Community Administration Guide

What is the role of a Community Administrator?

As a Community Administrator, the primary functions that you will be responsible for in catalogues.buy.nsw (referred to herein as "the platform") are the following:

- Managing User Accounts
    - Create New Users
    - Disable New Users
    - Update a Users Organisation Unit (where applicable)

- Managing Organisation Data
    - New Organisation Units
    - Location Field Updates:
        - New Shipping/Delivery Locations
        - Updates to existing Shipping/Delivery Locations
        - New Billing Location
        - Updates to existing Billing Location

In addition, where Applicable (so where 'On Account' Purchasing Approvals are managed within the platform):

- Manage Approvals
    - Update Approvals – add, delete or modify an approval chain (e.g. new approver comes into a position to replace existing user requires chain to be modified)
    - Update Approval levels

Community Administration functions can be found within the Administration Menu (gear icon) and allow an Agency to easily maintain its instance of catalogues.buy.nsw (referred to herein as "the platform)".

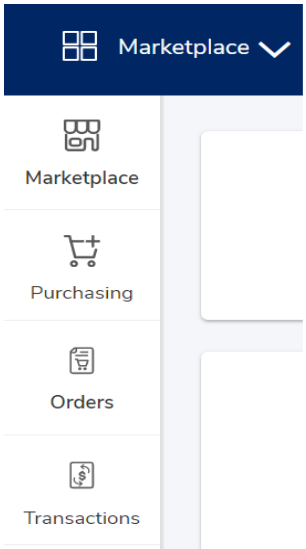


Table of Contents

Contents

Users

Manage users

Roles are a system of permissions in the platform, determining what features a user has access to.

Note: If your Users are externally managed (e.g. entering via Single-Sign on and passing User and/or Organisation data to Unimarket) user set up and information will be unique to your Agency.

In managing Users, a Community Administrator will typically need to manage the following processes:

To Create a New User:

- Log in as a Community Administrator or a User Administrator
- Select the **Users** option from the **Administration** section within the **Administration** module
- Select Create

A pop-up window will appear to input the users First Name, Last Name, Username (typically your email – ensure you maintain consistency across all users), Email, Role (Buyer at minimum), Buyer Group (General at minimum) and Organisation Unit(s) they are to be assigned to.

Then select Send Invitation for the user to complete their own password at first log in, or create a password on their behalf which they can elect to change under their Account profile. Note: if you are Single Sign On Agency, click Enabled instead of Send Invitation.

Assign/Edit User Roles:

- Log in as a Community Administrator or a User Administrator
- Select the **Users** option from the **Administration** section within the **Administration** module
- Search for the User
- Click **Edit**
- Make desired changes to Roles field
- Click **Save**

Disable a Role:

- Log in as a Community Administrator or a User Administrator
- Select the **Users** option from the **Administration** section within the **Administration** module
- Search for the User
- Click **Edit**
- Deselect the **"Enabled"** button

Note: for audit and history purposes, a user role is not deleted, but disabling the role means the user will no longer be able to access the system.

For more information on creating roles in the platform, click here or to view a list of the full user role types click here.

Buyer groups

Buyer Groups are used to determine which buyers can access which suppliers. This is done by creating buyer groups and then adding suppliers and buyers to the group. Most communities create a General group which contains all the suppliers that the majority of buyers can purchase from. However, more specific groups like IT or First Aid for example, can be created if the Agency wants to restrict specific suppliers to a select number of buyers.

For more information on adding Buyer Groups and assigning to Users click here.

