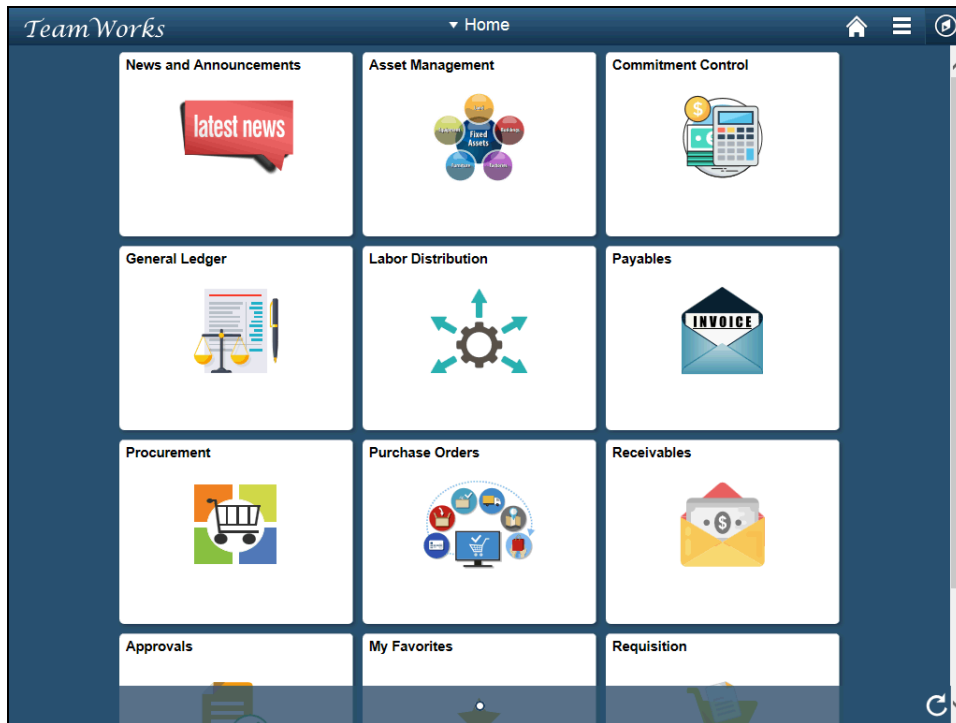

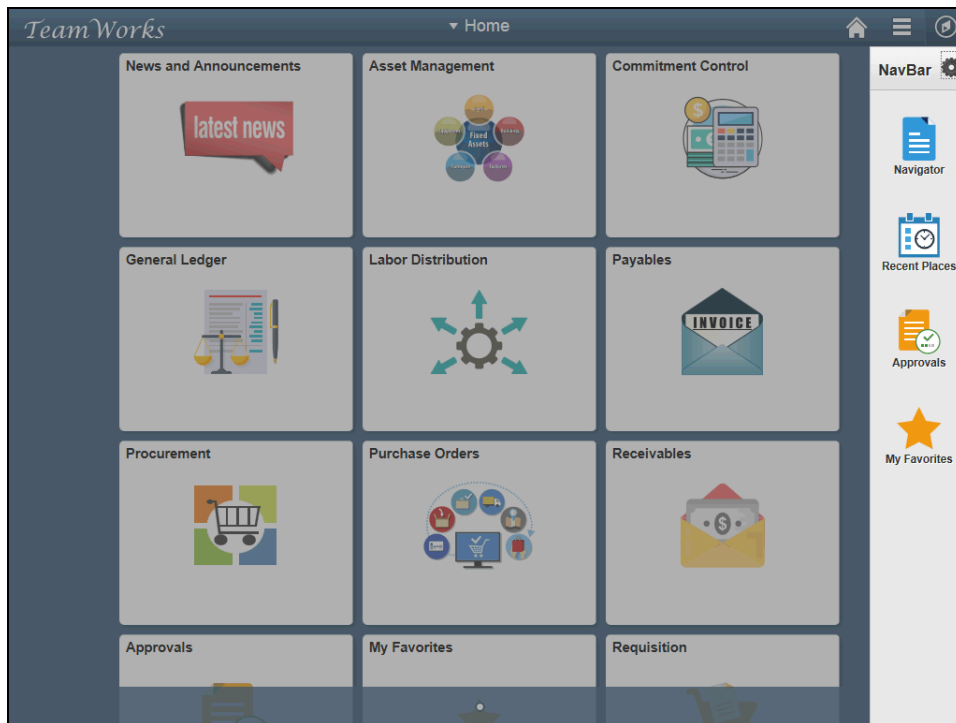



Reviewing the User Information Tab

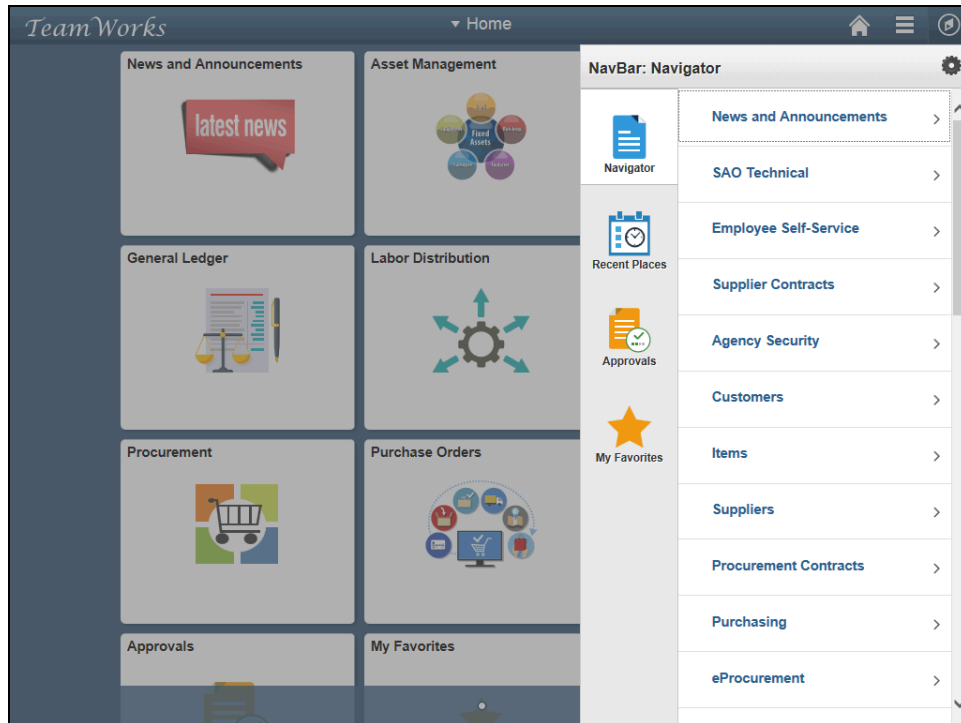
Below are the process steps to Reviewing the User Information Tab. As you are performing the task, use this document to be a Step-by-Step guide for completing this process. At the end, please click the link to complete a quick survey as to the usefulness of this document.



