

# Institution Administrator training guide <sup>1.6</sup>

prepared for institution users managing GeM  
portlet environments



The online store for HE & FE



**CONTENTS**



- Who does what ..... 3**
  - Further information about GeM ..... 3
  - Contract and purchasing procedures ..... 3
  - Supplier queries..... 3
  - Creating, merging and deleting Institutions..... 3
  - Training..... 3
  - System operation issues..... 3
  - @UK client forum ..... 3
- Contacts..... 3**
  - JISC Procureweb Team ..... 3
  - @UK Support Team ..... 3
  - GeM Supplier Adoption Team ..... 3
- GeM overview..... 4**
  - GeM process..... 4
  - Contract Management ..... 4
  - eMarketplace ..... 4
  - @UK PLC..... 4
- eMarketplace environment ..... 5**
- Accessing GeM ..... 6**
  - Logging in..... 6
- Your home page ..... 7**
  - Getting help..... 8
  - Data entry..... 8
  - Your profile..... 9
- GeM user roles..... 9**
  - New GeM users ..... 9
  - Administrator ..... 10
  - Contract manager..... 10
  - Purchaser..... 10
- User groups & views..... 11**
- Appendix 1: Permissions..... 12**
- Appendix 2: Supplementary functionality ..... 13**
  - Delivery addresses..... 13
  - Purchasing views ..... 14
    - Custom views ..... 14
    - Masking in views ..... 15
    - Checking contract content ..... 16
  - User groups ..... 16
  - Linking views and groups ..... 16
  - Shortcuts to supplier websites..... 17
  - Home page message ..... 18
  - Reporting..... 18



## Who does what

### Further information about GeM

<http://www.gem.ac.uk>

### Contract and purchasing procedures

JISC Procureweb Team

### Supplier queries

GeM Supplier Adoption Team

### Creating, merging and deleting Institutions

@UK Support Team

### Training

@UK Support Team

### System operation issues

@UK Support Team

### @UK client forum

Our online Client Forum carries announcements, outage reports, development plans and manuals. You may vote for planned software changes, post your views and respond to other users:

URL: <http://www.buyers.ukplc.net>

Follow the above URL and select Register, then enter the required details.

## Contacts

### JISC Procureweb Team

Email: [team@procureweb.ac.uk](mailto:team@procureweb.ac.uk)

Phone: 02920 870333

### @UK Support Team

Email: [support@ukplc.net](mailto:support@ukplc.net)

Phone: 01189 637052

Please have available whenever you call or email our Support Team:

- Your Username (used to login to the system)
- The exact text of any error message
- References such as Message ID or @UK Purchase Order Number
- The supplier name (if you were connecting to a website)
- Screenshots (if possible) of the failure process

The Support Team will try to resolve any issues on receipt, but complex problems may require development work and will therefore take longer to fix.

### GeM Supplier Adoption Team

Email: [supplieradoption@reading.ac.uk](mailto:supplieradoption@reading.ac.uk)

Phone: 01189 357083

# GeM overview

GeM (Generic eMarketplace) was conceived to provide HE and FE Institutions with a repository for contracts, shared content and a means of purchasing online by Pcard. The GeM Board (comprising representatives from JISC Advance, Procureweb, Consortia, HE and FE Institutions) manage the contract for provision of the technology which is developed and maintained by @UK PLC.

The system is fast, reliable and easy to use. It gives contract managers access to load, maintain and publish contracts. Local managers can customise their purchasers' views of contract items and purchasers can process enquiries, orders, invoices and payments online.

## GeM process

National, Regional and selected Local contracts are created, items loaded and access enabled for relevant member Institutions. When contracts are published the content is loaded into Institutions' purchasing views and into supplier websites as their custom catalogues for GeM buyers.



## Contract Management

Management of contracts and user permissions is carried out by three roles in GeM:-

- Consortium Contract Manager
- Contract Manager of an Institution which has its own local contracts loaded into GeM
- Administrator of Institutions with no local GeM contracts



Consortium and Institution Contract Managers create contract entities Agreements, Lots and Contracts where, for example:-

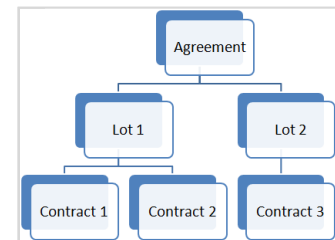
**Agreement** = Stationery

**Lots 1 and 2** = Paper and Pens

**Contracts 1 and 2** = contracts with supplier 1 and supplier 2 for Paper

**Contract 3** = contract with supplier 3 for Pens

Contracts hold header information and line item detail with contracted prices.



## eMarketplace

Purchaser and Supplier environments are housed within the secure eMarketplace environment. Institutions process enquiries and mini-competitions, place orders on contracted suppliers, receive invoices and make payment by purchasing card – all online via their eMarketplace portlet.

## @UK PLC

@UK PLC was established in 1999 to help make the process of contracting, buying and selling throughout the UK easier and more efficient using the Internet. @UK has pioneered the process of e-enabling suppliers to purchasing organisations, facilitating controlled paperless ordering and payment. As well as GeM, @UK offer:-

**SpendInsight** AI spend intelligence tool analyses purchases down to order line item level, identifying potential savings on products bought at different prices; most advantageous contracts available; benchmarking against what other organisations pay for the same products.

