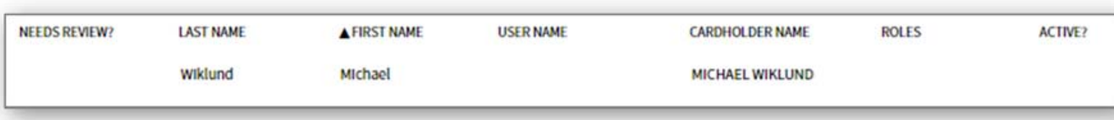
6. . Select the roles and click **Remove**. The following message displays:



7. Click **Proceed** to continue. The following message displays:



8. Click OK to clear the message. The system now displays the Accounts list. Within this listm you will see the deactivated user.



NEEDS REVIEW?	LAST NAME	▲FIRST NAME	USER NAME	CARDHOLDER NAME	ROLES	ACTIVE?
	Wiklund	Michael		MICHAEL WIKLUND		

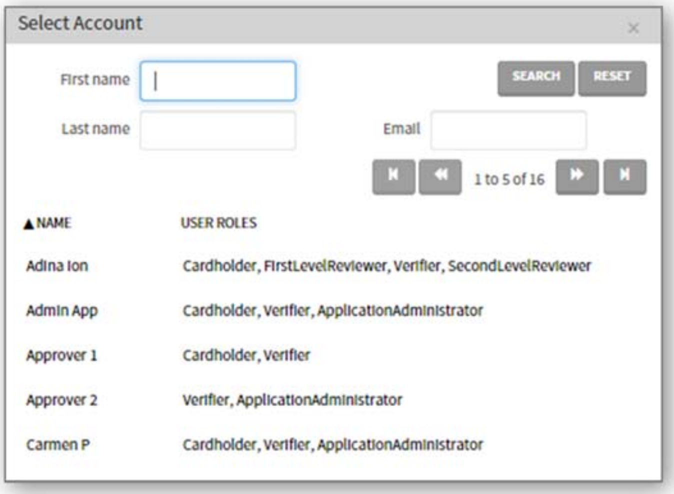
Note that the person no longer has a user name or roles and the Active column is blank.

To reactivate a person, use the Edit User function to assign roles, identify reviewers, and provide them with an active status.

Assign Reviewers

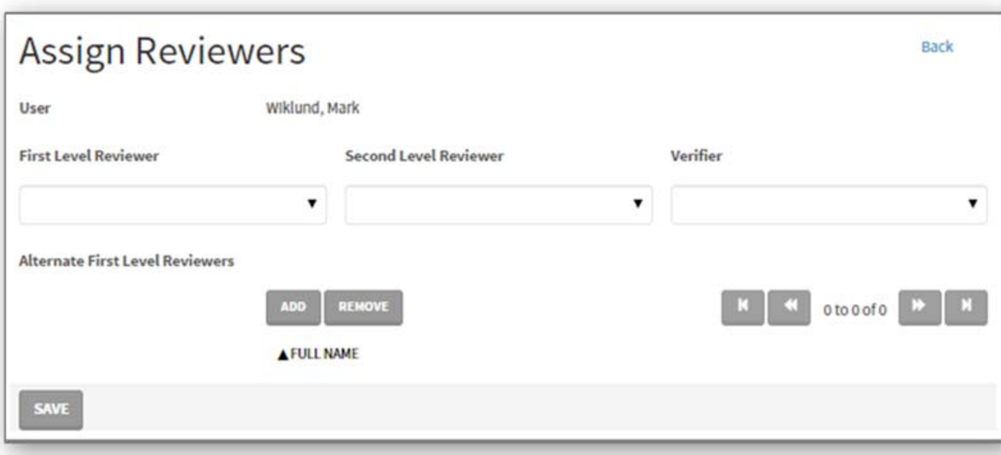
Use this process to update the reviewers and verifiers assigned to an existing user.

1. Select **Assign Reviewers** from the Administration men. The Select Account dialog displays:



2. Search for the user. You can use the arrow buttons to move through the list. You can also enter the user's first or last name and click **Search** to find the person.

3. Click on the user name – this brings you to the Assign Reviewers window.



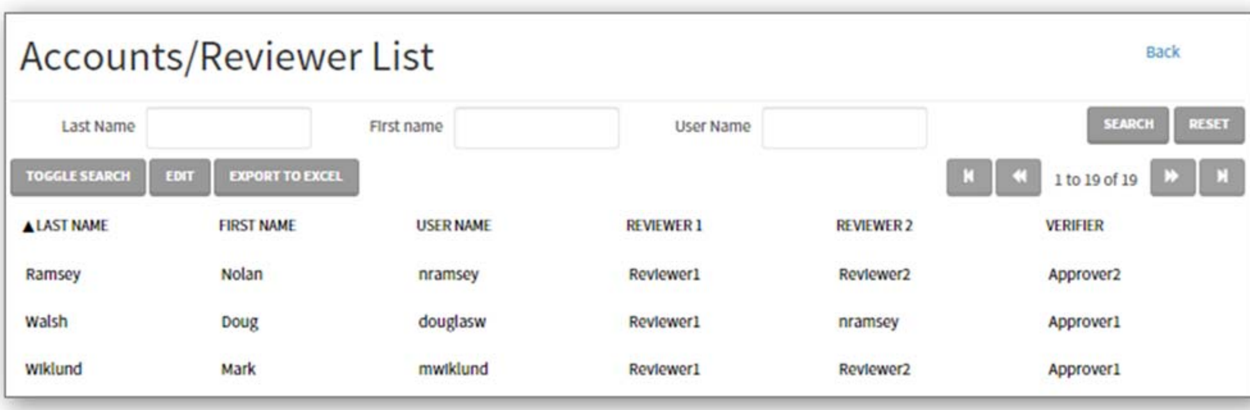
4. Select **First Level Reviewer**, **Second Level Reviewer**, and **Verifier** from the drop-downs.

5. To identify Alternate First Level Reviewers, click the **Add** button.

6. Click on the alternate reviewer's name and then click **Select**. (If you select the wrong person, you can Remove them). You now return to the Assign Reviewers window.
7. Click **Save** to save your work and add the new user to system. The person can now access and use the system per the roles you accorded them.

View Reviewer Assignments

From the Administration menu, select **Reviewer Assignments** to display a complete list of reviewer assignments in your organization.



Toggle Search: Displays and hides the search fields.

Edit: To change a user's reviewer and verifier assignments, select the user and then click the **Edit** button.

Export to Excel: Click this option to download the complete list into an Excel file. When the download is ready, a button displays at the bottom of the application window. Click this button to open the spreadsheet.