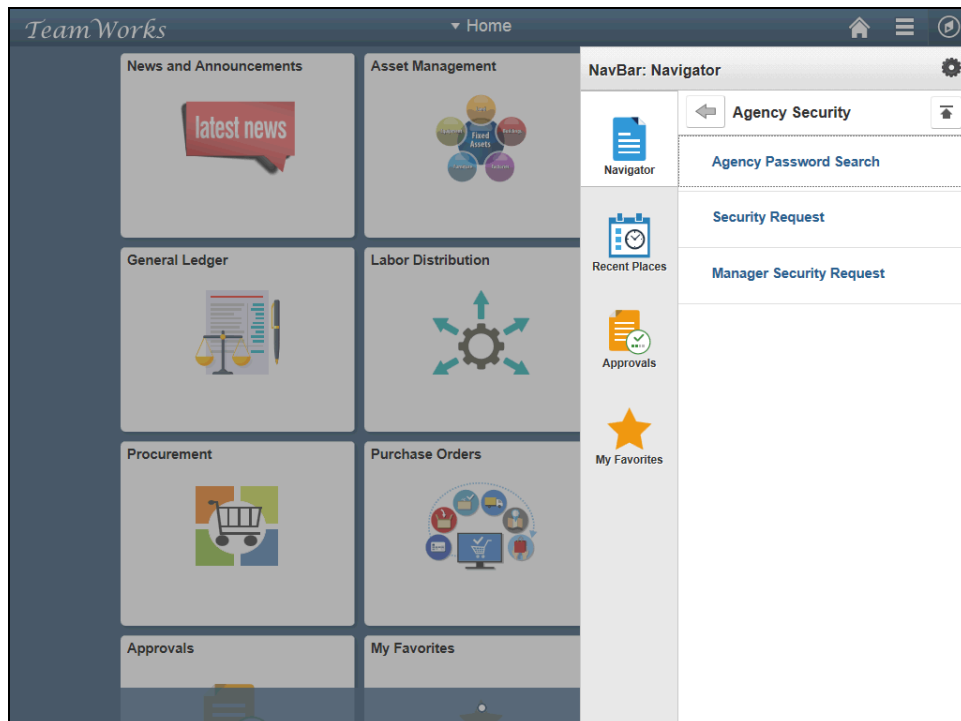
Step	Action
1.	<p>Begin by navigating to the Manager Security Report page.</p> <p>Note: This simulation is an example of a transaction. When entering a transaction in the live TeamWorks Financials system, please select all values and options based on agency policy, the paperwork on hand and the current situation.</p> <p>Click the NavBar icon.</p> 



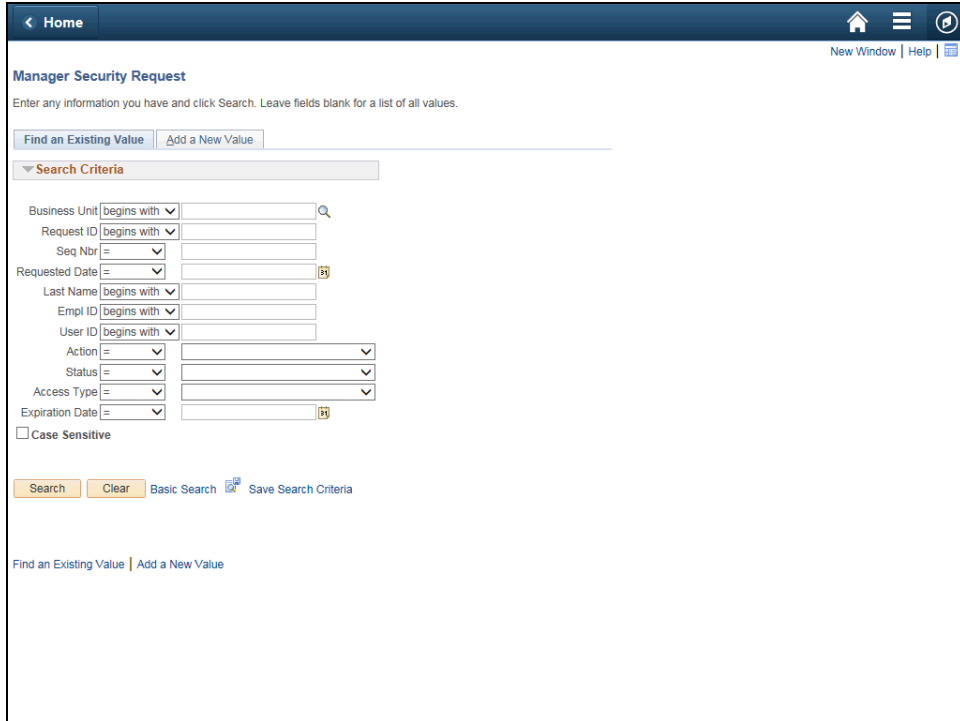
Step	Action
2.	Click the Navigator icon. <div data-bbox="354 1066 521 1224" style="text-align: center;">  <p>Navigator</p> </div>



