SECURITY ROLES
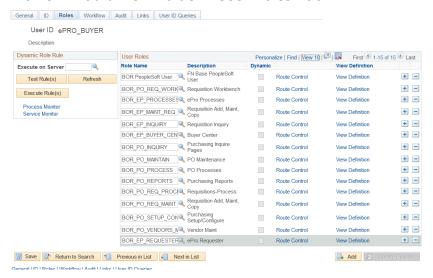
1

Navigation:

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

| General | ID | Roles | Workflow | Audit | Links | User ID Queries |

User ID ePRO_BUYER

Description

Dynamic Role Rule		User Roles			Personalize | Find | View 10 | First 1-15 of 15 Last
Execute on Server		**Role Name**	**Description**	**Dynamic**	**View Definition**
Test Rule(s) / Refresh		BOR PeopleSoft User	FN Base PeopleSoft User	☐ Route Control	View Definition ⊕ ⊖
Execute Rule(s)		BOR_PO_REQ_WORK	Requisition Workbench	☐ Route Control	View Definition ⊕ ⊖
		BOR_EP_PROCESSES	ePro Processes	☐ Route Control	View Definition ⊕ ⊖
Process Monitor		BOR_EP_MAINT_REQ	Requisition Add, Maint, Copy	☐ Route Control	View Definition ⊕ ⊖
Service Monitor		BOR_EP_INQUIRY	Requisition Inquiry	☐ Route Control	View Definition ⊕ ⊖
		BOR_EP_BUYER_CEN	Buyer Center	☐ Route Control	View Definition ⊕ ⊖
		BOR_PO_INQUIRY	Purchasing Inquire Pages	☐ Route Control	View Definition ⊕ ⊖
		BOR_PO_MAINTAIN	PO Maintenance	☐ Route Control	View Definition ⊕ ⊖
		BOR_PO_PROCESS	PO Processes	☐ Route Control	View Definition ⊕ ⊖
		BOR_PO_REPORTS	Purchasing Reports	☐ Route Control	View Definition ⊕ ⊖
		BOR_PO_REQ_PROC	Requisitions-Process	☐ Route Control	View Definition ⊕ ⊖
		BOR_PO_REQ_MAINT	Requisition Add, Maint, Copy	☐ Route Control	View Definition ⊕ ⊖
		BOR_PO_SETUP_CON	Purchasing Setup/Configure	☐ Route Control	View Definition ⊕ ⊖
		BOR_PO_VENDORS_M	Vendor Maint	☐ Route Control	View Definition ⊕ ⊖
		BOR_EP_REQUESTER	ePro Requester	☐ Route Control	View Definition ⊕ ⊖

Save | Return to Search | Previous in List | Next in List | Add | Update/Display

General ID \| Roles \| Workflow \| Audit \| Links \| User ID Queries

ePRO Buyer users enter and maintain requisitions using the ePro module. They also process requisitions and perform purchasing-related maintenance tasks. They also enter and maintain requisitions, purchase orders, change orders, procurement contracts and vendor information in the Purchasing module. They also process purchasing transactions, run purchasing-related reports and maintain purchasing-related configuration.

ROLES:
BOR_EP_BUYER_CENTER
BOR_EP_INQUIRY
BOR_EP_MAINT_REQ
BOR_EP_PROCESSES
BOR_PO_REQ_WORKBENCH
BOR_PO_INQUIRY
BOR_PO_MAINTAIN
BOR_PO_PROCESS
BOR_PO_REPORTS
BOR_PO_REQ_MAINT
BOR_PO_REQ_PROCESS
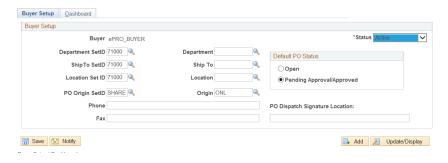BOR_PO_SETUP_CONFIG
BOR_PO_VENDORS_MAINT
BOR_EP_REQUESTER
BOR PeopleSoft User

BUYER SETUP

2

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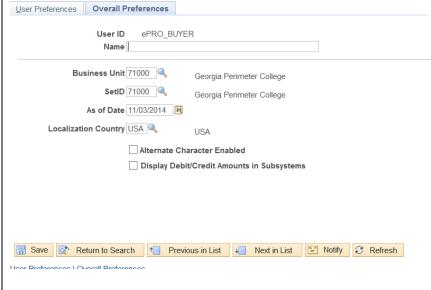

Default PO Status should be set to Pending Approval/Approved.

USER PREFERENCES

3

Navigation:
Set Up Financials & Supply Chain > Common Definitions > User Preferences > Define User Preferences > Overall Preferences
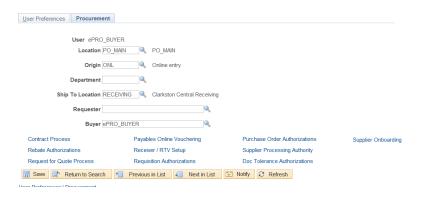
USER PREFERENCES

4

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

USER PREFERENCES

5

Navigation:
Set Up Financials & Supply Chain > Common Definitions > User Preferences > Define User Preferences > Procurement > Document Tolerance Authorizations hyperlink

The 'Override Purchase Order to Requisition Exceptions' option should only be checked if user should have authority to take this action.

USER PREFERENCES

6

Navigation:
Set Up Financials & Supply Chain > Common Definitions > User Preferences > Define User Preferences > Procurement > Receiver Setup hyperlink
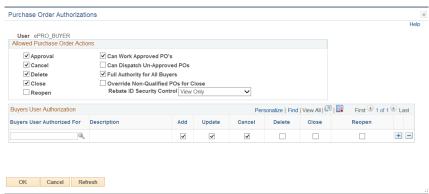

Focus only in this area: Set the default to either PO Remaining Qty, Ordered By, or No Order Qty and specify the days +/-

USER PREFERENCES

7

Navigation:
Set Up Financials & Supply Chain > Common Definitions > User Preferences > Define User Preferences > Procurement > Purchase Order Authorizations hyperlink

Select 'Full Authority for All Buyers' if user should have authority for all buyers. Do not specify individual Buyer Id's in the 'Buyers 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 Buyer ID for each buyer that the user should have authority for in the 'Buyers User Authorization' section.   Also, select the applicable box(es) to grant authority to the user for all applicable actions (Add, Update, etc).
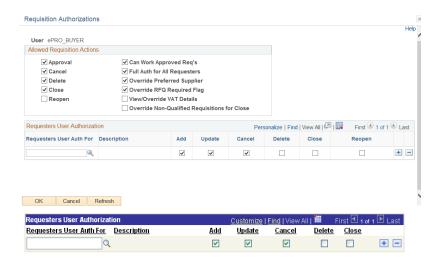
Note: Reopen is a new option in 9.2. Only grant if user should have authority to reopen Purchase Orders.

USER PREFERENCES

8

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

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

USER PREFERENCES

9

Navigation:
Set Up Financials & Supply Chain > Common Definitions > User Preferences > Define User Preferences > Procurement > Vendor Processing Authority hyperlink

**Enter or Approve, but not both

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.