**GreenInsight** calculates a scientifically valid carbon footprint for goods and services bought, giving an accurate measure of environmental impact and the choice to offset at point of purchase.

**Full eProcurement** portal functionality enables buyers to trade with multinational, medium-sized and small local companies on- or off-contract. It can be seamlessly integrated with back-office systems such as Oracle and Agresso, or approval workflow, receipting, etc can be set up within @UK.

**Internal websites** are used by purchasing organisations to host internal supplier catalogues, such as stores, print departments and catering services.

**Supplier websites** hosted on @UK provide full ecommerce functionality where suppliers process transactions and take payment by card or other means. They maintain one catalogue, with custom views for different sets of products/services and prices for individual customers or groups.

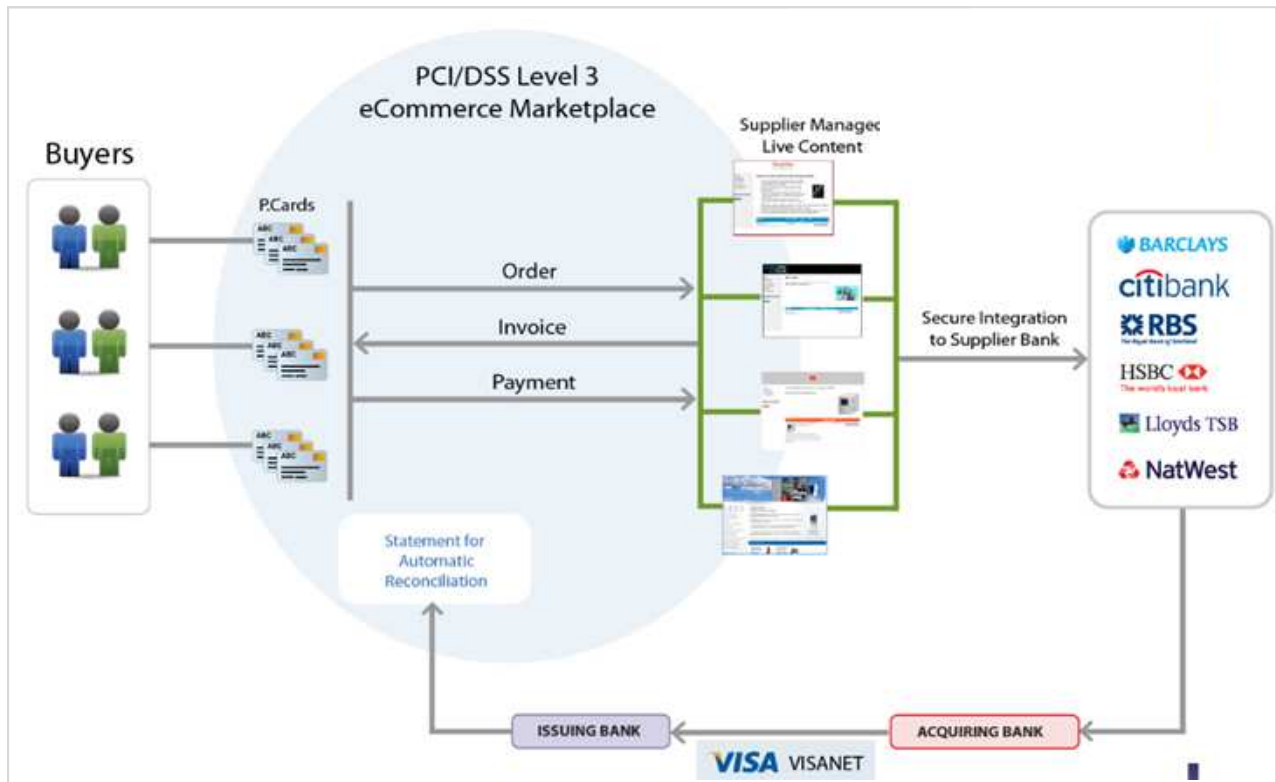
**Design and build** service is offered to clients who need more sophisticated functionality than that provided by @UK's range templates.

For further information on these services or any bespoke requirements:-

Website: <http://www.uk-plc.net>

Contact details: <http://www.uk-plc.net/contact-us.htm>

## eMarketplace environment



Suppliers associated with GeM contracts maintain their catalogues of goods and services either on a hosted @UK ecommerce website or, in the case of national and multinational companies such as Dell and RS Components, on their own independent site to which you punch out from the GeM environment.

