



Procurement
Government Services

User Administrator eLearning Workbook

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INTRODUCTION

Buying organisations that wish to use **smartbuy® TRADE** are asked to nominate a representative from their organisation to be the **smartbuy® Buying Organisation Administrator**.

As the Administrator, you are the key link to **smartbuy®** for your organisation. You have the responsibility to understand the functionality of **smartbuy®**, create additional users for your organisation and ensure new users are aware of their responsibilities.

Following registration of your buying organisation in **smartbuy®**, you are required to complete a short training session to learn the core functionality of **smartbuy®**.

You may choose one of two options for this training:

1. **Attendance at a one day (7 hour) instructor led PC-based training course (covers search and browse, purchasing and administration of your smartbuy® account)**

OR

2. **Completion of four self-paced eLearning Workbooks (approx. 1-2 hours per workbook)**

If you choose the second option, you should already have worked through the Getting Started Search and Browse Guide.

This workbook is the second self paced learning workbook. You will follow workbook instructions to complete online exercises in the **smartbuy® Training Environment**.

Once you have completed this workbook you will be able to:

- Logon and navigate in **smartbuy®**
- Manage your organisation's profile
- Create and maintain users

Workbook Completion

When you have completed this workbook, email the NSW Procurement Learning and Change Management (L&CM) Team at ebs_training@services.nsw.gov.au to inform them of your completion. The L&CM Team will check the exercises you have completed in the training environment, and then contact you to enable you to proceed to the next step.



What You Need

This workbook.

Access to the **smartbuy**® website: www.smartbuy.nsw.gov.au

Access to the **smartbuy**® online training environment details (provided to you by the NSW Procurement Learning and Change Management Team).

Time over the next week to complete the workbook, including the skill builder exercises in the **smartbuy**® training environment.

Note. You have been granted access to the training environment for a period of up to one fortnight.

For additional training time, contact - ebs_training@services.nsw.gov.au

Workbook Conventions

Every task in this workbook is identified using the following symbols:



Logon to **smartbuy**®



Tip



Overview



Skill builder –
exercises to be
completed in the
training environment



Note



Send/Email



MODULE 1: LOGGING ON AND NAVIGATING IN SMARTBUY®



Overview

In this module you will become familiar with logging on and navigating in **smartbuy®**.

Learning Outcomes

By the end of this module you will be able to:

Logon to **smartbuy®**

Locating the Navigation Bar

Prerequisites

Before commencing this module you should be able to use your Internet web browser.

You should also have worked through the Getting Started Search and Browse Guide.

1.1 Logging on to the smartbuy® training environment

Steps...

1. From your Internet Browser, type in the URL of **smartbuy®** training environment. The URL is <https://training2.smartbuy.nsw.gov.au/>

Fig. 1 Training Environment Logon Screen

2. Enter your **<name>** in the 'Name' field
Enter your **<password>** in the 'Password' field
Enter your **<organisation>** in the 'Organisation' field
Click **LOGON**

Logon fields are case sensitive

Contact eps_training@services.nsw.gov.au if you have not been given your training logon details.

You may need to reset passwords and set two authentication questions and answers.





1.2 Navigation Bar

The navigation bar at the left hand side of the screen remains in constant view while a user is logged on to **smartbuy®** (see Fig. 2). The menu available on the navigation bar varies depending on the access rights of the user who is logged on.

Navigation Bar

The screenshot shows the smartbuy® interface. On the left, a navigation bar is highlighted with a red dashed border. The main content area displays a welcome message and a bulletin board with two messages. The first message is dated 31-07-2006 and is titled 'smartbuy® has gone GREEN'. The second message is also dated 31-07-2006 and is titled 'smartbuy® - More than Stationery'. A 'View all Messages' button is located at the bottom right of the bulletin board section.

Fig. 2 smartbuy® Buying Organisation Home Screen



The user logon you are viewing has been given The Buying Organisation Administrator access role.



MODULE 2: BUYERSITE USER ADMINISTRATION



Overview

In this module you will learn to:

- Manage your organisation's profile information; and
- Create user accounts.

Learning Outcomes

By the end of this module you will be able to:

- Modify your Buyer Organisation profile
- Create a new user account with appropriate access rights
- Modify user accounts and access rights.

Prerequisites

Before commencing this module you should be able to use your Internet web browser.

You should also have worked through the Getting Started Search and Browse Guide

2.1 Organisation Profile Maintenance

2.1.1 Modifying Organisation Profile



The Organisation Profile is entered in the first instance by NSW Procurement. The following procedure enables you to modify your Organisation's Profile details.

1. Logon to the **smartbuy®** training environment.



Steps...



Fig. 5 Organisation Home Screen

2. Select Organisation on the Navigation Bar
3. Select Profile on the Navigation Bar



THE **GENERAL** TAB SCREEN WILL DISPLAY BY DEFAULT.



