Ordering Platform

Quick Reference Guide: Adding Additional Users, Roles, and Approval Limits

For Company Administrators

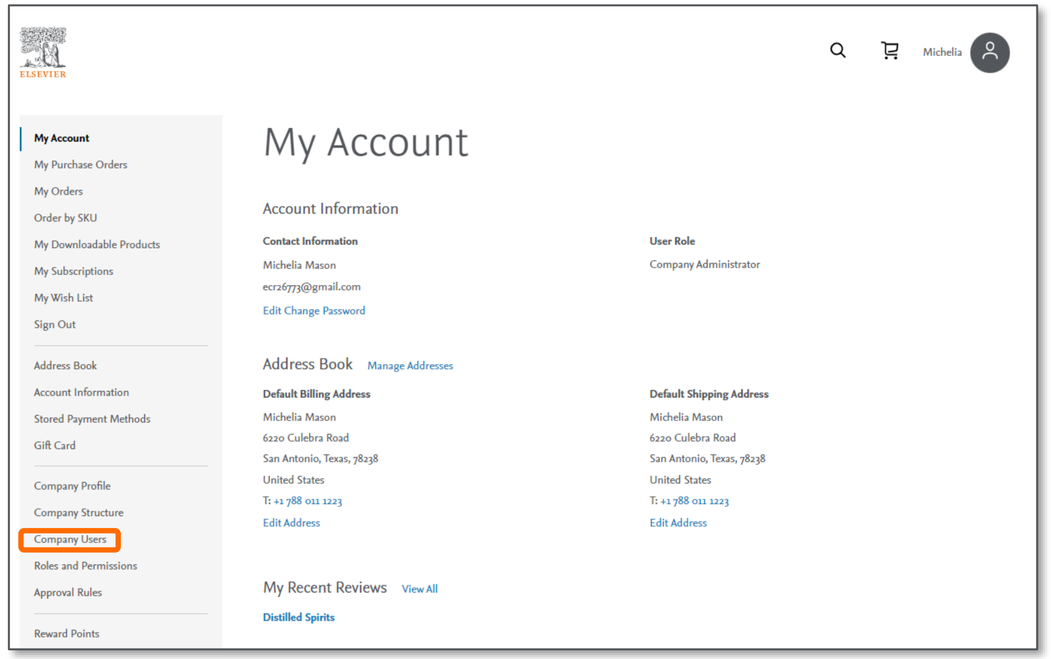
Introduction

Elsevier's Business Ordering Platform offers a hassle-free experience for purchasing ebooks and adding journal subscriptions. You will have increased control over your product holdings, a convenient way to manage and purchase content anytime, and the ability to instantly react to the dynamic needs of health professionals, faculties and students, ensuring the content is in place - at the right time.

Company Administrators can add additional company users to purchase products through the platform, and add new roles with selected permissions and approval limits

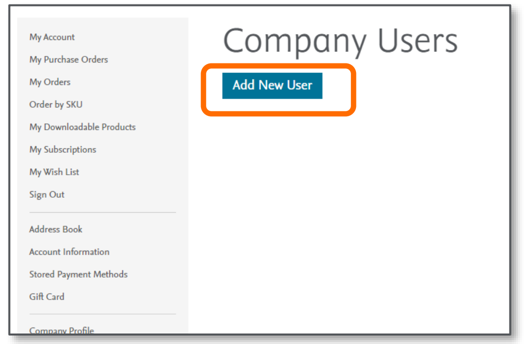
To open your account page, click the user icon in the top-right corner of the page (next to the cart)

Your 'My Account' page will open.



