bids&tenders™

HOW TO:

- ✓ ADD USERS
- ✓ CREATE GROUPS
- ✓ ADD USERS TO A GROUP

Mini Guide

Section 1 - Adding Users

You can add users to your Organization's account to assist with the end-to-end eProcurement process. Furthermore, once the users are added to the account, you are able to do the following:

- Create specific user groups such as; Admin, Evaluators, etc.
- Add users to existing groups
- Grant group specific permissions for system access

To add a user:

1. Log in to your organization's account, as you normally would.
2. Once you land on your organization's page, click on the 'Users' tab:
   - **PRO-TIP**: the 'Users' tab is found on the first page – do not click on the 'Bids' folder as this tab doesn't appear on subsequent pages. You can click on your domain (e.g., eSolutions) to get back to the landing page.
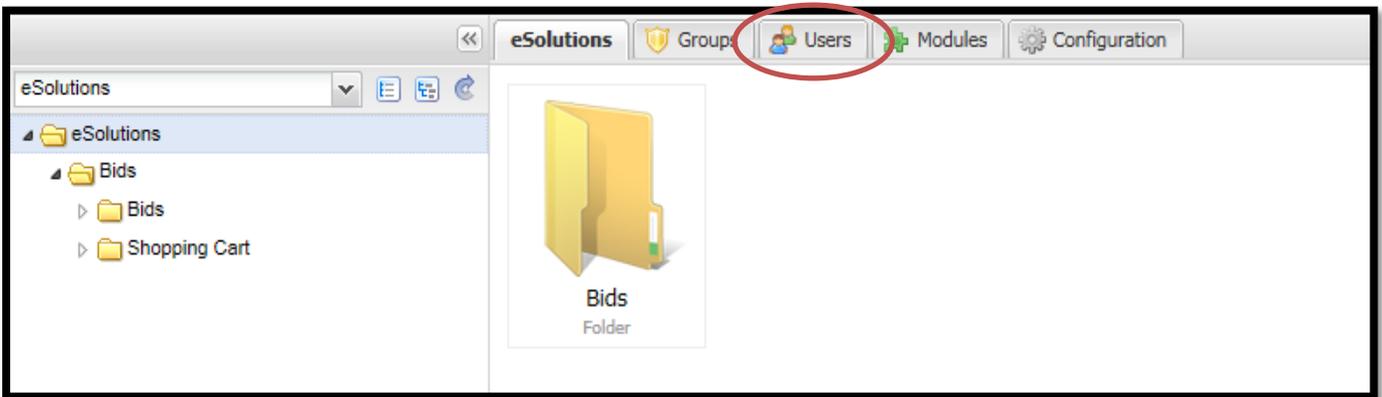
3. Click on the 'Add User' button:
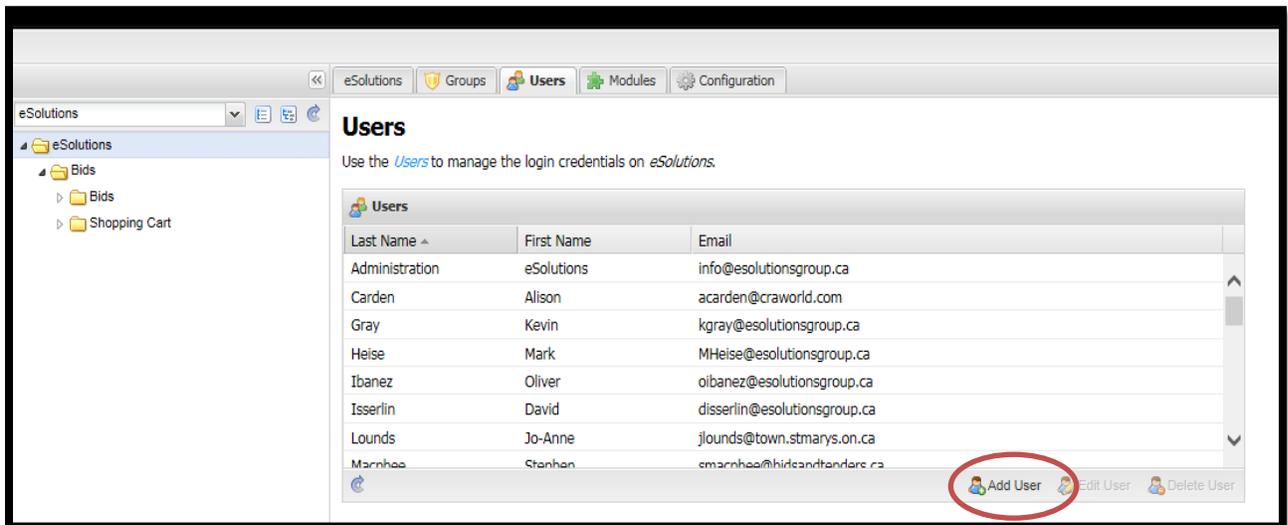
4. Type required information into the available fields and click the 'Create User' button at the bottom of the screen:
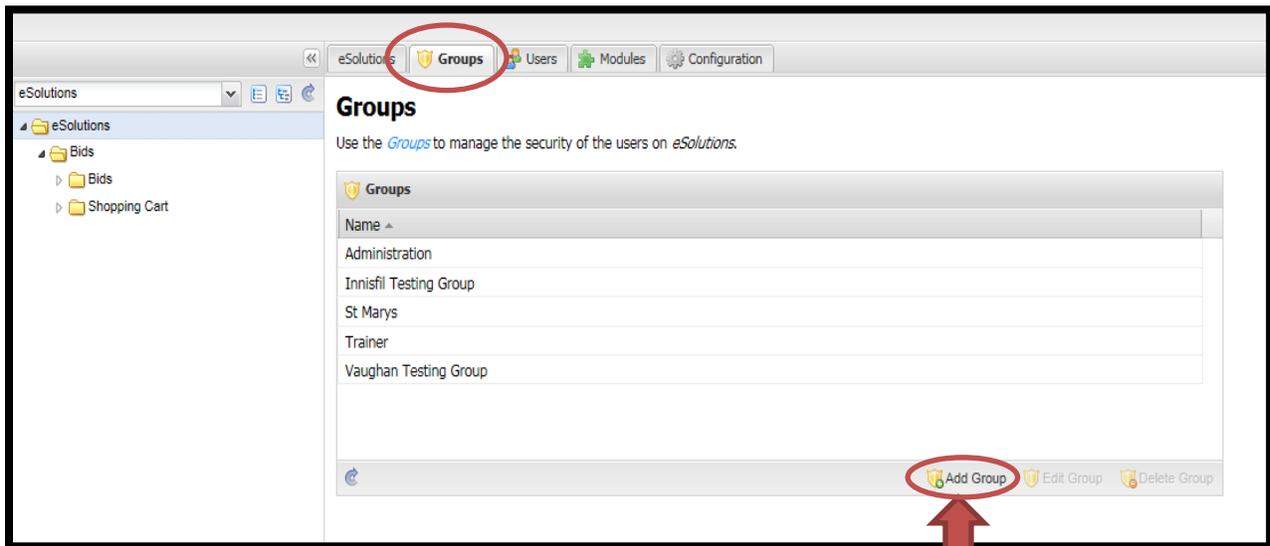

