

Manage/Approve Users. For Administrator Use Only.

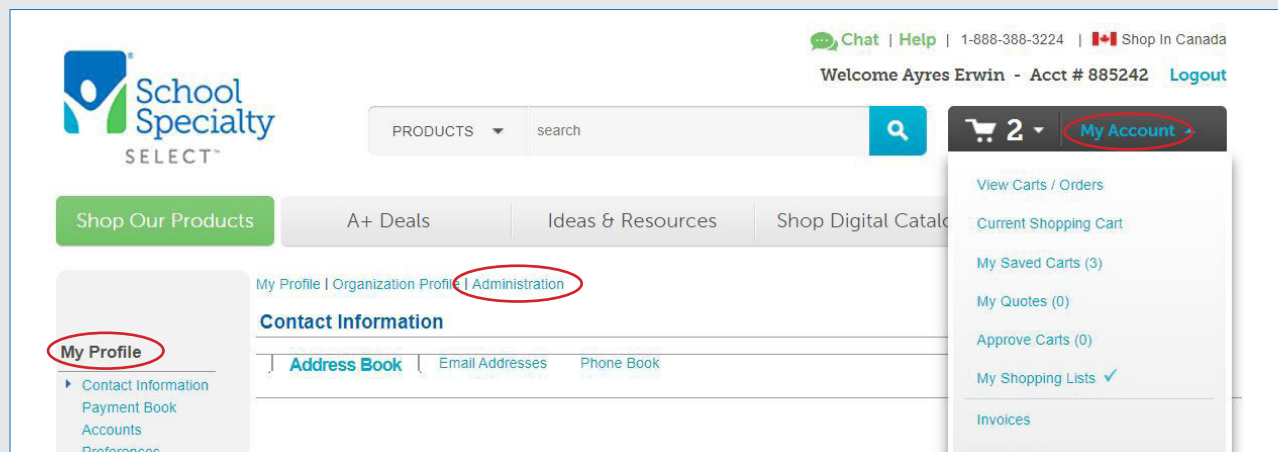
Welcome to School Specialty Online! Below are some instructions to help **only Administrators** manage and approve users. If you are not an administrator, please do not refer to the instructions below.

Login:

- Visit SchoolSpecialty.com. Select **Sign In/Create Account** in the top right corner.
- Choose **Continue & Login** under **Continue as a School or Business User** ordering with your school organization.
- Enter your user name and password, click **Login**.

Access Your Active Users:

- Click on **My Profile** option from the **My Account** menu at the top of the screen.
- Click on Administration located at the top of the white screen area.



Manage /Approve Users, cont.

- Your list of active users will display:
 - Search for users by name, status, approver and limit, shipping locations, and roles (permissions).
 - Click any user's name to view users details, approval workflow, available shipping locations, and roles (permissions).
 - Edit will update all selected users.
 - Create User will create a new user.

My Profile | Organization Profile | Administration

User Management Expand | Collapse

User/Contact Details
 User Name: [dropdown] | Equal To: [input] Status: [Active] [dropdown]

Roles: [has] [dropdown] Ship To Locations: [is assigned] [dropdown]

Approvals
 Approval Limit: [Equal To] [input]
 Approver Name: [has Approver as] [dropdown]

Show Users: [Registered Users] [dropdown] [Show All] [Search] [Create User] [Edit] [Export]

Total number of users in the organization: 1582
 Number of users matching your search: 308
 (A)=Approver; (P)=Primary User; (S) = Shared User

<< first < prev 1 2 3 4 5 next > last >> Rows/Page: 10 [dropdown]

<input type="checkbox"/>	Name	User Name	Default Ship To Location	Approval Status	Status
<input type="checkbox"/>	12 15. TEST TESTER	TEST1212	BT TEST REGRESSION TESTING INST OF AMERICA	APPROVED	Active
<input type="checkbox"/>	AAA. TEST	AAATEST	BT TEST REGRESSION TESTING INST OF AMERICA	APPROVED	Active
<input type="checkbox"/>	ABQUINA, DARLING	ABQUINADG	BT TEST REGRESSION TESTING INST OF AMERICA	APPROVED	Active
<input type="checkbox"/>	ADKINS, BRYAN (P, A)	BRYANONLINE		APPROVED	Active
<input type="checkbox"/>	ALCARAZ, MARIBEL (A)	MALCARAZ414567	ONLINE SUPPORT ISTORE TEST 123	APPROVED	Active
<input type="checkbox"/>	ALIALI, ALIALI	ALIALI		APPROVED	Active
<input type="checkbox"/>	AMANDA, KATE	KATE101		APPROVED	Active
<input type="checkbox"/>	APPLEBOTTOM, SUZIE (P, A)	SAPPLEBOTTOM		APPROVED	Active
<input type="checkbox"/>	APPROVER, ALEKS (P)	ALEKS_APPROVER		APPROVED	Active
<input type="checkbox"/>	APPROVER, LEVEL2 (P, A)	TESTAPP2		APPROVED	Active