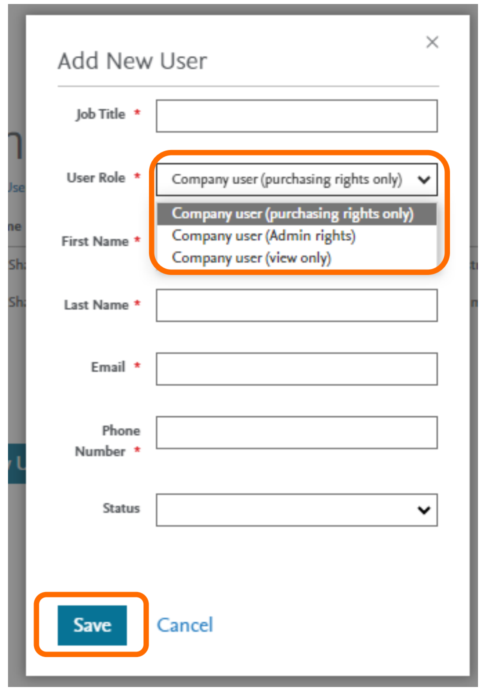
Select 'Company Users' from the left-hand menu.
This will take you to the Company User screen.

Adding additional **users**



On the 'Company Users' screen, you'll be able to manage the accounts of users within your company

To add a new user, select the 'Add New User' button. This will bring up a pop-up window to allow you to create a new user.



Input the details of the user you wish to add (all fields are mandatory, bar status)

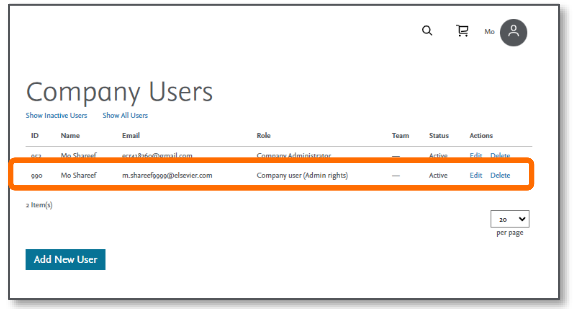
From the drop-down, select the role which you wish to assign the user to. There are three role profiles set up, but you are also able create new role profiles with specific permissions (see right column in this guide).

Pre-defined roles:

- Company user (purchasing rights only)
- Company user (admin rights)
- Company user (view only)

The company user with admin rights would give someone else the same admin rights as you, the Company Administrator.

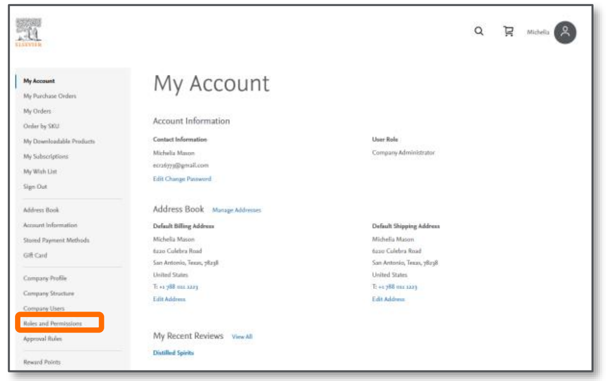
When ready, click 'Save'.



The newly created user will now appear on your 'Company Users' screen. To edit this user's role, select the 'Edit button' next to their account profile

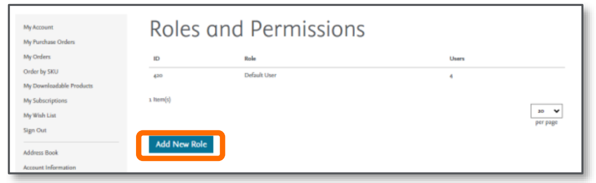
The added user will now receive a welcome email from the purchasing platform with a link to the store

