Contents

Users

The **User** section allows the vendor to review the current users for the account. There are two pages in the User Section- the Account Users page, and the My Profile Page.

Account Users Page

The **Account Users** page allows the user to view all users for the account. *Only users with an access level of "Account Administrator" can view this page*. If you are not an Account Administrator, skip to the My Profile section of this guide. On this page, the Account Administrator may add new users, or modify or delete existing users. The following steps outline how to navigate to the Account Users page

How Do I Access the Account Users Page?

The **Account Users** page allows the user to view all users for the account.

Note: *Only users with an access level of "Account Administrator" can view this page*. If you are not an Account Administrator, skip to the My Profile section of this guide.

Here, the Account Administrator may add new users, or modify or delete existing users. The following steps outline how to navigate to the Account Users page:

Step 1.   Log into VSS. Under the Account Information tab, click the **User** sub-tab.

Result: The Account Users page is opened.

Why Can't I View the Account Users Page?

Only users with an access level of "Account Administrator" can view this page. If your account level is "Full Access" or "Display Only", clicking the Users tab will take you directly to the My Profile page. If you are not an Account Administrator, skip to the My Profile section of this guide.

What Information Can Be Viewed on the Account Users Page?

The table below describes each of the fields on the **Account Users** page. This page is reached when an Account Administrator clicks on the **Users** tab.

Field Label	Source
User ID	The ID the user uses to log into VSS.
First Name	The first name entered for the user.
Last Name	The last name entered for the user.
Access Level	The account level chosen for the user during creation. The Primary Account Administrator (initially the first person to activate the vendor account) will default to "Primary Account Administrator". See the question "What are the Different Access Levels?" for further description of each access level.
Account Status	Specifies if the user account is activated in VSS.

What are the Different Access Levels?

There are three access levels a user can be assigned:

- **Account Administrator** – User can maintain all account information including user information.
  - One user is defined as the 'primary' account administrator for contact purposes.
  - The first user to register an account is assigned as the primary account administrator.
  - The primary account administrator can assign another individual to be the primary account administrator.
- **Full Access** – User can maintain all account information except for user information.
- **Display Only** – User can view account information but cannot update the information. The user can, however, maintain their user profile information.

What Is My Access Level?

You can determine your access level under the Access Level section of the My Profile page. See the My Profile section for instructions on how to navigate to this page.

Who is My Primary Account Administrator?

The Primary Account Administrator is listed on the **Account Summary** page. You can reach this page at any time by clicking the **Home** key in the top right hand corner (next to the Help link). The first section on this page is titled **Primary Account Administrator**, and includes the name and contact information of the Primary Account Administrator for the vendor account.

How Do I View or Modify User Information as an Account Administrator?

The Account Administrator can View or Modify user information such as contact information, email notification settings, access levels, and security questions from **View/Modify User Information** page. In order to view or modify user information as an Account Administrator, follow the steps below.

Step 1.   On the Account User page, click **View/Modify** for the desired user.

                Result: The **View/Modify User Information** Page is displayed.

Step 2.   Edit any information that needs to be changed and click **Save**.

                Result: The changes are saved and the user is brought back to the Account User Page.

What Information Can Be Changed on the View/Modify User Information Page?

The View/Modify User Information page allows the account administrator to edit the First Name, Last Name, email address, phone number, extension, fax number, and security question for the selected user. The Account Administrator can also edit the email notifications, make a user the Primary Account Administrator, or lock the account.

Can I Change the User's Password on this Page?

No, to change the user's password, you will need to go to the Password Maintenance page. Jump to the Password Maintenance section of the user guide for more information on changing a user's password.

Can I Change the User's Access Levels on this Page?

No, to change the user's access levels, you will need to go to the Access Levels page. Jump to the Access Levels section of the user guide for more information on how to change an Access Level.

How Do I Change a User's Password as an Account Administrator?

The Account Administrator can also change a user's password on the **Password Maintenance** page. To change a password as an Account Administrator, follow the steps below.

Step 1.   On the Account User page, click **View/Modify** for the desired user.

Result: The **View/Modify User Information** Page is displayed.

Step 2.   Click the **Change Password** link at the bottom of the page.

Result: The **Password Maintenance** page is displayed.

Step 3.   Enter and re-enter the new password, and click **Save**.

Result: The password is saved, and the user is returned to the View/Modify User Information page, with a message at the top of the page that the change was successful.