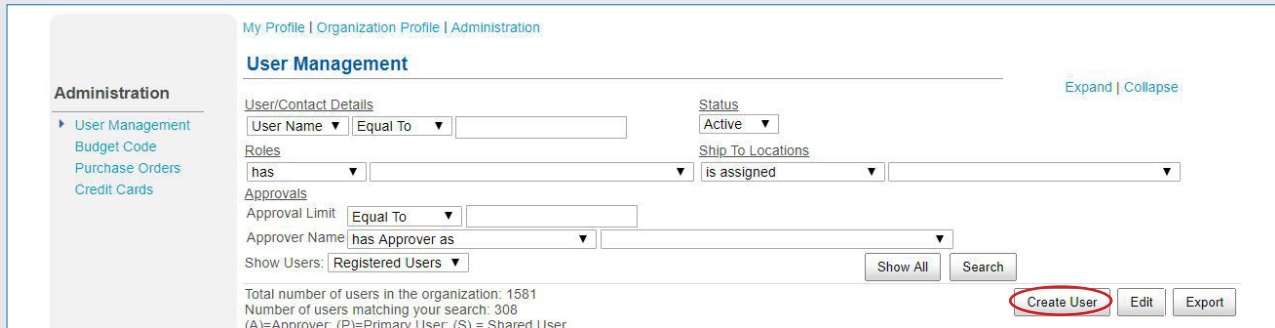
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[Create User] [Edit] [Export]

Manage /Approve Users, cont.

Create a New User:

- Above the individual users listed, select the icon **Create User**.



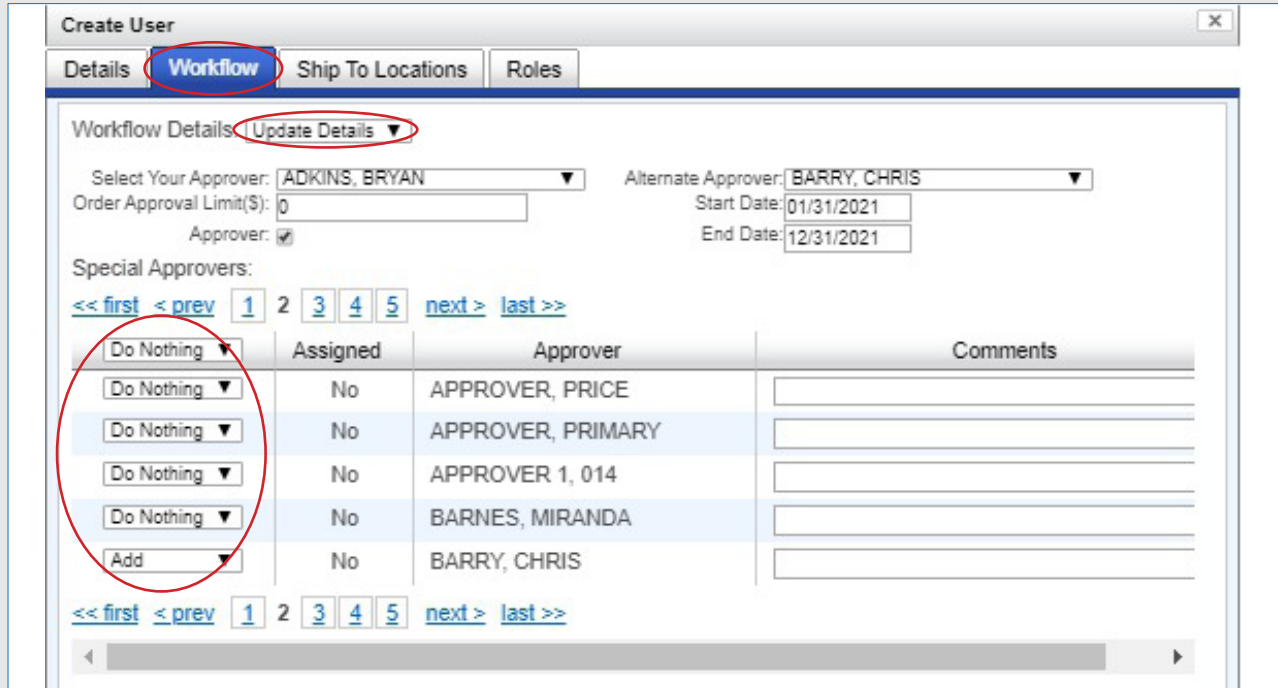
The screenshot shows the 'User Management' interface. On the left is a navigation menu with 'Administration' expanded to show 'User Management', 'Budget Code', 'Purchase Orders', and 'Credit Cards'. The main content area has a breadcrumb trail: 'My Profile | Organization Profile | Administration'. Below this is the 'User Management' header with an 'Expand | Collapse' link. The form includes fields for 'User/Contact Details' (User Name, Equal To), 'Status' (Active), 'Roles' (has), 'Ship To Locations' (is assigned), and 'Approvals' (Approval Limit: Equal To, Approver Name: has Approver as). At the bottom, there are 'Show All' and 'Search' buttons, and a 'Create User' button circled in red, along with 'Edit' and 'Export' buttons. A summary line at the bottom indicates: 'Total number of users in the organization: 1581', 'Number of users matching your search: 308', and '(A)=Approver, (P)=Primary User, (S)= Shared User'.

