



State Agency Superuser Guide

Texas SmartBuy Superusers serve as the security coordinator for your organization's access within the Texas SmartBuy portal.

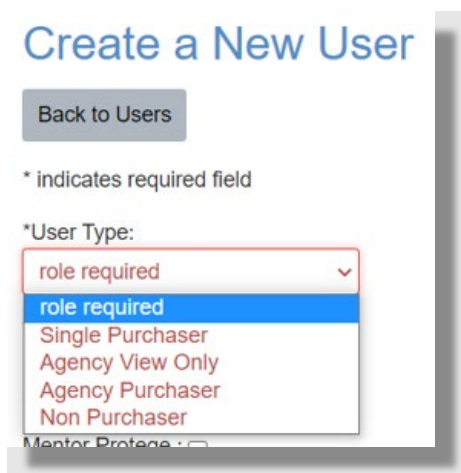
It is the responsibility of the Superusers to manage their agency's user access. Each superuser will receive a monthly report of their agency's active users, last login date, and their system permissions. They should review the monthly report and remove access for users that have either left the agency or no longer require that access.

To be added as a superuser for your agency, the access request must come from an existing superuser or an authorizing manager at your agency, which includes the new superuser's name, title, agency email address and phone number.

Superuser access needs to be requested from the Texas SmartBuy Help Desk txsmartbuy@cpa.texas.gov or call 512-463-3034 option 1.

- **Superuser (Must be set up, edited, and deactivated by Texas SmartBuy Help Desk)**
 - Can have a Purchaser or Non Purchaser role
 - Can add and deactivate addresses to the agency address book
 - Can edit user roles and application access
 - Can add new agency users other than Superuser
 - Can deactivate agency users
 - Cannot change user email address (contact Texas SmartBuy Help Desk)

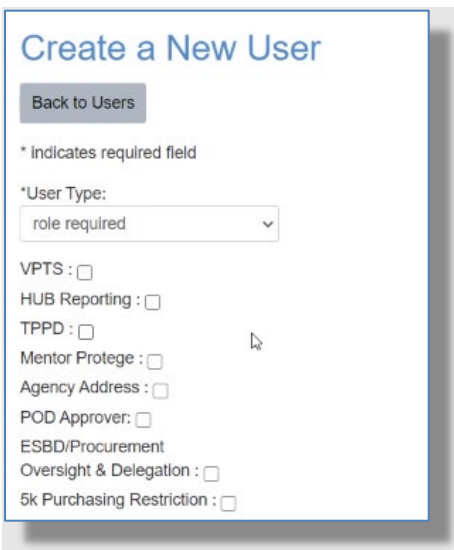
Statewide Procurement Division (SPD) Texas SmartBuy User Role Descriptions



- **Single Purchaser**
 - Can create POs

- Can view and edit their own POs
- Can cancel their own POs
- **Agency View Only**
 - Can view any POs created by their agency. This access is good for users like accounts payable or others that need to view POs but aren't in a purchaser role.
 - These users don't typically have access to other SPD applications
- **Agency Purchaser**
 - Can create POs
 - Can view and edit any PO for their agency
 - Can cancel any PO for their agency
- **Non Purchaser**
 - Can create shopping carts
 - Can save shopping carts
 - Can have multiple saved carts
 - Can share carts with purchasers
 - Cannot checkout to create POs

Statewide Procurement Division (SPD) Applications Descriptions



Create a New User

[Back to Users](#)

* Indicates required field

*User Type:
role required

VPTS :

HUB Reporting :

TPPD :

Mentor Protege :

Agency Address :

POD Approver:

ESB/Procurement Oversight & Delegation :

5k Purchasing Restriction :

- **VPTS (Vendor Performance Tracking System)** This application is used to report a vendor's contract performance. Reports are required for any purchases or milestones over \$25,000. [Visit 34TAC20 for more VPTS rules.](#)
- **HUB Reporting (Historically Underutilized Businesses)** This is the portal for the agency to submit their HUB expenditures for the Statewide HUB Report.
 - Usually only granted to HUB Coordinators or other individuals who need to report or review the agency's HUB Report Data
- **TPPD (Texas Purchasing From People With Disabilities)** – This application is for agencies to report exceptions when items available on WorkQuest are purchased from other vendors, if the goods or



services from WorkQuest meet state specifications as to quantity, quality, price, delivery, life cycle costs, and costs no more than the fair market price of similar items. [Visit TAC 34, 20.306b for more information about TPPD exception reports.](#)

