Region 1 ACE Small Purchasing Application

User Guide

Administrative Center of Excellence

The <Client> Administrative Center for Excellence (ACE) created the ACE SharePoint application to help <Client> employees submit purchasing requisitions that are then processed by ACE micropurchasers. The intended users of this application are <Client> employees, ACE micropurchasers, and regional program managers who monitor related purchasing activity data.

ACE Resources

This user guide focuses on how to use the ACE application to perform specific tasks. The user guide does not discuss micropurchasing policies nor other business processes. Micropurchasing rules and policies already are documented on the ACE web site.

For more information, see:

- <Client> Administrative Center of Excellence micropurchasing web site
- Micropurchasing Service Level Agreements
- Micropurchasing steps and prerequisites

If you have questions about any part of the micropurchasing process, you can call ACE at the following phone numbers:

- XXX-XXX-XXXX
- 1-866-XXX-XXXX (toll free)
- XXX-XXX-XXXX (fax)

Accounts

This section describes how user accounts are used to access the ACE application and how those accounts are created and managed.

Application Roles

There are four user groups, or roles, within the ACE application. Each user group has a set of pre-defined permissions that control what abilities the members of each group have and what tasks they can perform.

Role/Group Name	Abilities
End User	Purchase Order Requests • Submit purchase order requests [more] • View requests submitted by self [more] • Share a link to a request [more] • Set an alert for a request [more] • Download a copy of a request [more] • Export a list to Excel [more] • View archived requests [more]
Micropurchaser	Purchase Order Requests • Submit purchase order requests [more] • View requests submitted by self [more] • Process & edit purchase order requests [more] • Launch purchase order views [more] • Archive purchase order requests [more] • Share a link to a request [more] • Set an alert for a request [more] • Download a copy of a request [more] • Export a list to Excel [more] • View archived requests [more] • View requisition logs [more]
Report User	Purchase Order Requests • Submit purchase order requests [more] • View requests submitted by self [more] • Share a link to a request [more] • Set an alert for a request [more] • Download a copy of a request [more] • Export a list to Excel [more] • View archived requests [more]

	Reports • Run reports [more]
Site Owner	Purchase Order Requests • Submit purchase order requests [more] • View requests submitted by self [more] • Process & edit purchase order requests [more] • Launch purchase order views [more] • Archive purchase order requests [more] • View archived purchase order requests [more] • Share a link to a request [more] • Set an alert for a request [more] • Download a copy of a request [more] • Export a list to Excel [more] • View archived requests [more] • View requisition logs [more] System Administration • Add announcements to the ACE home screen [more] • Add useful links to the home screen [more] • Add, update and delete Micropurchasers [more] • Add, update and delete Organizational Districts [more] • Add,update and delete Organizational Units [more] User Management • Add a new user [more] • Delete a user [more] Reports • Run reports [more]

