

SECURITY ROLES

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Navigation:

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

The screenshot shows the 'User Roles' tab for the user 'PO_APPROVER'. The user's description is 'Purchasing Approver'. The 'Dynamic Role Rule' section on the left includes buttons for 'Execute on Server', 'Test Rule(s)', 'Refresh', 'Execute Rule(s)', 'Process Monitor', and 'Service Monitor'. The main table lists the following 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_APPROVE	PO approve	<input type="checkbox"/>	Route Control	View Definition
BOR_PO_REQ_APPR	Requisition Maint-Approve	<input type="checkbox"/>	Route Control	View Definition
BOR_PO_ASSET_APPR	BOR_PO_ASSET_APPR	<input type="checkbox"/>	Route Control	View Definition
BOR_PO_BUD_REF_APPR	BOR_PO_BUD_REF_APPR	<input type="checkbox"/>	Route Control	View Definition
BOR_BUYER_APPR	Buyer Approval	<input type="checkbox"/>	Route Control	View Definition

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

PO Approver users approve requisitions and purchase orders in the Purchasing module.

ROLES:

BOR PeopleSoft User
 BOR_PO_APPROVE
 BOR_PO_REQ_APPROVE
 BOR_BUYER_APPR
 BOR_PO_ASSET_APPR
 BOR_PO_BUD_REF_APPR

NOTE: The role assignments for Purchasing approvers may vary. For instance, only an approver approving assets in the purchasing module would need the BOR_PO_ASSET_APPR role.

USER PREFERENCES

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Navigation:

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

The screenshot shows the 'Overall Preferences' tab for the user 'PO_APPROVER'. The user's name is 'Purchasing Approver'. The 'Business Unit' is '71000' (Georgia Perimeter College) and the 'SetID' is '71000' (Georgia Perimeter College). The 'As of Date' is '12/02/2014'. The 'Localization Country' is 'USA'. There are two checkboxes: 'Alternate Character Enabled' and 'Display Debit/Credit Amounts in Subsystems'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', and 'Refresh'.

User ID PO_APPROVER
Name Purchasing Approver

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 > Common Definitions > User Preferences > Define User Preferences > Procurement

The screenshot shows the 'Procurement' tab for the user 'PO_APPROVER'. The user's name is 'Purchasing Approver'. The 'Location' is 'PO_MAIN', 'Origin' is 'ONL', 'Department' is blank, 'Ship To Location' is blank, 'Requester' is blank, and 'Buyer' is blank. There are several links for procurement-related processes: 'Contract Process', 'Rebate Authorizations', 'Request for Quote Process', 'Payables Online Vouchering', 'Receiver / RTV Setup', 'Requisition Authorizations', 'Purchase Order Authorizations', 'Supplier Processing Authority', 'Doc Tolerance Authorizations', and 'Supplier Onboarding'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', and 'Refresh'.

User PO_APPROVER Purchasing Approver
Location PO_MAIN
Origin ONL
Department
Ship To Location
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

****Here, you would list the appropriate Requester/Buyer User Id.**

USER PREFERENCES

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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

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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**6****Navigation:**

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

Document Tolerance Exceptions Override Authorizations

User PO_APPROVER Purchasing Approver

Document Tolerance Exceptions Override Authority

☒ Override Purchase Order to Requisition Exceptions

☐ Override Voucher to Purchase Order Exceptions

OK Cancel Refresh

Help

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