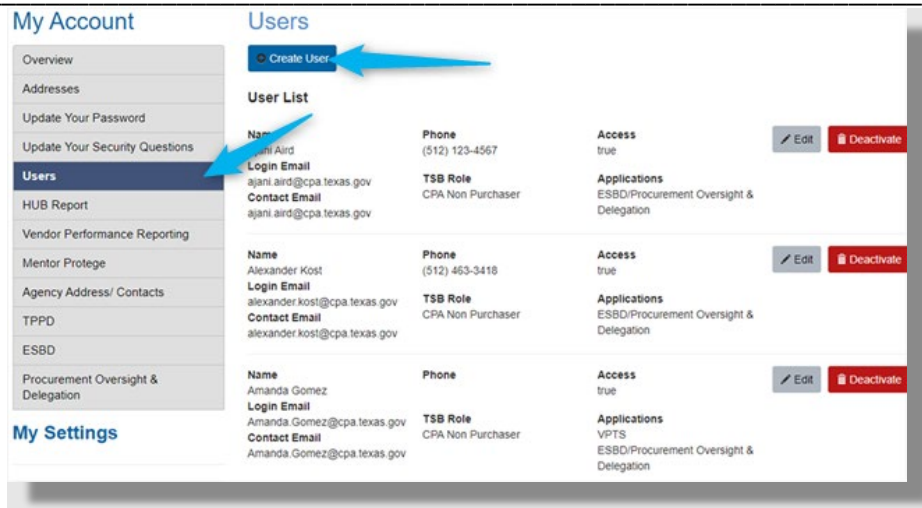
- No restrictions on access. This is reporting only.
- **Mentor Protégé:** This program creates mentor-protégé relationships between prime contractors and HUB vendors to help them increase business and create subcontracting opportunities.
 - Typically, HUB coordinators are the only users that need this access.
- **Agency Address** - The program is used for managing the agency HUB, Agency Heads, Purchasing Heads, and HUB Contacts for the agency.
 - Superusers and agency heads usually have access and manage these contacts. These contacts need to be managed by each agency since they are used to distribute communications to the agency contacts.
- **POD Approver** - This permission allows a user to respond to Procurement Oversight and Delegation (POD) recommendations for solicitations submitted by other users at their agency.
 - The user must be a Certified Texas Contract Developer (CTCD).
- **ESBD Electronic State Business Daily/Procurement Oversight & Delegation** - This access allows users to post solicitations and/or awards on the ESBD advertising platform and submit solicitations directly to SPD for Procurement Oversight and Delegation (POD) or Contract Advisory Team (CAT) review before posting on the ESBD.
 - The user must be a Certified Texas Contract Developer (CTCD).
- **5K Purchasing Restriction** - When this permission is selected the purchaser is only allowed to create POs totaling \$5,000 or less.
 - This is intended for users who have not taken the **Basic Texas Purchaser Training**.

For more information about Procurement training, visit the [SPD Training and Policy Division website](#).

