ePro APPROVER
9.2 SECURITY ROLES & USER PREFERENCES

SECURITY ROLES

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

**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.
**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

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

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.
ROLE ACTIONS

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

<table>
<thead>
<tr>
<th>Role Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>BOR_EP_RA_CHANGEALL</td>
<td>Role Action - Can Change All</td>
</tr>
<tr>
<td>BOR_EP_RA_CHANGEDIST</td>
<td>Role Action - Can Change Dist</td>
</tr>
<tr>
<td>BOR_EP_RA_CHANGEHDR</td>
<td>Role Action - Can Change Hdr</td>
</tr>
<tr>
<td>BOR_EP_RA_CHANGLINE</td>
<td>Role Action - Can Change Line</td>
</tr>
<tr>
<td>BOR_EP_RA_CHANGESCHED</td>
<td>Role Action - Can Change Sched</td>
</tr>
</tbody>
</table>

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_CHANGEDIST 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_CHANGLINE 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.