Accounts

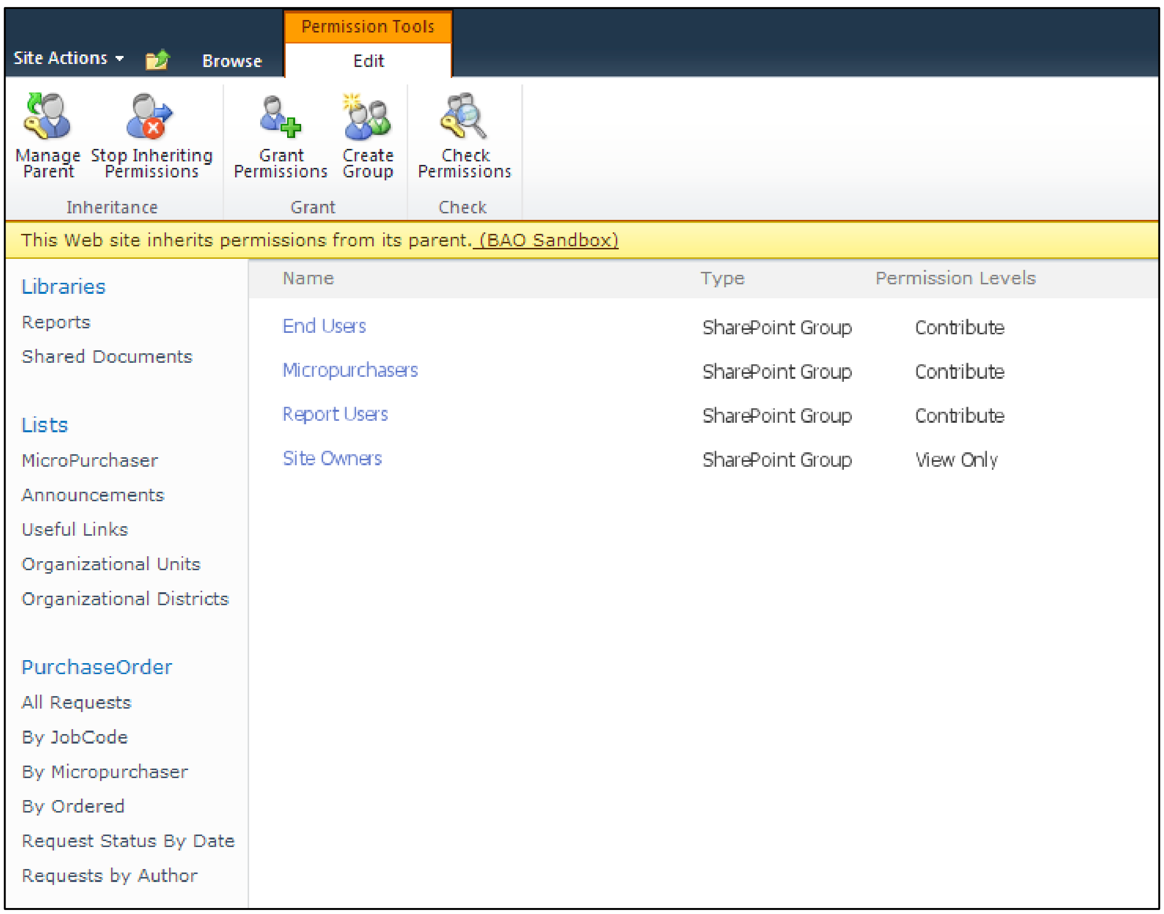
Add New User

This topic describes how to grant a user access to the ACE application. Only users with the Site Owner role can perform this task.

Granting a new user access to ACE is done by assigning the user to one of four user groups that already have pre-defined permissions. See Application Roles for more information about the abilities each group has.

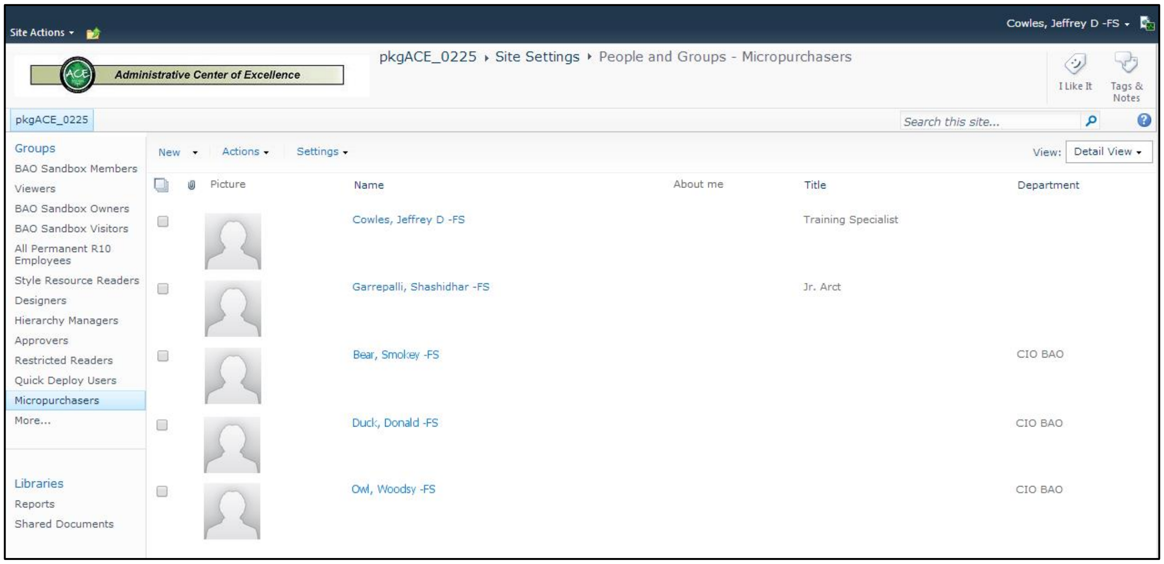
To create a new user:

1. Click the **Site Actions** menu in the top-left corner of the screen and then select **Site Permissions**.
   The Site Permissions screen appears and displays all groups in the ACE application. Image:



The Site Permissions Screen

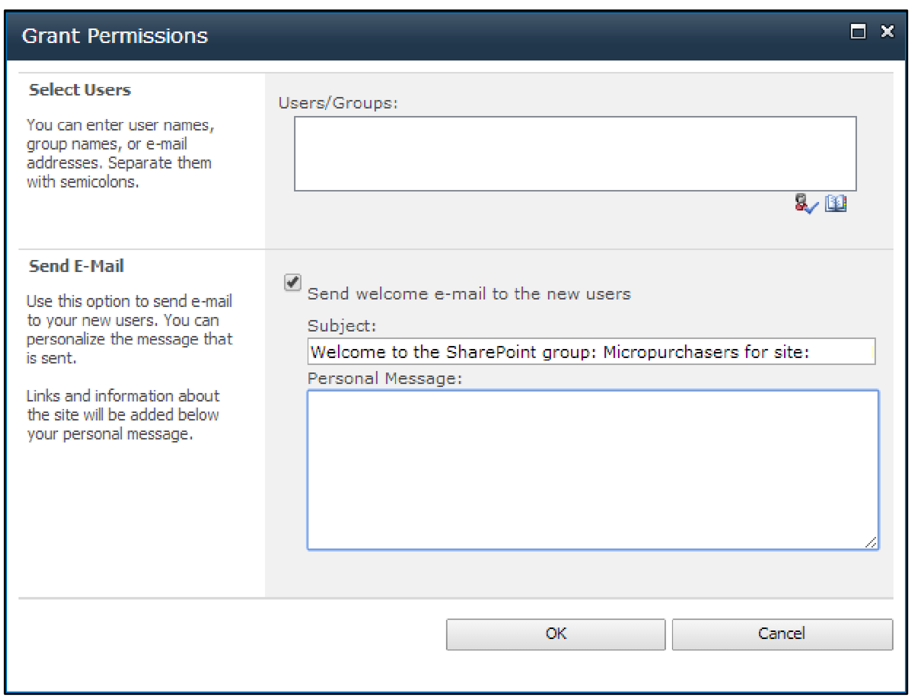
2. Click the name of the group to which you want to add a new user.
   A new screen appears, showing the users assigned to that group. Image:



Members of the Group

Note: When viewing the Site Owners group, there is an existing account called *svc_acetimerservice*. This account is critical for the proper function of the ACE application. Under no circumstances should you edit or delete it.

3. Select **New** > **Add Users** from the menu near the top of the screen. The Grant Permissions window appears. Image:



The Grant Permission Screen

4. Type the user's FS email address into the Users/Groups field and then click the Check User icon ( ).

SharePoint will search the Forest Service directory for that address and replace it with the user's name.

> **Tip:** If you do not have the user's FS email address, click the Browse icon ( ) to search for the person by name.

5. Optional: type a custom message that will be included in the system-generated email sent to the user.
6. Click **OK**.
   You are returned to the list of users for the group. The new user's name appears at the bottom of the list.

