

SECURITY ROLES

1

Navigation:

PeopleTools > Security > User Profile > Distributed User Profile > Add a New Value > User Roles Tab

The screenshot shows the 'User Roles' tab in the PeopleSoft interface for User ID PO_REQUESTER. The page includes a 'Dynamic Role Rule' section on the left with buttons for 'Execute on Server', 'Test Rule(s)', 'Refresh', 'Execute Rule(s)', 'Process Monitor', and 'Service Monitor'. The main area displays a table of roles:

Role Name	Description	Dynamic	Route Control	View Definition
BOR PeopleSoft User	FN Base PeopleSoft User	<input type="checkbox"/>	Route Control	View Definition
BOR_PO_REQ_MAINT	Requisition Add, Maint, Copy	<input type="checkbox"/>	Route Control	View Definition

At the bottom, there are buttons for 'Save', 'Add', and 'Update/Display'.

PO Core Requester users enter requisitions in the Purchasing module. The also maintains requisitions.

ROLES:

BOR PeopleSoft User
BOR_PO_REQ_MAINT

USER PREFERENCES

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Navigation:

Set Up Financials & Supply Chain > Common Definitions > User Preferences > Define User Preferences > Overall Preferences

User Preferences Overall Preferences

User ID PO_REQUESTER
Name Purchasing Requester

Business Unit 71000 Georgia Perimeter College
SetID 71000 Georgia Perimeter College
As of Date 12/02/2014 31
Localization Country USA USA

☐ Alternate Character Enabled
☐ Display Debit/Credit Amounts in Subsystems

Save Return to Search Notify Refresh

User Preferences | Overall Preferences

USER PREFERENCES

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Navigation:

Set Up Financials & Supply Chain > Product Related > Procurement Options > Purchasing > Requester Setup > Add a New Value

Requester Setup

Requester PO_REQUESTER Purchasing Requester *Status Active

Requisition Defaults

Ship To SetID 71000 Ship To RECEIVING
*Location SetID 71000 *Location PO_MAIN
PO Origin SetID SHARE Origin ONL
Currency USD Dollar
Phone
Fax

☐ Override Auto Item Substitute
☐ Use Only Assigned Catalogs
☐ Consolidate with other Reqs

Requestion Status
☐ Open
☒ Pending Approval

☐ Price Can Be Changed on Order
☐ Defaults Inventory BU

Chartfields

GL Unit Account Fund Dept Program Class Project Bud Ref

71000

Catalog Information

Personalize Find View All First 1 of 1 Last

Default	*SetID	*Catalog ID	Description
<input checked="" type="checkbox"/>	SHARE	NIGP_SHORT_TREE	NIGP Code, Short List Tree

Save Notify Add Update/Display

Default Requisition Status should be set to Pending Approval.

The GL Unit must be defined in the Chartfields section. Always leave the account field under defaults blank. This will default into the requisition from the NIGP code.

In the catalog information section, select the Default checkbox and enter SHARE for the SetID. Enter either NIGP_TREE or NIGP_SHORT_TREE for catalog ID.

USER PREFERENCES

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Navigation:

Set Up Financials & Supply Chain > Common Definitions > User Preferences > Define User Preferences > Procurement

USER PREFERENCES

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Navigation:

Set Up Financials & Supply Chain > Common Definitions > User Preferences > Define User Preferences > Procurement > Requisition Authorizations hyperlink

Requesters User Auth For	Description	Add	Update	Cancel	Delete	Close	Reopen
PO_REQUESTER		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Select 'Full Auth for All Requesters' if user should have authority for all requesters. Do not specify individual Requester Id's in the 'Requesters User Authorization' section if Full Authority is granted.

If the user should not have authority for all do not select the option above. Instead, enter the Requester ID for each requester that the user should have authority for in the 'Requesters User Authorization' section. Also, select the applicable box(es) to grant authority to the user for all applicable actions (Add, Update, etc).

Note: Reopen is a new option in 9.2. Only grant if user should have authority to reopen Requisitions.