

# Employee Creation and Renewing Subscriptions

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## Abstract

This document will guide the user through the process of creating, modifying and deleting an employee as well as creating and renewing the iCXWeb subscription.

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## Adding an Employee

### Prerequisites

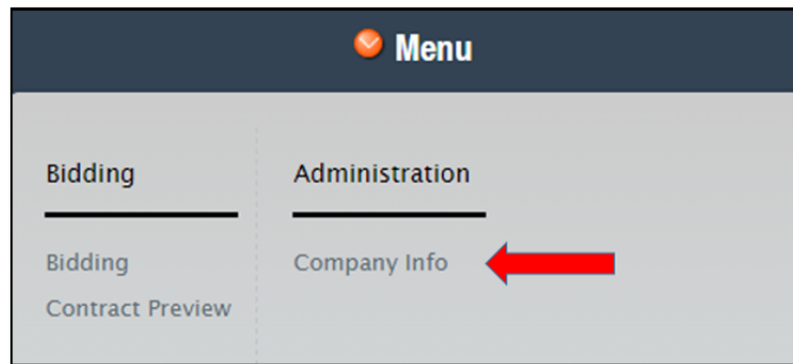
When a company is setup in the iCXWeb application by NHDOT, a user is also created with Administrator (Full) access. In order to add additional employees into the iCXWeb application for that company a user must have one of the following types of access rights:

- Maintenance
- Administrator (Full Access)

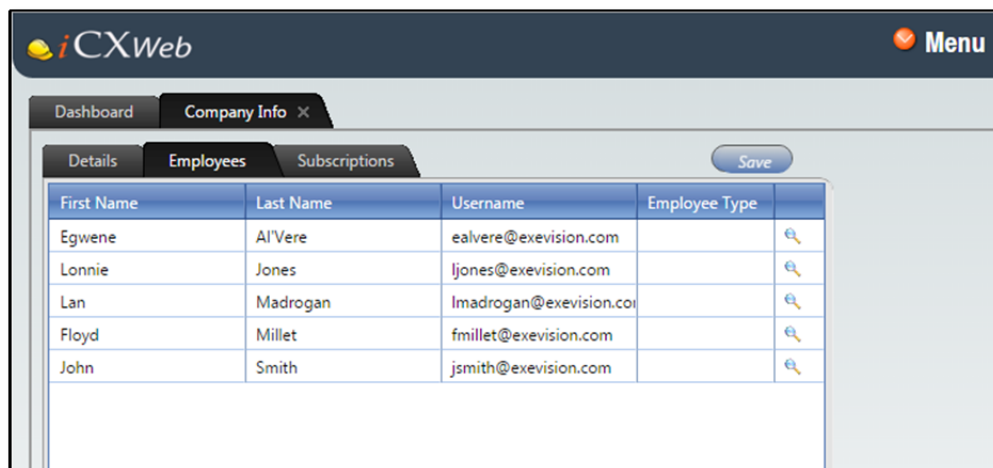
### Adding an Employee

To add employees:

- Click on the “Company Info” option in the main Menu.

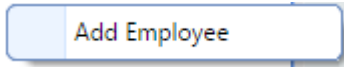


- Click on the Employees Tab



### To add Employee Contact Information

- Right-click in the Employees table (This will launch a pop-up menu)



- Click on "Add Employee" (This will launch the Employee Details Window)

