

### 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\_BUYER

Description

Dynamic Role Rule

Execute on Server

Test Rule(s) Refresh

Execute Rule(s)

Process Monitor

Service Monitor

Role Name	Description	Dynamic	Personalize	Find	View 10	First	1-15 of 15	Last
BOR PeopleSoft User	FN Base PeopleSoft User		Route Control		View Definition			
BOR_PO_REQ_WORK	Requisition Workbench		Route Control		View Definition			
BOR_EP_PROCESSES	ePro Processes		Route Control		View Definition			
BOR_EP_MAINT_REQ	Requisition Add, Maint, Copy		Route Control		View Definition			
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_PROCI	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

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### Navigation:

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

Buyer Setup

Buyer: ePRO\_BUYER \*Status: Active

Department SetID: 71000 Department: Department

Ship To SetID: 71000 Ship To: Ship To

Location SetID: 71000 Location: Location

PO Origin SetID: SHARE Origin: ONL

Phone: Phone

Fax: Fax

PO Dispatch Signature Location: PO Dispatch Signature Location

Default PO Status

☐ Open

☒ Pending Approval/Approved

Save Notify Add Update/Display

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

## 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\_BUYER

Name: Name

Business Unit: 71000 Georgia Perimeter College

SetID: 71000 Georgia Perimeter College

As of Date: 11/03/2014

Localization Country: USA USA

☐ Alternate Character Enabled

☐ Display Debit/Credit Amounts in Subsystems

Save Return to Search Previous in List Next in List Notify Refresh

## USER PREFERENCES

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### Navigation:

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

## 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.

## USER PREFERENCES

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### 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

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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

Requisition Authorizations

User ePRO\_BUYER

Allowed Requisition Actions

- ☒ Approval
- ☒ Cancel
- ☒ Delete
- ☒ Close
- ☐ Reopen
- ☒ Can Work Approved Req's
- ☒ Full Auth for All Requesters
- ☒ Override Preferred Supplier
- ☒ Override RFQ Required Flag
- ☐ View/Override VAT Details
- ☐ Override Non-Qualified Requisitions for Close

Requesters User Authorization

Requesters User Auth For	Description	Add	Update	Cancel	Delete	Close	Reopen
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

OK Cancel Refresh

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

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### Navigation:

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

Supplier Processing Authority

User ePRO\_BUYER

Supplier Processing Authority

- ☐ Authority to Enter
- ☐ Authority to Approve
- ☐ Authority to Inactivate
- ☐ Supplier Audit

OK Cancel Refresh

\*\*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.