Users

Chapter 6
Users

Section Objectives

At the end of this section, you should be able to:

- Setup a new User
- Maintain a user
- Remove or disable a user
- Update profile information
User Setup

Prerequisite

All potential WePay™ users must take online training and have a UPMC NT Login ID before they can be granted access to the WePay™ system. The process of registering for the training and requesting access to the WePay™ system are outlined on the WePay™ website in the Forms section at http://www.cfo.pitt.edu/wepay/index.php. For security reasons, only UPMC or Pitt affiliated email addresses are acceptable for communications regarding the WePay™ application.

Disable Users

Users should only be disabled if they will never need to use the WePay™ system again; e.g., terminated employees. If a user is transferring departments, their respective project and study access should be removed. ADMs, BOMs and SCs are responsible for maintaining departmental user access.

Personal Profiles

All users can update their personal profile details. It is important to update your WePay™ email address when changes are made. WePay™ uses this address for all WePay™ system generated email notifications.

Maintain Access

All users are responsible for maintaining access to the WePay™ application by logging into the system on a monthly basis. https://wepay.upmc.com/WP/
**Update a User**

When necessary, ADMs, BOMs and SCs can update certain user access.

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WePay™ System
N → Users → Maintain Users
Maintain Users
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**Update a user**

1. Open the Maintain Users window.
   - A list of all updateable users will be displayed.

2. Select the **Last Name** of the user for update.
Update a User

3. All fields can be updated except for *Organization*.
   - Only an ADM may change a user’s *Role*.
     - If an ADM changes a user’s role from BOM to SC/SA or from SC/SA to BOM, the WePay™ system automatically unlinks that user from all projects and studies.

4. Access to additional projects or studies can be granted.
   - If the selected user is an ADM or BOM, the Access to Projects section is shown.
   - If the selected user is an SC or SA, then the Access to Studies section is shown.

5. Click the SAVE button when updates are complete.

6. The WePay™ system will send an email notification to users when project or study access is granted.
Disable a User

When a user leaves the University, the ADM must immediately reclaim or disable any WePay™ cards in the user’s inventory, unlink the user’s access to any Projects or Studies, and immediately notify the Office of Finance.

WePay™ System
N → Users → Maintain Users
Maintain Users

Disable a user

1. Open the Maintain Users window.
   - A list of all updateable users will be displayed.

2. Select the Last Name of the user for update.

3. Click the Cards owned by this User button.
   - Any cards owned by the user must be reclaimed by an ADM as long as the cards are physically in the department’s possession. Otherwise, the cards must be disabled.
4. Uncheck any projects or studies the user is linked to in the ACCESS TO PROJECTS or ACCESS TO STUDIES section of this screen in order to unlink that access.

   • ADMs can unlink BOMs, both ADMs and BOMs can unlink SCs or SAs, and SCs can unlink SAs.

   • A user should only be disabled if they are leaving the University. If they are transferring to another department, only the user’s project and study access should be removed.

5. Click the Cancel button to abandon update of the user. Otherwise click the OK button to save the changes and unlink this user from your projects or studies.

6. Notify the University’s Office of Finance if a user must be disabled.

   • Complete and sign a WePay™ User Creation Request Form checking the Terminate WePay™ User box on that form, or

   • Send a WePay™ Contact Us e-mail providing User Name and your contact information.

Both can be found on the WePay™ Website: http://www.cfo.pitt.edu/wepay/index.php
**My Profile**

All users can update their personal profile details. It is important to update your WePay™ email address when changes are made. The WePay™ system uses this address for all WePay™ system generated email notifications. Only UPMC or Pitt affiliated addresses are acceptable.

WePay™
N → Users → My Profile
Maintain my Profile

**Update personal profile**

1. Open the Maintain my Profile window.

![Maintain my Profile](image)

2. Here you can edit the name, email, phone and address fields associated with your account.

3. Make any necessary changes and click the SAVE button.

4. Click the Cancel button to exit without saving the changes.
Users: Summary

Users

- Create a new user
- Maintain a user
- Disable a user
- Update profile information