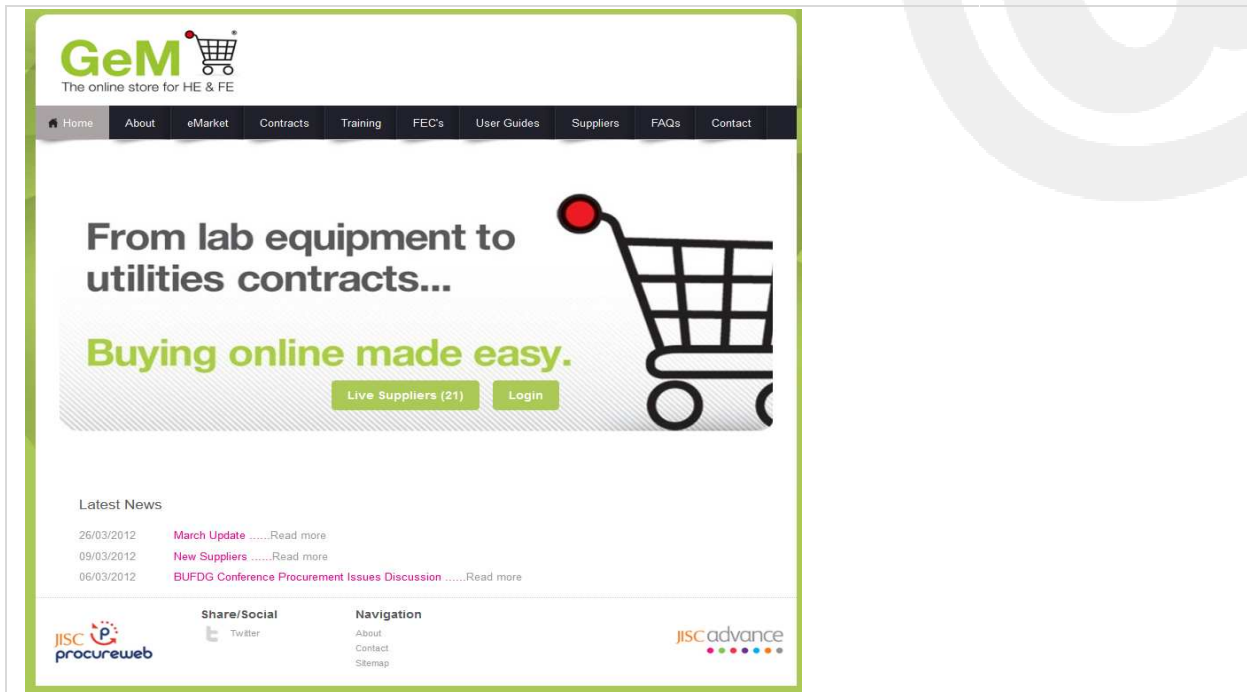
@UK hosted suppliers have the following facilities which are designed to ensure that your orders are priced accurately to minimise order-invoice mismatches and delays in fulfilling your requirements:-

- Restrict their customers' view of their catalogues to contracted items and prices only.
- Add extra charges such as delivery costs which are calculated when you add affected items or orders to your shopping basket.
- Apply promotional offers (such as buy one get one free and percentage or fixed monetary discounts) at basket stage.
- Associate forms with products and services (such as provision of temporary staff) requiring you to provide additional information at time of order.
- Flip orders into matching invoices and, in the case of call-off requirements, issue multiple non-matching invoices up to the total value of the original order.