- Fill in the appropriate/needed information for the user.
- Select **Yes** when asked "Do you want to register this contact as a user?"
- Create username and password.

Workflow:

- Select the **Workflow** tab and choose **Update Details** next to Workflow Details at the top.
- Select your approver on the dropdown tab to allow them to approve the new user's orders.
- Select the user's Order Approval Limit from the dropdown tab. Orders that exceed the Order Approval Limit will have to be approved. Order totals less than the limit will require no approval.
 - If no approval is needed, leave the Approver field blank and leave the Approval Limit to \$1,000,000.
- Order totals greater than the limit will forward the order to the assigned approver.
- Check the **Approver box** only if you wish this user to be able to approve other user's carts.
- Example: Require approval for orders over \$100:
 - Select your Approver and set your Order Approval Limit at \$100. All orders under \$100 will go automatically to School Specialty – all orders over \$100 will go to selected approver.
- Special Approvers: Setting a member of your school district or organization as your approver will give you the additional option of adding Special Approvers. By changing **Do Nothing** to **Add** next to the approver's name, your new user will then have the option of routing their order to either the default approver or to select one of the Special Approvers.
 - Special Approvers might be a manager of a special fund or account that this order needs to be routed to. Example: Special Ed, PTO funds, etc.

Manage / Approve Users, cont.



Create User

Details **Workflow** Ship To Locations Roles

Workflow Details **Update Details** ▼

Select Your Approver: ADKINS, BRYAN ▼ Alternate Approver: BARRY, CHRIS ▼
 Order Approval Limit(\$): 0 Start Date: 01/31/2021
 Approver: End Date: 12/31/2021

Special Approvers:
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Do Nothing ▼	Assigned	Approver	Comments
Do Nothing ▼	No	APPROVER, PRICE	
Do Nothing ▼	No	APPROVER, PRIMARY	
Do Nothing ▼	No	APPROVER 1, 014	
Do Nothing ▼	No	BARNES, MIRANDA	
Add ▼	No	BARRY, CHRIS	

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Ship to Locations:

- Select the **Ship to Locations** tab to add the new user's ship to location options.
- Change **Do Nothing** to **Add** in the drop down menu.

Roles:

- Select the **Roles** tab to assign your new user roles.
- Role options with descriptions are provided.
- To assign your new user a role, change **Do Nothing** to **Add** in the drop down menu.