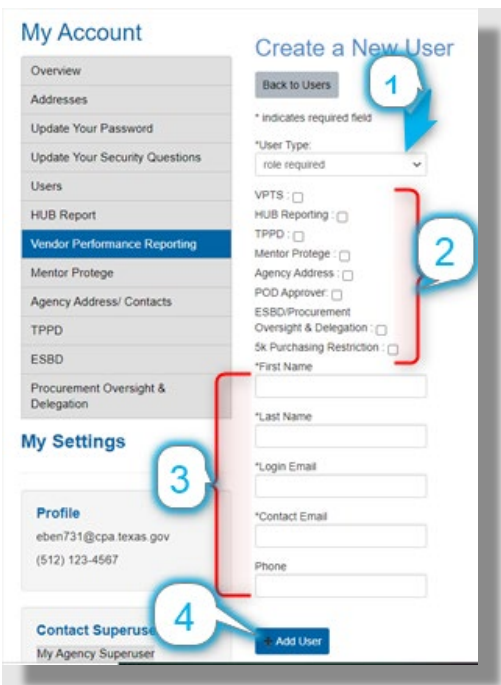
User Management

Creating New Users

- Choose Users from My Account
- Create User

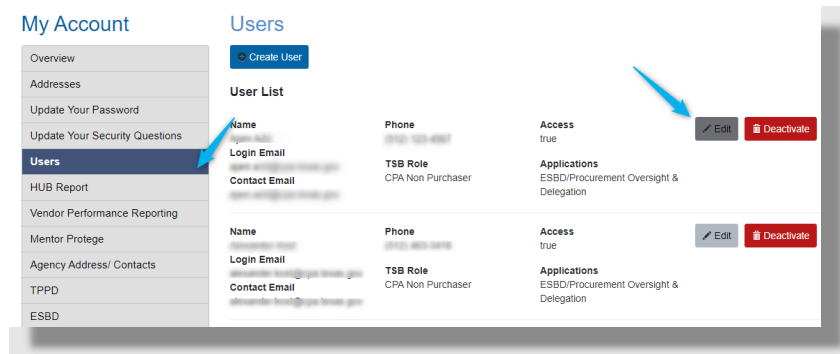


1. Select the appropriate user access role in the User Type field.
2. Check any application access the user needs.
3. Enter the user's contact information
 - First Name
 - Last Name
 - Login Email (used to login to the portal)
 - Contact Email (email where system notifications will be sent including POs)
 - Phone
4. Select Add User



Editing Users

1. Choose Users from My Account Navigation
2. Select the Edit button associated with the desired user.



3. The User's information will be displayed
4. Make required changes
5. Select Update User
6. Cancel will not save changes

Edit User
CLOSE ✕

* indicates required field

*TSB Role: Non Purchaser

VPTS :

HUB Reporting :

TPPD :

Mentor Protege :

Agency Address :

POD Approver :

ESBD/Procurement Oversight & Delegation :

5K Purchasing Restriction:

*First Name

*Last Name

Phone

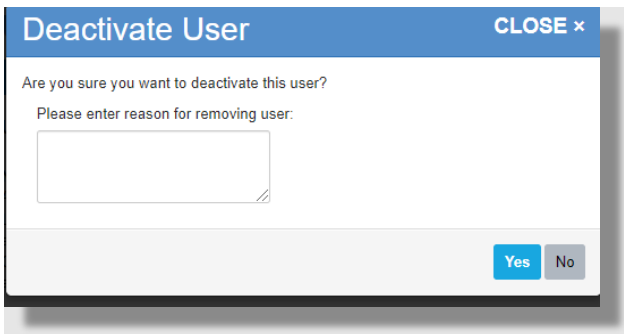
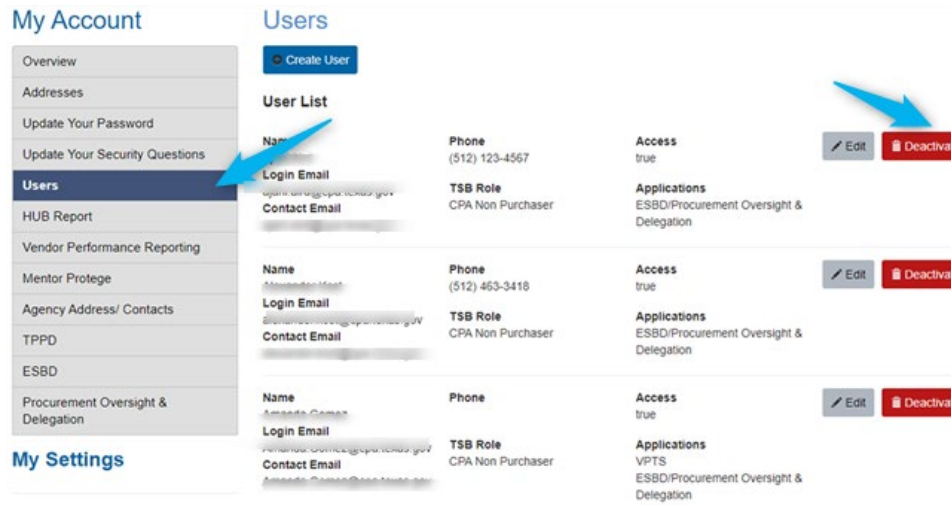
Contact Email

Update User
Cancel

Note: You are not allowed to change the login email. If the login email address needs to be changed or corrected you will need to contact the Texas SmartBuy Help Desk.