Step	Action
3.	Click the Agency Security link. Agency Security

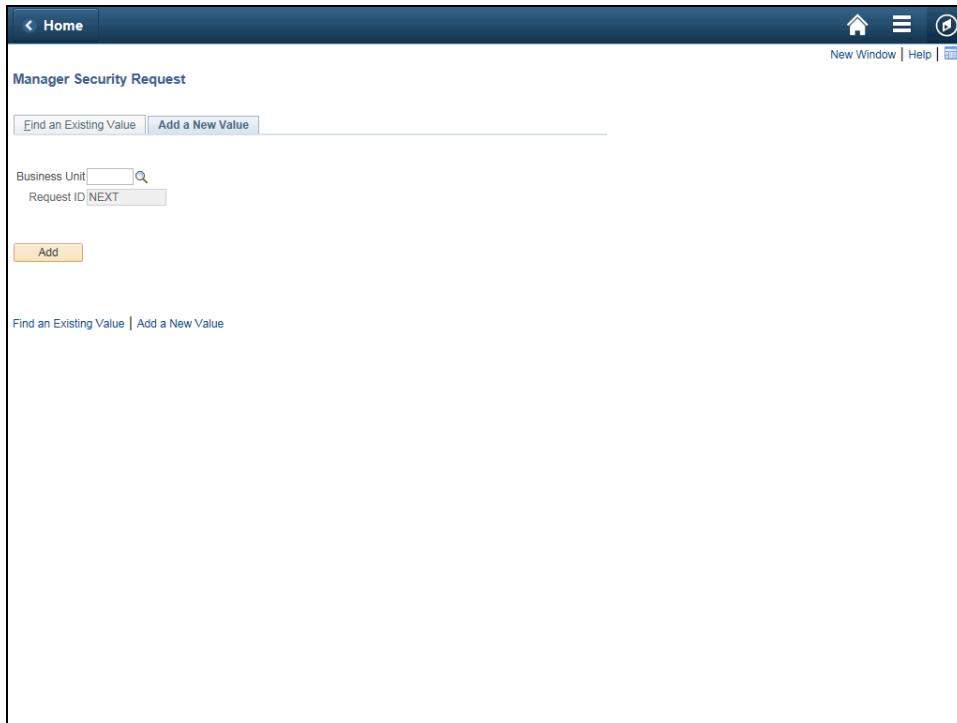



Step	Action
4.	Click the Manager Security Request link. Manager Security Request

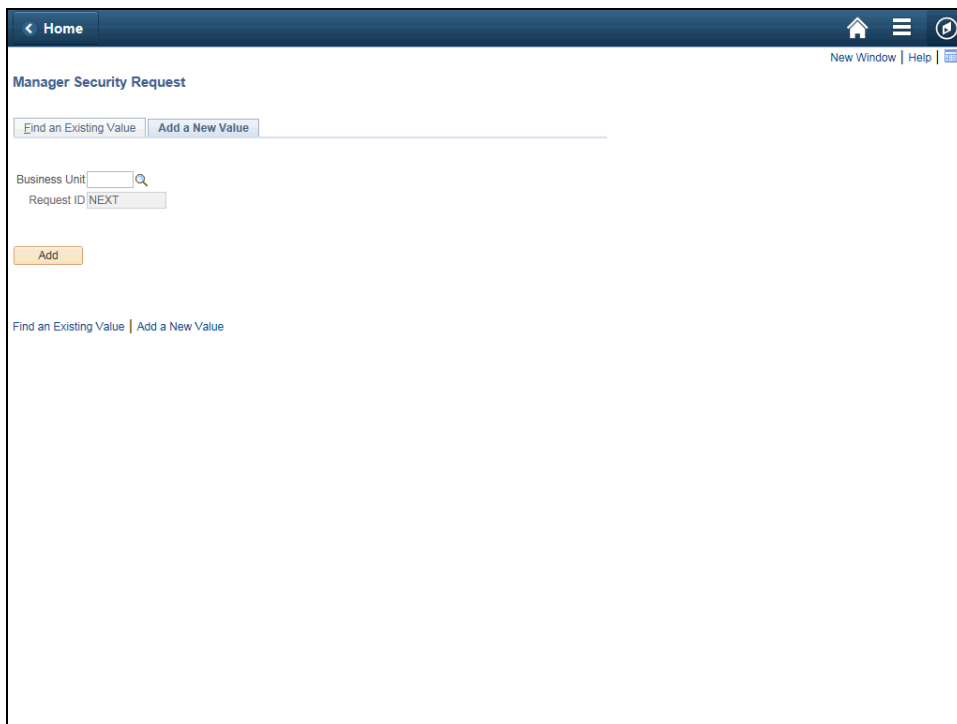


The screenshot shows a web application interface for "Manager Security Request". At the top, there is a navigation bar with a "Home" button and utility icons for "New Window" and "Help". Below the title, a prompt asks the user to "Enter any information you have and click Search. Leave fields blank for a list of all values." There are two tabs: "Find an Existing Value" (selected) and "Add a New Value". A "Search Criteria" section contains several search filters: Business Unit (begins with), Request ID (begins with), Seq Nbr (=), Requested Date (=), Last Name (begins with), Empl ID (begins with), User ID (begins with), Action (=), Status (=), Access Type (=), and Expiration Date (=). A "Case Sensitive" checkbox is also present. At the bottom of the search criteria, there are buttons for "Search", "Clear", "Basic Search", and "Save Search Criteria".

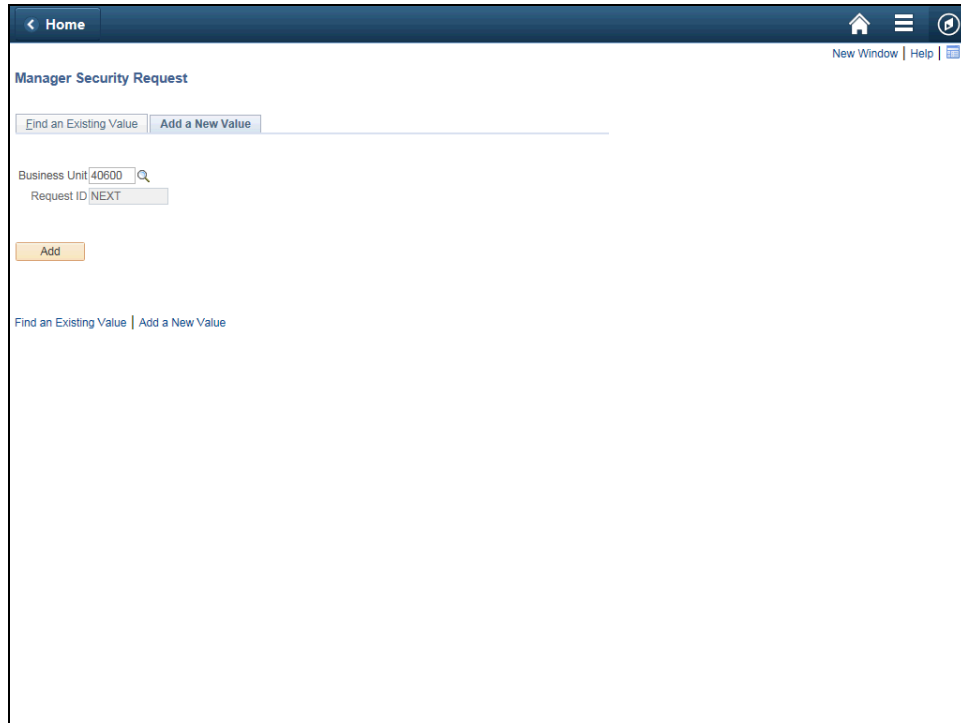
Step	Action
5.	To view the User Information tab, a new Security Request needs to be started. Click the Add a New Value tab. Add a New Value

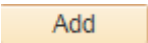


Step	Action
6.	Click in the Business Unit field. 



Step	Action
7.	Enter the appropriate information into the Business Unit field. For this example, type 40600 .



Step	Action
8.	Click the Add button. 

Step	Action
9.	<p>We will be making changes to the User Information tab.</p> <p>Click the User ID tab.</p> <p>*User ID: <input style="border: 2px solid red;" type="text"/></p>

[Home](#)
New Window | Help | Personalize Page

[Security Request](#) | [Comments](#) | [Activity Security](#) | [Procurement Security](#) | [User Information](#) | [Security Approval](#) | [Status History](#)

Business Unit: 40600 Banking and Finance, Dept of Request ID: NEXT Request Seq Num: 1

Electronic signature of Security Officer and Supervisor acknowledges application, receipt for ID, password and an understanding that applicant is legally responsible for the protection of said ID/Password pursuant to Chapter 9 of Title 16 of the Official Code of Georgia Annotated, Georgia Computer System Protection Act, as well as all other applicable computer/information laws.

Security Request

*Requested Date: 08/06/2018 *Action: Add
 *Status: Draft *Request Type: Employee
 Reject Reason:

Source: Online Support Number:
 Entered by: TOMANDJERRY Tom And Jerry 770/770/7707 Entered on: 08/02/2018
 Submitted By:

Access Type
 Permanent Temporary Expiration Date:

User Data

*User ID: Initial Password:
 Empl ID:
 *First Name: Middle Initial: *Last Name:
 Job Title:
 *Telephone: Fax Number:
 Email Address:

Business Address
 Address Line 1:
 Address Line 2:

Step	Action
10.	We will be making changes to the User Information tab. Enter the appropriate information into the User Information field. For this example, type HHENDERSON .

Business Unit: 40600 Banking and Finance, Dept of Request ID: NEXT Request Seq Num: 1

Electronic signature of Security Officer and Supervisor acknowledges application, receipt for ID, password and an understanding that applicant is legally responsible for the protection of said ID/Password pursuant to Chapter 9 of Title 16 of the Official Code of Georgia Annotated, Georgia Computer System Protection Act, as well as all other applicable computer/information laws.

Security Request

*Requested Date: 08/06/2018 *Action: Add
 *Status: Draft *Request Type: Employee
 Reject Reason:
 Source: Online Support Number:
 Entered by: TOMANDJERRY Tom And Jerry 770/770/7707 Entered on: 09/02/2018
 Submitted By:

Access Type

Permanent Temporary Expiration Date:

User Data

*User ID: HHENDERSON Initial Password:
 Empl ID:
 *First Name: Middle Initial: *Last Name:
 Job Title:
 *Telephone: Fax Number:
 Email Address:

Business Address

Address Line 1:
 Address Line 2:

Step	Action
11.	Press [Tab] .

