

BizAdmin: How to Invite and Manage Users

The purpose of this document is to describe the navigation features of the “BizAdmin” application for electronic invoicing at NIH. The term “BizAdmin” refers to a role that designated vendor users are given to invite other users in their organization to register for electronic invoicing at NIH, manage iSupplier access for those users, and designate additional BizAdmins.

IMPORTANT – Before You Begin

Please verify that your organization's Electronic Business Point of Contacts (EBPOCs) are correctly registered in <http://www.SAM.gov>.

EBPOCs are a critical part of the registration process, which begins with an invitation from NIH to your EBPOCs. At least one EBPOC must register to initiate your organization's enrollment.

Once registered, an EBPOC becomes a BizAdmin and can in turn invite additional users.

BizAdmin Roles and Responsibilities

Please note that only provisioned BizAdmins are authorized to access the BizAdmin application.

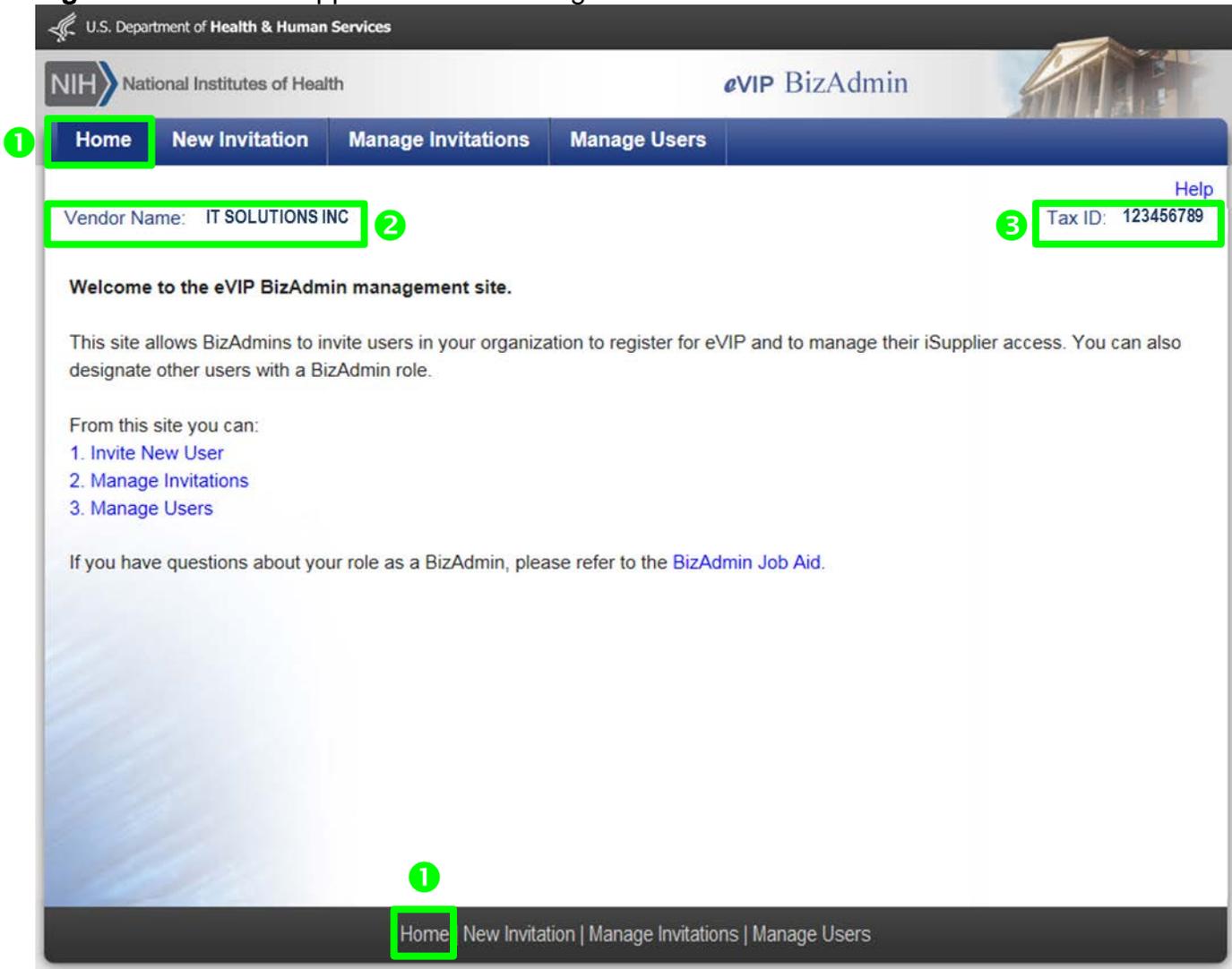
As an NIH electronic invoicing BizAdmin for your organization, you are responsible for:

- ✓ Inviting users within your organization to register for electronic invoicing at NIH;
- ✓ Tracking current and past invitations sent to users;
- ✓ Designating other users the “BizAdmin” role; and
- ✓ Provisioning and de-provisioning users.

I. Home Page

The **Home Page** is the main landing page of the BizAdmin application. This page displays the name of your organization, Tax ID, and tabs/links to other sections of the application.