What Will the User Enter at Their Next Log-In?

When the user next logs into their account, they should enter the new password during log-in. For this reason, be sure to tell a user if you are changing their password.

What Can I Enter As the New Password?

Passwords should be between 8 and 16 characters in length and contain at least 1 numeric value. Passwords are case sensitive. An error will be received if you try to enter a password that was used recently.

How Do I Change a User's Access Level as an Account Administrator?

The Account Administrator can change the Access Level of users on the **Access Levels** page. To change an access level as an Account Administrator, follow the steps below:

Step 1.   On the Account User page, click **View/Modify** for the desired user.

Result: The **View/Modify User Information** Page is displayed.

Step 2.   Click the **Change Access Levels** link at the bottom of the page.

Result: The **Access Levels** page is displayed.

Step 3.   Select the levels for the user and click **Save**.

Result: The user is returned to the View/Modify User Information page, where the new Access Levels are displayed.

What Information Is Displayed on the Access Levels Page?

The table below describes each of the fields on the **Access Levels** page. See the above question for instructions on navigating to this page.

Field Label	Source
User ID	The ID the user uses to log into VSS.
First Name	The first name entered for the user.
Last Name	The last name entered for the user.

Field Label	Source
Primary Access Level	The Primary Account Administrator has the option of setting the user to Account Administrator, Full Access, or Display Only. A description of each is given in the question above.
Optional Access Level	This section allows the Primary Account Administrator to dictate if the user can perform certain actions. These actions include Creating Electronic Invoices and Creating Solicitation Responses. Checking the box next to any of these optional access levels will grant that user permission to perform these actions. **Note:** When "Account Administrator" is selected as the Primary Access Level, all three of the Optional Access Level boxes default to checked.

How Do I Add A New User?

The Account Administrator can create a new user through the **Account Users** page. To create a new user as an Account Administrator, follow the steps below.

Step 1.   On the Account Users page, click **Add**.

Result: The **Add Account Users** page is opened.

Step 2.   Enter the information for the user and click **Next**.

Result: The **Access Levels** page is opened.

Step 3.   Select the access levels for the user and click **Save**.

Result: The user is brought back to the Account Users page, where the new user is displayed.

What is the User ID?

The User ID is what the user will use as their User Name when logging into VSS.

Will the User Keep the Password I Enter?

The user will need this password to log into their account for the first time. Upon their first login, they will be prompted to change their password.

How Do I Delete A User as an Account Administrator?

The Account Administrator can delete a user from the **Account Users** page. To delete a user as an Account Administrator, follow the steps below.

Step 1.   On the Account Users page, click **Delete** next to the user whose account you wish to delete.

Result: A warning box is displayed which reads "Warning: You are about to delete a user. Select OK to continue or Cancel to go back to the Account Users page"

Step 2.   Click **OK.**

Result: The Account Users page refreshes and the deleted user no longer appears.

My Profile Page

All users will have a **My Profile** page. For the Account Administrator, this will appear as a link on the right hand side of the page under the **Users** tab. For all other users, this is the default page that will open after clicking the **Users** tab. Here, any user can view or modify their own profile information.

Note: If after clicking the **Users** tab, you see an Account Users page, you are an Account Administrator and should proceed to the "How Do I Access the My Profile Page as an Account Administrator?" section. If you are not an Account Administrator, clicking the **Users** tab will take you directly to the **My Profile** page.

How Do I Access the My Profile Page as an Account Administrator?

If your access level for VSS is "Account Administrator", follow the steps below to access the My Profile page. If unsure of your status, see "What is My Access Level?"

Step 1.   Log into VSS. Under the Account Information tab, click the **User** sub-tab.

   Result: The Account Users page is opened.

Step 2.   Click **My Profile** in the column on the left hand side of the page.

   Result: The **My Profile** page is displayed.

How Do I Access the My Profile Page as a Standard User?

If your access level for Vendor Self Service (VSS) is "Full Access" or "Display Only", follow the steps below to access the My Profile page.

Step 1.   Log into VSS. Under the Account Information tab, click the **User** sub-tab.

   Result: The **My Profile** page is opened.

What is My Access Level?

Once on the **My Profile** page, you can see your Access Level under the "Access Levels" section at the bottom of the page.

What are the Different Access Levels?

