

SECURITY ROLES

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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_APPROVER

Description: ePro Approver

Dynamic Role Rule

Execute on Server: [Search]

Test Rule(s) Refresh

Execute Rule(s)

Process Monitor Service Monitor

Save Add Update/Display

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

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

ePRO Approver users approve requisitions created in the ePro module. They can view requisitions to review chartfields, distributions, etc.

ROLES:

BOR_EP_MAINT_REQ (only if they need to edit req)**
 BOR_EP_REQ_APPROVE
 BOR PeopleSoft User

If the approver is a Dept or Project Approver, the above roles are enough.

****For GaFirst MarketPlace Access also add role BOR_EP_MAINT_REQ_SCI.**

If they are a special approver, they will need one or more of the following:

Agency Fund Approver – BOR_AGENCY_FUND_APPR
 Amount Approver – BOR_EP_CAT_AMOUNT_APPR
 Asset Approver – BOR_ASSET_APPR **
 Audio Visual Approver – BOR_AUDIO_VIS_APPR
 It Approver – BOR_IT_APPR
 Chemical Approver – BOR_CHEMICAL_APPR
 University Relations Approver – BOR_UNIVREL_APPR
 Facilities Approver – BOR_FACILITIES_APPR
 Buyer Approver – BOR_BUYER_APPR ***
 Grants Approver - BOR_GRANT_APPR
 Tech Fee Approver - BOR_TECH_FEE_APPR
 Human Resources Approver - BOR_HR_APPR
 Furniture Approver BOR_FURNITURE_APPR
 Pharm Drugs Approver - BOR_PHARM_DRUG_APPR

** This role contains the role action of Can Change Distrib and Can Change Schedule. This allows the approver to be able to change any field on the requisition distribution or schedule without restarting the approval process on requisitions that are not fully approved.

*** This role contains the role action of Can Change All. This allows the approver to be able to change any field on the requisition, including quantity and price, without restarting the approval process on requisitions that are not fully approved.

**** If any other level approver needs a role action, there are other role actions roles that can be assigned to the user. See the Role Action Job information on last page for details.

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 ePRO_APPROVER
Name ePro Approver

Business Unit 71000 Georgia Perimeter College
SetID 71000 Georgia Perimeter College
As of Date 10/22/2014
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 > Common Definitions > User Preferences > Define User Preferences > Procurement

User Preferences Procurement

User ePRO_APPROVER ePro Approver
Location PO_MAIN PO_MAIN
Origin ONL Online entry
Department
Ship To Location RECEIVING
Requester
Buyer

Contract Process Payables Online Vouchering Purchase Order Authorizations Supplier Onboarding
Rebate Authorizations Receiver / RTV Setup Supplier Processing Authority
Request for Quote Process Requisition Authorizations Doc Tolerance Authorizations

Save Return to Search Notify Refresh

User Preferences | Procurement

****The approver's User Id Must be populated in the Requester field if they are also a requester. If it is not entered here, the user will not be able to access ePro Requisitions Page.**

USER PREFERENCES

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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 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

USER PREFERENCES

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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.

ROLE ACTIONS

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Navigation:

PeopleTools > Security > User Profile > Distributed User Profile > Search for Value > User Roles Tab

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

User ID: ePRO_APPROVER
Description: ePro Approver

Dynamic Role Rule	User Roles	Personalize	Find	View All	First	1-4 of 4	Last
Execute on Server	Role Name	Description	Dynamic	View Definition			
Test Rule(s)	BOR PeopleSoft User	FN Base PeopleSoft User	<input type="checkbox"/>	Route Control	View Definition		
Execute Rule(s)	BOR_EP_REQ_APPR	Approve Requisitions	<input type="checkbox"/>	Route Control	View Definition		
Process Monitor	BOR_EP_MAINT_REQ	Requisition Add, Maint, Copy	<input type="checkbox"/>	Route Control	View Definition		
Service Monitor	BOR_EP_RA_CHANGE		<input type="checkbox"/>	Route Control	View Definition		

Save Add Update/Display

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

In the event you want a different level approver to have a specific role action, there are 5 new roles that can be assigned. You will need to choose only one of the five for each user.

Search Results

View All First 1-5 of 5 Last

Role Name	Description
BOR_EP_RA_CHANGEALL	Role Action - Can Change All
BOR_EP_RA_CHANGEDISTR	Role Action - Can Change Distr
BOR_EP_RA_CHANGEHDR	Role action - Can Change Hdr
BOR_EP_RA_CHANGELINE	Role Action - Can Change Line
BOR_EP_RA_CHANGESCHED	Role Action - Can Change Sched

The BOR_EP_RA_CHANGEDISTRIB and the BOR_EP_RA_CHANGESCHED may have to be added together until a PS Bug is corrected.

The BOR_EP_RA_CHANGEALL role will allow an approver to update any portion of the requisition without restarting workflow on requisitions that are not fully approved. If the requisition has been approved, and the approver makes a change, the requisition will reroute back through workflow.

The BOR_EP_RA_CHANGEDISTRIB role will allow an approver to update the distribution of the requisition without restarting workflow on requisitions that are not fully approved. If the requisition has been approved, and the approver makes a change, the requisition will reroute back through workflow.

The BOR_EP_RA_CHANGEHDR role will allow an approver to update the header of the requisition without restarting workflow on requisitions that are not fully approved. If the requisition has been approved, and the approver makes a change, the requisition will reroute back through workflow.

The BOR_EP_RA_CHANGELINE role will allow an approver to update the line of the requisition without restarting workflow on requisitions that are not fully approved. If the requisition has been approved, and the approver makes a change, the requisition will reroute back through workflow.

The BOR_EP_RA_CHANGESCHED role will allow an approver to update the schedule of the requisition without restarting workflow on requisitions that are not fully approved. If the requisition has been approved, and the approver makes a change, the requisition will reroute back through workflow.

Without any of the role action roles assigned, if an approver updates information on the requisition, such as chartfield information, the requisition will have to be rerouted back through the approval levels