Figure 1: BizAdmin application 'Home Page'



1. **Home** tab and link help you navigate to the home page of the application.
2. **Vendor Name** displays the full name of your organization.
3. **Tax ID** displays your organization's tax identification number (TIN).

II. New Invitation

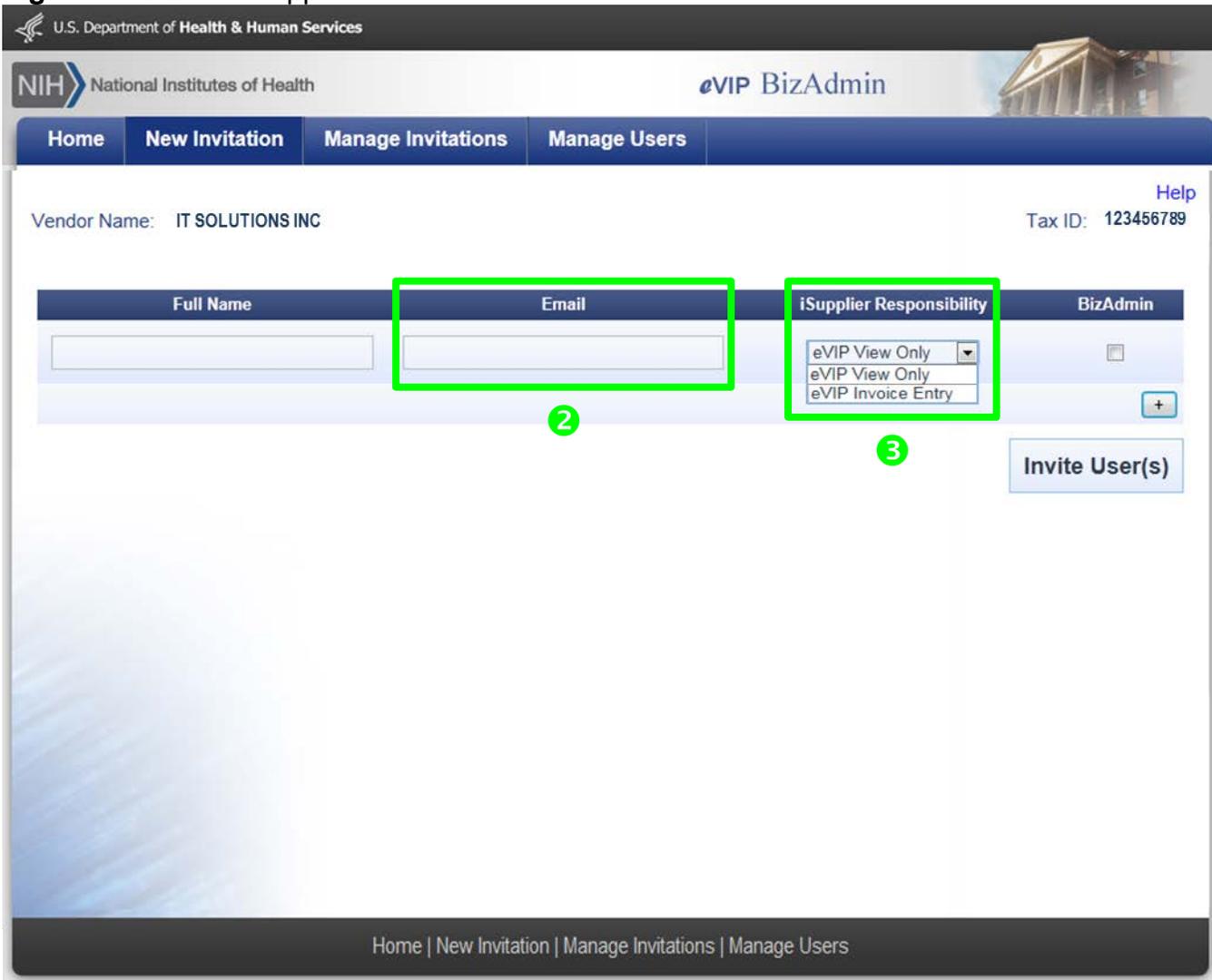
The **New Invitation** tab allows you to invite users within your organization to register for electronic invoicing at NIH by entering the name, e-mail, their associated responsibility, and whether or not the user will serve as another BizAdmin for your organization.

Figure 2: BizAdmin application 'New Invitation' tab

1. **Full Name** – Enter the full legal name of the user from your organization (NO middle names; ONLY first and last names – for example, the name displayed on their driver's license, Jonathan Smith versus John James Smith).

