User Roles and Permissions

KCDA new Ecommerce site empowers its Customers to take charge of their User Management.

Every KCDA Customer must have an Account Level User Manager to create or approve Users and assign Roles and Permissions to the Ecommerce Website users.

KCDA Website Users assume 2 types of roles: Management Roles and Buyer/Approver Roles

Management Roles:

Role	Level in Hierarchy	Permissions
User Manager	Account	• Creates, Approves and Edits Users and assigns Roles and Permissions • May Add/Edit ShipTo to Customer Account
	ShipTo	• Creates, Approves and Edits Users and assigns Roles and Permissions at own ShipTo Level only
AP Manager	Account	• May pay invoices online for all Users, across all ShipTos within the Account.
	ShipTo	• May pay invoices online for all Users within the ShipTo.

Account Level Managers

ShipTo Level Managers

All Ecommerce Users
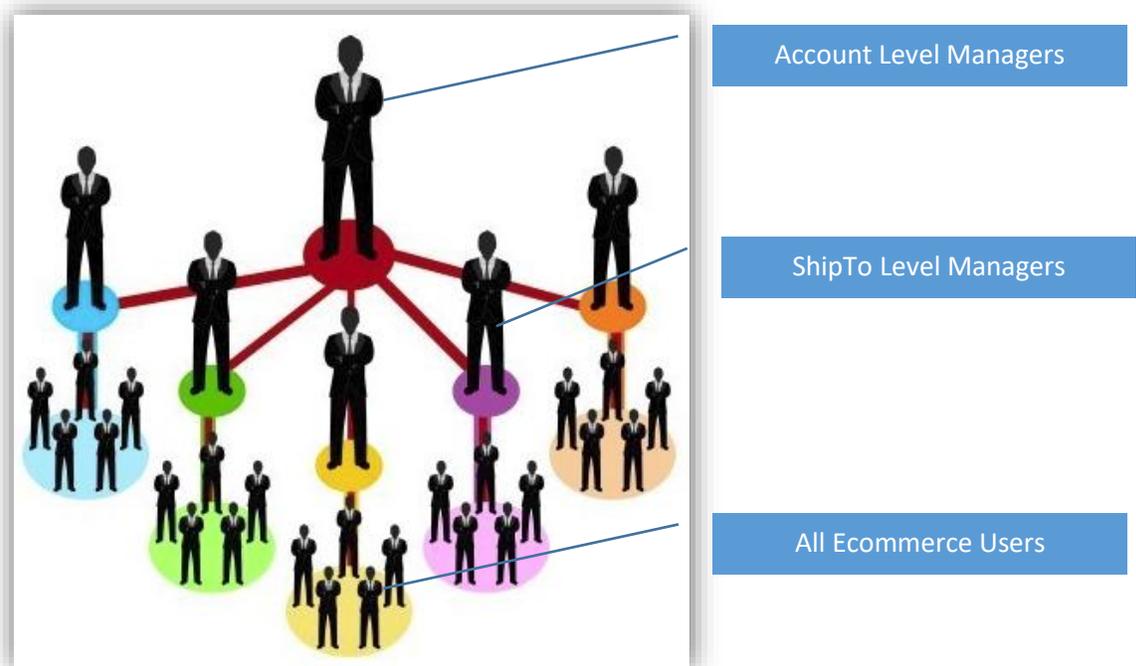
- A single user may assume multiple roles within the KCDA Ecommerce User Setup.
- You may also have multiple people assigned to the same role
- Account Level User Manager may create ShipTo Level User Managers.
- Once assigned, an Account Level User Manager may not be de-activated unless there is another user assigned to that role.

Creating Management Roles:

Creating a User Manager:
1. KCDA Customer Service may be called to create a User Manager Role at the Account Level for your School District/Agency.
2. Thereafter the Account Level User Manager may create other Account User Managers or ShipTo User Managers.

Creating an AP Manager:
1. Account Level User Manager may create Account AP Managers.
2. Account Level User Manager or ShipTo Level User Manager may create ShipTo Level AP Managers.

Creating a Management Role: You must be a User Manager to create Management roles
1. Login to their Account on KCDA Ecommerce site.
2. Select "Manage Approvers" from the home page menu options.
3. Select Account or ShipTo Level Permissions as required and permitted.
4. Select Approver Group – User Manager or AP Manager.
5. Select User (s) to assign to this Approver Group.
6. Hit Save.