Out of office

Community Administrators have the ability to view and manage users and approvers availability. This is extremely useful if an approver has forgotten to mark themselves as unavailable and assign a proxy (if proxy approvals are enabled). For the Community Administrator to view any approvers currently marked as unavailable or mark an approver as unavailable they simply need to:

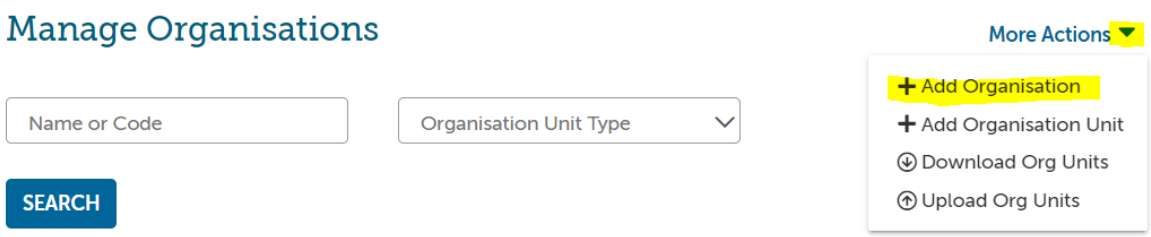
- Log in as a Community Administrator or a User Administrator
- Select the **Users** option from the **Administration** section within the **Administration** module
- Click on the Out of Office tab
- Click **Add Unavailable User** and complete the relevant details

Organisations

Manage Organisations

Organisation Units (Org Units) can be hierarchical so that they can be setup to mirror your organisation's “divisional/business unit” or similar structure. All users should be assigned one or more organisation units within the platform so their spend can be reported to the correct Org Unit for reporting purposes. The Org Units are created, assigned approval chains, and assigned to users from the tabs of an Organisation set up.

To create a new Organisation or Organisation Unit, click More Actions on the right-hand side of screen and select Add Organisation or Add Organisation Unit.



For instructions on how to add a New Organisation, click here.

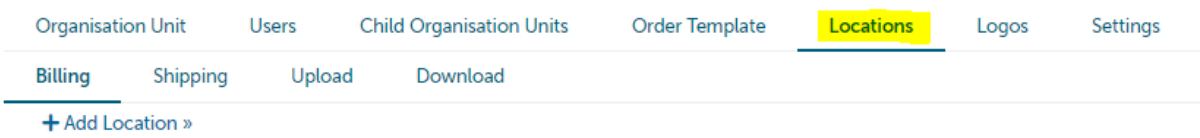
To **Edit** an existing Organisation or Organisation Unit (for example, to add a new Approval Chain or update the Name), click on the applicable Organisation and select **Edit** from the **More Actions** menu at the top right. A pop-up window will appear for you to update any applicable information.

If a **new Organisation** is created, a Community Administrator can then add Location data, Purchase Order Terms & Conditions and Logos relevant to that Organisation.

Note: for On Account purchasing, an Approval Chain also needs to be loaded to an Organisation/Organisation Unit

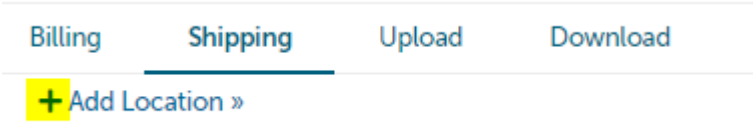
Location fields – Bill To and Ship To

Billing and Shipping information can be updated by selecting **Organisations** from the **Administration** menu, clicking on the Organisation Unit whose locations you'd like to see and selecting the Locations tab.



The Location fields are:

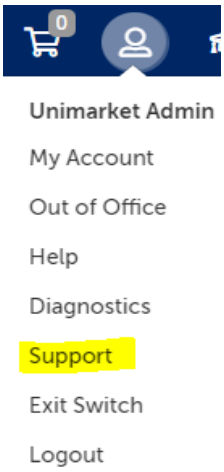
- Billing = the Bill To field at the Checkout screen
- Shipping = the Ship To (aka delivery address) at the Checkout screen



A Community Administration can add a new delivery address as required by selecting **Add Location** or edit an existing address by selecting **Edit** to the right of the applicable address.

If a number of address changes are required, these can be easily managed in bulk by way of upload. Click here for instructions.

