

SECURITY ROLES

1

Navigation:

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

User ID PO_REQUESTER
Description Purchasing Requester

Dynamic Role Rule	User Roles	Personalize	Find	View All	First	1-2 of 2	Last
Execute on Server	Role Name	Description	Dynamic	Route Control	View Definition		
Test Rule(s)	BOR PeopleSoft User	FN Base PeopleSoft User	<input type="checkbox"/>	Route Control	View Definition	+	-
Execute Rule(s)	BOR_PO_REQ_MAINT	Requisition Add, Maint, Copy	<input type="checkbox"/>	Route Control	View Definition	+	-

Save Add 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 ID PO_REQUESTER
Name Purchasing Requester

Business Unit 71000 Georgia Perimeter College
SetID 71000 Georgia Perimeter College
As of Date 12/02/2014
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 > 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 *Location SetID 71000 PO Origin SetID SHARE Currency USD Dollar Origin ONL
☐ Override Auto Item Substitute ☐ Use Only Assigned Catalogs ☐ Consolidate with other Reqs
☐ Price Can Be Changed on Order ☐ Defaults Inventory BU

Requestion Status
☐ Open ☒ Pending Approval

Chartfields
GL Unit Account Fund Dept Program Class Project Bud Ref
71000

Catalog Information
Default *SetID *Catalog ID Description
☒ 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

5

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.