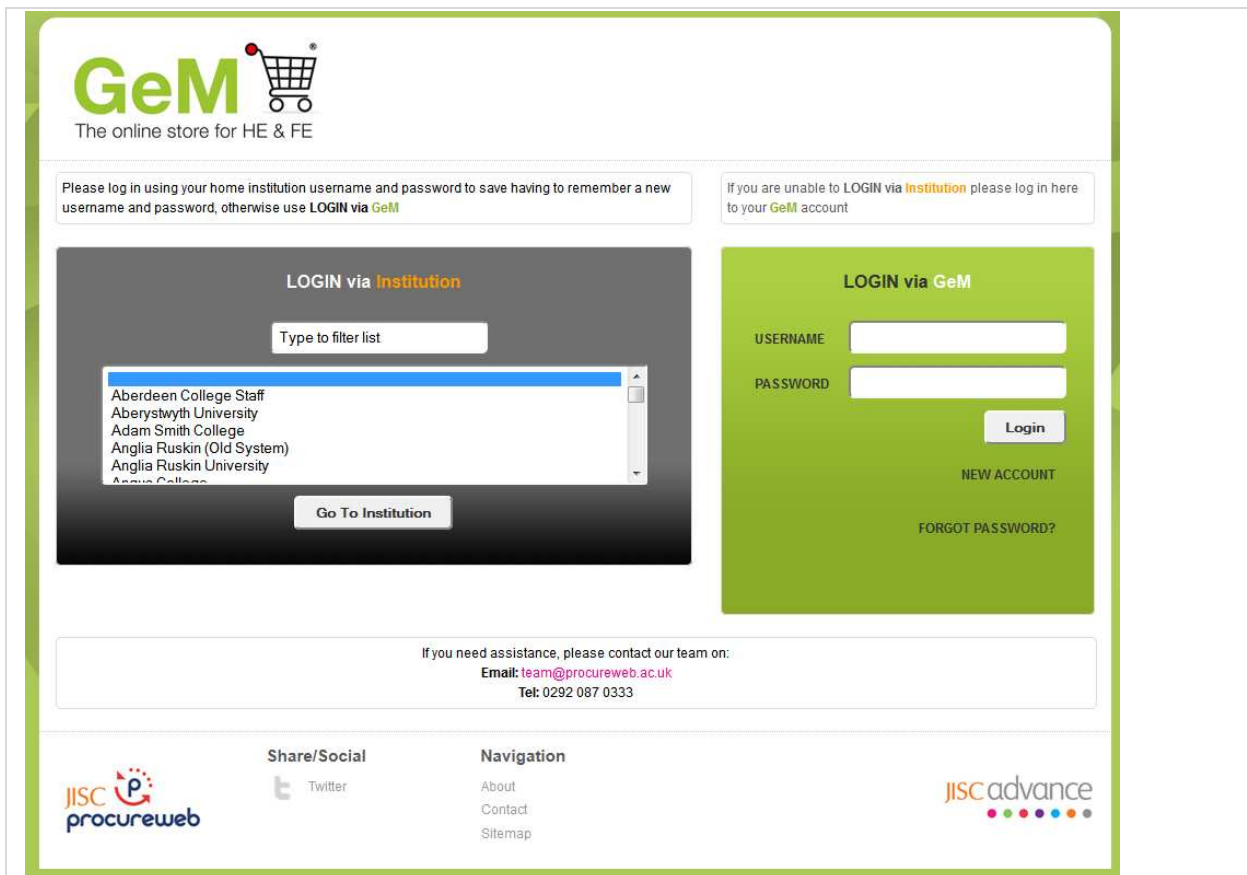
# Accessing GeM

## Logging in

Go to [www.gem.ac.uk](http://www.gem.ac.uk) and click the *Login* button



**i** Try **LOGIN via Institution** using your home institution credentials for instant access to GeM and so that you don't have to set up a separate username and password. (Using **LOGIN via GeM** and registering a new account requires your Administrator to authorise access before you can use GeM).



# Your home page

The screenshot shows the GeM home page with a navigation bar at the top containing 'Home', 'Support', 'Log Out', and 'View Basket'. Below the navigation bar is a main menu with links for 'Local Contracts', 'All Contracts', 'Orders', 'Organisation', 'My Details', 'Users', 'Suppliers', 'Portal settings', and 'Reports'. The main content area is divided into several sections: 'Search Catalogue' with a keyword search box, 'Contract Search' with a search term box, 'Quick Order' with a code search box, and 'Create a Quote' with a 'BEGIN' button. On the right side, there are sections for 'Categories' (Computing, Medical, Stationery), 'Administrator Message' from the @UK Support Team, 'My Favourites' with a 'VIEW ALL' button, 'My Orders' with a table of recent orders, and 'Top Suppliers'.

From your home page you can access functions via the top row of tabs or purchasing options in the main body of the screen. Selecting *Home* at the top right of the screen returns you to this page.

**i** You may see a different set of tabs at the top of your home page, depending on your CuPID permissions. If you aren't going to use all the options, you can restrict your access to relevant activities only.

The *Sitemap* link at the foot of your home page shows purchasing, administrative and contract system options in the main boxes.

This screenshot shows a different view of the GeM home page, likely for an administrator. The navigation bar and main menu are the same. The main content area is dominated by a large menu structure with categories like 'Local Contracts', 'All Contracts', 'Orders', 'Organisation', 'My Details', 'Users', 'Suppliers', 'Portal settings', and 'Reports'. Each category has a list of sub-options, such as 'New order', 'Assign to timesheet user', 'My purchase orders', 'Favourites', and 'My quotes' under 'Orders'. A 'Profile' section on the right shows user information for 'Mary Moss' and an 'Update your details' button.

## Getting help

**Context-sensitive help** and information is displayed alongside the information icon at the head of each screen.



Search for contracts using the following criteria


- Contract Key
- Title
- Supplier
- Owner
- Start Date
- End Date
- Team
- Agreement

If you want to view all contracts, leave the below fields blank and click the Search button

Clicking the  icon during a process generates a pop-up help window.

Edit File Category

Visible to Institutions



If this is checked, all contract attachments of this type will be visible to contract administrators at institutions.

Close

**Breadcrumb trails** are shown at the top of the page, with direct links back to earlier points in the system.

You are here: Orders [Favourites](#) » [Top items](#) »

The **Support** link at the top right of your home page gives instructions on reporting technical issues:-



### Support

If you experience any technical problems using the system, or would like information on training, please contact:-

**@UK Support Team**  
Email: [support@uk-plc.net](mailto:support@uk-plc.net)  
Phone:  01189 637052 

Please have available when calling or emailing the Support Team as much as possible of the following:

- Your Username (used to login to the system)
- The time and date at which the problem occurred.
- The exact text of any error message
- References such as Message ID, @UK PO number or Contract ID/Name
- The supplier name (if you were connecting to a website)
- Screenshots (if possible) of the failure process

## Data entry

The following fields are populated from a dropdown list of available options. These options are managed by **Procureweb**, who you should contact to request changes or additions to the options under:-

- Category
- Terms of delivery
- Terms of purchase

When entering data to fields showing **Type to filter list** in the input box, you may:-

- click on the required item from the list;
- type into the box until the required entry is automatically added;

If you make a mistake, simply delete the entry and restart your input.

Date fields have a quick date selector function: click on the  calendar icon, then you may:-

- click on the required date in the current month.
- use left/right arrowheads to move back/forward a month at a time
- click on the month name to access the year display and select a month or move back/forward in years using the arrowheads.

## Your profile

The option *My Details > Profile Settings* allows you to customise the contract summary information displayed on your home page.

You should ensure that your personal information is kept up-to-date via the *Edit my details* option.