Note: when making multiple changes to your Shipping Locations, please advise Unimarket Support – this allows us to advise Suppliers of the changes, so they can reflect the changes in their systems to ensure no delays with orders for new sites.
A Community Administrator can simply send a notification to Unimarket Support, by going to the person silhouette at the top right and selecting **Support,** or directly emailing support@unimarket.com



Suppliers

Users with the Community Administrator or Community Supplier Administrator role can manage suppliers. Community suppliers can be managed from the **Administration** module > **Administration** > **Suppliers** > **Manage Suppliers** tab. From here the administrator can add and remove suppliers from the community, assign suppliers to buyer groups, update community supplier records and invite suppliers.

Note: It is expected that NSW Government Agencies will have access to the applicable NSW Whole of Government Suppliers and therefore this menu may not be frequently accessed, unless there is Agency specific suppliers.

For further information on Managing Suppliers, click here or contact Unimarket Support for guidance on the applicable steps (Email: support@unimarket.com)

Catalogues

Note: It is expected that NSW Government Agencies will have access to the applicable NSW Whole of Government Suppliers and therefore this menu may not be frequently accessed, unless there is Agency specific suppliers

When a Supplier uploads a new Catalogue to the platform, this will become available to users with the Community Administrator or the Catalogue Reviewer role to assign Buyer groups. An email notification is sent out to the Supplier Forums or Default email address loaded for your Community.

If a catalogue does not yet have any Buyer Groups assigned, it will not be available in your community's eMarketplace.

Assign Buyer Groups:

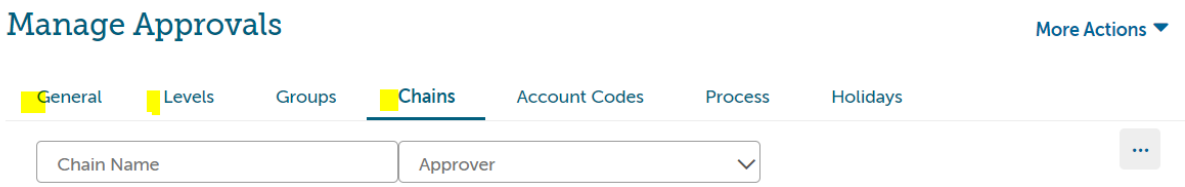
Community Administrators and Catalogue Reviewers can click on the Buyer Group link (on the right-hand side of each catalogue listed) to assign or change the Buyer Groups who can access the catalogue.

For further information on managing catalogues can be found here or contact Unimarket Support for guidance on the applicable steps (Email: support@unimarket.com).

Approvals

Manage Approvals

For the full information on each component of the Approvals tab, please click here however, the key features are explained below.



General

The General tab allows your community administrators to configure general approval settings. This includes the following information:

Default Reminder Period - the amount of time before a reminder email is sent to an approver (regarding unactioned requisitions).

Time Before Escalation – the amount of time before an unactioned approval task escalates to the next approver in the chain.

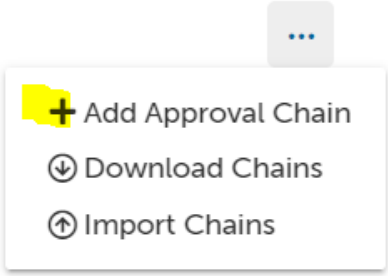
Levels

Approval levels can be assigned to members of approval chains to determine the dollar value they can clear up to for approvals – this is typically based on the financial delegation policy of your organisation.

To add an approval level just enter the name and value of the level and select **Add**.

Chains

Approval Chains are chains of approvers where requisitions are routed. The requisition will move up the chain until a user or group with a high enough approval level can clear the requisition dollar amount. The approval chain a requisition uses is based on the Organisation Unit.



A new Approval Chain can easily be created or an existing Approval Chain easily modified to reflect changes within an Agency (role changes with staff).

Add or Edit

To create a new Approval Chain, click on the 3dot icon on the right and select **Add Approval Chain**.