JOB AID: *BizAdmin*

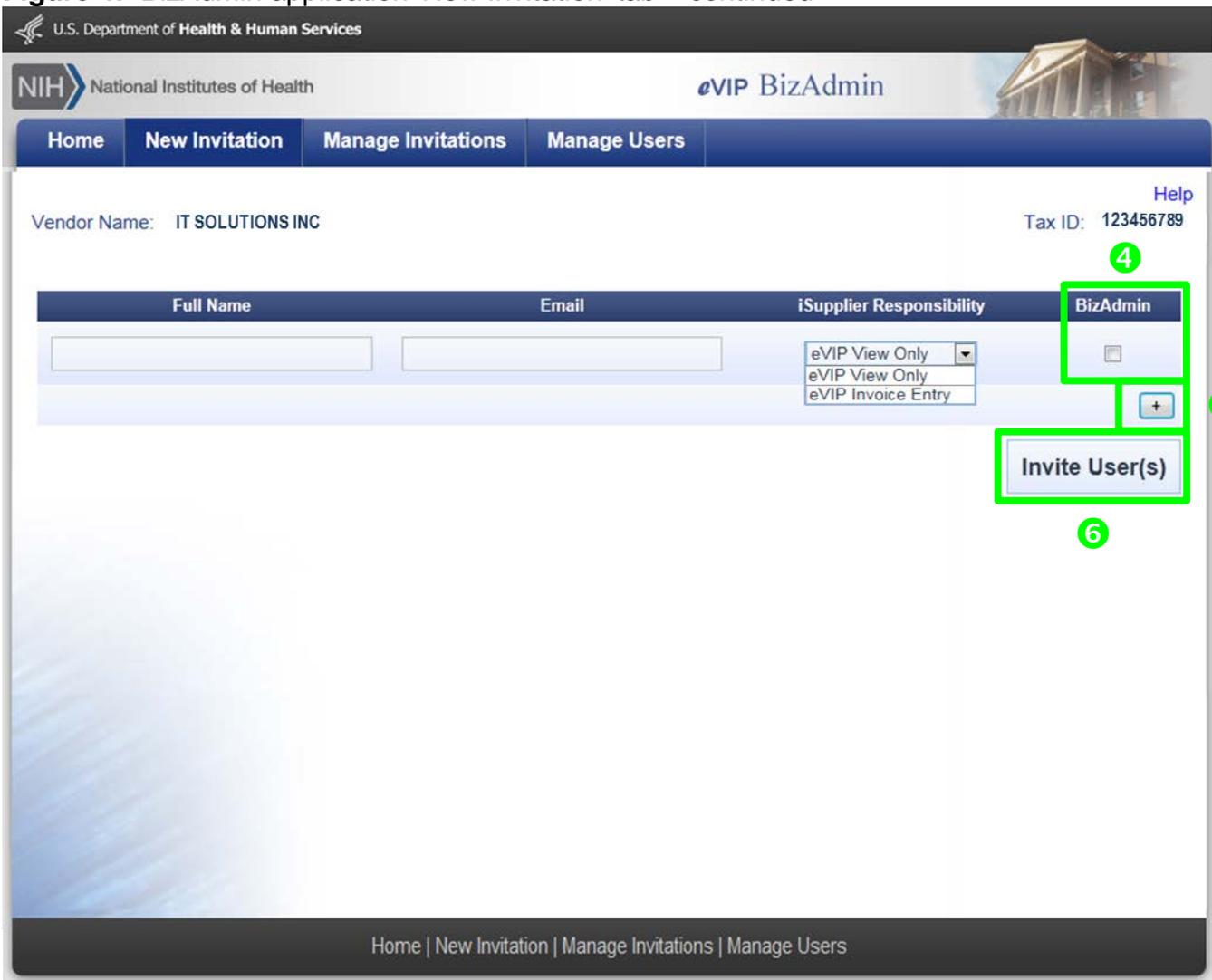
Figure 3: BizAdmin application 'New Invitation' tab – continued



2. **Email** – Enter the user’s organization e-mail address.
3. **iSupplier Responsibility** – Select this drop-down to choose the appropriate iSupplier access responsibility for the user:
 - a. View Only (Research Only) – Responsibility that grants users access to the iSupplier ‘View-Only’ application. *Select this option only if the user will not be creating invoices.*
 - b. Invoice Entry (Invoice Entry) – Responsibility that grants users access to the iSupplier ‘Invoice Entry’ application. *Select this option if the user will be creating electronic invoices.*