Deactivating/Reactivating Users

1. Choose Users from My Account Navigation
2. Select the Deactivate button on the desired user
3. You will be prompted to enter the reason the user's access is being removed
4. Select Yes to remove the user's access



5. You will receive this confirmation message. Press OK to close the message box.



6. To reactivate a user's access select Reactivate



Name Address Test Login Email atest@aol.com Contact Email areal@me.com	Phone (123) 456-7890 TSB Role	Access false Applications	Edit Reactivate
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7. Select the appropriate role and application permissions
8. Select Yes to complete the change

Reactivate User CLOSE x

*TSB Role:

VPTS :

HUB Reporting :

TPPD :

Mentor Protege :

Agency Address :

POD Approver:

ESBD/Procurement Oversight & Delegation :

5K Purchaser Restriction :

Are you sure you want to reactivate this user?

[Yes](#) [No](#)

Address Book

Texas SmartBuy provides superusers with address book management for your agency. Your agency address book is a group-level address book with all your shipping and billing addresses combined for the entire agency. The list of addresses is shared by all purchasers from your respective agency.

Purchasers need to contact their superuser to add an address in the address book. A list of superuser contacts is linked from the My Account page.



My Account

- Overview
- Addresses
- Update Your Password
- Update Your Security Questions
- Purchase Requisitions
- Purchase Orders
- Favorite Orders
- Users
- HUB Report
- Vendor Performance Reporting
- Mentor Protege
- Agency Address/ Contacts
- TPPD
- ESBD
- Procurement Oversight & Delegation

Welcome to the Portal

Announcements Section

Home TxSmartBuy VPTS Hub Report TPPD

Main Announcement Page

Please make sure to check the recent announcements for your apps.

My Settings

- Profile
- Contact Supersuser

Addresses Page

As the Texas SmartBuy superuser you have additional functions on the Addresses page. Superusers are authorized to add and deactivate the address listings on behalf of the organization. Access the agency address book by selecting Addresses from the My Account navigation.

My Account

- Overview
- Addresses
- Update Your Password
- Update Your Security Questions
- Users
- HUB Report
- Vendor Performance Reporting
- Mentor Protege
- Agency Address/ Contacts
- TPPD
- ESBD
- Procurement Oversight & Delegation

Addresses

Shipping Default: No default shipping address is set. Billing Default: No default billing address is set.

Filter Addresses

Location Code, Contact Name, Select an Address Type, Street Name, City, Zip, Search, Clear Filters

Address List

Export Address Book, New Address

Sort By: Location Code, Show: 10 results per page

Address 1	Address 2	Address 3		
Lubbock Enforcement Office	5012.50th Street	Suite 202	Edit	Deactivate
Location Code: 2H03	Contact Name	City, State Zip: Lubbock, TX 79414	Set My Default Shipping	
Type: Shipping	Phone			
Address 1: 925 Lamar	Address 2: Suite 1900	Address 3:	Edit	Deactivate
Location Code: 2H05	Contact Name	City, State Zip: Wichita Falls, TX 76301-3414	Set My Default Shipping	
Type: Shipping	Phone			
Address 1: 1 Village Drive Suite 250 (2nd Floor)	Address 2:	Address 3:	Edit	Deactivate
Location Code: 2H06	Contact Name: Abilene Field Enforcement Office - Century Plaza	City, State Zip: Abilene, TX 79606	Set My Default Shipping	



1. Export Addresses

As superuser, you can download the entire address list as a csv file (Excel). In the Address List section, select the blue “Export Address Book” button.

NOTE: If you need to deactivate or add several addresses, you can make the edits in the file and send a request to import to the Texas SmartBuy Helpdesk. Please add a column in front of all the other columns and indicate per row the action need: Add or Deactivate.