Related Topics

Accounts

Application Roles

Delete a User

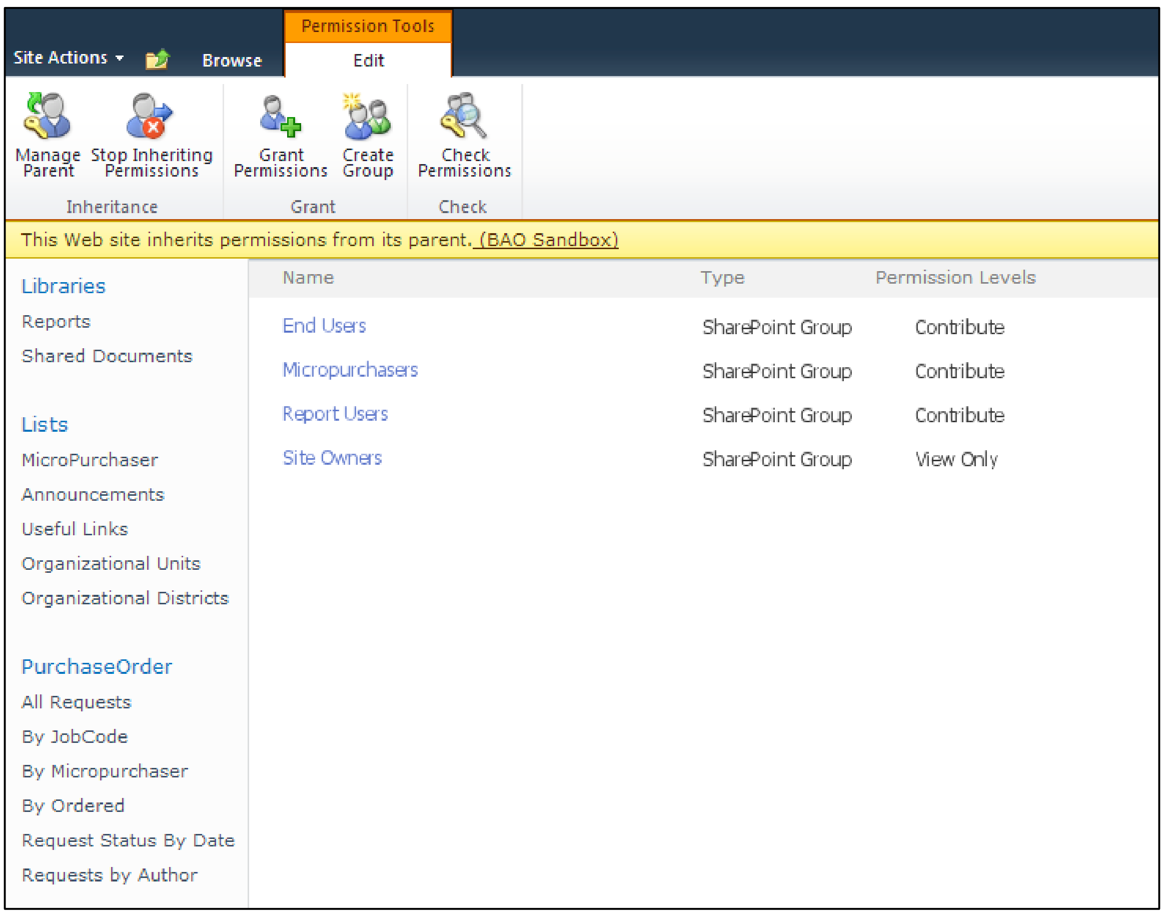
Delete a User

This topic describes how to remove users from the four ACE user groups (roles).

Remember that permissions are not assigned directly to each user, but rather they are assigned at the group level. Individual users are simply assigned to a group and thus receive whatever permissions that the group bestows. Therefore, editing a user's permissions is a matter of removing him or her from one group and adding him or her to another group.

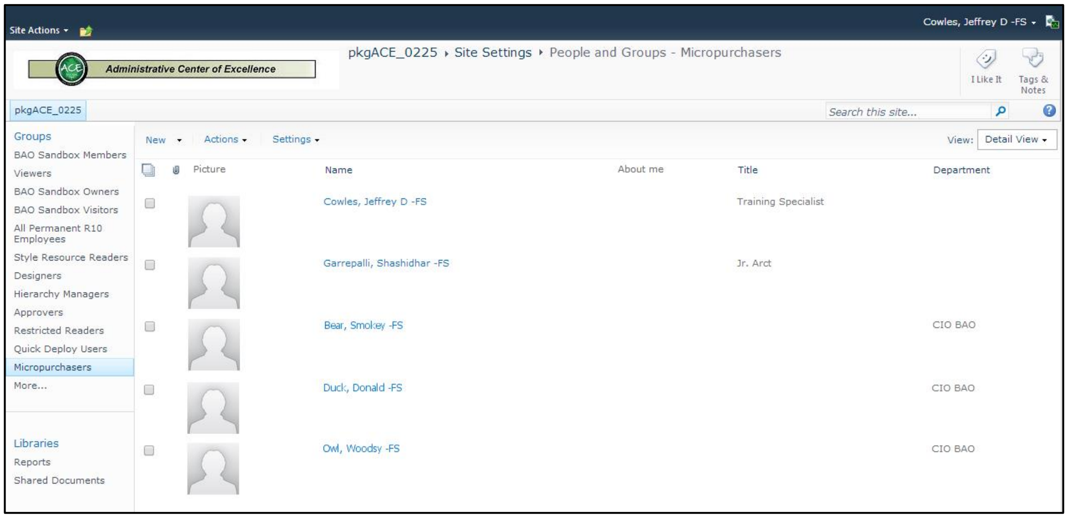
To remove a user from a user group:

1. Click the **Site Actions** menu in the top-left corner of the screen and then select **Site Permissions**.
   The Site Permissions screen appears and displays all groups in the ACE application. Image:



The Site Permissions Screen

2. Click the name of the group which contains the user you want to delete.
   A new screen appears, showing the users assigned to that group. Image:



Members of the Group

Note: When viewing the Site Owners group, there is an existing account called *svc_acetimerservice*. This account is critical for the proper function of the ACE application. Under no circumstances should you edit or delete it.

3. Check the box that corresponds to the user you want to remove.

Tip: You can select multiple users at the same time in order to remove them all simultaneously.

4. Click **Actions** > **Remove Users from Group**.
   A confirmation message appears asking if you are sure you want to remove the user(s) from the group.
5. Click **OK**.
   You are returned to the list of users for the group. The user(s) no longer appears in the list.
6. To add a user to another user group (role) see Add New User.

Related Topics

Accounts

Application Roles

Add New User

Access ACE

ACE is accessible within the Forest Service's SharePoint environment.

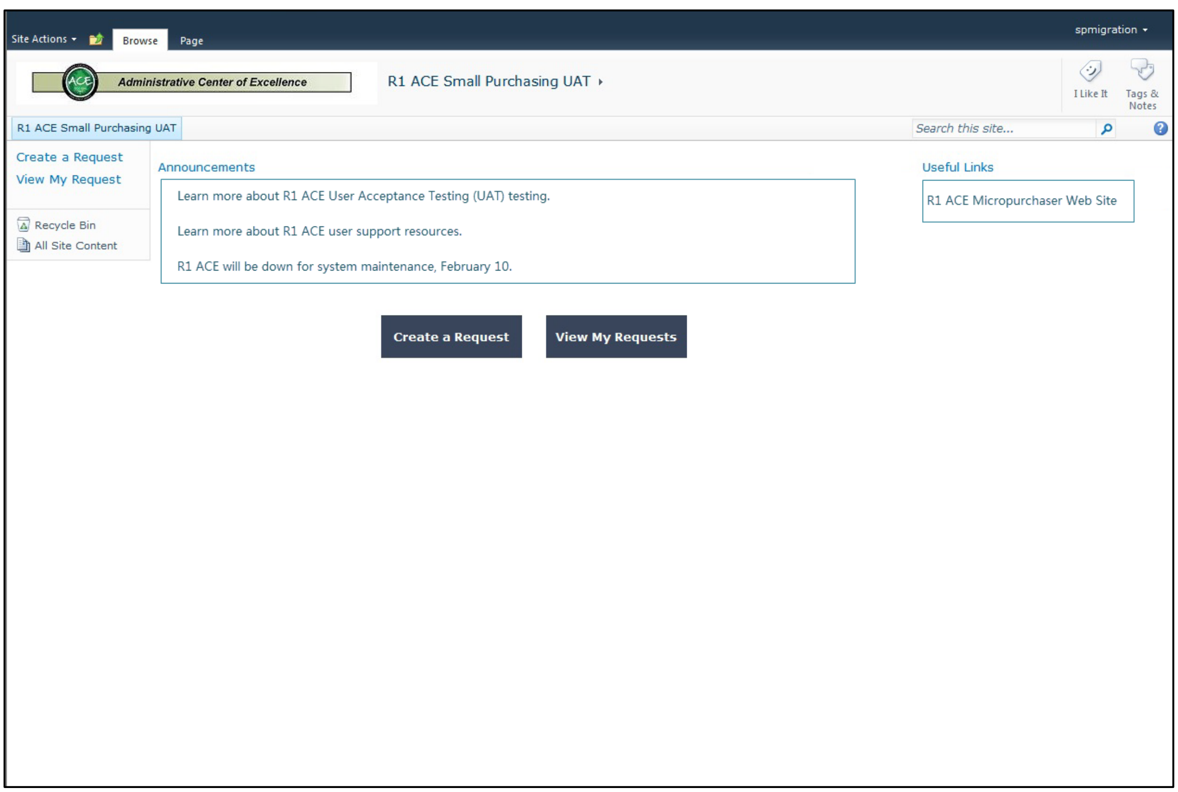
To access ACE:

1. Open Internet Explorer.
2. Go to https://ems-team.usda.gov/sites/fs-r01-ace/.
   SharePoint opens and the ACE application appears.