JOB AID: *BizAdmin*

Figure 4: BizAdmin application 'New Invitation' tab – continued

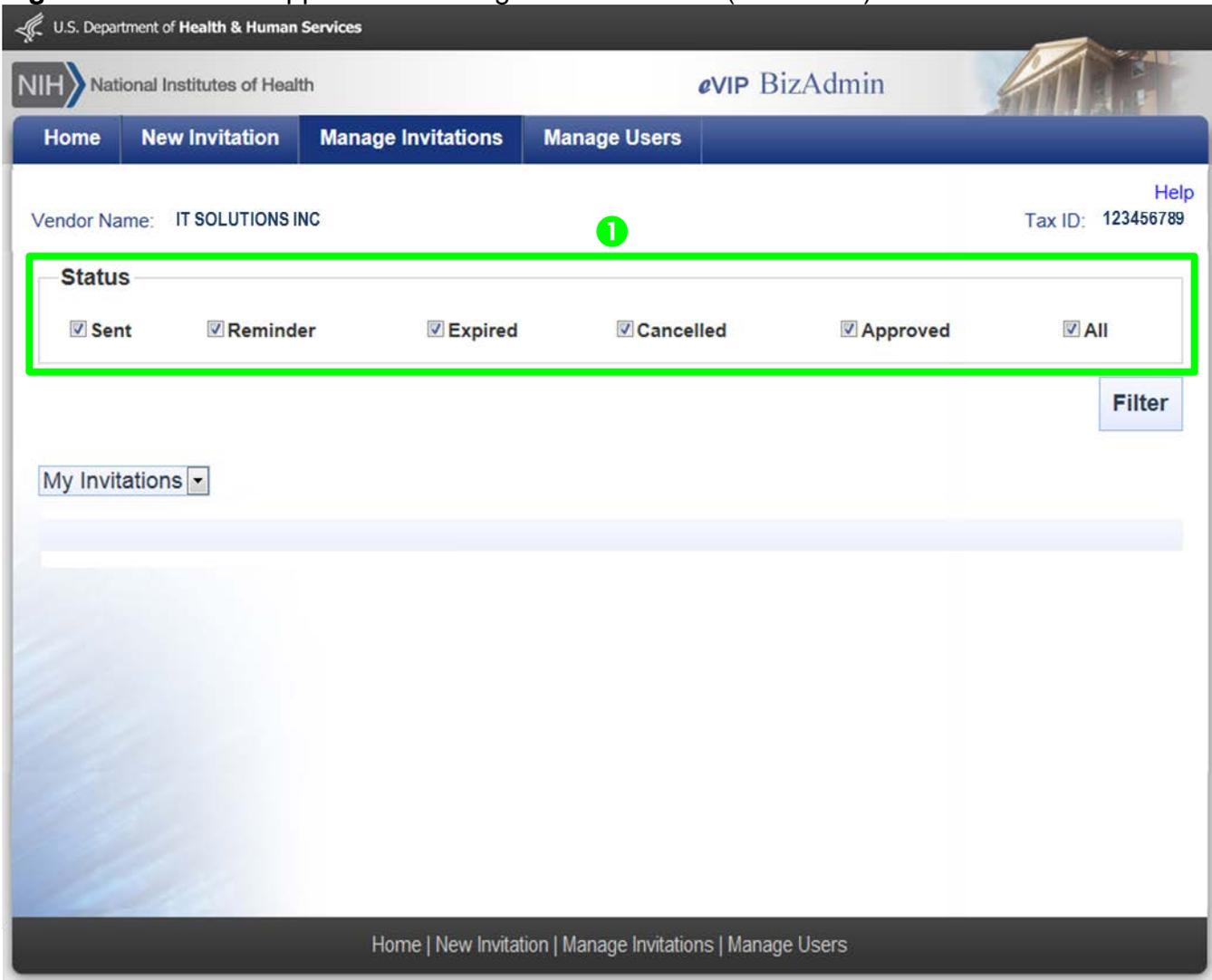


4. **BizAdmin** – Select checkbox if user will be another BizAdmin for your organization.
5. **[+]** – Select button to invite more associates to register.
6. **Invite User(s)** – Select this button once you have finished entering the users' names, e-mail addresses, and iSupplier responsibilities.

III. Manage Invitations

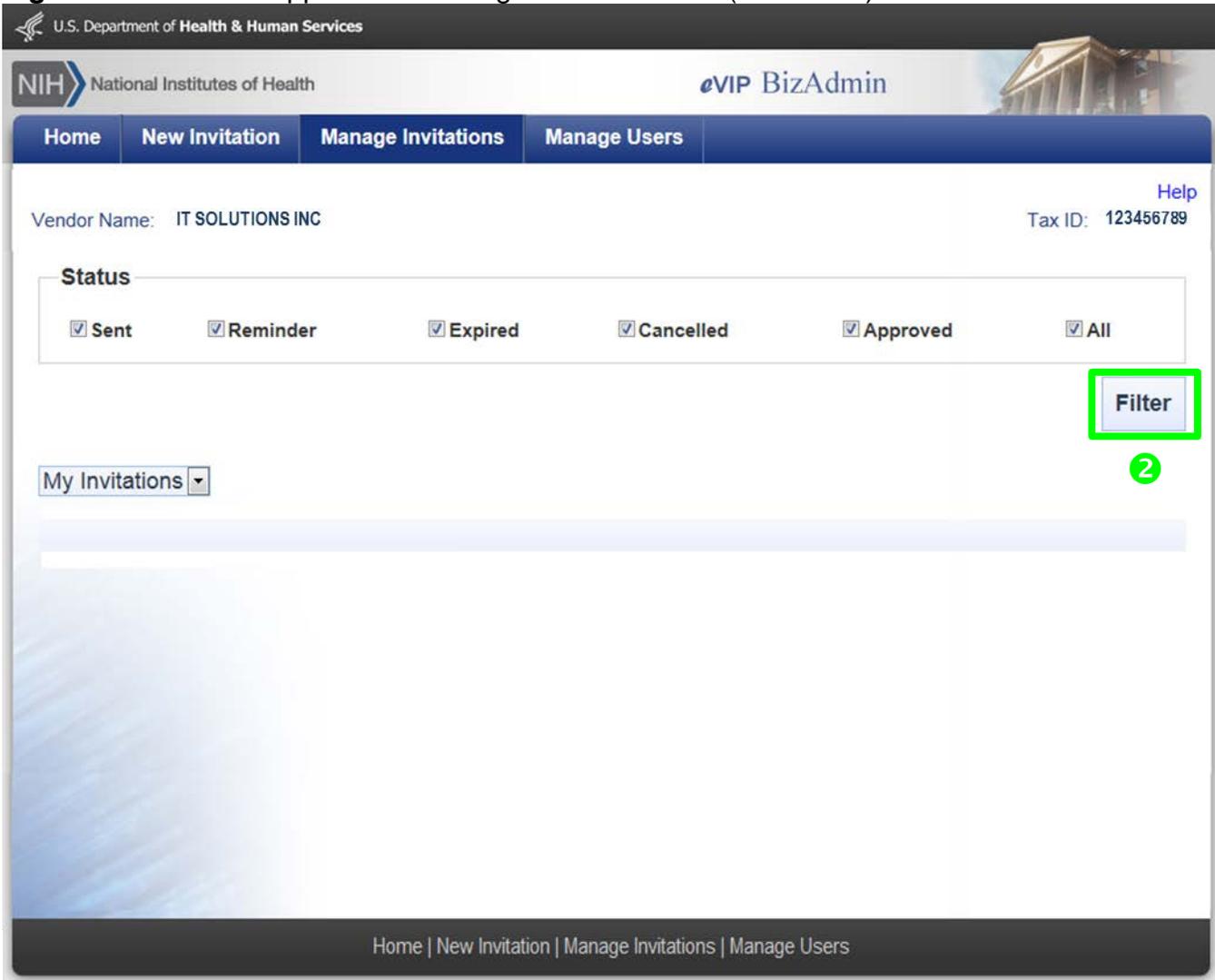
The **Manage Invitations** tab provides functionality to filter all NIH electronic invoicing invitations that have been extended within your organization.

