

# Efasst | How to Manage User Accounts?

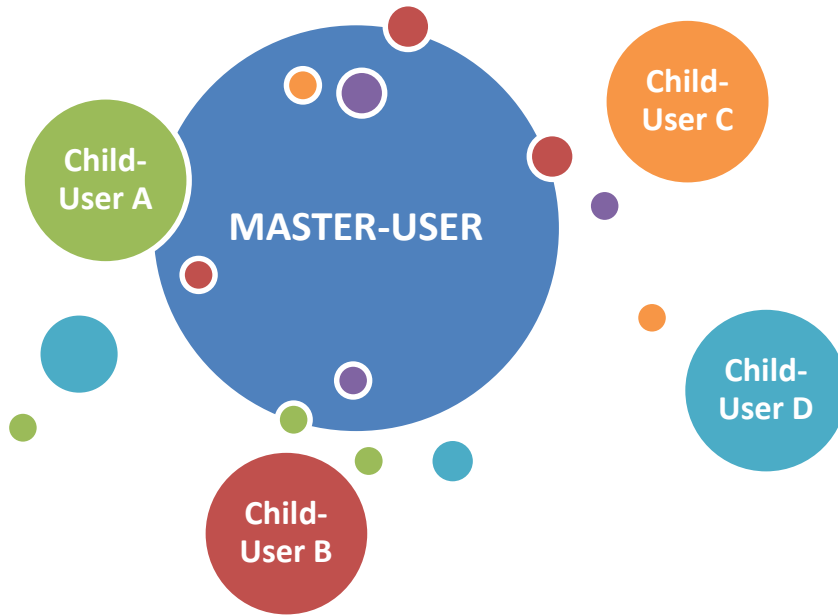
## *Quick Start Guide*



- 1 Most important terms
- 2 How can I change my User details?
- 3 How can I change my system access password?
- 4 How can I create/activate a new user account?
- 5 How to assign/change access profiles for each user account?
- 6 What do the different access profiles mean?
- 7 How can I deactivate a user account?
- 8 How to change the Master User?
- 9 How to change Registry Data?

# Quick Start Guide

Most important terms for managing user accounts



## MASTER-USER

- User that manages all user accounts/profiles associated with the Supplier.
- User with Efacec partner code (PXXXXXXX).
- This user can activate/deactivate user accounts as well as manage which access profiles that each account must have.
- Has full access to the Efacec Supplier Portal.

## CHILD-USER

- Supplier Secondary-User.
- User account activated by the Master-User.
- The level of access to the Efacec Supplier Portal depends on the profile assigned by the Master-User.
- Cannot manage user accounts.
- The Master-User can create n Child-Users!

# Quick Start Guide

How can I change my User details?



## Scenario 1 - User who wants to change the data is a MASTER-USER

If you are the Master-User and want to change your User data, you must make the changes directly in the Portfolio (tab "Roles Management") and search the Userid equal to your partner number.

**Portfolio - Roles Management**

- User Data
- Roles Management**
- General Company Data
- Supply Scope
- Supply Chain

0010 - Efacec	
Name	User ID
André Ma	ANTONIO JOSE

After recording the data an automated email will be sent with a request to Efacec in order to update them on our central information systems!

# Quick Start Guide

How can I change my User details?



## Scenario 2 - User who wants to change the data is a CHILD-USER

1 | Access "User" menu (main menu bar)

**Portfolio - Roles Management**

- User Data
- Roles Management**
- General Company Data
- Supply Scope
- Supply Chain

**Click on Menu "Roles Management"**

2010 - Efacec	
Name	
ANDRÉ MATEUS	André Ma
ANTONIO JOSE	António Jo

**User Data** **Edit** **Change Password**

Userid

**2 - Click on "Edit" option**

**User Data**

Userid \* UTILIZADOR1

Name \* User Name (1)

Full Name \* User Name (1)