You are here: [My Details](#) [Edit my details](#) >

[My Details](#)  
[Profile Settings](#)  
[Edit my details](#)

**Update your details**

Use the form below to update your contact details.  
You can change your password using the link at the bottom of the page.

**Update your details**

First name\*   
Surname\*   
Telephone   
Email Address\*   
Address 1\*   
Address 2   
Address 3   
Town/City   
County   
Country\*   
Postcode\*

## GeM user roles

**i** Standard @UK eMarketplace functionality which is not applicable to GeM users has, wherever possible, been disabled. You should take care not to change configuration options other than those covered in this guide.

User profiles are set up automatically in your portlet the first time they log in to GeM. New users have purchasing permissions only, but you may upgrade purchasing users to Administrators.

**Users**

- Create purchasing user
- Delete user
- User groups
- Manage administrators
  - Create administrator
  - Edit administrator
  - Promote standard user

## New GeM users

You or your nominated user approver will need to authorise the setup of new users. Those who can login via their usual institution username will be set up automatically on the system, but ones who select *Login via GeM* will have to complete a registration form which generates an email notification to you.

Select *Users > Registration requests* to approve or reject user creation.

**Users**

- Create purchasing user
- Delete user
- User groups
- Manage administrators
- Registration Requests

**Registration Requests**

You can use this page to approve or reject requests for registration on the portlet.

**Registration Requests**

Username	First Name	Surname	Job Title	Department	Telephone Number	Email Address		
sheila.smith.cardiff	Sheila	Smith	Buyer	Procurement	8768768768	sheila.smith@ukplc.net	<input type="button" value="APPROVE"/>	<input type="button" value="REJECT"/>

## Administrator

As your institution's administrator you are responsible for managing user permissions and, if required, assigning different groups of purchasers to their own tailored view of goods and services available to buy.

The following access rights can be assigned to Administrators:-

- **Manage Admins**  
Create new administrator and contract manager users; amend and remove their permissions and those of current users.
- **Change Portal Settings**  
Add and update a message to be displayed on the home page of all your institution users. (*Portal settings > Home page message*)
- **Set Up Users and Addresses**  
Create purchase order delivery addresses; enable and disable users' purchasing permission; set up groups of users with similar purchasing or administrative requirements.
- **Manage Purchasing Views**  
Customise views of purchasable products for different types of user.
- **Contract Administrator**  
Access available GeM content and institution subscription report.

### To amend a user's administrative rights

Go to *Users > Manage administrators > Edit administrator*. Click *Edit* against the username and tick the required permissions.

Surname	First Name	Username	Edit properties	Remove administration access
Addecott	Janice	addecottj@cf.ac.uk	<input type="button" value="EDIT"/>	<input type="button" value="REMOVE ADMIN ACCESS"/>

- Manage Admins
- Change Portal Settings
- Set Up Users And Addresses
- Manage Approval Rules
- Set Up Category Codes
- Manage Purchasing Views
- Contract Administrator

### To give administrative rights to an existing standard user

Go to *Users > Manage administrators > Promote standard user*. Click *Edit* against the username and tick the required permissions.

## Contract manager

Your contract manager will have access to GeM national and regional contracts and, if your institution has local contracts on GeM, he/she will be responsible for their maintenance. Contract managers need access to the administrative permission:-

- **Contract Administrator**

## Purchaser

Whether your institution is using GeM to purchase from contracted suppliers or not, your users will access the same functionality to compare prices, access rich supplier website content and run competitions. Users will automatically be assigned to a delivery address, but need no administrative rights.

## User groups & views

Your institution's GeM portlet environment is configured to allow access for your users to purchase goods and services from contracts to which you subscribe. Their access is governed by the *User Group* they belong to and the *Purchasing View* assigned to their group.

You may leave the system to populate the group *All Users* and the associated *Default View* and take no further action. All administrative, contract management and purchasing user profiles will be stored in the *All Users* group and contract content will be stored in the *Default View*. Hence all your purchasing users will be able to buy all available contract items and services.

Please refer to Appendix 2: Supplementary functionality if you wish to:-

- restrict purchasing access by supplier, range or item;
- provide different groups of users with custom views of the emarketplace;
- show shortcuts to available suppliers on user home pages;
- check contract content before releasing it for purchase;
- run reports on transaction, users and addresses.