Adding new **roles** and set permissions



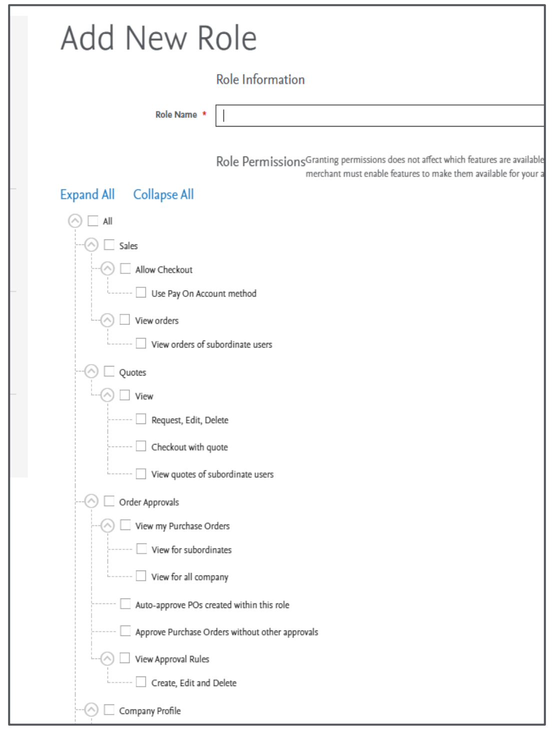
On your Account page select 'Roles & Permissions' from the left-hand menu

From the 'My Account' page, select 'Roles & Permissions' from the left-hand menu. This will take you to the Roles & Permissions screen.



From this page you're able to view all active roles across your company

To add a new role, select the 'Add New Role' button.



You'll be taken to the 'Add New Role' page. From this page you'll be able to name the new role & set the role permissions

Permissions can be set at a group level or an individual level. To set a permission highlight the relevant box.

When you're happy with the permissions set for the newly created role click save.

You'll then be able to assign the newly created role to company users as per the process in the middle column of this guide.

Questions? Visit the Elsevier Business Ordering Platform Support Center for FAQs or use our webform to contact Customer Service.

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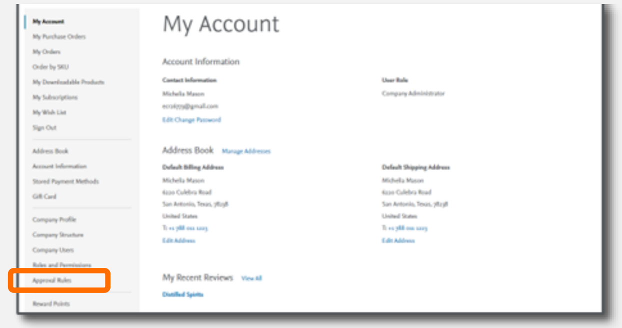
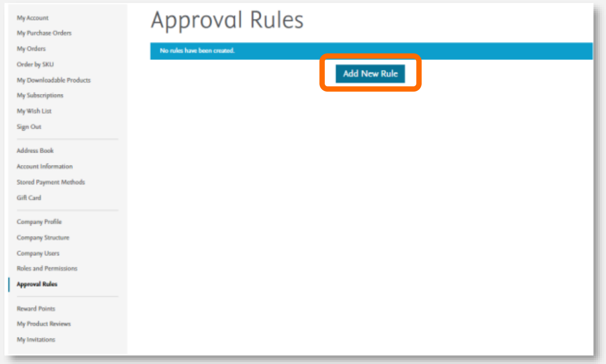
Setting approval limits

In addition to adding users and setting up new roles with selected permissions, you will be able to **set approval limits**, i.e., decide how much a user can spend on the platform, and specify who will be able to approval purchases.