E-Mail username@username.com

Commercial Language \* Portuguese

Decimal Separator \* ,

Status \* Active

**Save**

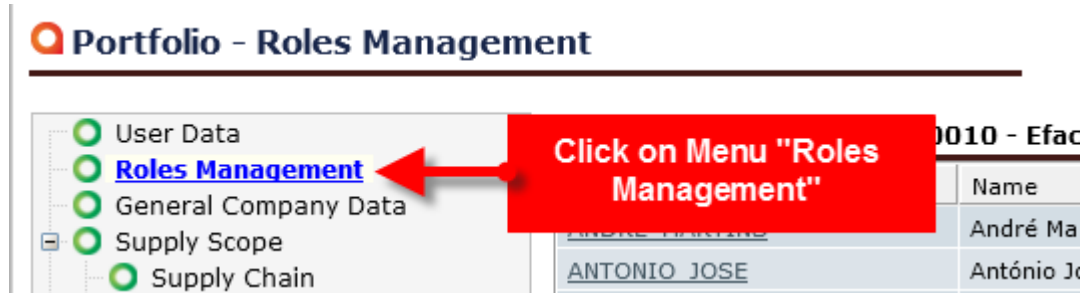
**3 - Change the desired data and click on "Save" option**

# Quick Start Guide

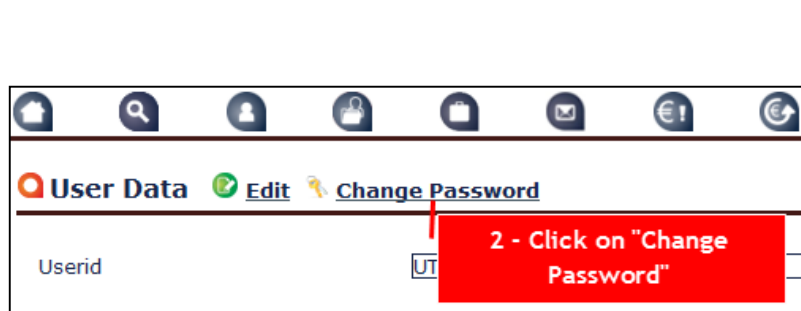
How can I change my system access password?



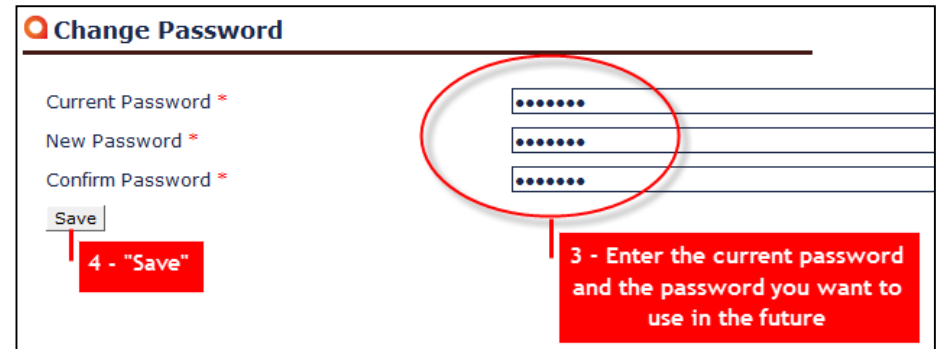
## 1 | Access “User” menu (main menu bar)



## 2 | Click on “Change Password”



## 3 | Enter the required information and “Save”



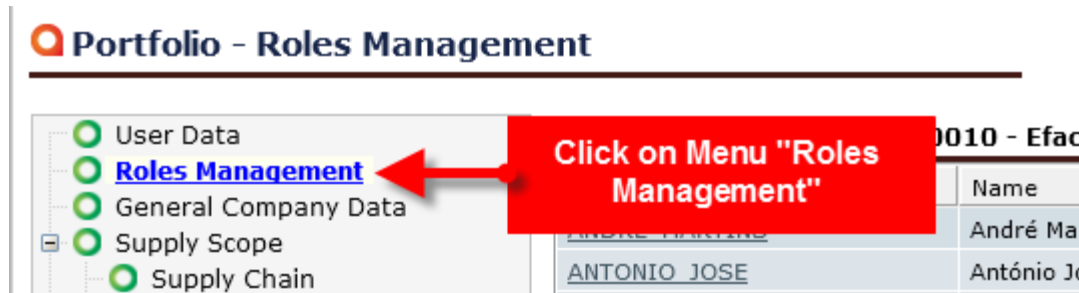
**Note:** For safety reasons and ease of access it is recommended that you change your portal access password in the 1st login!

