PURCHASING USER MANUAL

ADDING AND MAINTAINING USERS

INTRODUCTION

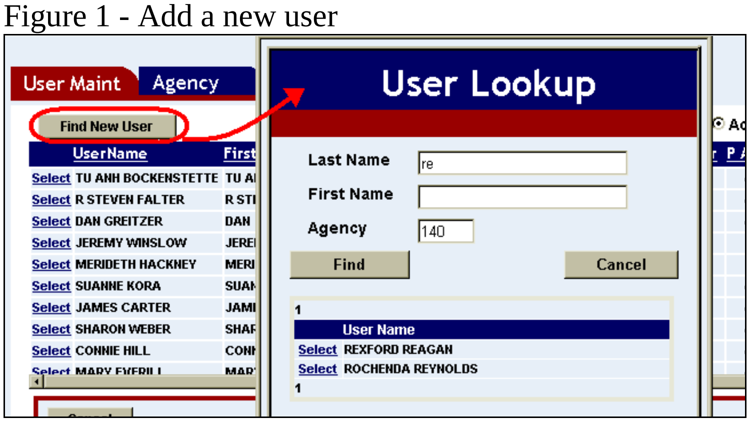
The Purchasing administrator can:

- Add new users and assign their security and any limits on their approval rules.
- Update existing users.
- Assign users to the Workflows and Departments

ADD A NEW USER

1. On the **User Maint** tab, Click **Find New User**.
2. In the **User Lookup** dialog box, type the last name of the new user in the **Last Name** field. (You can type the first few letters of a user's name if you are not sure how it is spelled.)
3. To add an employee <u>from</u> another agency, type the last and/or first name and enter their agency number in the **Agency** field. Do not add an employee from your agency to another agency number.
4. Click **Find**. If the user cannot be found, contact your payroll administrator to make sure that the person has been added to state payroll records.
5. Click **Select** next to the user's name to add and then click **OK** to confirm adding the user.

Figure 1 - Add a new user



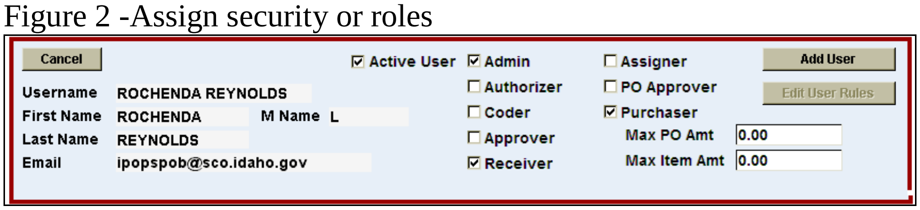
6. Select **Active User** to grant the user access to the application.

7. Select the security or the roles to assign to the user. Some of these roles are related to settings on the **Agency** screen.

   - **Admin** – agency administrator functions. It is recommended to have at least two users added for this role so that one can serve as a backup.
   - **Authorizer** – authorizes the requisition prior to approval. If you enable **Auto Authorize Requisitions** on the **Agency** screen, you do not need an Authorizer.
   - **Coder** – adds fiscal coding to the line items of the requisition.
   - **Approver** – approves the requisition. Add Approvers to the **Workflow(s)** you create on the **Agency** screen. If you create **Req Departments** on the **Agency** screen and enable **Restrict Approval by Department**, add the Approvers to the appropriate requisition departments.
   - **Assigner** – assigns requisitions to specific purchasers. If you do not enable **PO Assigner Required** on the **Agency** screen, you do not need an Assigner.
   - **Purchaser** – purchases the items from requisitions. Purchasers do not need to belong to Workflows. If you create **PO Departments** on the **Agency** screen, add Purchasers to the departments.
     - **Max PO Amt** – Set the maximum dollar amount of the entire purchase order that the purchaser can make.
     - **Max Item Amt** - Set the maximum dollar amount of a single line item that the purchaser can add to a purchase order.
   - **PO Approver** – approves a purchase order. If you do not enable **PO Approver Required** on the **Agency** screen, you do not need a PO Approver.
   - **Receiver** – receives and records the receipt of the items purchased.