The tools and other options visible on the ACE home screen depend on the role associated with your account. Some roles will have access to more tools than others. Below are screen captures of how the home screen will appear to each of the four roles.

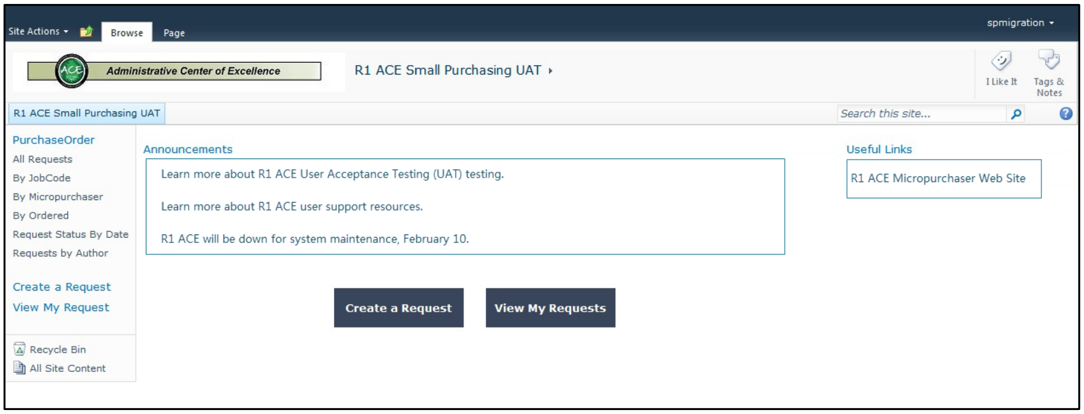
End User Role

End Users will see links for creating purchase order requests and for viewing the requests they have created.



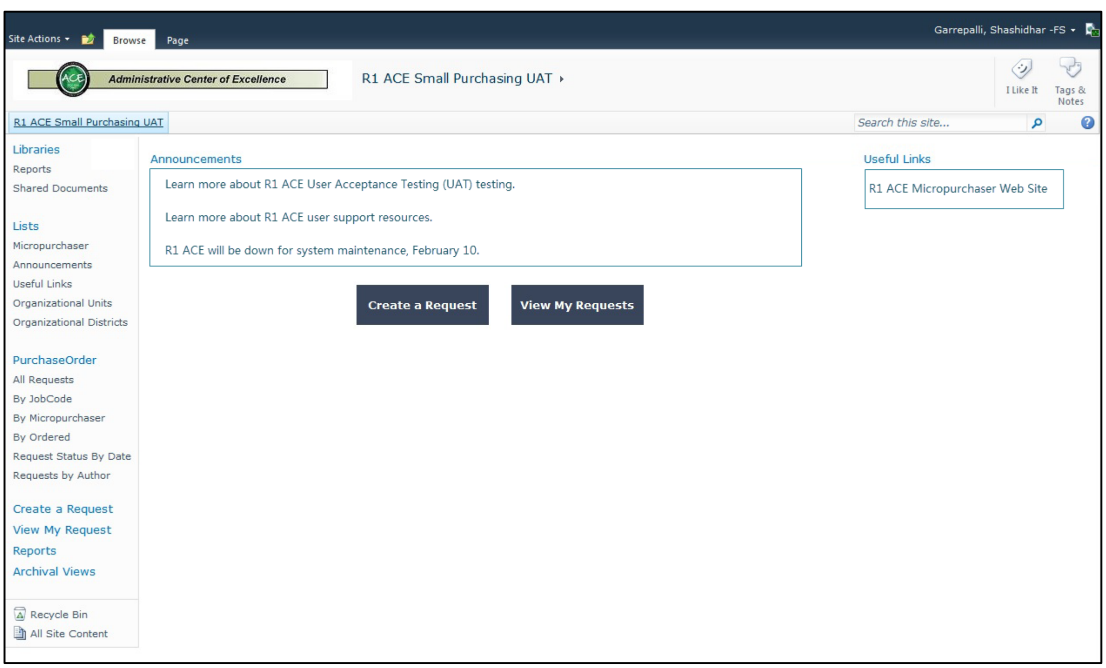
Micropurchaser Role

Micropurchasers will see links for creating/viewing their own requests, updating end user requests, archiving requests as well as links for launching Micropurchaser views and managing requisition logs.