# Quick Start Guide

How can I create/activate a new user account?



## 1 | Access "Roles Management" menu (main menu bar)



Click on "Create New User", fill in the requested information about the user to add and click "Create"

Roles Management

Associated users list P00000750

Create New User

Userid \* USER1 Name \* E-Mail \* unsername@username.com Create

Userid	Name	commercial	financial	technical	qse	Status
P00000750		<input checked="" type="checkbox"/> Disable	<input checked="" type="checkbox"/> Disable	<input checked="" type="checkbox"/> Disable	<input checked="" type="checkbox"/> Disable	Active

Created new user

### Notes:

1. Only the Master-User has the possibility of creating a new User account.
2. After creating the new user account, you must assign an access profile (see next slide)!
3. After creating the new user account, the system will send to him an automatic email with the password!

# Quick Start Guide

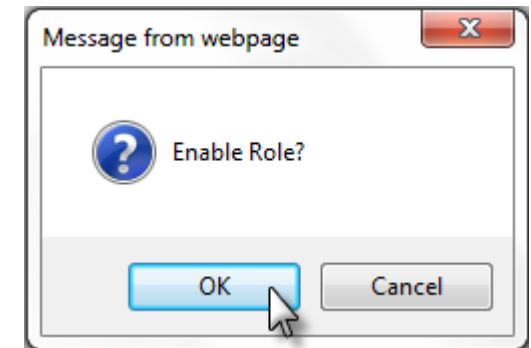
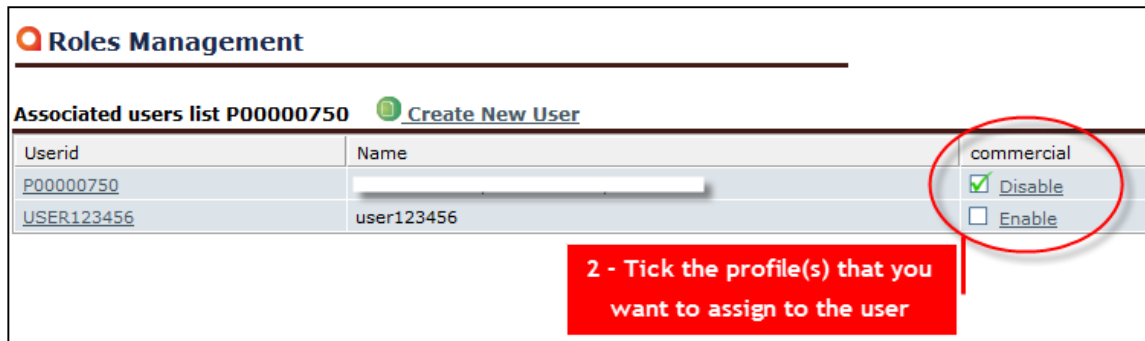
How to assign/change access profiles for each user account?



## 1 | Access " Roles Management" menu (main menu bar)



## 2 | Tick the profile(s) that you want to assign to the user (you can select more than one profile)



### Notes:

1. You can change access profiles for each user account whenever you want.
2. Only the Master-User can assign/change access profiles!
3. Access profiles are cumulative!
4. To remove an access profile of a user account, the procedure is equivalent to assigning profile!



# Quick Start Guide

What do the different access profiles mean?