Email the file with your update request to txsmartbuy@cpa.texas.gov

2. Add Addresses

To add an address, select the “New Address” button to enter an address your purchasers plan to use on several purchase orders. (Purchasers can use the Ad Hoc address feature for unique or one time addresses, but they are not added to the address book). Certain fields are required as indicated by an asterisk.

Required Fields:

- Address Type (Shipping, Billing, or Both)
- Address 1
- City
- State
- Zip

My Account

Overview
Addresses
Update Your Password
Update Your Security Questions
Users
HUB Report
Vendor Performance Reporting
Mentor Protege
Agency Address/ Contacts
TPPD
ESBD
Procurement Oversight & Delegation

Add New Address

[Back to Address Book](#)

* indicates required field

*Address Type: Shipping Billing

Location Code

Contact Name

Phone

*Address 1

Address 2

Address 3

*City

*State

*Zip

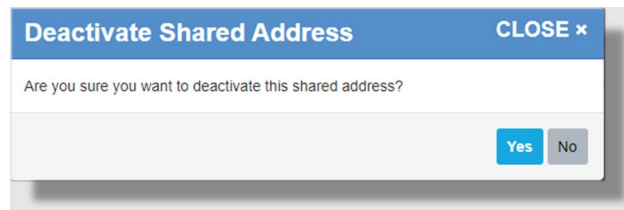
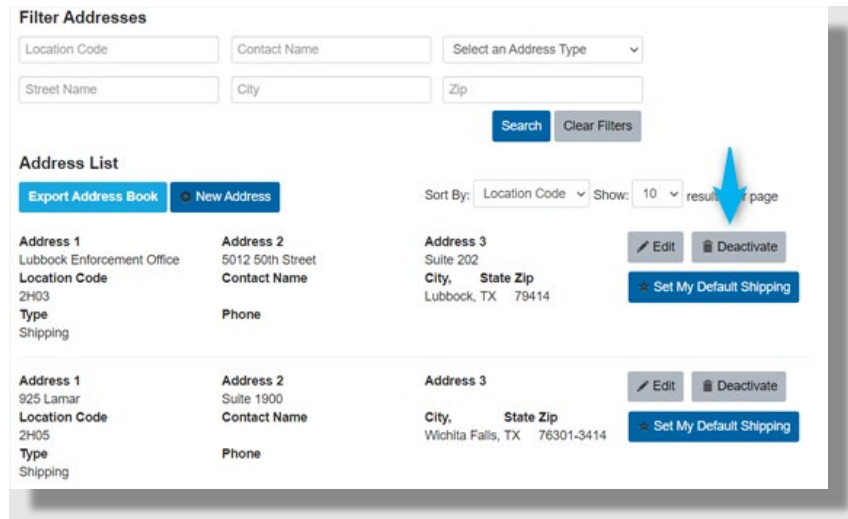
[Save Address](#)

[✖ Cancel](#)

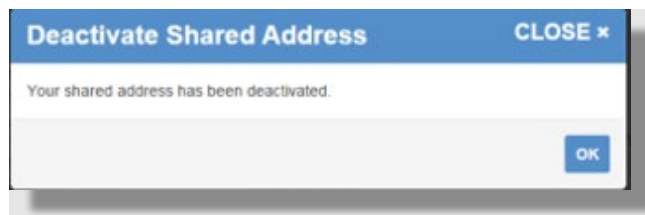
Once you save a new address, it will appear in the address list, which defaults to a sort order of ascending location codes.

3. Deactivate Addresses

Select the gray “Deactivate” button to the right of an address listing. A confirmation message box will appear as a screen overlay.



If you select the “Yes” button, the message box will update to confirm the address was deactivated.