8. Click **Add User**.

Figure 2 -Assign security or roles

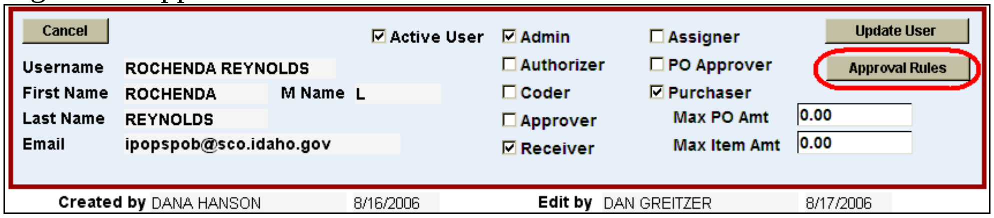


ASSIGN SPECIFIC APPROVAL RULES

Specific approval rules can work in conjunction with creating requisition departments and workflows. For instance, two approvers can be assigned to the same department and workflow, but one could approve items that are fiscally coded with specific PCAs.

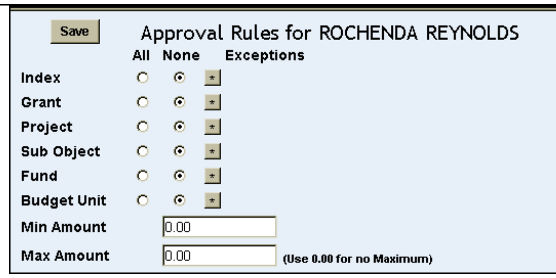
1. To assign approval rules, such as limiting an approver to specific Grants or Funds or Budget Units, click **Approval Rules**.

Figure 3 - Approval Rules button



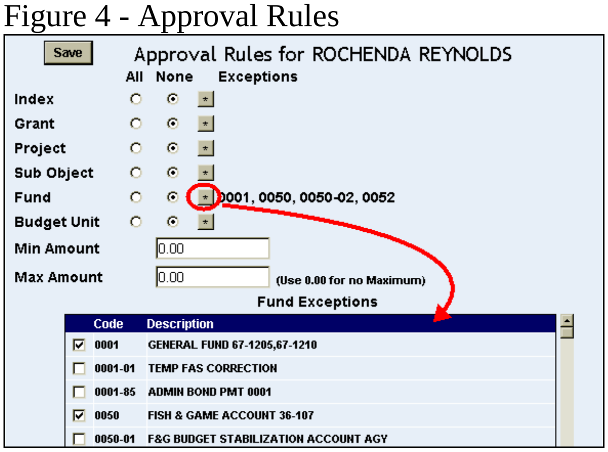
2. Determine the fiscal codes you want to allow the user to approve. The options are:

- Index (or PCA)
- Grant
- Project
- Subobject
- Fund
- Budget Unit



3. Select either **All** or **None** for each fiscal code.
   - **All** indicates that the user can approve *all* Indexes, PCAs, Grants, etc.
   - **None** indicates that the user cannot approve any of them.
4. Click the **Exceptions** asterisk next to a fiscal code to display the list of specific fiscal codes to select as exceptions to the **All** or **None** choice. For example:
   - If you select **All** for **Fund** and then select several Funds from the Exceptions list, the user *can* approve requisition items that are coded with *all* Funds *except* for those selected.
   - If you select **None** for **Fund** and then select several Funds from the Exceptions list, then the user *cannot* approve requisition items *except* for the ones coded with the Funds you selected.

Figure 4 - Approval Rules



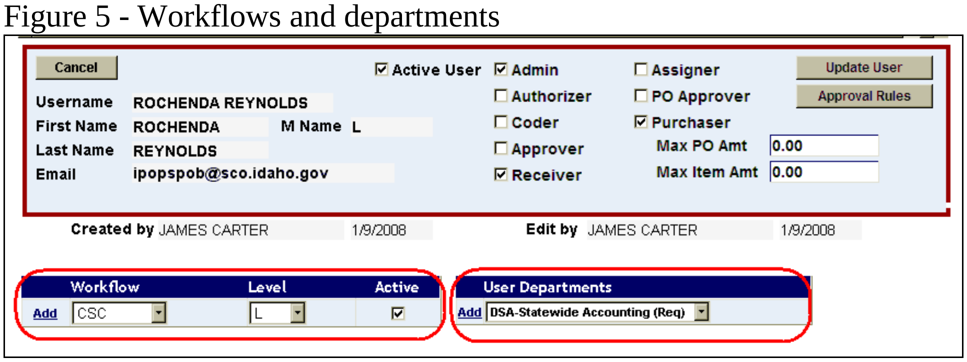
5. Enter a minimum dollar amount (**Min Amount**) and/or a maximum dollar amount (**Max Amount**) of a requisition that the approver can approve. The approver will not be able to approve requisition items higher or lower than these dollar amounts.
6. Click **Save** when finished. Approvers will see that requisition items that they cannot approve will be highlighted in the application. Although the approvers can view the requisition items on the **Approval** screen, they will not be able to approve them.