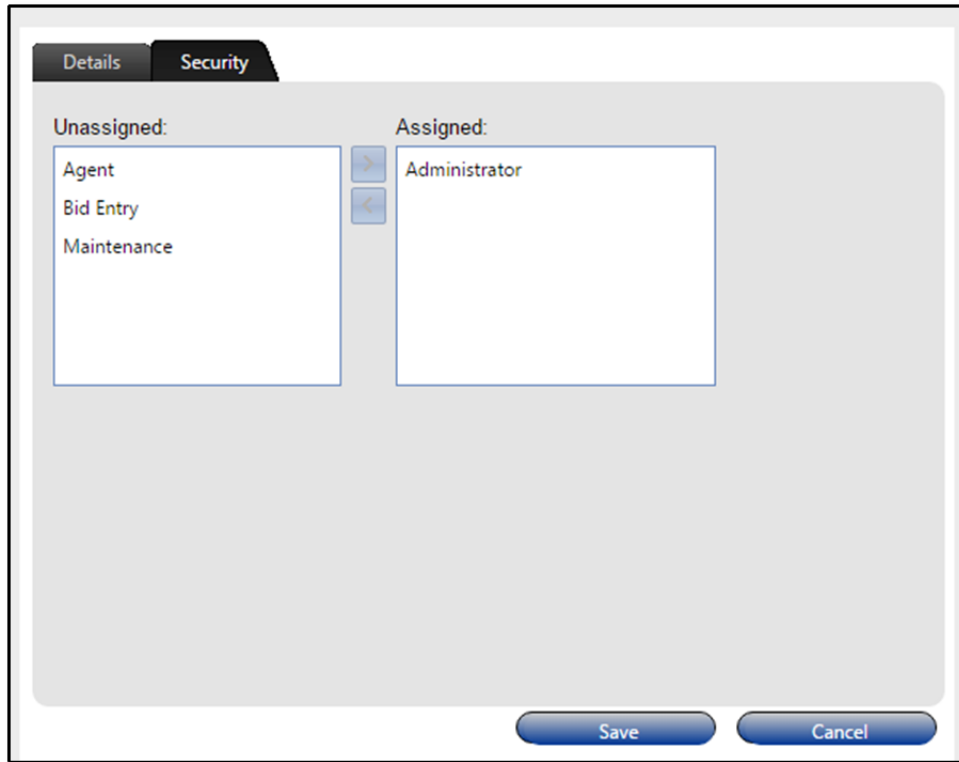
A screenshot of a web application window titled "EMPLOYEE". The window has two tabs: "Details" (selected) and "Security". The form contains the following fields: "Account Active:" with radio buttons for "Yes" (selected) and "No"; "\* First Name:" with a text input field; "\* Last Name:" with a text input field; "Employee Type:" with a dropdown menu and a red checkmark icon; "\* Address 1:" with a text input field; "Address 2:" with a text input field; "\* City:" with a text input field; "\* State:" with a dropdown menu and a red checkmark icon; "\* Zip Code:" with a text input field; "Phone Number:" with a text input field; "Email Address:" with a text input field; "\* Username:" with a text input field; "\* Enter Password:" with a text input field; and "\* Reenter Password:" with a text input field. At the bottom right, there are two buttons: "Save" and "Cancel".

- Add the desired information (Fields with a red asterisk are required).

## Employee Creation and Renewing Subscriptions

### To add Employee Access information

- Click on the Security Tab in the Company Info window.



- Select the Security role(s) for this employee.
  - Administrator: Full access to all iCXWeb functionality, including user access rights.
  - Agent: Able to edit bid information on authorized contracts and submit bids.
  - Bid Entry: Able to edit bid information on authorized contracts.
  - Maintenance: Able to maintain company and employee information, including user access rights.
- Click Save

## Subscribing to submit bids through the iCXWeb application

### Summary

When a company is set up by NHDOT in the iCXWeb application, the company will have access to all functionality, except the ability to submit a bid. In order to submit a bid, the company must have subscribed to use the iCXWeb.

### Prerequisites

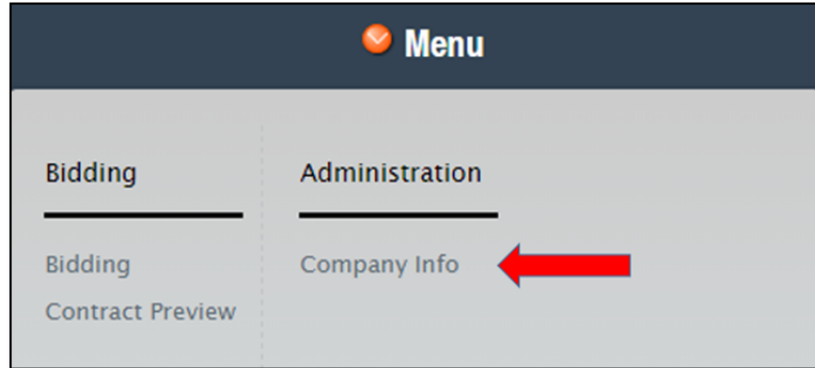
In order to subscribe to the iCXWeb service the user must have one of the following types of access rights:

- Maintenance
- Administrator (Full Access)