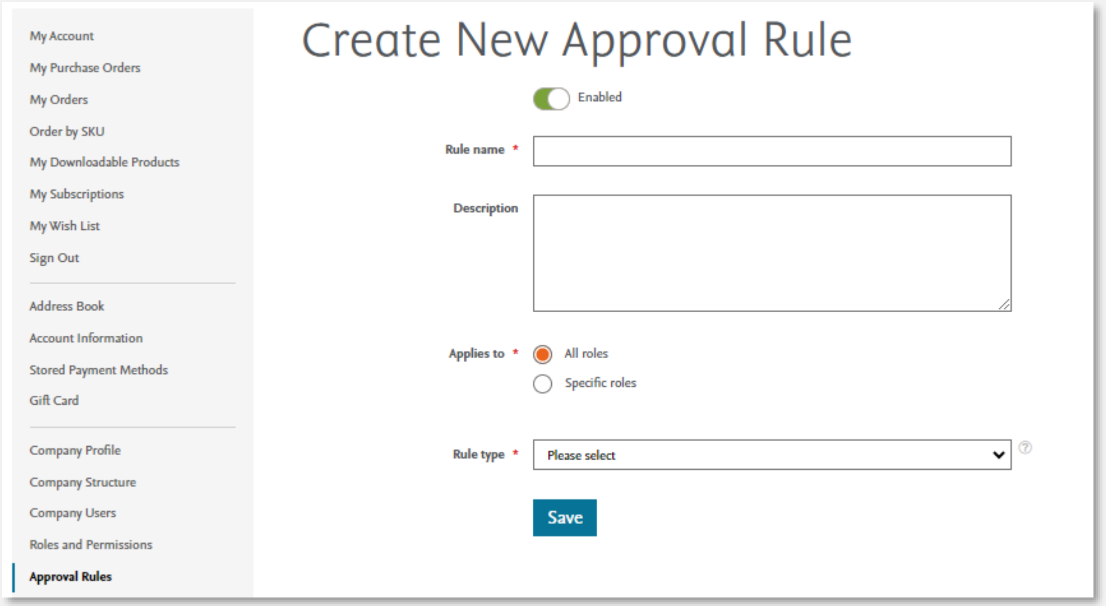
On the Account page select 'Approval Rules' from the left-hand menu

This will take you to the 'Approval Rules' screen.



On the Approval Rules screen, select 'Add New Rule'

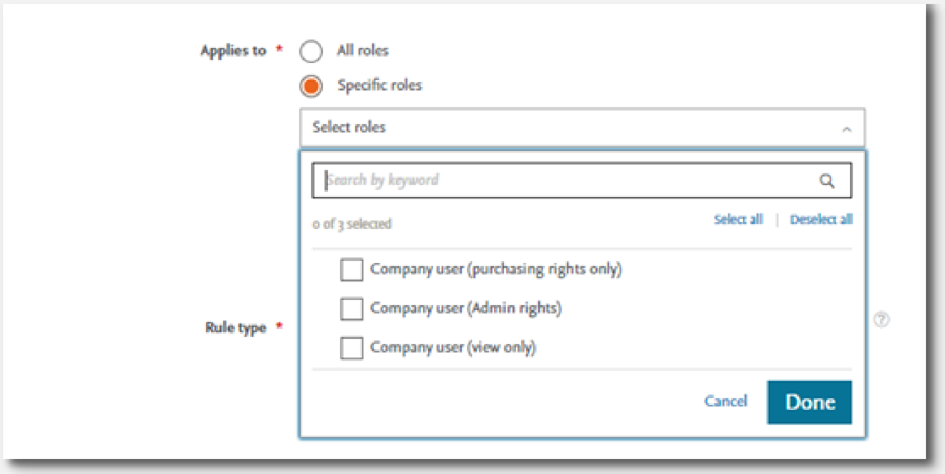
When doing that, new fields will display for you to select.



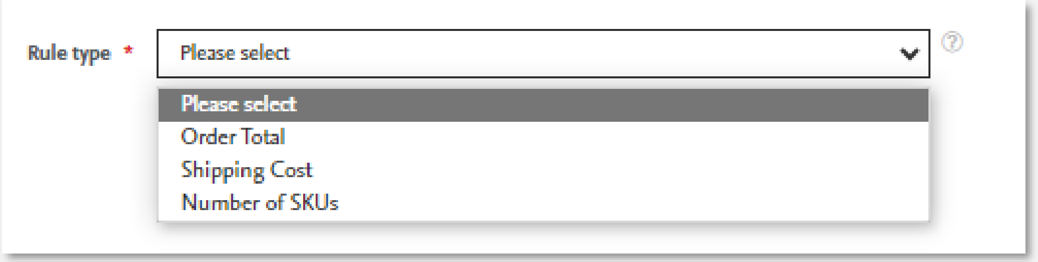
Setting approval limits continued

On the 'Create a New Approval Rule' page:

1. Create a 'Rule name', i.e. 'Purchase limit - Engineer Department'.
2. Add a description to explain the rule in more detail (optional).
3. Select which roles this rule applies to. Selecting 'specific roles' will open a drop-down menu.
4. Select the 'Role Type' from the drop-down menu.