Fig 6 Profile – General Screen

4. Add/modify the <data> in the appropriate field/s.



The 'DUNS' field may be left empty if your organisation does not have a D&B D-U-N-S number. Some suppliers require you to have a D-U-N-S number to trade electronically with them through **smartbuy®**.

5. Click on **APPLY**

6. Select Contact Info tab

7. Add/modify the <data> in the appropriate field/s then Click **APPLY**

Fig 7 Profile – Contact Info screen



2.2 User Administration



As the Buying Organisation Administrator, you have the authority to create the **smartbuy®** user accounts required by your organisation. The table below shows some of the user types (access roles) that you could allocate to your users.

Access Role	Description
Agency Guest Account	This role enables users to search & browse catalogues with products
User Administrator	This role may create, delete, activate and de-activate user accounts.
Buying Organisation Administrator	This role has aggregated permissions of all other BuyerSite roles except rights to handle purchase orders.

Table 2: Access Role Descriptions

One user may have more than one Access Role

More than one user may have the same Access Role

The User Administrator role gives authority to the person with that role to create and modify user accounts.



2.2.1 Create a User Account



Steps...

1. Logon to the **smartbuy®** training environment with your allotted login details.

Fig. 8 smartbuy® Buying Organisation Home Screen

2. Select Organisation on the Navigation Bar



3. Select Users on the Navigation Bar

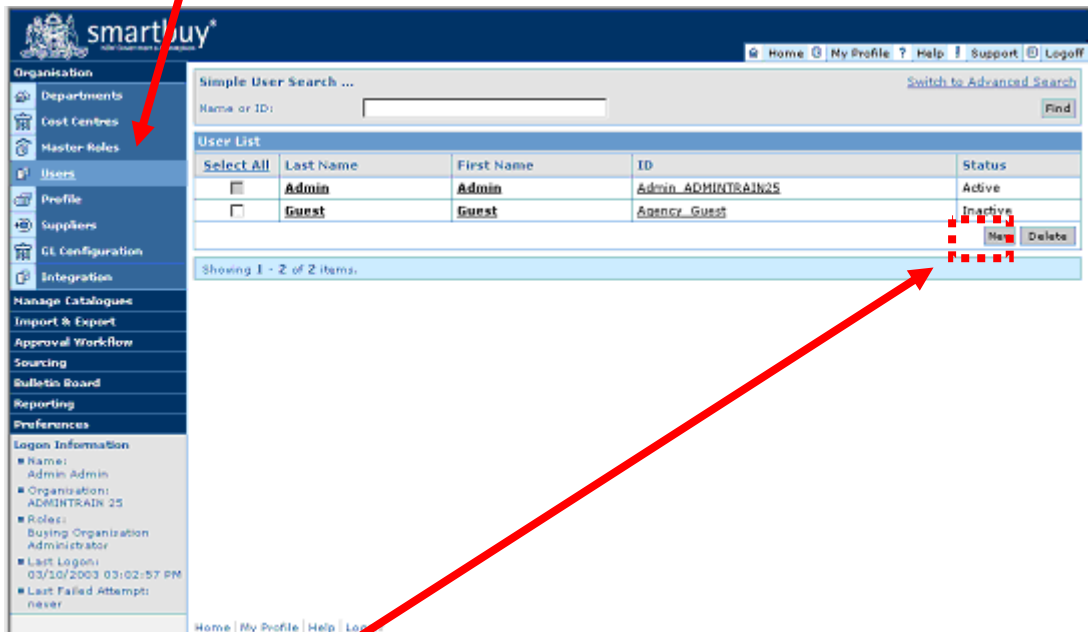


Fig. 9 Simple User Search Screen

4. Click on **NEW**



THE **GENERAL** TAB WILL DISPLAY BY DEFAULT. SEE FIG 10 FOR SCREEN DETAILS.