# Appendix 1: Permissions

User & Tab / Option	Action	Contracts System / Local Contracts Tab	Contracts Tab
<b>CONSORTIUM CM</b>			
<i>Tabs:</i>	CONTRACT SYSTEM MY DETAILS		
<i>Options:</i>	Agreements	Create	Own
		View	Own
	Contracts	Create	Own
		View	Own
		Subscribe	Can subscribe any institution across GeM, but own institutions are subscribed by default.
	Companies	Create	All GeM
		View	All GeM
	Products	View	Products attached to own contracts
<b>INSTITUTION ADMINISTRATOR WITH LOCAL CONTRACTS</b>			
<i>Tabs:</i>	HOME LOCAL CONTRACTS CONTRACTS ORDERS ORGANISATION MY DETAILS USERS SUPPLIERS PORTAL SETTINGS REPORTS		
<i>Options:</i>	Agreements	Create	Local
		View	Local
	Contracts	Create	Local
		View	Local
		Subscribe	Own institution and others who have subscribed to their local contracts
	Companies	Create	Local
		View	Local
	Products	View	Products attached to local contracts
			Default is they can see all. All Consortia can change this per contract.
			Default is they can see all. All Consortia can change this per contract.
			Can choose to opt out
			All GeM and local contract companies
			Products attached to GeM and local contracts whether subscribing or not.
<b>INSTITUTION ADMINISTRATOR no local contracts</b>			
<i>Tabs:</i>	HOME CONTRACTS ORDERS ORGANISATION MY DETAILS USERS SUPPLIERS PORTAL SETTINGS REPORTS		
<i>Options:</i>	Agreements	Create	
		View	
	Contracts	Create	
		View	
		Subscribe	
	Companies	Create	
		View	
	Products	View	
			Default is they can see all. All Consortia can change this per contract.
			Default is they can see all. All Consortia can change this per contract.
			Can choose to opt out
			All GeM companies
			Products attached to GeM contracts
<b>INSTITUTION PURCHASER</b>			
<i>Tabs:</i>	HOME CONTRACTS ORDERS MY DETAILS		
<i>Options:</i>	Agreements	View	
		View	
	Contracts	View	
			All that are visible to the institution, and from which the institutional CM has not opted out.
			All that are visible to the institution, and from which the institutional CM has not opted out.

# Appendix 2: Supplementary functionality

## Delivery addresses

Purchasers may enter order delivery addresses per order during the checkout process. Your main institution address is already loaded, but you may set up more addresses which they can choose to use.

Organisation  
Delivery addresses

You are here: Organisation Delivery addresses »

**Delivery addresses**

**i** This section allows you to set up your delivery addresses.  
 Delivery addresses can be set up in a tree structure to represent your organisation.  
 Once you have created addresses you can assign users to them. Users are unable to purchase from addresses which they do not have permission on.

Scroll through available addresses by clicking on the first letter of the location name

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other

Pages 1

**Delivery addresses**

Location name	Address codes	No of child addresses	No of users	Edit	Add child address	Delete	View children	Assign Users
HEFCE Aldermaston University	Address Code 1 : Address Code 2 : Address Code 3 :	2	2	EDIT	ADD CHILD	DELETE	VIEW CHILDREN	ASSIGN USERS

CREATE ADDRESS CREATE USER

In order for purchasers to use your delivery addresses, you must use the *Assign Users* option to link them:

**Assign user to address**

**i** From this page you can assign a user to the selected address from the pool of available users.  
 You can also remove a users permission to use the selected address on this page.

**The following users can order from HEFCE Aldermaston University**

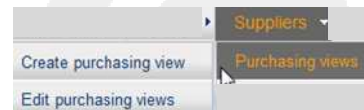
Surname	First Name	User Name	Remove permission
Newman	Norah	norah.newman.gem.auni	REMOVE PERMISSION
Smith	Sheila	sheila.smith.gem.auni	REMOVE PERMISSION

**The following users are available to be added to HEFCE Aldermaston University**

Surname	First Name	User Name	Add Permission
Johnson	James	james.johnson.gem.auni	ADD PERMISSION
Kershaw	Kay	kay.kershaw.gem.auni	ADD PERMISSION

## Purchasing views

Purchasing views contain the suppliers, ranges and products or services that the associated group of users may access. By default, all available suppliers and items are automatically loaded into the *Default View*.



You may use purchasing views to:-

- Build custom views for different groups of user, for example, restricting purchasers of specific commodities to viewing only the suppliers and ranges they buy.
- Set up views containing a group of suppliers associated with each framework for automatic selection by users requesting prices.
- Create a view to receive contract content to be validated before release to purchasers.

## Custom views

Go to *Suppliers > Purchasing views > Create purchasing view*. Enter the view name and description; click *Save Changes*.

The table below shows a list of companies that have been assigned to this view. You can edit which of these companies products appear in this view by clicking 'edit properties' against the chosen entry.  
 Use the search box to find new companies to add to your view.

Editing view **Chemistry view**

▶ **View properties**

◉ **Edit view**

View name\*

View description

All available suppliers and ranges are stored in the *Default View* (or – if you’re checking contract content before releasing it – in *Contracts view*). To add a subset of available items to your new view, you need to copy content from your default view.

Go to *Suppliers > Purchasing views > Edit purchasing view* and click *Edit view* alongside *Default view* (or *Contracts*). Click *Copy* against the required supplier.

▶ **Suppliers currently in this view**

◉ **Companies in this view**

Name	Description	Edit properties	Add this company to another view
@UK TRAINING DEMONSTRATION	Demonstration portal illustrating features, functionality and benefits of @UK plc eProcurement Training to delegates on Administrator, Purchaser and Supplier courses, as well as a range of Applications and Soft Skills training.	<input type="button" value="EDIT"/>	<input type="button" value="COPY"/>
Demo Davies Sports	Demonstration site for Davies Sports, suppliers of Sports equipment for schools.	<input type="button" value="EDIT"/>	<input type="button" value="COPY"/>

- To set up a view containing framework suppliers, click *Add company to view*.
- To copy all available content from the supplier to a new view, click *Add company to view*
- To copy only the content which has not been masked in *Default view*, click *Add to view and copy masking*.