Business Unit: 40600 Banking and Finance, Dept of Request ID: NEXT Request Seq Num: 2

Electronic signature of Security Officer and Supervisor acknowledges application, receipt for ID, password and an understanding that applicant is legally responsible for the protection of said ID/Password pursuant to Chapter 9 of Title 16 of the Official Code of Georgia Annotated, Georgia Computer System Protection Act, as well as all other applicable computer/information laws.

Security Request

*Requested Date: 08/06/2018 *Action: Change
 *Status: Draft *Request Type: Employee
 Reject Reason:
 Source: Online Support Number:
 Entered by: TOMANDJERRY Tom And Jerry 770/770/7707 Entered on: 09/02/2018
 Submitted By:

Access Type

Permanent Temporary Expiration Date: 01/01/1900

User Data

*User ID: HHENDERSON Initial Password:
 Empl ID: 003003003
 *First Name: Harry Middle Initial: *Last Name: Henderson
 Job Title: Accounting Director 1
 Telephone: 770/770-7707 Fax Number: 986/986-9869
 Email Address: hhenderson@anywhere.state.ga

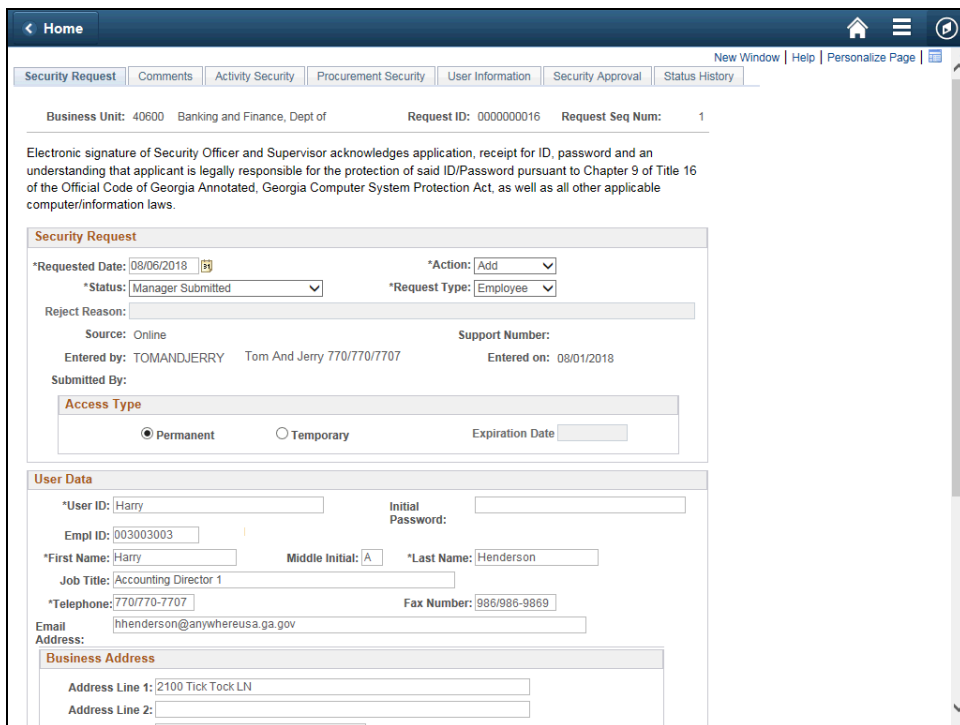
Business Address

Address Line 1: 2100 Tick Tock LN
 Address Line 2:

Message

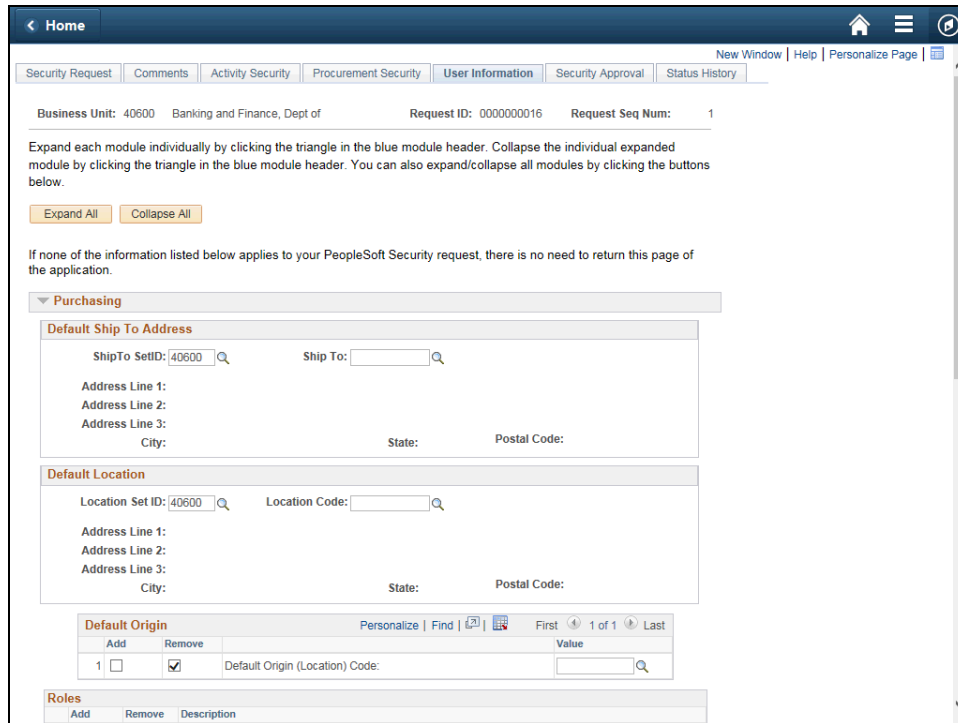
Warning -- A completed request exists for this user and will be copied into this request. (29999,30)

Step	Action
12.	<p>We will be making changes to the User Information tab.</p> <p>Click the OK button.</p> <div data-bbox="354 380 1179 611" style="border: 1px solid black; padding: 5px;"> <p>Message</p> <p>Warning -- A completed request exists for this user and will be copied into this request. (29999,30)</p> <p style="text-align: center;">OK</p> </div>



The screenshot shows a web application interface with a navigation bar at the top containing tabs for Security Request, Comments, Activity Security, Procurement Security, User Information, Security Approval, and Status History. The main content area displays details for a Security Request (ID: 000000016, Seq Num: 1) submitted by TOMANDJERRY on 08/01/2018. Below this, there are sections for 'Security Request' (with fields for Requested Date, Status, Action, and Request Type) and 'User Data' (with fields for User ID, Emp ID, First Name, Middle Initial, Last Name, Job Title, Telephone, Fax Number, and Email Address). The 'Business Address' section is partially visible at the bottom.