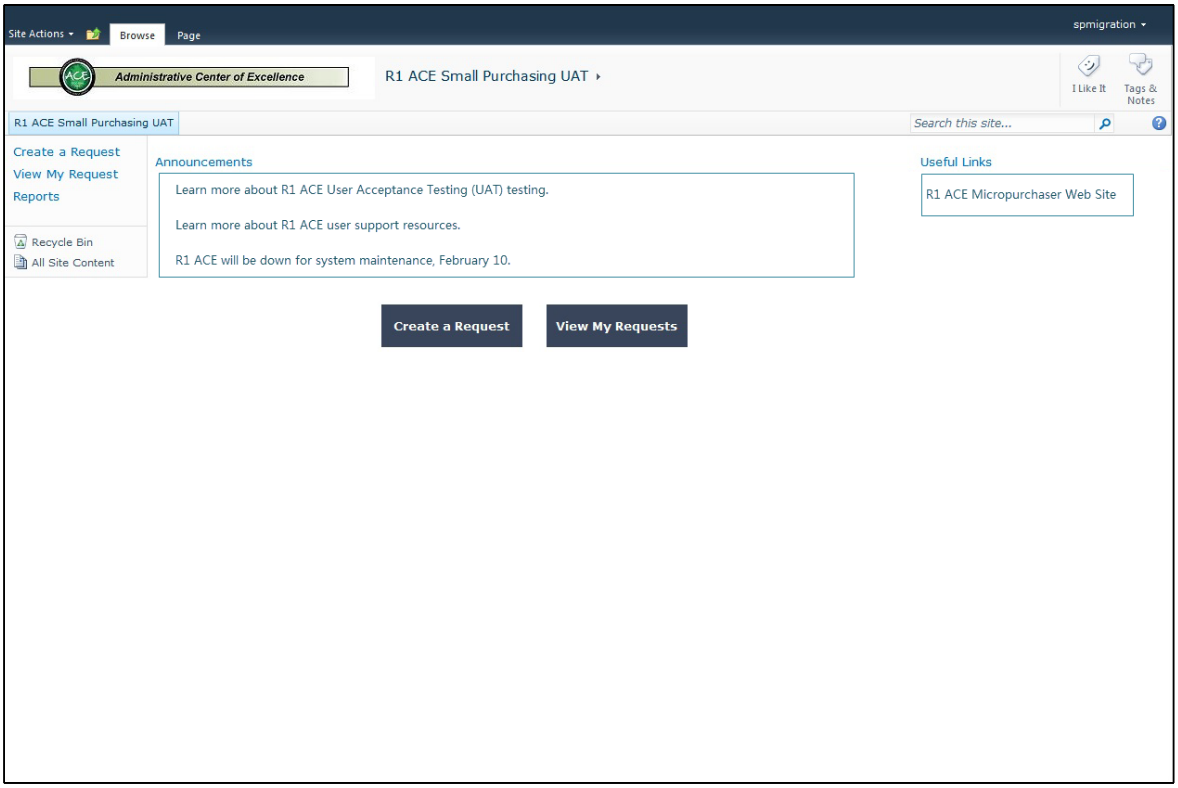
Site Owner Role

Site Owners have access to all End User and Micropurchaser tools described above. In addition, Site Owners can access archived purchase order requests and they also can access administrative tools for managing Micropurchasers, application announcements and useful links, and FS organizational units and districts.



Reports User Role

Reports Users will see links for creating/viewing their own requests as well as a link for accessing application reports.