COMMERCIAL	FINANCIAL	TECHNICAL	QSE
<ul style="list-style-type: none"><li>▪ Portfolio: Full access (except Financial Data tab, where you can only read the information)</li><li>▪ Negotiation Platform: Full access</li><li>▪ User Management: You can not manage accounts / user profiles (only you can change is your user data)</li></ul>	<ul style="list-style-type: none"><li>▪ Portfolio: Full access to modify financial information/contacts</li><li>▪ Negotiation Platform: Reading access</li><li>▪ User Management: You can not manage accounts/user profiles (only you can change is your user data)</li></ul>	<ul style="list-style-type: none"><li>▪ Portfolio: Read only access</li><li>▪ Negotiation Platform: Access to global view and can insert Technical Proposals</li><li>▪ User Management: You can not manage accounts/profiles (only you can change is your user data)</li></ul>	<ul style="list-style-type: none"><li>▪ Portfolio: Can see all the information in the Portfolio. Can only change information on Quality/Environment and Safety tabs</li><li>▪ Negotiation Platform: Reading access</li><li>▪ User Management: You can not manage accounts / user profiles (only you can change is your user data)</li></ul>

**Master-User: Has full access to the Supplier Portal, including management of user accounts/profiles!**

# Quick Start Guide

How can I deactivate a user account?



## 1 | Access « Roles Management" menu (main menu bar)

**Portfolio - Roles Management**

- User Data
- Roles Management**
- General Company Data
- Supply Scope
- Supply Chain

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Name
André Ma
ANTONIO JOSE
António Jo

## 2 | Access User to deactivate

**Roles Management**

Associated users list P00000750 [Create New User](#)

Userid	Name
P00000750	
USER123456	user123456

2 - Access User to deactivate

## 3 | Click on “Deactivate User”

**User Data** [Edit](#) [Deactivate User](#)

3 - Click on "Deactivate User"

Userid	USER123456
Name	user123456
Full Name	user123456
E-Mail	user123456@user.com
Commercial Language	English
Decimal Separator	?
Status	Active

*Note: The system does not send an automatic email alert to the deactivated user!*

# Quick Start Guide

How to change the Master-User?



The Master-User code can not be changed since it corresponds to the Efacec Partner code. However, you can change the name and email address, whenever you want!

Since these data correspond to the Supplier's general information, you must make the changes via Portfolio (tab "User Data")

The screenshot shows the efasST web interface. The top navigation bar includes Home, Search, Portfolio, Messages, Purchase Orders, Requests for Quotation, and Articles. The 'Portfolio - User Data' tab is active, and the 'Edit' button is highlighted with a red callout box containing the text: "Click on 'Edit' option to unlock the Master-User Form".

Field	Value
Userid	123456789
Name	Company Name
Full Name	Company Name
Email efasst	efasst@company.com
Institutional email	efasst.support@efacec.com
Commercial Language	Portuguese
Decimal Separator	?
Status	Active

After Saving the Data a request will be sent to Efacec in order to update them on our central information systems!

# Quick Start Guide

How to change Registry Data?



Your registry general data can be changed via Portfolio (tab “General Company Data”)

**efasST**® Efasst  
Strategic Sourcing Tools

Home Search Portfolio Messages Purchase Orders Requests for Quotation Articles

Search

**Portfolio - General Company Data** **Edit** Click on "Edit" option to unlock the tab "General Company Data"

- User Data
- Roles Management
- General Company Data**
- Supply Scope
  - Supply Chain
  - Items supplied
  - Geographical areas
  - Market segments
  - Efacec Business Areas
- Affiliated companies
- QSE Data
- Contacts
- Other Information
- Addresses
- Financial Data

**Identification**

**Company information**

Legal Company Name

Commercial Name

Taxpayer identification number

Commercial Language

Currency

**Company Address**

**Country**

**Company Contacts**

Phone (+351)

Phone 2 (+351)

Fax (+351)

E-Mail

Email 2

Web Site

After Saving the Data a request will be sent to Efacec in order to update them on our central information systems!



EFAST SUPPORT

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