Step	Action
13.	<p>We will be making changes to the User Information tab.</p> <p>Click the User Information tab.</p> <div data-bbox="354 1570 586 1619" style="border: 1px solid black; padding: 2px; display: inline-block;"> <p>User Information</p> </div>



Step	Action
14.	<p>Currently both of the modules are expanded. Scroll down the page to see the access options.</p> <p>Click the Vertical scrollbar.</p>

The screenshot shows a web application interface with a dark blue header containing a home icon, a menu icon, and a refresh icon. Below the header, there are several configuration sections, each with a title, a 'Personalize' link, and navigation buttons (Find, First, Last). Each section contains a table with 'Add' and 'Remove' columns and a 'Value' column. The sections are:

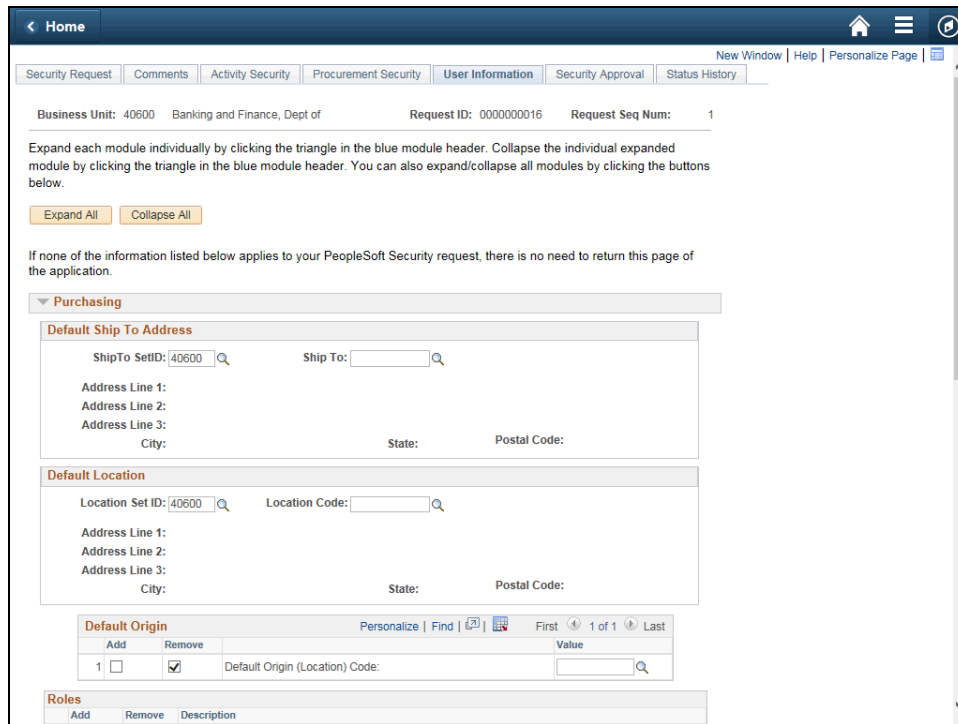
- Default Origin:** A table with one row containing a checked 'Remove' checkbox and the text 'Default Origin (Location) Code:'.
- Roles:** A table with three rows. Row 1: 'PO Approver: User generally does not create documents, but will approve requisitions or PO's.' Row 2: 'PO Buyer: User may create state requisitions and PO's. User name will appear on PO as "buyer".' Row 3: 'PO Requester: User may create state requisitions and their name appears as "requester".'
- PO Approval Type:** A table with four rows. Row 1: 'Approver 1-Up to 4,999'. Row 2: 'Approver 2-Up to 9,999'. Row 3: 'Approver 3-Up to 999,999,999'. Row 4: 'Chartfield'.
- Authorized Location (Origins):** A table with one row containing a checked 'Remove' checkbox and a search input field.
- Accounts Payable:** A section with a sub-section 'Origin' containing a table with one row containing a checked 'Remove' checkbox and the text 'Origin (enter your site ID number or ONL for online):'.
- Functions:** A table with four rows. Row 1: 'Allow Single Payment Voucher (enables the operator to enter and pay a voucher to a one-time vendor)'. Row 2: 'Authority to Override Match (enables the operator to override a voucher with a match exception)'. Row 3: 'Manually Schedule Payments (authorizes user to override the Scheduled Payment Date)'. Row 4: 'Record Payment (enables the operator to manually record a payment on the voucher payment page)'.

 At the bottom of the screenshot, there is a note: 'Expand each module individually by clicking the triangle in the blue module header. Collapse the individual expanded...'

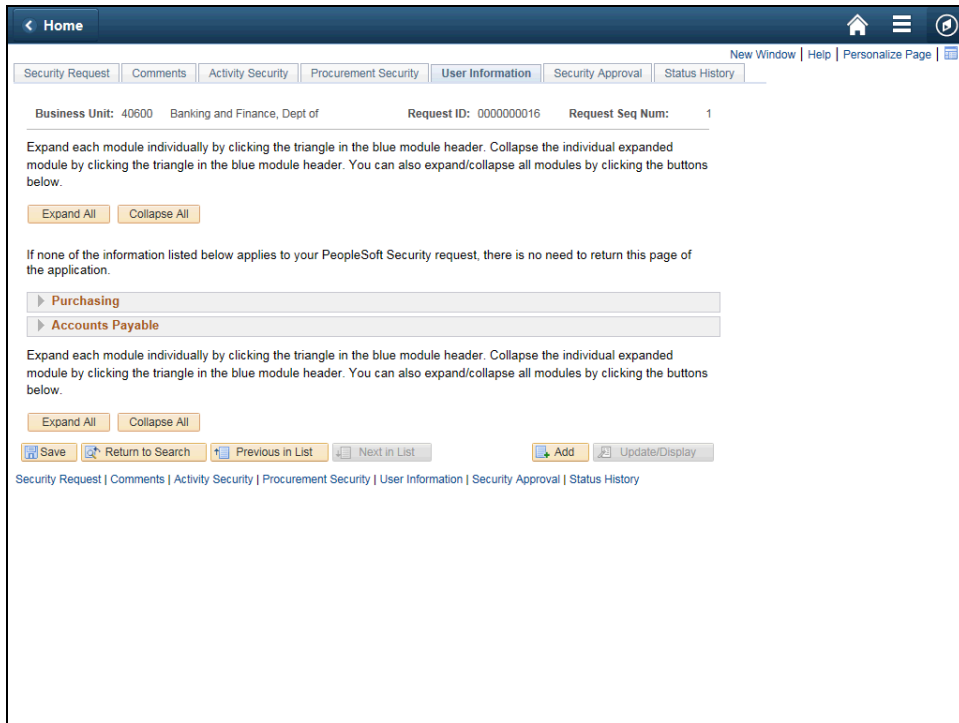
Step	Action
15.	Click the Vertical scrollbar to view the bottom of the page.

This screenshot shows the same web application interface as the previous one, but scrolled down to reveal the bottom portion. The 'Roles' and 'PO Approval Type' sections are now at the top of the visible content. At the bottom of the page, there are several buttons: 'Expand All', 'Collapse All', 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Add', and 'Update/Display'. Below these buttons is a footer with the text: 'Security Request | Comments | Activity Security | Procurement Security | User Information | Security Approval | Status History'.