### Subscribing to the iCXWeb Service

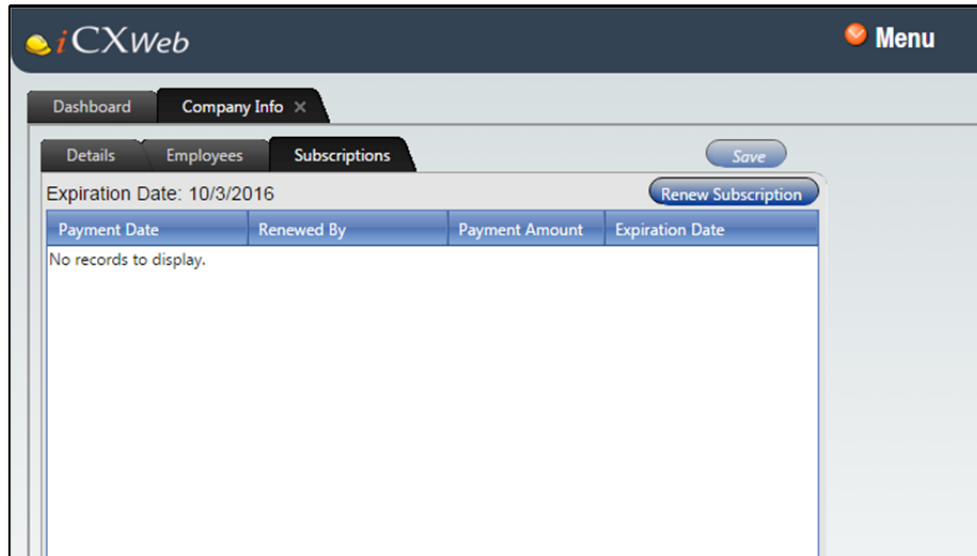
To subscribe or renew a subscription the user must:

- Click on the “Company Info” option in the main Menu.

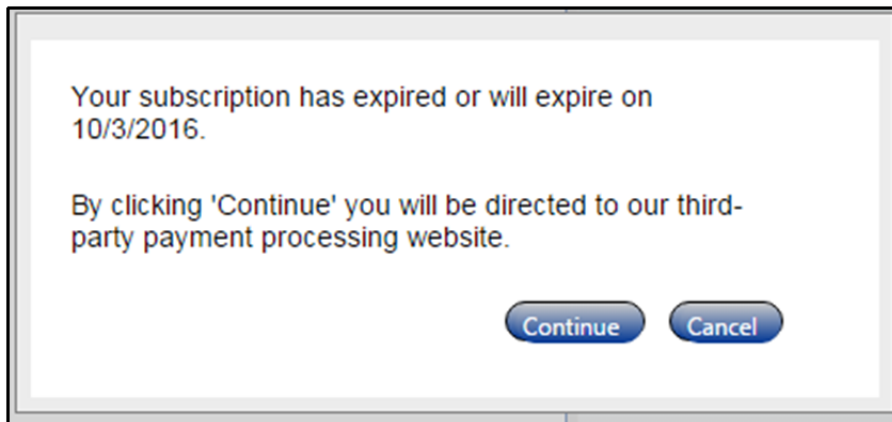


## Employee Creation and Renewing Subscriptions

- Click on the Subscriptions Tab



- Click the Renew Subscription button. This will bring up a message window that will tell you when your subscription expired or when it will expire.



- Click the Continue button to launch the Payment window for our third-party payment processing website.
- Click Cancel to return to the Subscriptions tab.

## The Payment Window

**iCX**  
Integrated Contractor Exchange

**Secure Contractor Bidding**  
The State of New Hampshire has chosen ExeVision's iCXWeb platform for state electronic contractor bidding. For authorization to use the SecureVault(TM) system, contractors sign up for a subscription to the SecureVaultTM service. For convenience, NHDOT has provided three options in an effort to best fit the needs of an individual contractor. Please select your preferred option and follow the payment instructions below.

**PAYMENT INFORMATION**

Choose your subscription option:

<input checked="" type="radio"/> Annually (12 month access - Save \$40)	500.00
<input type="radio"/> Quarterly (3 month access)	130.00
<input type="radio"/> Month-to-Month	45.00

Total Amount: \$500.00

Memo

Note: Check box to make your selection a recurring purchase.

**PAYMENT METHOD**

Card Number\*

Expires\*  -

Security Code\*  (Where is this?)

**BILLING ADDRESS**

Location\*

Company

Name\*

Street Address\*

City/Town\*

State/Province\*

ZIP/Postal Code\*

Phone\*

Email\*

\* Required

### The Payment Information Section

Choose your subscription option:

- Annual - This discounted amount allows the User to bid for an entire year from the time that the payment is made.
- Quarterly - This discounted amount allows the User to bid for three months from the time the payment is made.
- Month-to-Month - This is used generally for contractors that want to bid on a specific contract.

Choose to have a recurring purchase

- A user may have their subscription automatically renewed by clicking on the checkbox that allows for recurring purchases.



### The Payment Method Section:

- Fill in the Credit Card information.
- Fill in the Billing Address.
- Please ensure that the address is the address that the credit card company has on file for the credit card being used. It is possible that the company address and the credit card billing address are not the same.
- Press the Process Transaction Now button.