5. Enter <data> in the appropriate fields

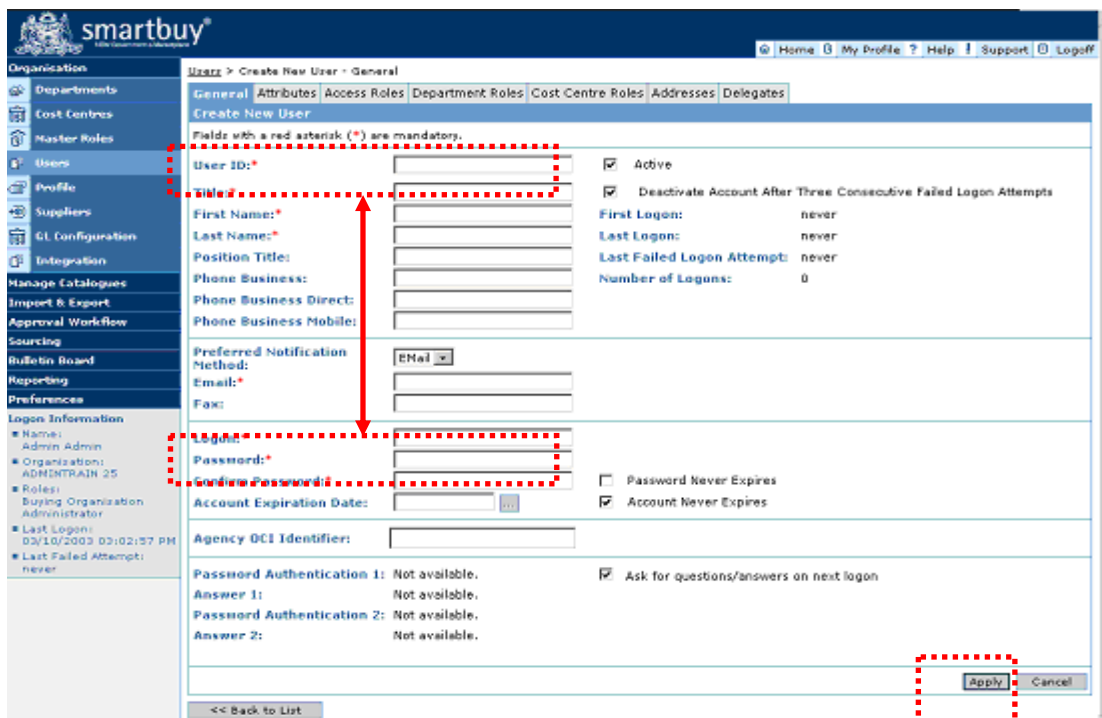


Fig. 10 Create New User Screen



Red asterisk fields are mandatory

'User ID' identifies the user in the system (eg, jonesk for Karen Jones)

'Login' is the persons login (eg. jonesk for Karen Jones)

Ensure **ACTIVE** box is checked



The 'User ID' and 'Login' do not have to be the same. It is recommended that for ease of searching and maintaining users that the User Id and Login are the same eg jonesk

Use the conventions from your organisation for normal computer logon eg (lastname+firstinitial eg jonesk or firstname+lastinitial eg karenj)



6. Click on **APPLY**

A WARNING MESSAGE DISPLAYS. IF YOU DO NOT ALLOCATE AN ACCESS ROLE TO A USER, THEY WILL NOT BE ABLE TO LOGIN TO SMARTBUY®. ACCESS ROLES DEFINES WHAT SCREENS THE USER WILL BE ABLE TO SEE/ACCESS.



Fig 11 Warning Pop Up

7. Select the **Access Roles** tab

The Agency Guest Account role – gives the user access to search & browse all contracts & catalogues. Access Roles are explained in detail in the next eLearning Manual - Buyer Administrator – Advanced.



Fig 12 Access Roles screen

8. Check (✓) the **AGENCY GUEST ACCOUNT** for this user to search & browse contracts and catalogues.

9. Click on **APPLY**

10. Click **BACK TO LIST** to return to User List Screen



11. Logout of this session
12. Login as the new user you have created



The 'Organisation' field entry is the same for all users in your organisation i.e. the same as your 'Organisation' field entry (eg. ADMINTRAIN91).

2.2.2 Modify a User Account (eg change password)



Steps...

1. Logon to the **smartbuy**® training environment with your allotted login details.
2. Select Organisation on the Navigation bar
3. Select Users on the Navigation Bar
4. Select the required user from the **User List**

Select All	Last Name	First Name	ID	Status
<input type="checkbox"/>	Admin	Admin	Admin_ADMINTRAIN25	Active
<input type="checkbox"/>	Guest	Guest	Agency_Guest	Inactive
<input type="checkbox"/>	TEST	TEST	TEST1	Active

Fig. 13 User List Screen

5. Select General tab and change password
6. Check (✓) the 'Active' box is selected
7. Click on APPLY



If users have forgotten their password then the Buyer Organisation Administrator or User Administrator are the only ones who can change a password. If the Buying Organisation Administrator forgets their password they must contact the NSW Procurement Client Support Centre to get this reset.



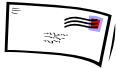
If the 'Active' box is not selected, then the user will not be able to log on.



COMPLETION

Congratulations you have now completed the User Administrator eLearning Workbook.

Once you have completed this workbook and the skill builders in the training environment, you need to advise the NSW Procurement Learning and Change Management Team you have done so.



The address to email advice of your completion is:

ebs_training@services.nsw.gov.au

The L&CM Team will check the exercises you have completed in the training environment, and then contact you to enable you to proceed to the next step.

Once you have been given **User Administrator** access in the production environment, you will need to create users from your organisation in your **smartbuy®** account.

Don't forget to give your users their login details!

YOUR COMMENTS

Your comments regarding the content, structure and presentation of this elearning experience would be appreciated. Please direct your comments to the NSW Procurement Learning and Change Management Team via email to ebs_training@services.nsw.gov.au