Figure 5: BizAdmin application 'Manage Invitations' tab (un-filtered)



1. **Status** filter options – Selecting these checkboxes allows you to filter specific invitations.
 - a. Sent – Sent invitations.
 - b. Reminder – Reminders sent to users to register.
 - c. Expired – Expired invitations; registration link is no longer active. Re-Invite required.
 - d. Cancelled – Withdrawn or suspended invitations.
 - e. Approved – Accepted invitations currently awaiting provisioning within iSupplier
 - f. All – A list of all invitations.

Figure 6: BizAdmin application 'Manage Invitations' tab (un-filtered) – continued



- 2. **Filter** – Allows you to filter invitations based on the above status options.

JOB AID: *BizAdmin*

Figure 7: BizAdmin application 'Manage Invitations' tab (filtered results)

U.S. Department of Health & Human Services

NIH National Institutes of Health eVIP BizAdmin

Home New Invitation **Manage Invitations** Manage Users

Vendor Name: IT SOLUTIONS INC Tax ID: 123456789 [Help](#)

Status

Sent Reminder Expired Cancelled Approved All

3

My Invitations

Name	Email	Invitation Date	Expiration Date	Invited By	Status	
Drake X. Ample	drake.x.ample@itsolutions.com	7/31/2013 11:36:56 AM	8/21/2013 11:36:55 AM	Drake Daughdrill	Sent	Re-Invite Suspend
Janet S. Ample	janet.s.ample@itsolutions.com	7/31/2013 11:36:32 AM	8/21/2013 11:36:31 AM	Drake Daughdrill	Sent	Re-Invite Suspend
Jenny M. Tester	jenny.m.teste@itsolutions.com	7/31/2013 11:35:56 AM	8/21/2013 11:35:56 AM	Drake Daughdrill	Sent	Re-Invite Suspend
John Q. Tester	john.q.teste@itsolutions.com	7/31/2013 11:33:41 AM	8/21/2013 11:33:41 AM	Drake Daughdrill	Sent	Re-Invite Suspend

Home | New Invitation | Manage Invitations | Manage Users

3. **Invitations** filter – Select one of the following options to filter the invitations:
 - a. My Invitations – Selecting this option filters invitations that have been sent by you.
 - b. All Invitations – Selecting this option filters invitations that have been sent by other BizAdmins within your organization.

JOB AID: *BizAdmin*

Figure 8: BizAdmin application 'Manage Invitations' tab (filtered results) – continued

U.S. Department of Health & Human Services

NIH National Institutes of Health eVIP BizAdmin

Home New Invitation **Manage Invitations** Manage Users

Vendor Name: IT SOLUTIONS INC Tax ID: 123456789 Help

Status

Sent Reminder Expired Cancelled Approved All

Filter

My Invitations ▾ 4

Name	Email	Invitation Date	Expiration Date	Invited By	Status	
Drake X. Ample	drake.x.ample@itsolutions.com	7/31/2013 11:36:56 AM	8/21/2013 11:36:55 AM	Drake Daughdrill	Sent	Re-Invite Suspend
Janet S. Ample	janet.s.ample@itsolutions.com	7/31/2013 11:36:32 AM	8/21/2013 11:36:31 AM	Drake Daughdrill	Sent	Re-Invite Suspend
Jenny M. Tester	jenny.m.test@itsolutions.com	7/31/2013 11:35:56 AM	8/21/2013 11:35:56 AM	Drake Daughdrill	Sent	Re-Invite Suspend
John Q. Tester	john.q.test@itsolutions.com	7/31/2013 11:33:41 AM	8/21/2013 11:33:41 AM	Drake Daughdrill	Sent	Re-Invite Suspend

Home | New Invitation | Manage Invitations | Manage Users

4. **Data Fields:**

- a. Person – Displays the user’s name.
- b. Email – Displays the user’s organizational e-mail address to which the invitation was sent.
- c. Invitation Date – Indicates the date and time the invitation was sent.
- d. Expiration Date – Indicates the date the invitation will expire. If the user does not select the URL within the invitation e-mail by the expiration date, a new invitation must be sent.
- e. Invited By – Displays the BizAdmin within your organization who invited the user.
- f. Status – Indicates the latest status of the invitation.