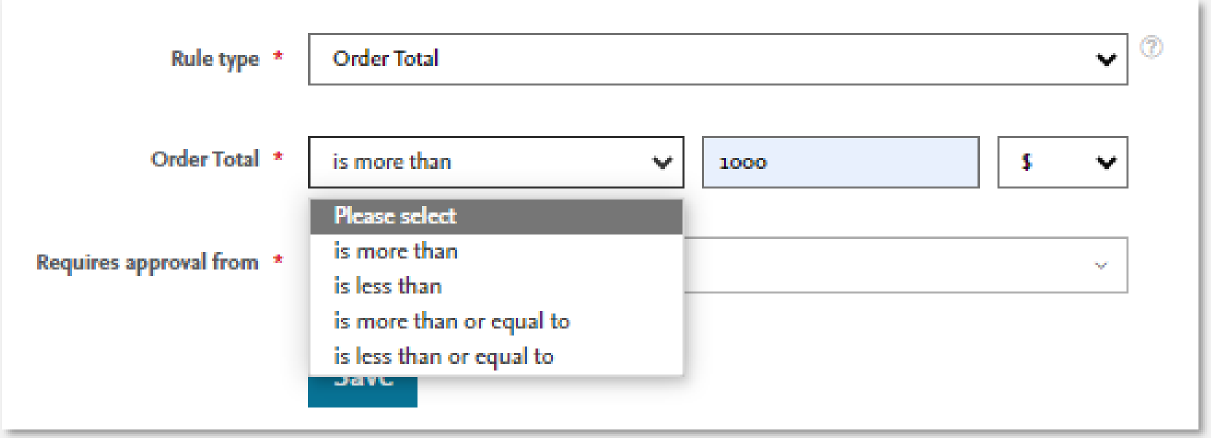


5. Select the 'Rule Type' from the drop-down menu.

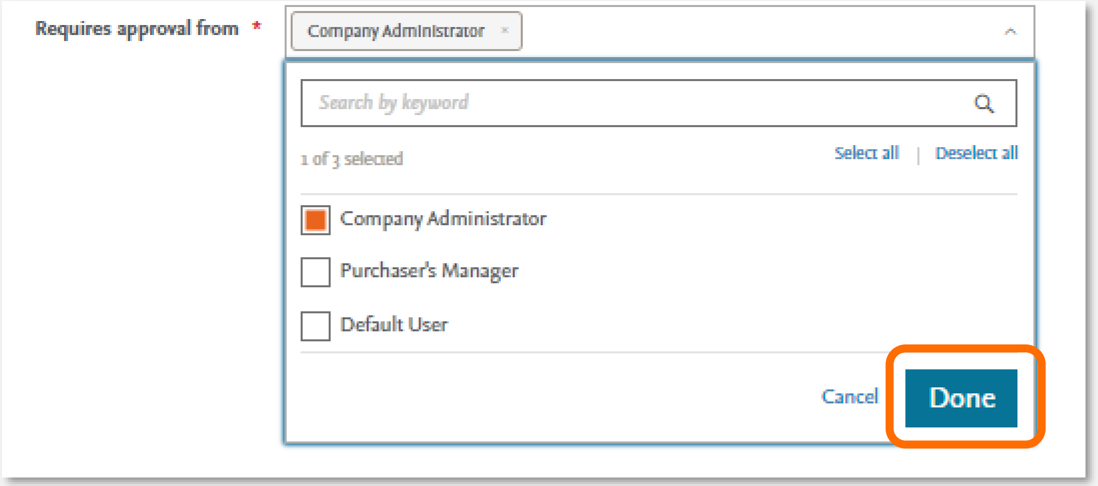


In this example we chose 'Order Total'.

6. Select the 'Order' total.



7. Then select the approver and click 'Done'.



Your new rule has now been added.