To Edit and existing name, search or scroll for the applicable Approval Chain and click Edit. You can then Delete or Add new users (approvers) to the chain as required.

For further information on Editing and Adding Chains, click here.

Settings

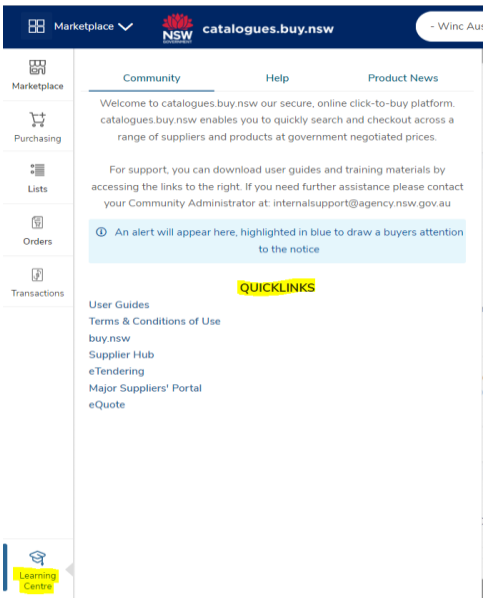
Profile

The key features for a Community Administrator in this menu are:

Description:

The **Description** can be used to specify text that will appear at the top of the community homepage. This is often used to display a welcome message or key information for buyers.

An alert can be specified which displays highlighted text at the top of the community homepage. This is often used if there are special instructions that buyers need to see.



Links:

Links (URLs) can be specified. These are displayed in the Learning Centre found at the bottom Left Tool Bar.

Emails:

Configure emails for your community, which define where notifications are sent during purchasing, approvals, invoicing and more. The help bubbles next to each email address explain how it is used. You can choose to have one default email address that will be the email for all notifications OR you can have specified email addresses for the different notifications.

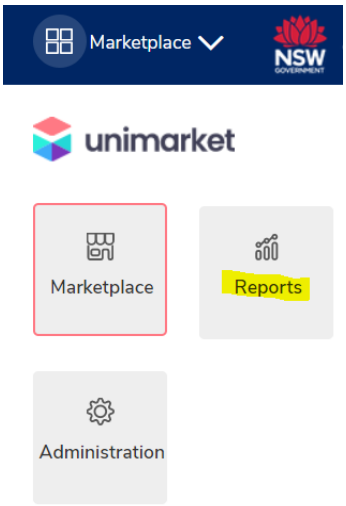
For further information, click here.

Modules / Procurement

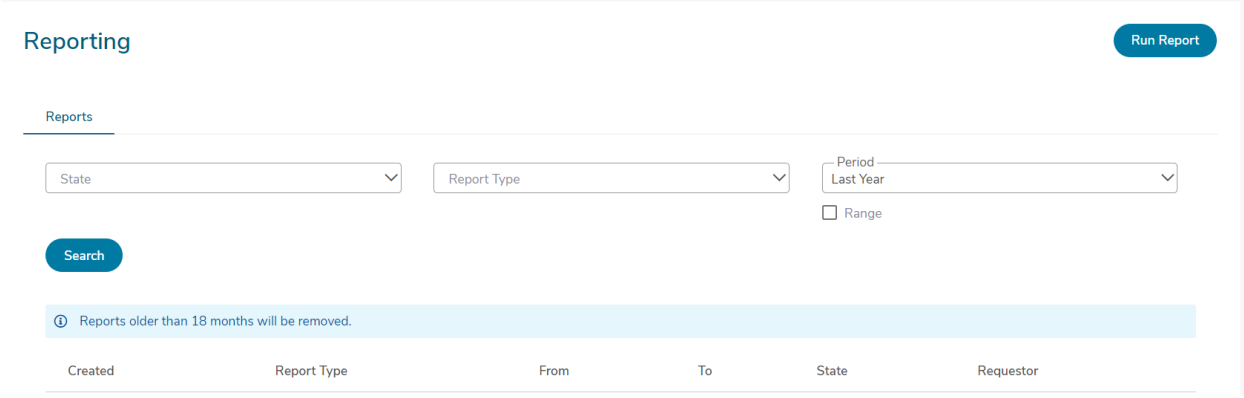
It is envisaged that NSW Government Agencies will not have the need to make changes to any configuration components here; however further information can be found here.