◉ **Available Views**

View Name	Description	View children	Go to add company to view page	Add company to view and copy masking
Chemistry view	Products for Chemistry buyers		<input type="button" value="ADD COMPANY TO VIEW"/>	<input type="button" value="ADD TO VIEW AND COPY MASKING"/>

On the next page, click *Add all products to this view*:-

Selected company details	
Name	Description
@UK TRAINING DEMONSTRATION	Demonstration portal illustrating features, functionality and benefits of @UK plc eProcurement Training to delegates on Administrator, Purchaser and Supplier courses, as well as a range of Applications and Soft Skills training.

Available actions	
Action description	Action
Browse the website for this company (opens new window)	<a href="#">VIEW WEBSITE</a>
Add all products belonging to this company to this view	<a href="#">ADD ALL PRODUCTS TO THIS VIEW</a>
This option allows you to view Products belonging to this company and assign whether or not they should form part of this view	<a href="#">VIEW PRODUCTS</a>
Add or remove items from the view by entering a list of codes.	<a href="#">MANAGE BY CODE</a>
Download a report of this companies products within this view.	<a href="#">DOWNLOAD REPORT</a>
Copy this supplier to another view.	<a href="#">COPY</a>

## Masking in views

To restrict different user groups to different ranges and items you may mask parts of a view.

Select *Suppliers > Purchasing Views > Edit purchasing views* and click *Edit View* alongside the relevant view name. From this page you may use *Edit* to mask categories or items per supplier, or *Copy* to make the same items available in another purchasing view.


► Suppliers currently in this view

Companies in this view			
Name	Description	Edit properties	Add this company to another view
Demo Davies Sports	Demonstration site for Davies Sports, suppliers of Sports equipment for schools.	<a href="#">EDIT</a>	<a href="#">COPY</a>
DEMO SUPPLIER STATIONERY	We supply all kinds of stationery to the public sector.	<a href="#">EDIT</a>	<a href="#">COPY</a>

*View products* lists all the items available from the supplier.

Available actions	
Action description	Action
Browse the website for this company (opens new window)	<a href="#">VIEW WEBSITE</a>
Add all products belonging to this company to this view	<a href="#">ADD ALL PRODUCTS TO THIS VIEW</a>
Delete this company and its products or services from this view	<a href="#">REMOVE COMPANY FROM THIS VIEW</a>
This option allows you to view Products belonging to this company and assign whether or not they should form part of this view	<a href="#">VIEW PRODUCTS</a>
Add or remove items from the view by entering a list of codes.	<a href="#">MANAGE BY CODE</a>
Download a report of this companies products within this view.	<a href="#">DOWNLOAD REPORT</a>
Copy this supplier to another view.	<a href="#">COPY</a>

**Edit purchasing view - Category**

 The navigation structure of this supplier site is shown below.  
 • Toggling a category will either add or remove all products under the selected category and its sub-categories from the view  
 • Please note that depending on the size of the supplier site this page may trigger some large updates. If your updates seem to be taking a long time please try making changes at a lower level of the category tree as this will update less data per click.

You are viewing categories for supplier **DEMO SUPPLIER FURNITURE** under purchasing view **Default View**

► Categories and related products

Index » **Toggle | Categories**

- Desk
- Seating
- NHS Products

• Products belonging to selected category

To mask an entire category from this view, click the  icon. Click on the category name to mask items within that category.

## Checking contract content

By default all contract content is loaded into the *Default view* as soon as it is available to purchase and your users may buy items immediately.

**i** If you wish to check goods and services or add different items to different customer views before releasing them for purchase, you must follow these instructions:-

1. Create a purchasing view called **Contracts**.
2. Create a user group and add in the user(s) who will be checking contract content.
3. Assign **Contracts** view to the above user group.

Contract items will be added into the *Contracts* view and will only be accessible to users in the associated group until you copy them into purchasers' views.

For ease of selection, suppliers may also be displayed on the home page in Categories.

## User groups

Groups link together users with the same access requirements, for example, all Stationery buyers who only need access to the relevant suppliers, or Administrators who can check contract content before making it available to purchase.



Go to *Users > User Groups > Create user group* and give the group a name. Tick the username(s) to be included in the group.

You are editing user group: **Stationery buyers**

**Edit user group**

Surname	First Name	User Name	Included in this group?
Lane	Lewis	lewis.lane.gem.buni	<input type="checkbox"/>
Moss	Mary	mary.moss.gem.buni	<input checked="" type="checkbox"/>
Todd	Tom	tom.todd.gem.buni	<input type="checkbox"/>

**SAVE CHANGES**

## Linking views and groups

Once users have been added to a group and their corresponding suppliers and items put into a view, you need to link the two. You can link from groups to users or vice versa using the *Edit User Groups* or *Edit Purchasing Views* option.

You are here: [Users](#) > [User groups](#) > [Edit user groups](#)

**Edit user groups**

**i** The table below shows the Groups that have been created by your organisation. Clicking the 'edit group' link allows you to peruse the contents of the group and edit its properties. Clicking 'Assign Group to View' allows you to assign the chosen user group to purchasing views. If you assign a user group to a view then buyers that are members of the user group have permission to view and purchase from companies that contribute to the chosen view.