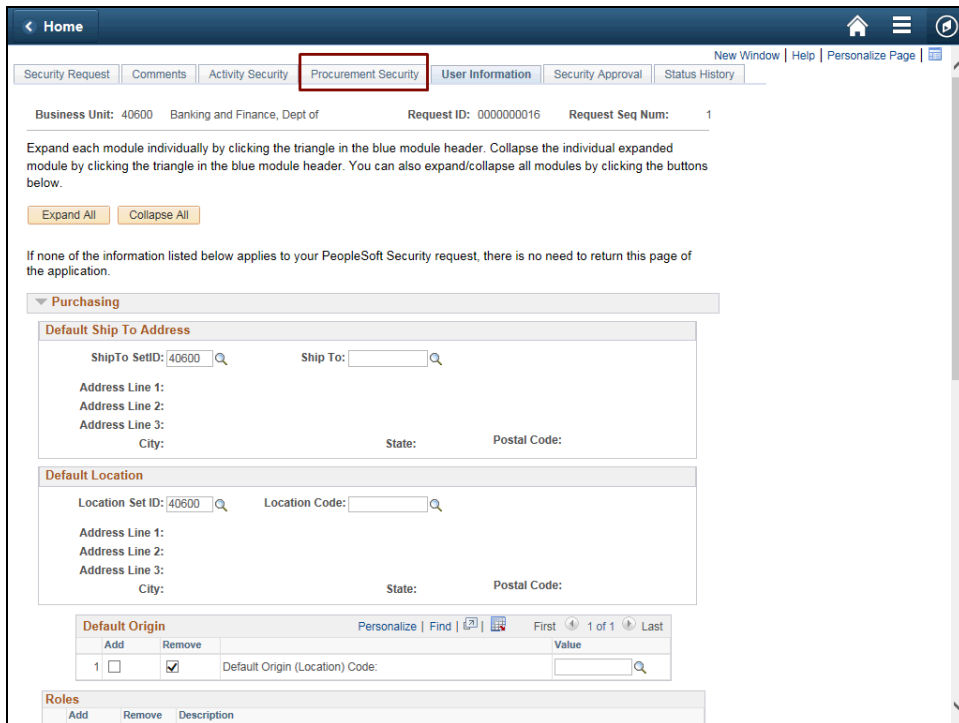
Step	Action
16.	Click the Vertical scrollbar to return to the top of the page.



Step	Action
17.	<p>You can expand all the modules by clicking the Expand All button and you can collapse all modules by clicking the Collapse All button.</p> <p>Click the Collapse All button.</p> <p>Collapse All</p>

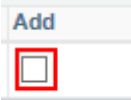


Step	Action
18.	Click the Expand All button. <div style="border: 1px solid black; padding: 5px; margin: 5px 0; text-align: center;"> Expand All </div>



Step	Action
19.	<p>If Create Requisition, ePro Buyer, Event Buyer are selected on the Procurement Security tab and PO Buyer and PO Requestor are selected in the User Information tab, enter:</p> <ul style="list-style-type: none"> -the Ship To value in the Default Ship to Address -the Location Code value in the Default Location -the Default Origin (Location) Code

The screenshot shows a web application interface for a Security Request. The top navigation bar includes tabs for Security Request, Comments, Activity Security, Procurement Security, User Information, Security Approval, and Status History. The current page is titled 'Business Unit: 40600 Banking and Finance, Dept of' and 'Request ID: 000000016 Request Seq Num: 1'. Below the navigation is a section for 'Purchasing' with three main sub-sections: 'Default Ship To Address', 'Default Location', and 'Default Origin'. Each sub-section contains input fields for various attributes like Ship To SetID, Location Set ID, and Default Origin (Location) Code. There are also 'Expand All' and 'Collapse All' buttons at the top of the Purchasing section.

Step	Action
20.	<p>Click the Add option.</p> 

Home

Security Request | Comments | Activity Security | Procurement Security | **User Information** | Security Approval | Status History

Business Unit: 40600 Banking and Finance, Dept of Request ID: 0000000016 Request Seq Num: 1

Expand each module individually by clicking the triangle in the blue module header. Collapse the individual expanded module by clicking the triangle in the blue module header. You can also expand/collapse all modules by clicking the buttons below.

Expand All Collapse All

If none of the information listed below applies to your PeopleSoft Security request, there is no need to return this page of the application.

Purchasing

Default Ship To Address

ShipTo SetID: 40600 Ship To:

Address Line 1:
Address Line 2:
Address Line 3:
City: State: Postal Code:

Default Location

Location Set ID: 40600 Location Code:

Address Line 1:
Address Line 2:
Address Line 3:
City: State: Postal Code:

Default Origin Personalize | Find | First 1 of 1 Last

Add	Remove	Value
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Origin (Location) Code:

Roles Add Remove Description

Step	Action
21.	Click the Vertical scrollbar to view additional fields on the page.

Home

Personalize | Find | First 1 of 1 Last

Add	Remove	Value
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Origin (Location) Code:

Roles Add Remove Description

<input type="checkbox"/>	<input checked="" type="checkbox"/>	PO Approver: User generally does not create documents, but will approve requisitions or PO's.
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PO Buyer: User may create state requisitions and PO's. User name will appear on PO as "buyer".
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PO Requester: User may create state requisitions and their name appears as "requester".

PO Approval Type Personalize | Find | First 1-4 of 4 Last

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Approver 1-Up to 4,999
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Approver 2-Up to 9,999
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Approver 3-Up to 999,999,999
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Chartfield

Authorized Location (Origins) Personalize | Find | First 1 of 1 Last

Add	Remove	Route Control Profile
<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Accounts Payable

Origin Personalize | Find | First 1 of 1 Last

Add	Remove	Value
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Origin (enter your site ID number or ONL for online):

Functions Personalize | Find | First 1-4 of 4 Last

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Allow Single Payment Voucher (enables the operator to enter and pay a voucher to a one-time vendor).
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Authority to Override Match (enables the operator to override a voucher with a match exception).
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Manually Schedule Payments (authorizes user to override the Scheduled Payment Date).
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Record Payment (enables the operator to manually record a payment on the voucher payment page).

Step	Action																			
22.	<p>Click the Add button for any roles. For this example, the employee is a PO Buyer and PO Requester.</p> <p>Click the Add option.</p> <table border="1"> <thead> <tr> <th colspan="3">Roles</th> </tr> <tr> <th></th> <th>Add</th> <th>Remove</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>1</td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td>PO Approver: User generally does not create documents, but will approve requisitions or PO's.</td> </tr> <tr> <td>2</td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td>PO Buyer: User may create state requisitions and PO's. User name will appear on PO as "buyer".</td> </tr> <tr> <td>3</td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td>PO Requester: User may create state requisitions and their name appears as "requester".</td> </tr> </tbody> </table>	Roles				Add	Remove	Description	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	PO Approver: User generally does not create documents, but will approve requisitions or PO's.	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	PO Buyer: User may create state requisitions and PO's. User name will appear on PO as "buyer".	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	PO Requester: User may create state requisitions and their name appears as "requester".
Roles																				
	Add	Remove	Description																	
1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	PO Approver: User generally does not create documents, but will approve requisitions or PO's.																	
2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	PO Buyer: User may create state requisitions and PO's. User name will appear on PO as "buyer".																	
3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	PO Requester: User may create state requisitions and their name appears as "requester".																	

The screenshot shows a web application interface with several configuration sections:

- Default Origin:** A table with columns Add, Remove, and Value. Row 1 has Add checked and Remove unchecked.
- Roles:** A table with columns Add, Remove, and Description. Row 2 (PO Buyer) and Row 3 (PO Requester) have both Add and Remove checked.
- PO Approval Type:** A table with columns Add, Remove, and Description. Rows 2, 3, and 4 have both Add and Remove checked.
- Authorized Location (Origins):** A table with columns Add, Remove, and Route Control Profile. Row 1 has Add checked and Remove unchecked.
- Accounts Payable:** A section with a table for Origin, Add, Remove, and Value. Row 1 has Add checked and Remove unchecked.
- Functions:** A table with columns Add, Remove, and Description. Rows 2, 3, and 4 have both Add and Remove checked.