There are three access levels a user can be assigned:

- **Account Administrator** – User can maintain all account information including user information.
    - One user is defined as the 'primary' account administrator for contact purposes.
    - The first user to register an account is assigned as the primary account administrator.
- **Full Access** – User can maintain all account information except for user information.
- **Display Only** – User can view account information but cannot update the information. The user can, however, maintain their user profile information.

What Information Can I See on the My Profile Page?

The table below describes each of the fields on the **My Profile** page. This page is reached when a user clicks the **Users** tab, or when an Account Administrator clicks **My Profile**.

Section	Field Label	Source

Section	Field Label	Source
General Information	*User ID*	The ID the user uses to log into VSS.
	First Name	The first name entered for the user.
	Last Name	The last name entered for the user.
	Email	The email address entered for the user.
	Phone	The phone number entered for the user.
	Ext.	The extension entered for the user.
	Fax	The fax number entered for the user.
Security Hint	*Security Question*	The security question selected during vendor set-up.
	Security Answer	The encrypted answer for the security question.
Email Notifications	*Registration*	Dictates if the user will receive emails regarding registration.
	Account Maintenance	Dictates if the user will receive emails regarding account maintenance,
	Recent Financial Transactions	Dictates if the user will receive emails regarding recent financial transactions.
Access Levels	*Access Level*	The account level chosen for the user during creation. The Primary Account Administrator (the first person to activate the vendor account) will default to "Account Administrator". See below for further description of each access level. Only an account administrator can change this information.
	Optional Access Levels	If the user has been granted additional access, such as the ability to create invoices or solicitation responses, those access levels will be listed here. Only an account administrator can change this information.

How Can I Modify My Profile Information From My Account?

Non-Account Administrators can edit their own general information, password, or security question though the **My Profile** page. To modify your account information, follow the steps below.

Note: Other information, such as access levels and email notification settings, can only be changed by an Account Administrator.

Step 1.   On the My Profile page, click **Modify**.

Result: The editable version of the **My Profile** page is displayed. The General Information section (aside from the User ID) and the Password/Security Question section can be edited.

Step 2.   Change the necessary information and click **Save**.

Result: The information is saved.

Step 3.   Click the **My Profile** Link on the side of the page.

Result: The **My Profile** page is displayed again. The updated information has been saved.

Why is there a Password Box under the Security Question Section?

In order to change your security question on the **My Profile** page, you will need to enter your password before hitting **Save**.

Where Can I Change My Access Level or Email Notifications?

Only an Account Administrator can edit this information. If you need this information changed, please contact your Account Administrator.

Who is My Primary Account Administrator?

The Primary Account Administrator is listed on the **Account Summary** page. You can reach this page at any time by clicking the **Home** key in the top right hand corner (next to the Help link). The first section on this page is titled **Primary Account Administrator**, and includes the name and contact information of the Primary Account Administrator for the vendor account.

Can I Change My Password Directly on the My Profile Page?

No, you must click the **Change Password** link on the **My Profile** page to change your password. The password field that is displayed under the Security Question and Answer is where the user would need to enter their password to verify their identity when changing their Security Question or Answer. For more information on changing your password, see Password Maintenance section of this guide.

How Can I Change My Password Through My Account?

Non-Account Administrators can edit their password though the **My Profile** page. To change your password, follow the steps below.

Step 1.   On the editable My Profile Page, click **Change Password**.

Result: The Password Maintenance page is displayed.

Step 2.   Enter the current password, and then enter and re-enter the new password. Click **Save**.

Result: The page refreshes, and a message is displaying stating that the password change was successful.

Can I Change My Password Directly on the My Profile Page?

No, you must click the **Change Password** link on the **My Profile** page to change your password. The password field that is displayed under the Security Question and Answer is where the user would need to enter their password to verify their identity when changing their Security Question or Answer.

How Can I Reset My Password?

A user can reset their password by following the steps below.

Step 1.   On the main My Profile Page, click **Password**.

Result: A **Password Reset** page opens in a new window.

Step 2.   Enter your User ID and click **Next**.

Result: The next page of the Password reset is displayed.

Step 3.   Enter the Security Answer and click Email my password.

Result: A message is displayed stating that the new password has been emailed to the email address on record. Check the email address on your account for this email, which will contain a new temporary password.

Step 4.   Return to VSS and login with the password from the email.

Result: Upon login, the user is prompted to change their password.