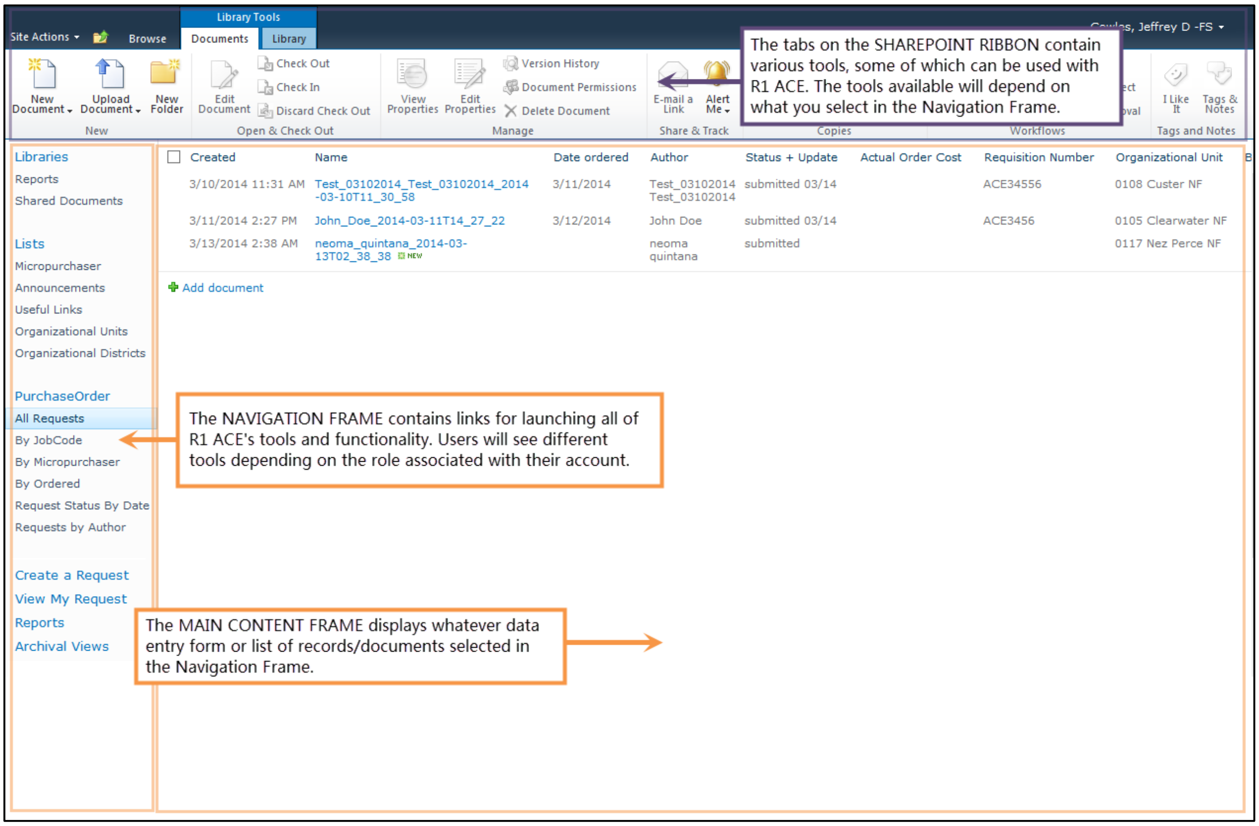
Related Topics:

[Application Tour]

[Application Roles]

Application Tour

This topic contains an overview of the onscreen elements of the ACE application and how to use them to access the application's functionality. Refer to the following screen capture. Each element shown is then further described below.



The Elements of the ACE Application Interface

Navigation Frame

The Navigation Frame contains links for launching all tools and other functionality such as creating and processing purchase order requests, launching views and reports, performing administrative tasks, and more. When you click a link in the Navigation Frame, the corresponding tool or content appears appear in the Main Content Frame to the right.

Not all links shown in the screen capture above will appear for all users. See the [Access ACE](#) topic for more information about what information appears for each type of application user.

Main Content Frame

The Main Content Frame displays whatever tool or data were selected from the Navigation Frame. For example, if a Micropurchaser selects the name of a specific view, all records in that view appear in the Main Content Frame. If any user creates a new purchase order request, the New Request form appears in the Main Content Frame.

Microsoft SharePoint Ribbon

Because ACE is created on top of Microsoft's SharePoint, users have access to a variety of SharePoint tools that are not necessarily part of ACE. The toolbar that appears at the top of the SharePoint screen (and in other Microsoft applications such as Word and Excel) is called the ribbon.

Examples of some of the tools in the SharePoint ribbon that ACE users can use include Share a Link to a Request, Set an Alert for a Request, Download a Copy of a Request, and Export a List to Excel.

Microsoft SharePoint Tab Bar

Use the SharePoint tab bar at the top of the screen to access the various tools contained in the ribbon. The tab bar changes depending on the SharePoint tool you are using.

- When working with purchase order views, the tab bar is called Library Tools and contains two tabs: Documents and Library.
- When using lists (Micropurchaser names, announcements, useful links, and requisition logs), the tab bar is called List Tools and contains two tabs: Items and Lists.

Related Topics

Access ACE

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