Step	Action																			
23.	<p>Click the Add option.</p> <table border="1"> <thead> <tr> <th colspan="3">Roles</th> </tr> <tr> <th></th> <th>Add</th> <th>Remove</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>1</td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td>PO Approver: User generally does not create documents, but will approve requisitions or PO's.</td> </tr> <tr> <td>2</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>PO Buyer: User may create state requisitions and PO's. User name will appear on PO as "buyer".</td> </tr> <tr> <td>3</td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td>PO Requester: User may create state requisitions and their name appears as "requester".</td> </tr> </tbody> </table>	Roles				Add	Remove	Description	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	PO Approver: User generally does not create documents, but will approve requisitions or PO's.	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	PO Buyer: User may create state requisitions and PO's. User name will appear on PO as "buyer".	3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	PO Requester: User may create state requisitions and their name appears as "requester".
Roles																				
	Add	Remove	Description																	
1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	PO Approver: User generally does not create documents, but will approve requisitions or PO's.																	
2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	PO Buyer: User may create state requisitions and PO's. User name will appear on PO as "buyer".																	
3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	PO Requester: User may create state requisitions and their name appears as "requester".																	

Home

Default Origin Personalize | Find | First 1 of 1 Last

Add	Remove	Value
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Origin (Location) Code:

Roles

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PO Approver: User generally does not create documents, but will approve requisitions or PO's.
<input checked="" type="checkbox"/>	<input type="checkbox"/>	PO Buyer: User may create state requisitions and PO's. User name will appear on PO as "buyer".
<input checked="" type="checkbox"/>	<input type="checkbox"/>	PO Requester: User may create state requisitions and their name appears as "requester".

PO Approval Type Personalize | Find | First 1-4 of 4 Last

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Approver 1-Up to 4,999
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Approver 2-Up to 9,999
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Approver 3-Up to 999,999,999
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Chartfield

Authorized Location (Origins) Personalize | Find | First 1 of 1 Last

Add	Remove	Route Control Profile
<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Accounts Payable

Origin Personalize | Find | First 1 of 1 Last

Add	Remove	Value
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Origin (enter your site ID number or ONL for online):

Functions Personalize | Find | First 1-4 of 4 Last

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Allow Single Payment Voucher (enables the operator to enter and pay a voucher to a one-time vendor).
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Authority to Override Match (enables the operator to override a voucher with a match exception).
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Manually Schedule Payments (authorizes user to override the Scheduled Payment Date).
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Record Payment (enables the operator to manually record a payment on the voucher payment page).

Step	Action															
24.	<p>If PO Amount Approver and/or PO Chartfield Approver are selected on the Activity Security tab, click the Add button for the appropriate PO Approval type.</p> <p>For this example, the employee is Approver 2-Up to 9,999</p> <p>Click the Add option.</p> <p>PO Approval Type Personalize Find First 1-4 of 4 Last</p> <table border="1"> <thead> <tr> <th>Add</th> <th>Remove</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td>Approver 1-Up to 4,999</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td>Approver 2-Up to 9,999</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td>Approver 3-Up to 999,999,999</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td>Chartfield</td> </tr> </tbody> </table>	Add	Remove	Description	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Approver 1-Up to 4,999	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Approver 2-Up to 9,999	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Approver 3-Up to 999,999,999	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Chartfield
Add	Remove	Description														
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Approver 1-Up to 4,999														
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Approver 2-Up to 9,999														
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Approver 3-Up to 999,999,999														
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Chartfield														

The screenshot displays a software configuration page with the following sections:

- Default Origin:** A table with columns 'Add', 'Remove', and 'Value'. Row 1 has 'Add' checked and 'Value' set to 'Default Origin (Location) Code:'.
- Roles:** A table with columns 'Add', 'Remove', and 'Description'. Row 1 has 'Remove' checked. Row 2 has 'Add' checked. Row 3 has 'Add' checked.
- PO Approval Type:** A table with columns 'Add', 'Remove', and 'Description'. Row 1 has 'Remove' checked. Row 2 has 'Add' checked. Row 3 has 'Remove' checked. Row 4 has 'Remove' checked.
- Authorized Location (Origins):** A table with columns 'Add', 'Remove', and 'Route Control Profile'. Row 1 has 'Add' checked.
- Accounts Payable:** A section containing an 'Origin' table with columns 'Add', 'Remove', and 'Value'. Row 1 has 'Remove' checked.
- Functions:** A table with columns 'Add', 'Remove', and 'Description'. Row 1 has 'Remove' checked. Row 2 has 'Remove' checked. Row 3 has 'Remove' checked. Row 4 has 'Remove' checked.

Step	Action
25.	<p>If PO Amount Approver and/or PO Chartfield Approver are selected on the Activity Security tab, add the appropriate origins in the Authorized Location (Origins) box.</p> <p>Click the Add option.</p>

Home

Default Origin Personalize | Find | First 1 of 1 Last

Add	Remove	Value
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Origin (Location) Code: <input type="text"/>

Roles

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PO Approver: User generally does not create documents, but will approve requisitions or PO's.
<input checked="" type="checkbox"/>	<input type="checkbox"/>	PO Buyer: User may create state requisitions and PO's. User name will appear on PO as "buyer".
<input checked="" type="checkbox"/>	<input type="checkbox"/>	PO Requester: User may create state requisitions and their name appears as "requester".

PO Approval Type Personalize | Find | First 1-4 of 4 Last

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Approver 1-Up to 4,999
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Approver 2-Up to 9,999
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Approver 3-Up to 999,999,999
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Chartfield

Authorized Location (Origins) Personalize | Find | First 1 of 1 Last

Add	Remove	Route Control Profile
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text"/> <input type="button" value="Search"/>

Accounts Payable

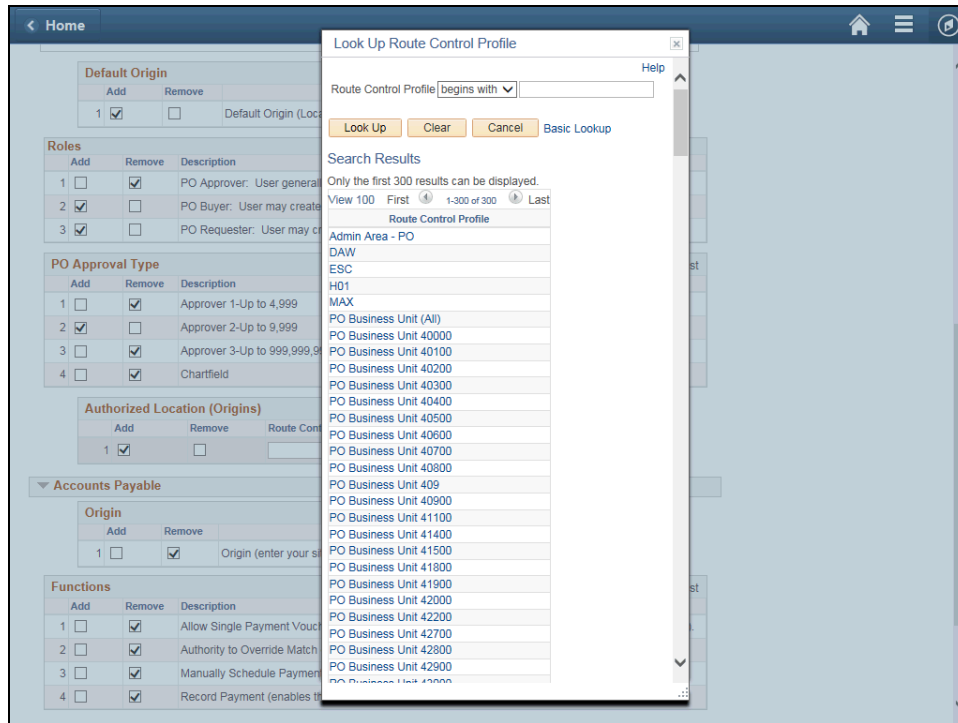
Origin Personalize | Find | First 1 of 1 Last