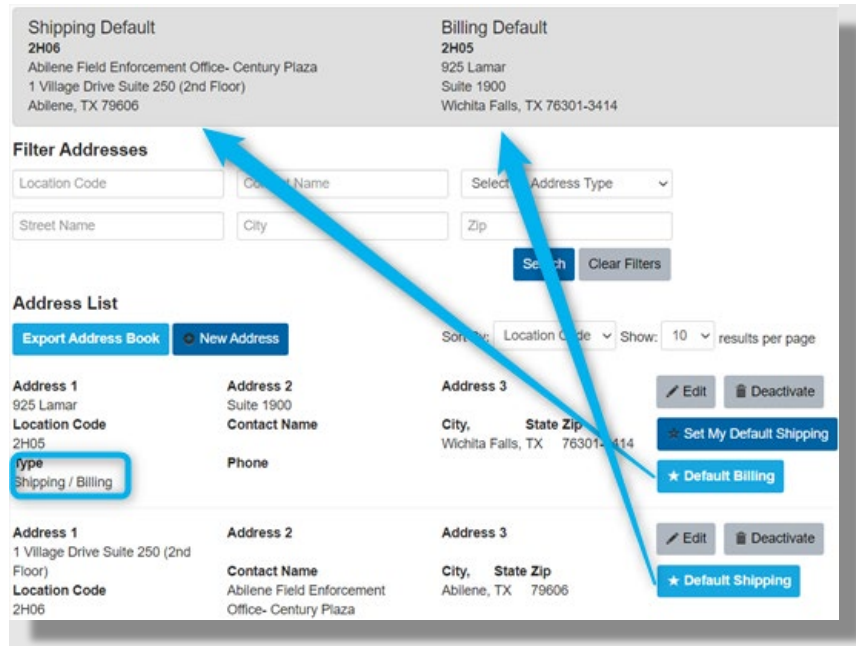


The address will disappear from the agency address list. It will not be permanently deleted from Texas SmartBuy since it may have been used on an existing purchase order.

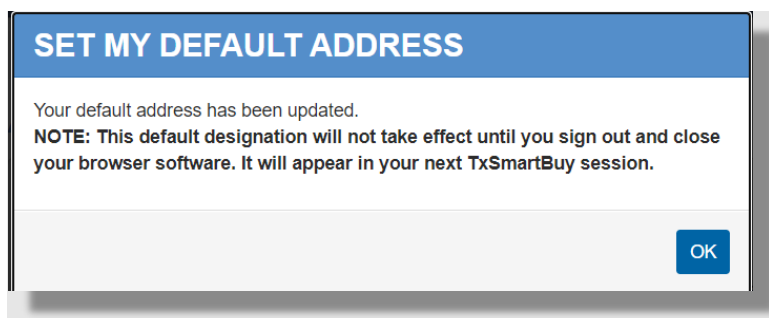
Default Addresses

The Addresses page indicates your default shipping and billing addresses in a gray box at the top of the page. Important: The default addresses MUST be present in the gray box for purchase order entry to successfully complete. If you set a default address, it ONLY applies to your individual user account. This applies to purchasers and superusers. When a new address is created the Type field will determine if it can be used as a default billing, shipping, or both.

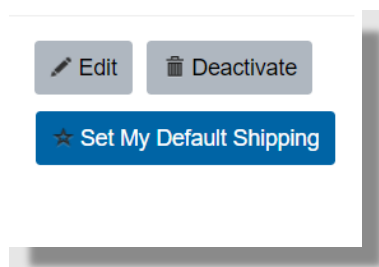
To set an address as the default, select either the “Set My Default Shipping” or “Set My Default Billing” -- or both -- to assign the defaults for your individual account.



Once selected a confirmation message will appear. The Defaults will be indicated by blue buttons in the Address List.



If you have set up an address with just one address type, only the related “Set My Default...” button will appear in the Address List. If you need to change the address type you can select edit and make the correction.





Filter Addresses

Search filters are provided to find or narrow down the number of address records displayed. Filter options include Location Code, Contact Name, Address Type, Street Name, City and Zip Code.

Filter Addresses

<input type="text" value="Location Code"/>	<input type="text" value="Contact Name"/>	<input style="border: none;" type="text" value="Select an Address Type"/>
<input type="text" value="Street Name"/>	<input type="text" value="City"/>	<div style="border: 1px solid #ccc; padding: 2px;"><div style="background-color: #007bff; color: white; padding: 2px;">Select an Address Type</div><div style="padding: 2px;">Shipping</div><div style="padding: 2px;">Billing</div></div>
		<input type="button" value="Search"/> <input type="button" value="Clear Filters"/>

The “Clear Filters” button will set the Address List back to the default list of address records.