You may use the same process as Management Role assignment to Assign L1-L3 Approval Roles in bulk.
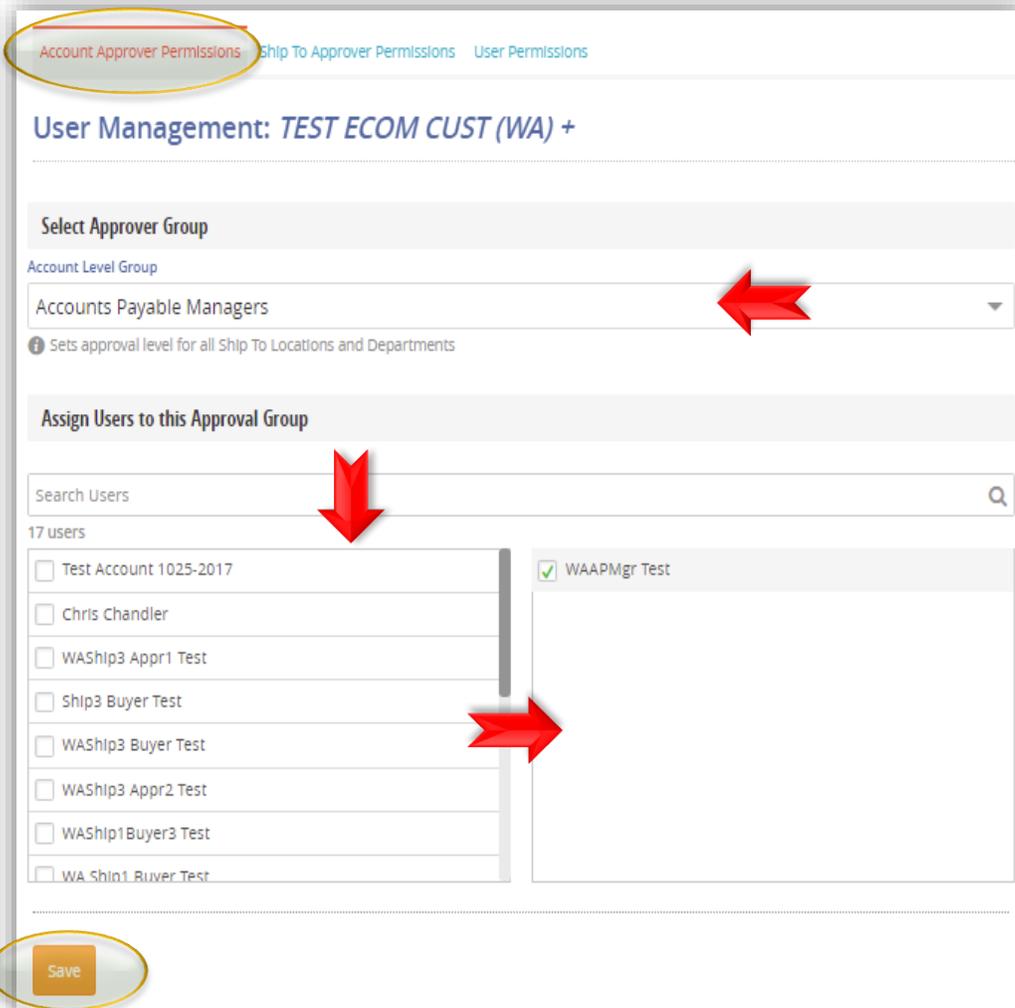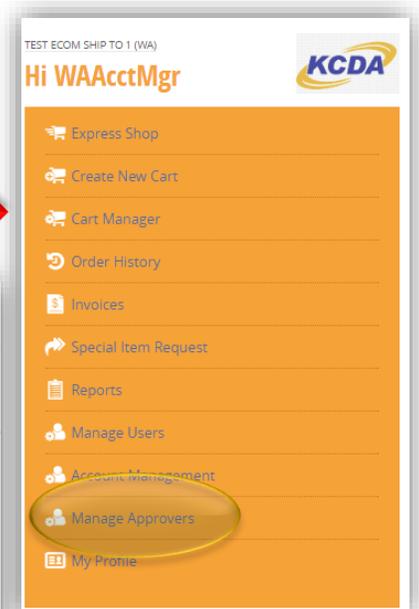
KCDA Ecommerce Buyer/Approver Roles:

We offer 5 types of Roles for users who shop at our website. All users must have a valid Login and password to see prices.