JOB AID: *BizAdmin*

Figure 9: BizAdmin application 'Manage Invitations' tab (filtered results) – continued

U.S. Department of Health & Human Services

NIH National Institutes of Health eVIP BizAdmin

Home New Invitation **Manage Invitations** Manage Users

Vendor Name: IT SOLUTIONS INC Tax ID: 123456789 Help

Status

Sent Reminder Expired Cancelled Approved All

Filter

My Invitations ▾

Name	Email	Invitation Date	Expiration Date	Invited By	Status	
Drake X. Ample	drake.x.ample@itsolutions.com	7/31/2013 11:36:56 AM	8/21/2013 11:36:55 AM	Drake Daughdrill	Sent 5	<input type="button" value="Re-Invite"/> <input type="button" value="Suspend"/>
Janet S. Ample	janet.s.ample@itsolutions.com	7/31/2013 11:36:32 AM	8/21/2013 11:36:31 AM	Drake Daughdrill	Sent	<input type="button" value="Re-Invite"/> <input type="button" value="Suspend"/>
Jenny M. Tester	jenny.m.teste@itsolutions.com	7/31/2013 11:35:56 AM	8/21/2013 11:35:56 AM	Drake Daughdrill	Sent	<input type="button" value="Re-Invite"/> <input type="button" value="Suspend"/>
John Q. Tester	john.q.teste@itsolutions.com	7/31/2013 11:33:41 AM	8/21/2013 11:33:41 AM	Drake Daughdrill	Sent	<input type="button" value="Re-Invite"/> <input type="button" value="Suspend"/>

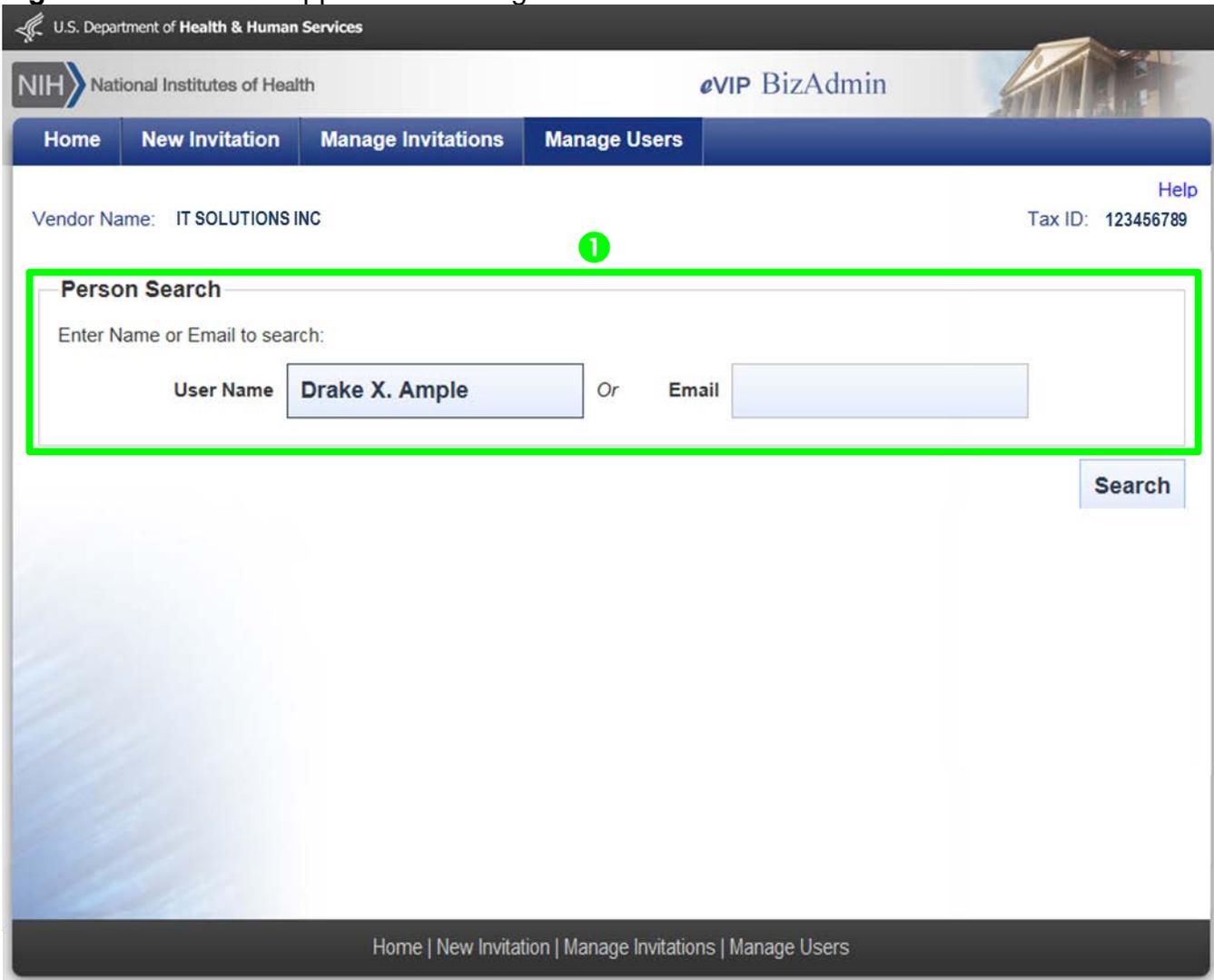
Home | New Invitation | Manage Invitations | Manage Users