5. You have successfully created a user!

Section 2 – Creating Groups

If there are a number of users that you would like to have the same permissions, it is helpful to create a group. You can then add and delete users in that group.

To create a group:

1. From the landing page, click on the 'Groups' tab:
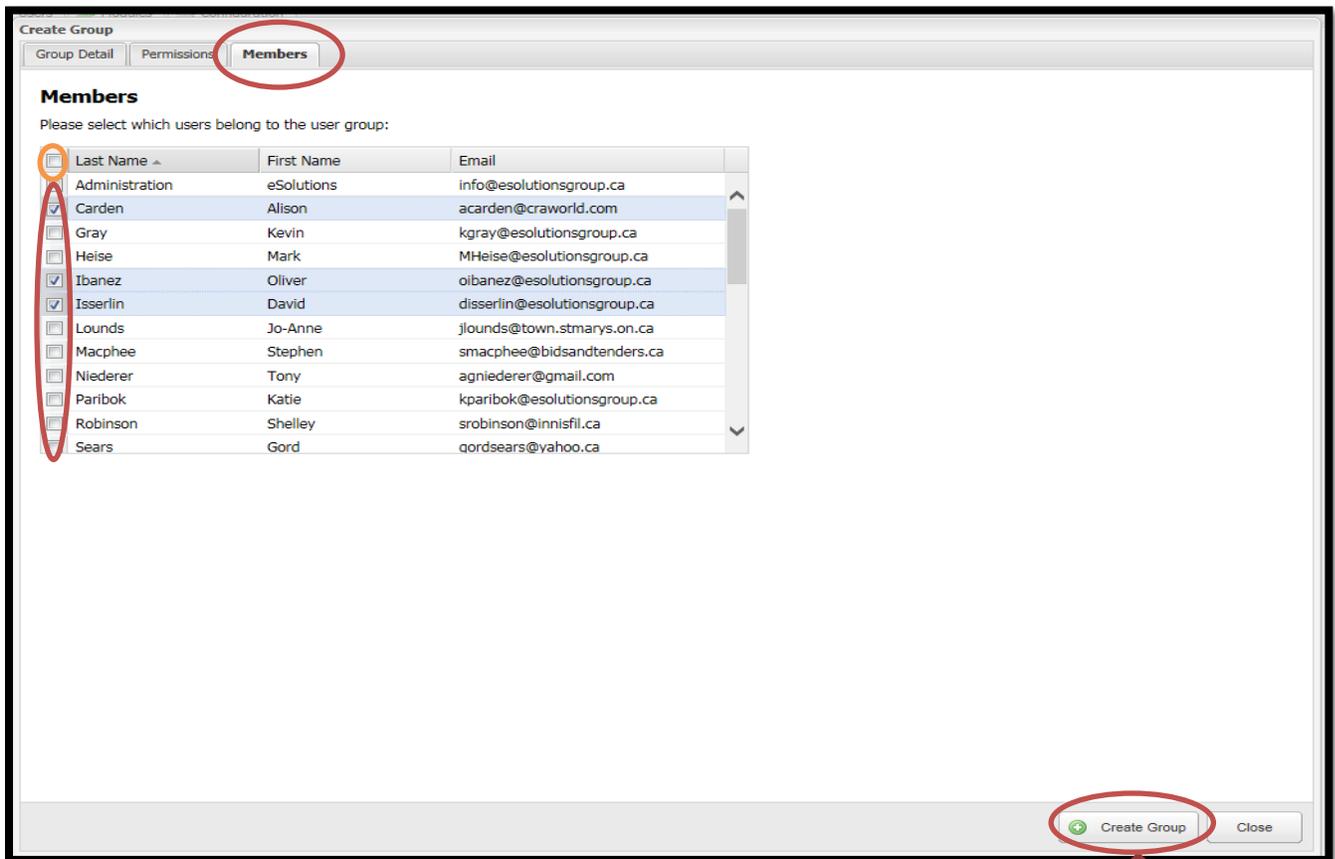

2. Click the 'Add Group' button at the bottom of the screen

3. Give the group a name:

4. Click on the 'Permissions' tab and select the permission levels that you want members of this group to have access to:
   - **PRO-TIP**: If you want the group to have access to everything, just click off the box next to the 'Permission' heading:
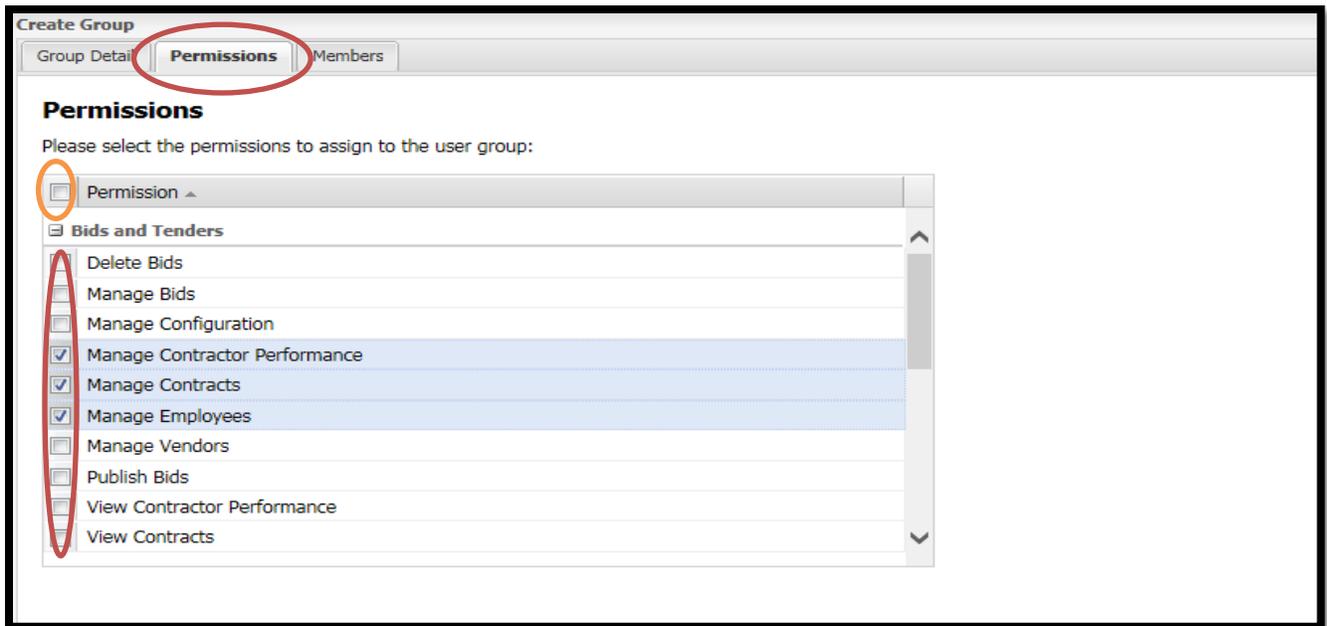
5. Once you have selected the permission levels, click the 'Members' tab to select the users that will be in the group:
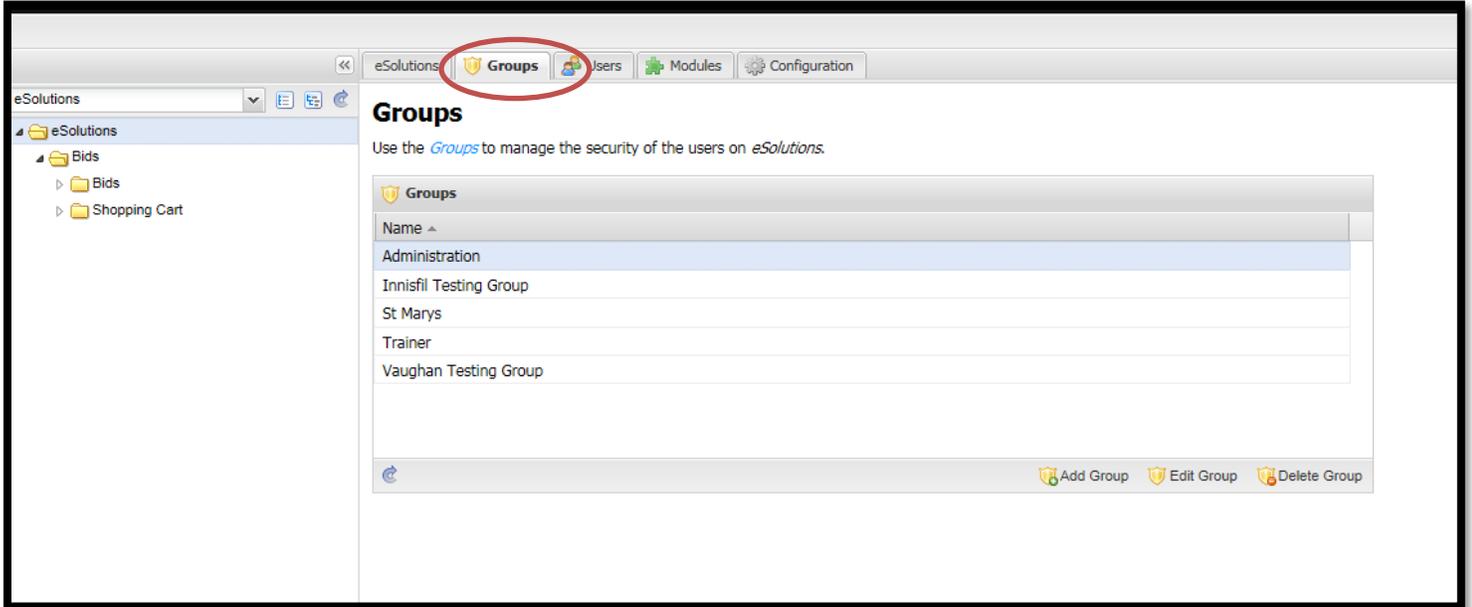   o **PRO-TIP**: If you want to select everyone, just click off the box next to the headings:

6. Click 'Create Group' button at the bottom of the screen

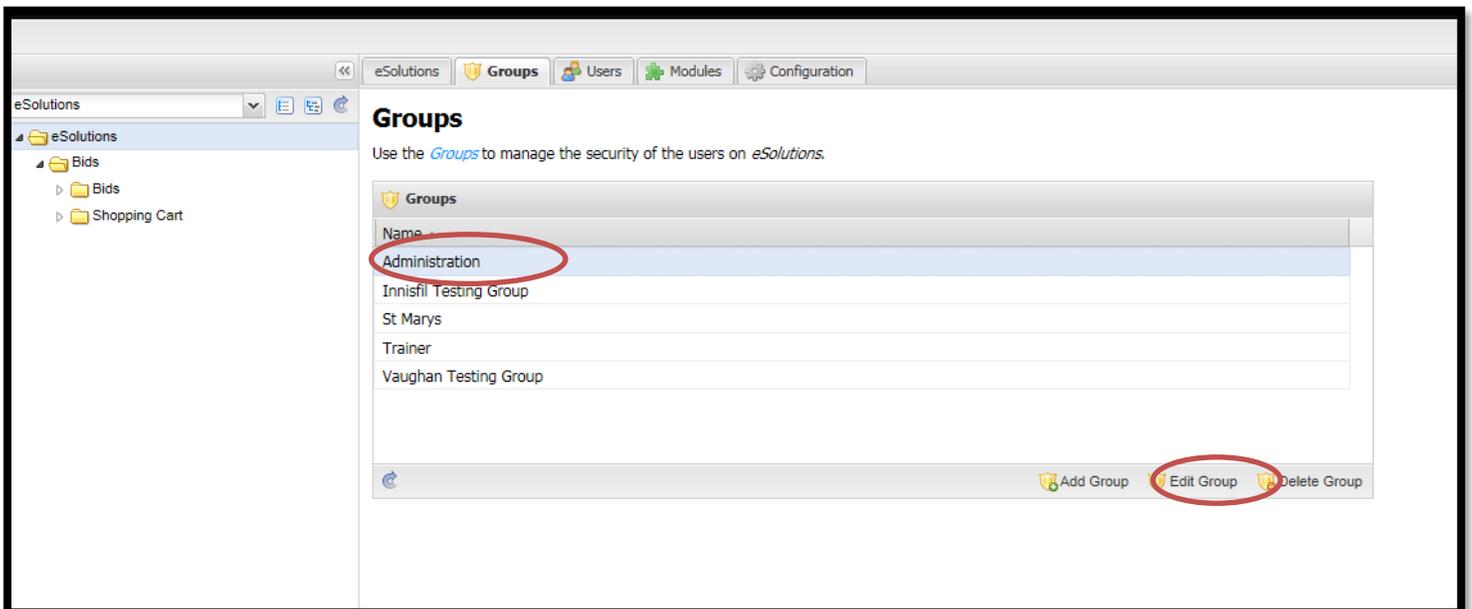# Section 3 – Adding Members to an Existing Group

To add a user to an existing group:

- o **PRO-TIP:** It is not recommended to add a single user to multiple groups with different permission levels.
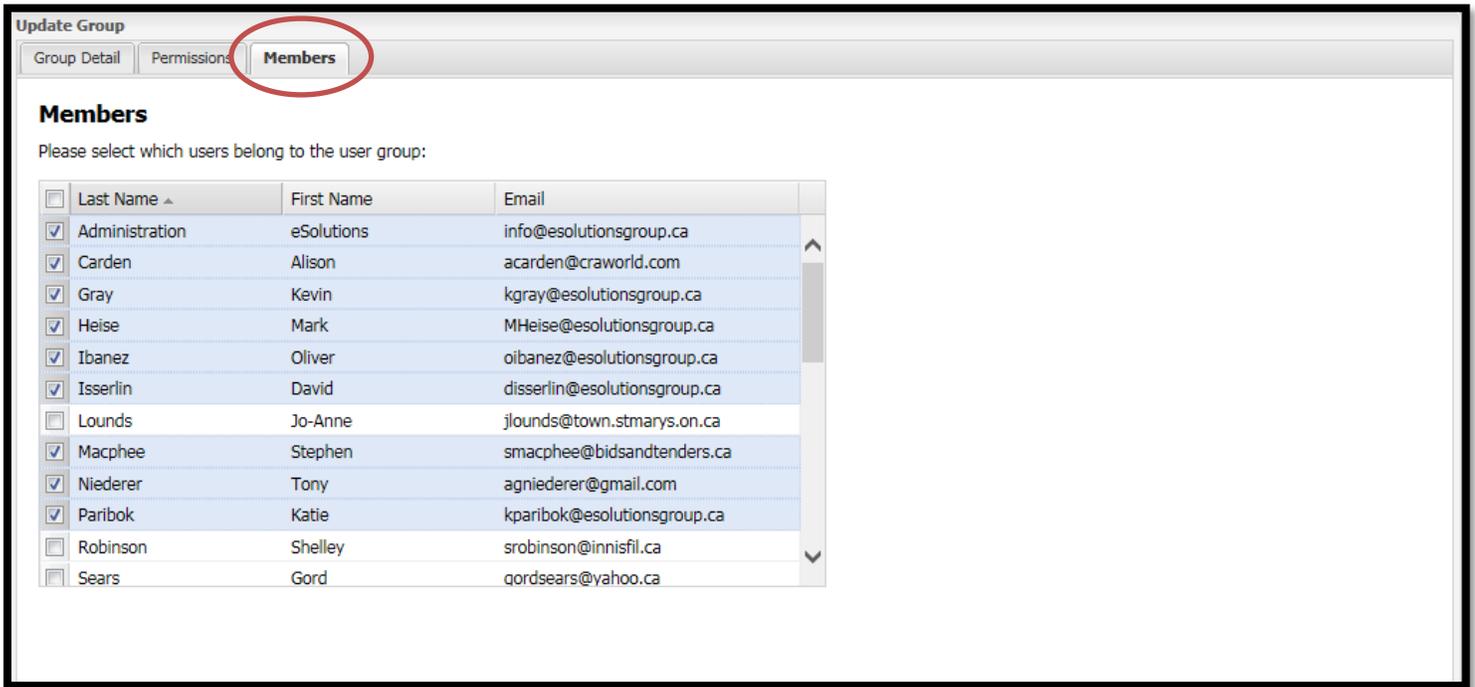
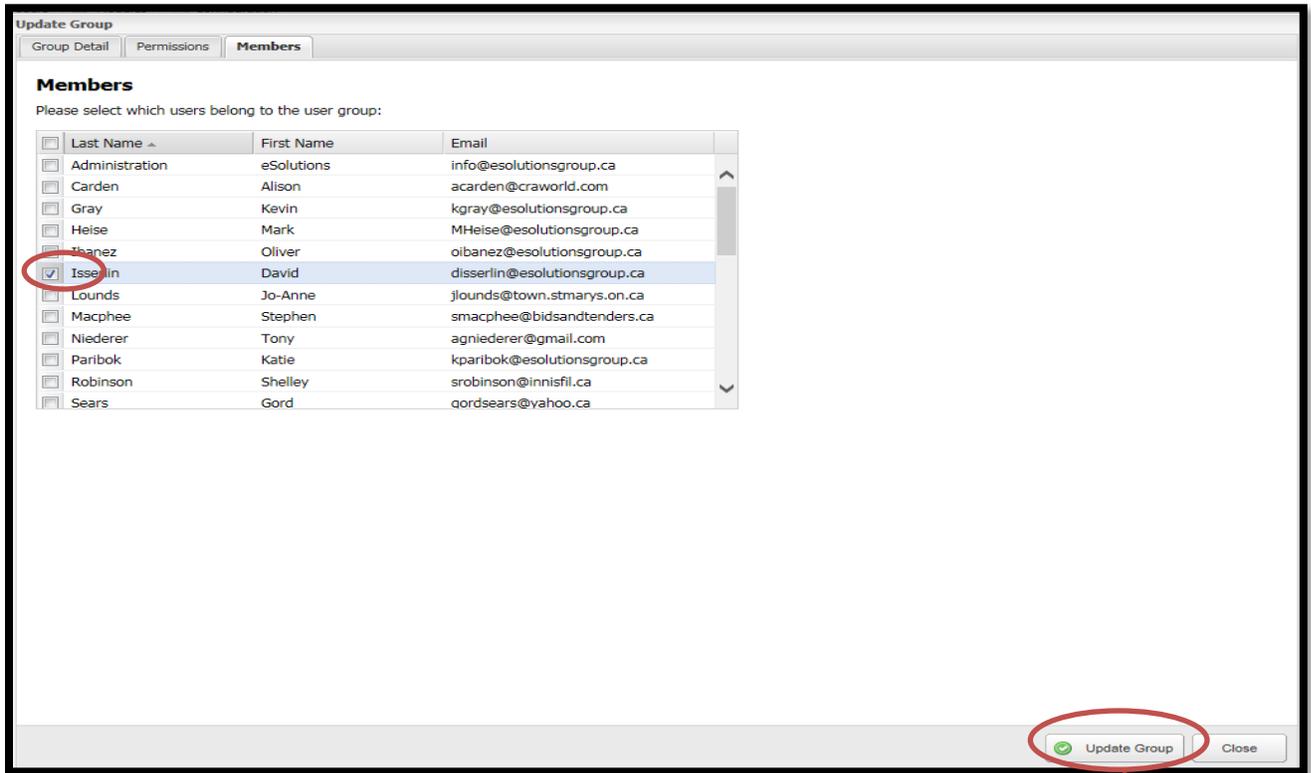1. On the landing page, click on the 'Groups' tab:

2. Select the group that you want to add members to and click on the 'Edit Group' button at the bottom of the screen:

3. Click on the 'Members' tab:

4. Select the user that you want to add to the group:

5. Click the 'Update Group' button at the bottom of the screen

Appendix 1 – Permission Definitions

The following are high-level definitions of the various permission levels found in the system:

Permission	Definition
Bids and Tenders	
Delete Bids	Ability to erase bids from the system.
Manage Bids	Ability to create, edit, and delete bids (without the ability to publish bids).
Manage Configuration	Manage all items under the 'Configurations' tab (e.g., changing eBids settings, changing Messages displayed to the public, etc).
Manage Contractor Performance	Ability to create, edit, and delete Performance Evaluations (under 'Performance' tab in the 'Contracts' Module).
Manage Contracts	Ability to create, edit, and delete information in all of the tabs under the 'Contracts' Module.
Manage Employees	Ability to create, edit, and delete Employees within the organization's account.
Manage Vendors	Ability to view information about all the Vendors in the system. If the user has access to Contractor Performance, they are able to track performance at Vendor level.
Publish Bids	Ability to switch bid status to 'Open' and make bids public.
View Contractor Performance	Access to the Performance tab in 'Contracts' Module with the ability to view the information but not create, edit, or delete.
View Contracts	Access to the 'Contracts' tab with the ability to view the information but not create, edit, or delete.
Security	
Group Management	Ability to create groups, add, and delete users in the group.
User Management	Ability to create, delete users, and add them to groups.