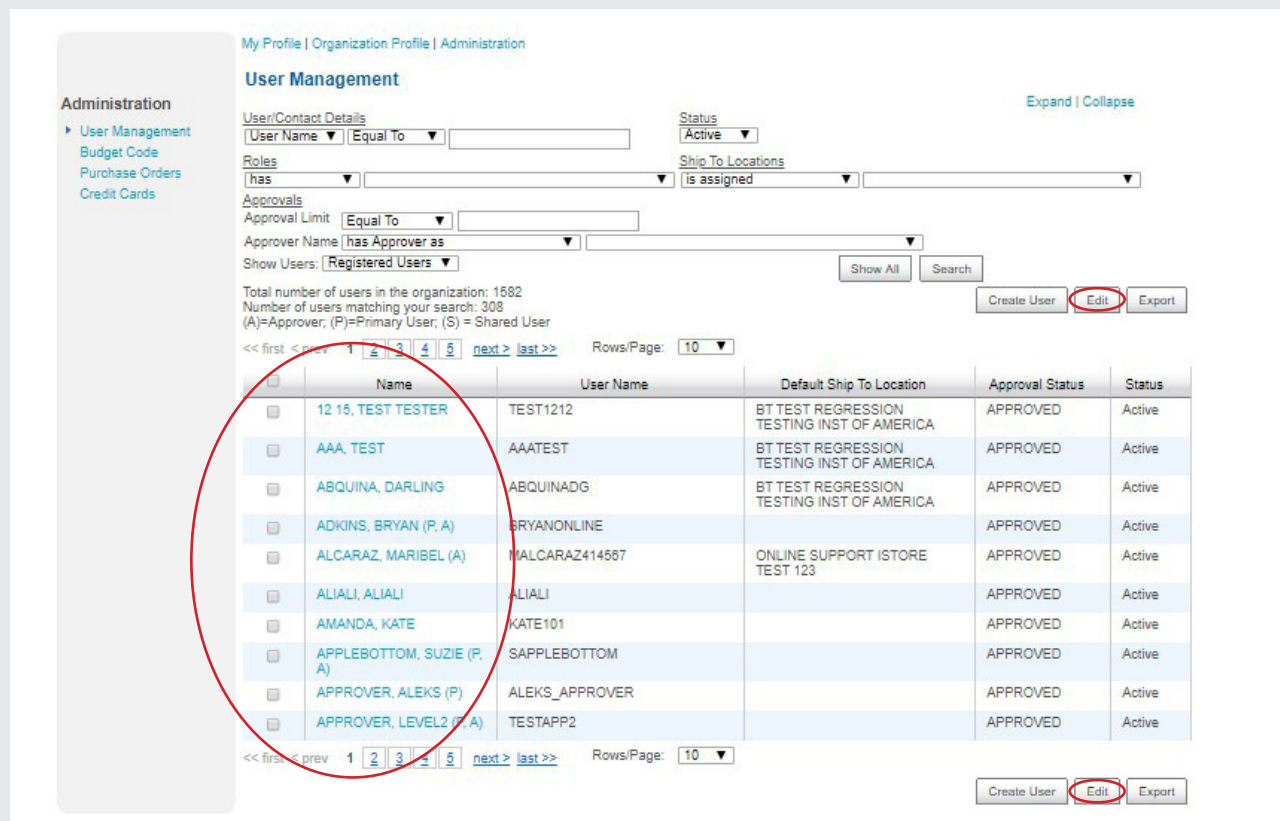
Below the user information, click on **Save** to create your new user and save their information. Your new user will receive an email notifying them that they are now a user.

NOTE: Your School or District user can register themselves by registering under their account number or the school's name/address. You will NOT be notified if someone registers as a new user however, you can find them in your User Management Page and can edit as needed. Changing an approver will not automatically move carts that are in the previous approver's queue to approve. To move these, go to My Account / View Carts/Orders, search for all carts pending the previous approver's name, and reassign the cart(s) to the new approver.

Manage / Approve Users, cont.

Editing a User:

- Click a user's name to edit an individual user
- Select multiple users by selecting the boxes and click **Edit** to edit multiple users at a time
- Adjust the user details as needed, select **Save** once complete.
- You can edit a user at any time.



The screenshot displays the 'User Management' interface. On the left is a navigation menu with 'Administration' expanded to show 'User Management', 'Budget Code', 'Purchase Orders', and 'Credit Cards'. The main area shows user management options like 'User/Contact Details', 'Roles', 'Approvals', and 'Show Users'. A table lists users with columns for Name, User Name, Default Ship To Location, Approval Status, and Status. The 'Edit' button in the top right is circled in red. A red circle highlights the first row of the table, which contains the user '12 15, TEST TESTER'.

	Name	User Name	Default Ship To Location	Approval Status	Status
<input type="checkbox"/>	12 15, TEST TESTER	TEST1212	BT TEST REGRESSION TESTING INST OF AMERICA	APPROVED	Active
<input type="checkbox"/>	AAA, TEST	AAATEST	BT TEST REGRESSION TESTING INST OF AMERICA	APPROVED	Active
<input type="checkbox"/>	ABQUINA, DARLING	ABQUINADG	BT TEST REGRESSION TESTING INST OF AMERICA	APPROVED	Active
<input type="checkbox"/>	ADKINS, BRYAN (P, A)	BRYANONLINE		APPROVED	Active
<input type="checkbox"/>	ALCARAZ, MARIBEL (A)	MALCARAZ414567	ONLINE SUPPORT ISTORE TEST 123	APPROVED	Active
<input type="checkbox"/>	ALIALI, ALIALI	ALIALI		APPROVED	Active
<input type="checkbox"/>	AMANDA, KATE	KATE101		APPROVED	Active
<input type="checkbox"/>	APPLEBOTTOM, SUZIE (P, A)	SAPPLEBOTTOM		APPROVED	Active
<input type="checkbox"/>	APPROVER, ALEKS (P)	ALEKS_APPROVER		APPROVED	Active
<input type="checkbox"/>	APPROVER, LEVEL2 (P, A)	TESTAPP2		APPROVED	Active