**Edit user groups**

Group Name	Edit group	Assign group to view	View dependencies and delete group
All Users	<a href="#">EDIT GROUP</a>	<a href="#">AS SIGN GROUP TO VIEW</a>	<a href="#">VIEW DEPENDENCIES AND DELETE GROUP</a>
Chemistry users	<a href="#">EDIT GROUP</a>	<a href="#">AS SIGN GROUP TO VIEW</a>	<a href="#">VIEW DEPENDENCIES AND DELETE GROUP</a>

You are editing user group: **Chemistry users**

**Assign user group to view**

View Name	User group can buy from this view?
Chemistry view	<input checked="" type="checkbox"/>
Default View	<input type="checkbox"/>
Engineering view	<input type="checkbox"/>

**SAVE CHANGES**

# Shortcuts to supplier websites

You may provide shortcuts on user home pages to available supplier websites, either as a single list or a hierarchy of categories. (*Root* is the top level of the hierarchy.)



**Manage home page categories**

Category Name\*

Live category? (Displays on homepage)

► Add a supplier to the category: **Root**

Click on the name of your new category.

Category name (Click to navigate)	Active Category (Click to toggle)	Action
Root » <a href="#">Stationery</a>	<input checked="" type="checkbox"/>	<input type="button" value="DELETE"/>

**Manage home page categories**

Category Name\*

Live category? (Displays on homepage)

Select the purchasing view which contains the supplier(s) to be added to your categories and click *Add* against each one on the subsequent page.

**Current category:**

Root » Stationery »

---

Category **Stationery** does not have any sub categories  
Use the form below to set up new categories.

**Manage home page categories**

Category Name\*

Live category? (Displays on homepage)

► Add a supplier to the category: **Stationery**

**By searching the @UK directory**

**Search for a supplier**

Search term\*

**or By adding an existing supplier from a purchasing view**

- Biology Labs
- Chemistry View
- Default View
- IT Equipment
- Nath Test PV
- Nathan View

The new category and direct links to associated companies' websites will be shown on the home page of all users who have access to the supplier(s).

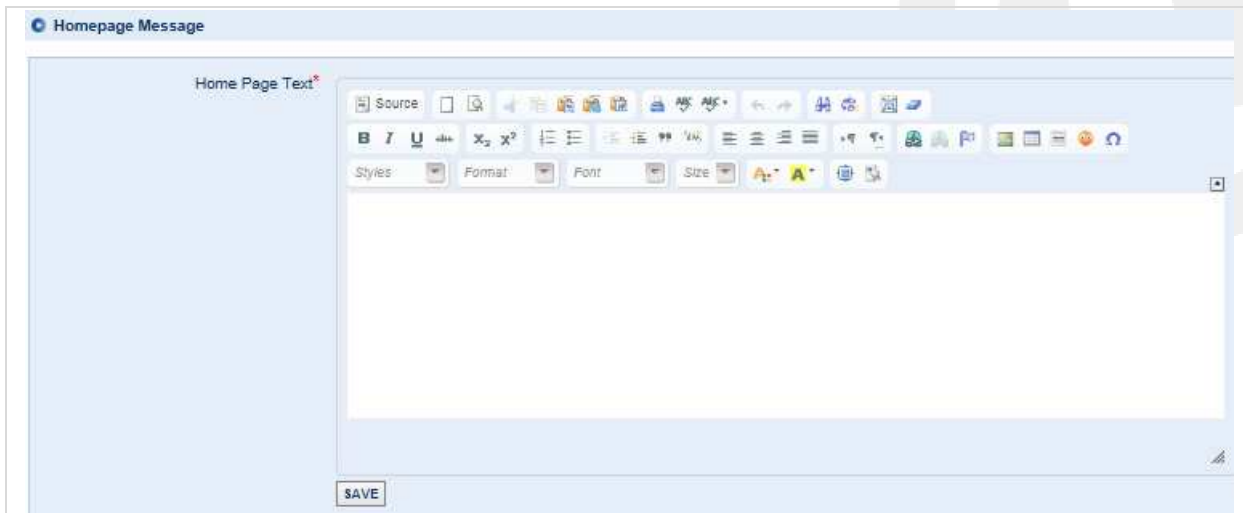
**Categories**

**Stationery**

- DEMO SUPPLIER STATIONERY

## Home page message

You may enter and format a message which appears on the home page of all your users via the *Portal settings > Home page message* option.



## Reporting

Reports may be downloaded in csv format to Excel.

Reports   
Reports menu





- ▶ Please use the form below to build up a query to send to our database. This will create a CSV file which you can save to your harddisk and open in a spreadsheet application e.g. Microsoft Excel.
- ▶ Please note that if you request a large amount of data this page may timeout or even crash. If this occurs try to limit your query to a smaller subset of data. This can be achieved by choosing a smaller date range or limiting the search to individual users.
- ▶ Further down the page you can find additional report types for providing information on delivery locations and users.

### Transaction report

Transaction type\*  Orders  
 Invoices  
 Credits

Detail level\*  Header only  
 Show line detail


Start Date\*  


End Date\*  

### Quotes report



This form will return a report of quotes created in the date range selected.

Start Date\*  

End Date\*  

### Delivery point report

This report will return all delivery locations set up under your portal.

### User report

This report will return all users set up under your portal.

### Address permission report

This report will return a cross match of user versus the delivery location(s) they are able to order from.