- Re-Invite/Suspend** – Select Re-Invite if the invitation has expired and you'd like to invite the user again. Select Suspend to withdraw the invitation.

IV. Manage Users

The **Manage Users** tab allows you to search for all registered NIH electronic invoicing users within your organization and make changes to their iSupplier Responsibility or BizAdmin designation.

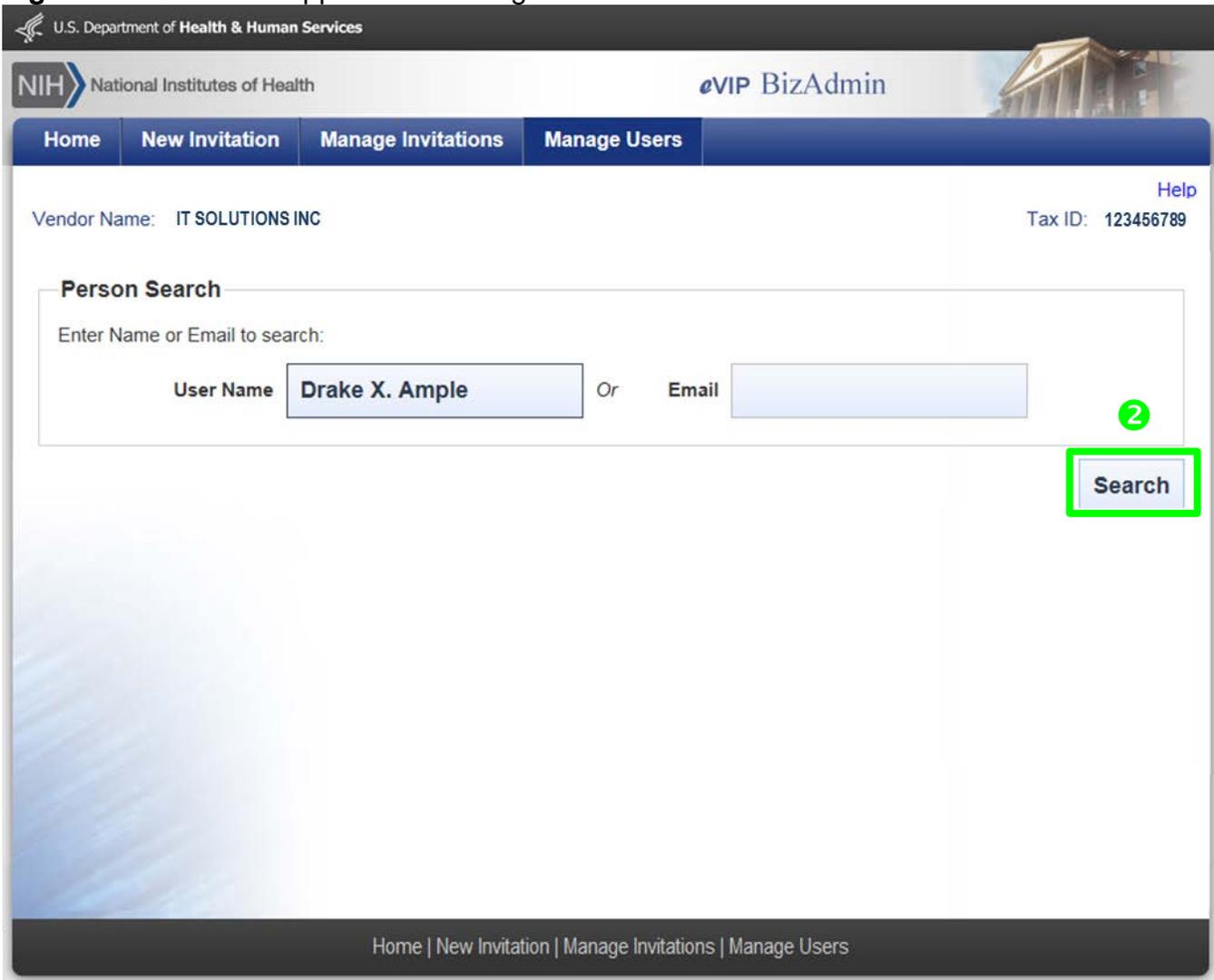
Figure 10: BizAdmin application 'Manage Users' tab



1. **Person Search** – This section allows you to search for provisioned users in your organization by entering the name or e-mail of the associate.
 - a. User Name – Enter the name of the associate in your organization who is currently registered for electronic invoicing at NIH.
 - b. Email – Enter the associate’s organizational e-mail address.