ADD A USER TO A WORKFLOW AND DEPARTMENT

If you have created Workflows and Departments on the **Agency** screen, you can add users to them on the **User Maint** screen. If you add your users before creating Workflows and Departments, you can add them on the **Agency** screen when you create the Workflows and Departments. See Creating Workflows and Departments.

1. On the **User Maint** screen, either select an existing user from the user list, or continue with a new user set up:
2. Select a workflow from the **Workflow** drop down menu.
3. Select a **Level**.
4. Be sure **Active** check box is checked.
5. Click **Add**.
6. Continue adding the user to as many workflows as needed.
7. If you have created departments, select a department from the **User Departments** drop down menu.
8. Click **Add**.
9. Continue adding the user to as many departments as needed.
10. Click **Update User**.

Figure 5 - Workflows and departments



APPROVERS UNABLE TO APPROVE REQUISITION ITEMS

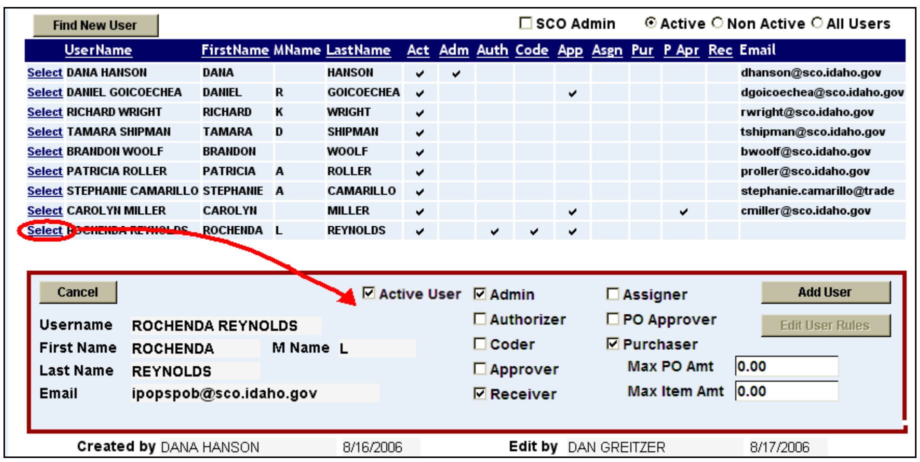
If an approver cannot approve a requisition or requisition line items:

- They are not part of the requisition workflow.
- They are not part of the Requisition Department and you have restricted approvals by department.
- There are line item(s) with fiscal coding or a dollar amount which their approval rules do not allow them to approve.
- They are not an approver.

Users can click **Approve** next to a requisition and then click a line item **Menu** and **Show Reason** to find out why they cannot approve the item.

EDIT EXISTING USERS

1. On the **User Maint** tab, click **Select** next to a user's name.



Depending on the changes you want to make, choose from the following:

a. Uncheck **Active User** to remove the user's access to the application.

b. Select or deselect the security or the roles to assign to the user (see above). If a person is removed as an **Approver** but left on the workflow, they will not be able to approve requisitions. But if you remove a user as an **Approver**, you should also remove them from the approver level of requisition workflows.

c. Add a user to a **Workflow** or **Department** as described above.

d. To delete a user from a **Workflow** or **Department**, click **Del** next to the **Workflow** or **Department** name.

e. Click **Approval Rules** to edit the user's approval authority (as described above) and click **Save**.

2. When finished making changes to a user, click **Update User**.