USER ROLES & FUNCTIONS

This section defines the different *User Roles* within *smartOCI*. *User Roles* include the *Master Administrator*, *Administrator*, *Approver*, *Buyer* and *Shopper*.

➢ **Master Administrator**: The *Master Administrator* has the following privileges in *smartOCI*:
   o Create, view, and update rights to any catalog data in the system maintained by any other *SmartOCI* user
   o Create and edit the master data in *smartOCI*, including categories and supplier master records
   o Create, edit and delete any user, including other *Master Administrators*
   o Create, edit and delete any *Content View*
   o Create *Announcements*
   o Configure all *Company Settings*

When an organization is registered in *smartOCI*, at least one user in the company will be assigned to the *Master Administrator* role. If there is only one *Master Administrator*, this *Master Admin* will not be able to be deleted or deactivated from the system. For changes to the last remaining *Master Admin* account, contact us by submitting a request to the *Vroozi* support team at https://vroozi.zendesk.com.

➢ **Administrator**: *Admins* have the following privileges in *smartOCI*:
   o Create, view and update catalog data which they have created or catalogs which have been assigned to their respective profiles
   o Create new users (*Approvers* and *Buyers*)
   o Edit, delete, deactivate and activate any users they created themselves

Administrators have the capability to create content specific to their assigned region(s), spend categories, and departmental responsibility.. When the user is created, they are assigned to one or many *Content Views* which will determine what catalog content the user has access to maintain and update. If a *Content View* is common among two or more *Administrators*, they can share each other's catalog data.

➢ **Approver**: *Approvers* have the following privileges in *smartOCI*:
   o Approve the catalog or sales quote at the header level
   o Approve or reject specific line items in the catalog or sales quote

Approvers can be assigned to a supplier or a specific catalog. When changes are made to the relevant catalogs, the assigned *Approver* receives an email notification and message within *SmartOCI* to approve the catalog content.

- ➢ **Buyer**: *Buyers* have the following privilege in *smartOCI*:
  - ○ View catalog content

  The *Buyer* has display access to catalog content (*Punchout* and/or *Internal Catalog* content) which they are authorized to view. This control is defined by the *Content View* assignment upon initial creation of the *Buyer* user by the *Master Administrator* or *Administrator* within *smartOCI*.

- ➢ **Shopper**: *Approvers* have the following privileges in *smartOCI*:
  - ○ Search for products and services from assigned catalogs
  - ○ Compare different products
  - ○ Add items as favorites
  - ○ Use the *smartOCI Messaging Center* to communicate with other users (only if a valid email address is entered by the *Shopper*)
  - ○ Save search terms (frequently used search terms function)

  *Shopper*s are created automatically in the *smartOCI* system upon initial access to the *smartOCI Marketplace* from the external ERP system. When a *Shopper* logs into *smartOCI* from the external system, the *Shopper* is created and signed in on the basis of SY-UNAME field. SY-UNAME is a system field mapped to the employee's *User ID*. The *Shopper* automatically inherits the *Content Views* associated with the *Content Group* they have been assigned.

  The *Shopper* does not have an email address applied to their preferences upon initial creation in the *smartOCI* system, which will prevent the user from receiving any email notifications generated by the system.

  The *Shopper* cannot log in to *smartOCI* directly from the *smartOCI* login page. They can only access *smartOCI* within their existing ERP environment.