Role	Permissions
Registered User	Has login credentials, may see prices, create wish lists but Cannot CheckOut the Cart
Buyer	May Create and Checkout/Submit for Approval Carts for the Assigned ShipTo (s)/Department (s) only
L1 Approver	Is a Buyer and may Edit/Cancel/Hold, Checkout or Approve Buyer's carts in the assigned Approval Chain within Assigned ShipTo (s)/Department (s). May Checkout directly to KCDA within $ Limits.
L2 Approver	Is a Buyer and may Edit/Cancel/Hold, Checkout or Approve Buyer's and L1 approvers' carts in the assigned Approval Chain within Assigned ShipTo (s)/Department (s). May Checkout directly to KCDA within $ Limits.
L3 Approver	Is a Buyer and may Edit/Cancel/Hold, Checkout or Approve Buyer's and L1 and L2 approvers' carts in the assigned Approval Chain within Assigned ShipTo (s)/Department (s)
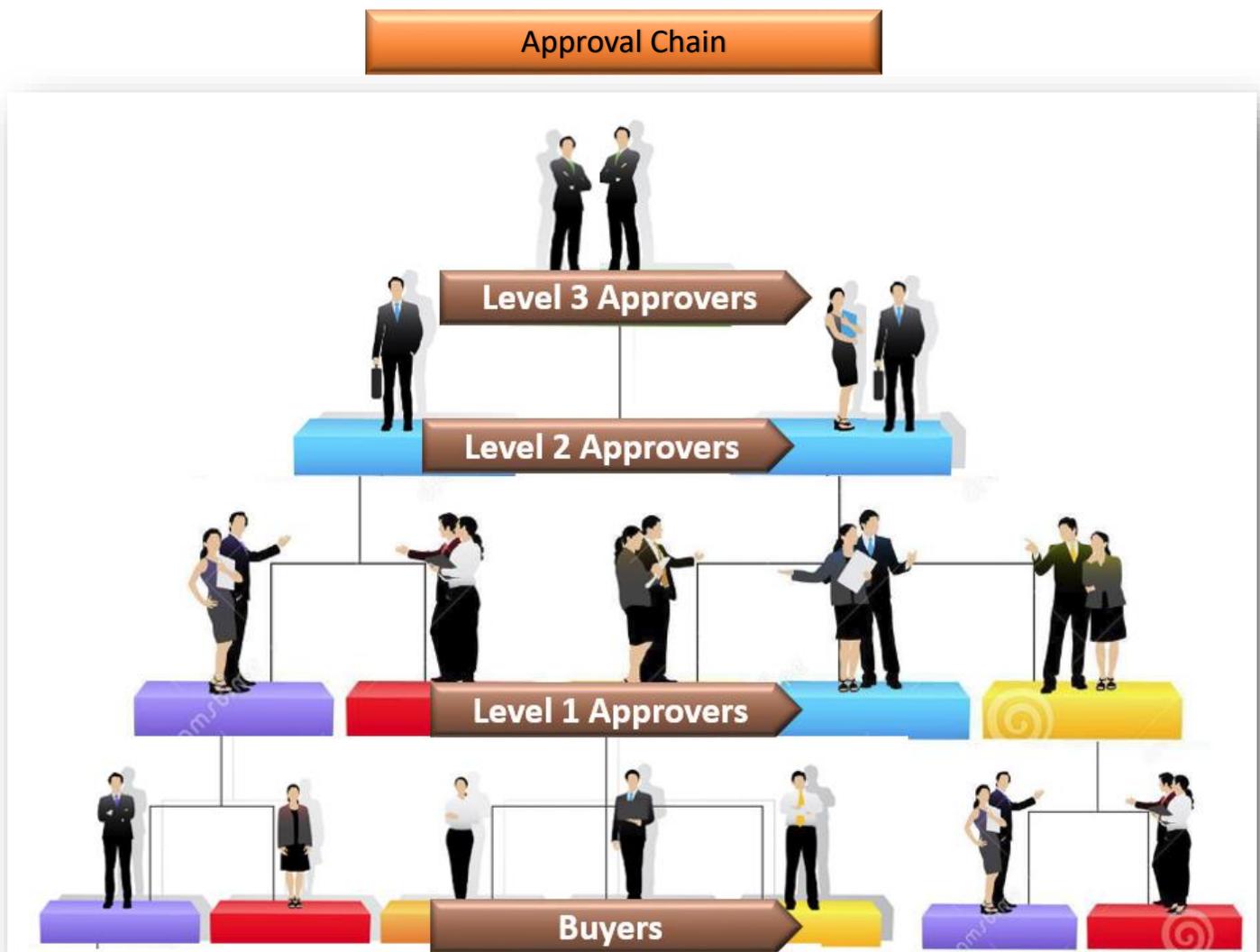
Creating and Approving an ECommerce User: You must be a User Manager to perform this function.

When a New User requests a login to KCDA Ecommerce site, ShipTo User Manager you will receive notifications. If ShipTo UM does not exist then Account UM will receive all such notifications. The UM may then proceed to:

1. Login to their Account on KCDA Ecommerce site.
2. Select "Manage Users" from the home page menu options.
3. Select the User that seeks Approval from the "Pending Approval" users list. Review and scroll down to see ShipTo Information.
4. If all looks good, Assign appropriate role and give appropriate permissions.
   a. Registered User, Buyer, L1, L2 or L3 Approver
   b. Credit Card usage enabled
   c. Approval Required or not with $ limit
5. Approve or Deny the User.

To assign Approver Roles in bulk you may also use the Create Management roles Process. (See Guidelines sheet)

Use the same steps as above to Update Role/Permissions for an existing user.