JOB AID: *BizAdmin*

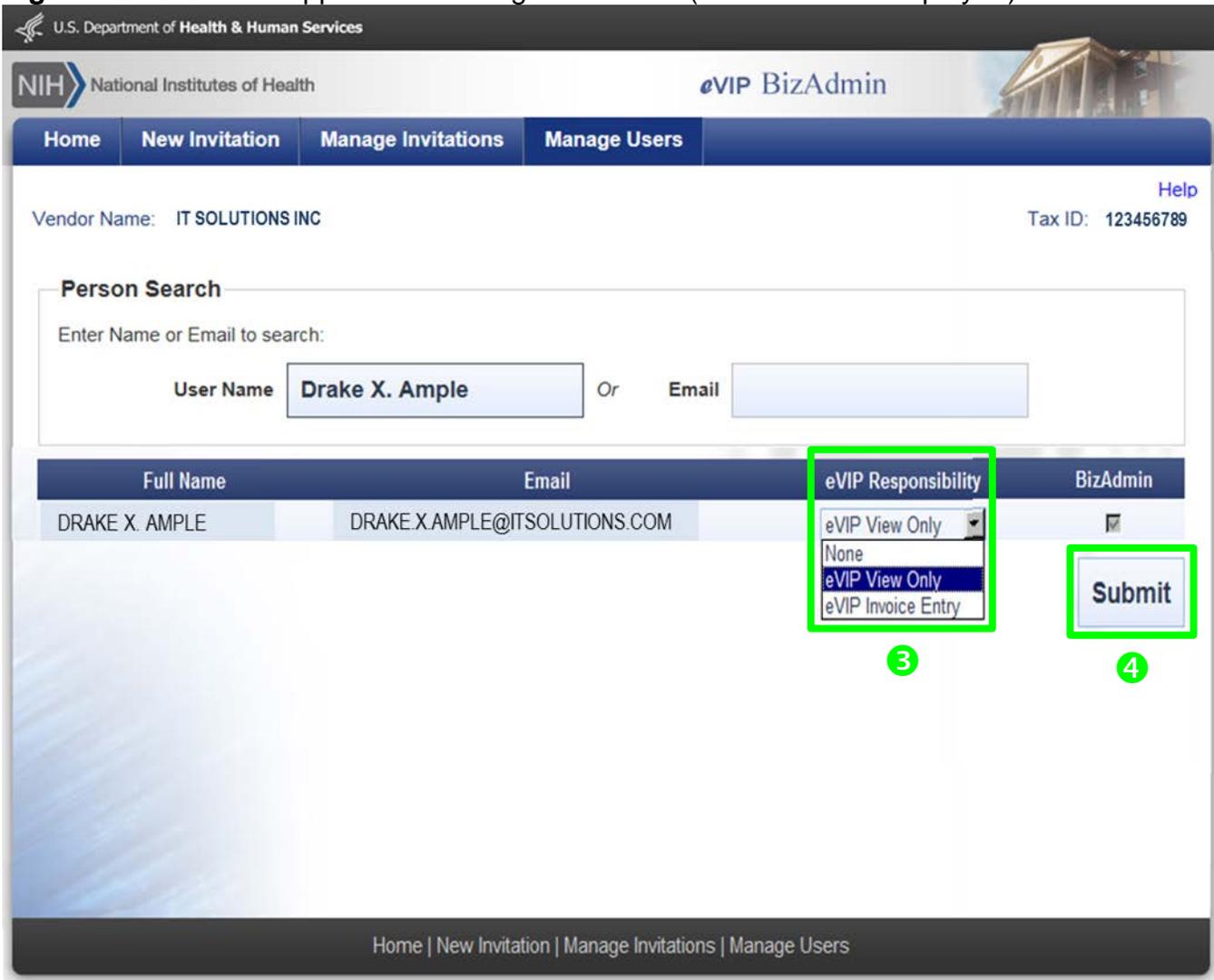
Figure 11: BizAdmin application 'Manage Users' tab – continued



2. **Search** – After entering the associate’s name or e-mail address, select the Search button to search for and populate the name results.

JOB AID: *BizAdmin*

Figure 12: BizAdmin application 'Manage Users' tab (search results displayed)



3. **iSupplier Responsibility** – Select this drop-down to select the appropriate responsibility for the user.
4. **Submit** – Select the Submit button once you have selected the appropriate responsibility for the user.

V. Summary

Thank you for participating in electronic invoicing at NIH and representing your organization as a BizAdmin. You are now prepared to:

1. Invite new users in your organization to participate in electronic invoicing at NIH;
2. Manage invitations;
3. Designate View-Only or Invoice-Entry access in iSupplier; and
4. Designate new BizAdmins for your organization.

To further prepare yourself and your new organization's users to fully leverage the power of the iSupplier application to research, create and submit electronic invoices to NIH, please access the web-based iSupplier training materials on the NIH Electronic Invoicing website (<https://evip.nih.gov>).