Reporting

Users with the Community Administrator or View Transactions roles will have access to the Reporting menu and can run reports on community data.

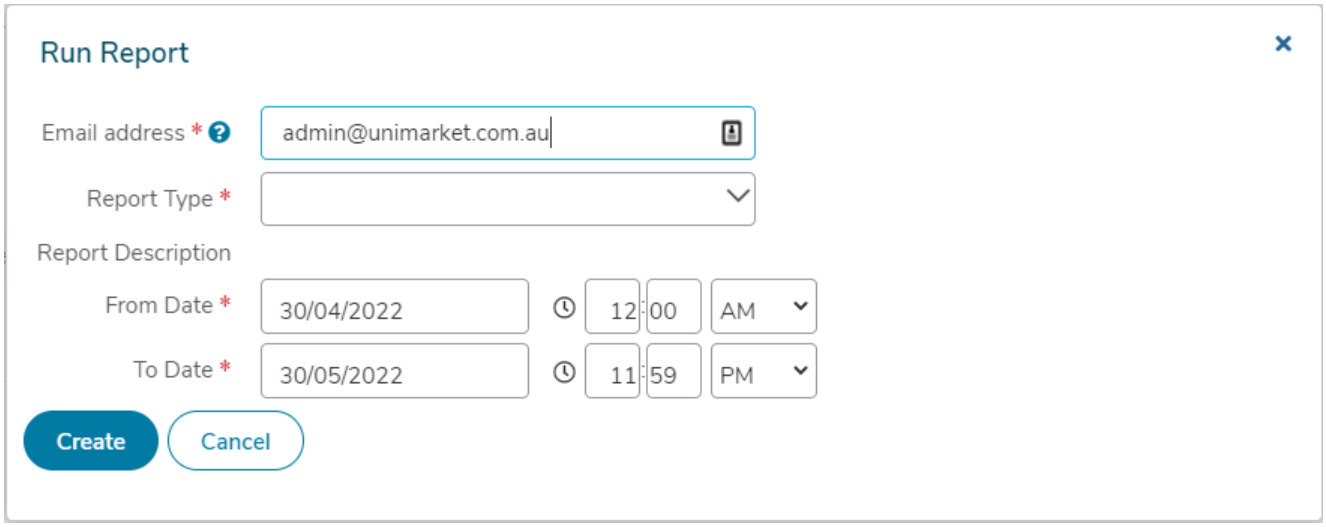


When in the **Reports** module, if the **Reports** section of the Reporting menu is clicked you can see a list of the reports that have been run. Select **Download** to extract the report in a CSV format. Reports older than 18 months will be removed.



Run New Report

To Run a new report, select **+Run Report** from the **Actions** in the top right. Enter an email address which will receive notification once the report is ready, choose the **Report Type** you want to use and the date range you wish to report across (this defaults to one month).



The report will be added to the list, you can check the status of the report in the Status column and it can be downloaded once complete.

Report Types

Report Type Templates define the format and content of the report. The most commonly used reports are:

Standard Templates	Description
Unimarket Order Report	Lists orders created in the specified date range.
Unimarket Requisitions In Progress	Lists requisitions created in the specified date range that have at least one item still awaiting approval.
Unimarket Requisitions	A list of requisitions placed in the system. All states.
Unimarket Requisition Approval Statistics	Requisitions and their associated approval timelines.

A full list of Reports is available here, or please reach out to the Unimarket Support team with any questions – E: support@unimarket.com