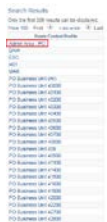
Add	Remove	Value
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Origin (enter your site ID number or ONL for online): <input type="text"/>

Functions Personalize | Find | First 1-4 of 4 Last

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Allow Single Payment Voucher (enables the operator to enter and pay a voucher to a one-time vendor).
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Authority to Override Match (enables the operator to override a voucher with a match exception).
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Manually Schedule Payments (authorizes user to override the Scheduled Payment Date).
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Record Payment (enables the operator to manually record a payment on the voucher payment page).

Step	Action
26.	<p>By clicking the magnifying glass symbol, you can use the search function to find the correct value.</p> <p>Click the Route Control Profile look-up button.</p> 



Step	Action
27.	<p>For this example we want the Admin-Area-PO as an Authorized Location.</p> <p>Click the Admin Area - PO link.</p> 

Home

Default Origin Personalize | Find | First 1 of 1 Last

Add	Remove	Value
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Origin (Location) Code:

Roles

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PO Approver: User generally does not create documents, but will approve requisitions or PO's.
<input checked="" type="checkbox"/>	<input type="checkbox"/>	PO Buyer: User may create state requisitions and PO's. User name will appear on PO as "buyer".
<input checked="" type="checkbox"/>	<input type="checkbox"/>	PO Requester: User may create state requisitions and their name appears as "requester".

PO Approval Type Personalize | Find | First 1-4 of 4 Last

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Approver 1-Up to 4,999
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Approver 2-Up to 9,999
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Approver 3-Up to 999,999,999
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Chartfield

Authorized Location (Origins) Personalize | Find | First 1 of 1 Last

Add	Remove	Route Control Profile
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Admin Area - PO

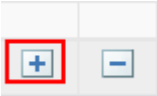
Accounts Payable

Origin Personalize | Find | First 1 of 1 Last

Add	Remove	Value
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Origin (enter your site ID number or ONL for online):

Functions Personalize | Find | First 1-4 of 4 Last

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Allow Single Payment Voucher (enables the operator to enter and pay a voucher to a one-time vendor).
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Authority to Override Match (enables the operator to override a voucher with a match exception).
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Manually Schedule Payments (authorizes user to override the Scheduled Payment Date).
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Record Payment (enables the operator to manually record a payment on the voucher payment page).

Step	Action
28.	<p>To add additional values, click the + symbol to add an additional row.</p> <p>Click the Add a new row at row 1 button.</p> 

Default Origin

Add	Remove	Value
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Origin (Location) Code: <input type="text"/>

Roles

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PO Approver: User generally does not create documents, but will approve requisitions or PO's.
<input checked="" type="checkbox"/>	<input type="checkbox"/>	PO Buyer: User may create state requisitions and PO's. User name will appear on PO as "buyer".
<input checked="" type="checkbox"/>	<input type="checkbox"/>	PO Requester: User may create state requisitions and their name appears as "requester".

PO Approval Type

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Approver 1-Up to 4,999
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Approver 2-Up to 9,999
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Approver 3-Up to 999,999,999
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Chartfield

Authorized Location (Origins)

Add	Remove	Route Control Profile
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Admin Area - PO <input type="text"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>

Accounts Payable

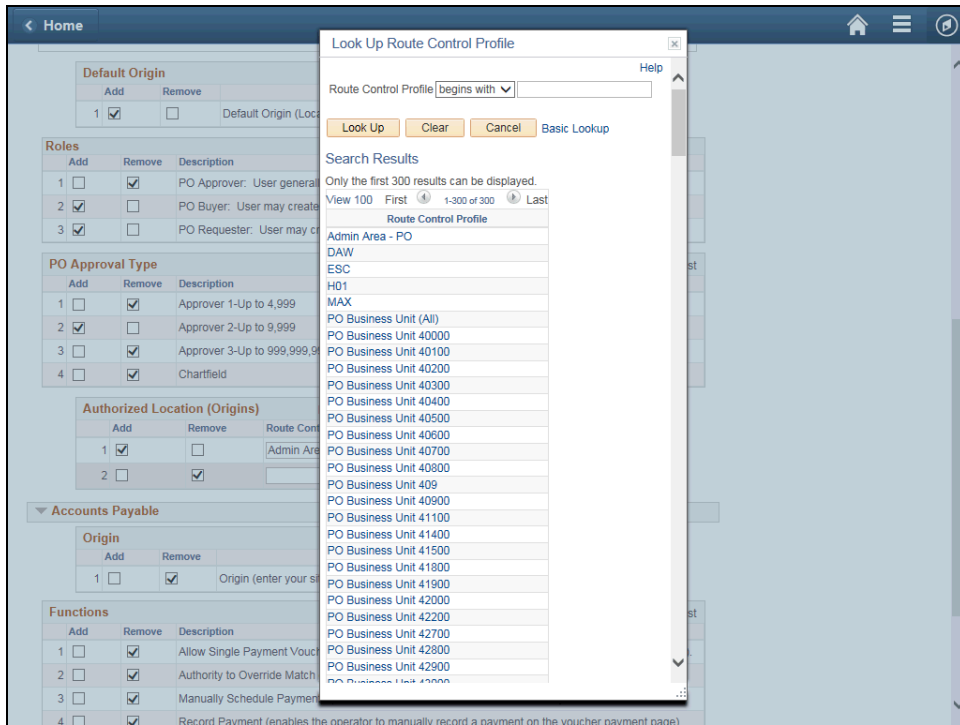
Origin

Add	Remove	Value
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Origin (enter your site ID number or ONL for online): <input type="text"/>

Functions

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Allow Single Payment Voucher (enables the operator to enter and pay a voucher to a one-time vendor).
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Authority to Override Match (enables the operator to override a voucher with a match exception).
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Manually Schedule Payments (authorizes user to override the Scheduled Payment Date).
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Record Payment (enables the operator to manually record a payment on the voucher payment page).

Step	Action
29.	<p>Use the magnifying glass again to assist in the search.</p> <p>Click the Route Control Profile look-up button.</p>



Step	Action
30.	Click the PO Business Unit 40600 link.

Home

Default Origin Personalize | Find | First 1 of 1 Last

Add	Remove	Value
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Origin (Location) Code: <input type="text"/>

Roles

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PO Approver: User generally does not create documents, but will approve requisitions or PO's.
<input checked="" type="checkbox"/>	<input type="checkbox"/>	PO Buyer: User may create state requisitions and PO's. User name will appear on PO as "buyer".
<input checked="" type="checkbox"/>	<input type="checkbox"/>	PO Requester: User may create state requisitions and their name appears as "requester".

PO Approval Type Personalize | Find | First 1-4 of 4 Last

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Approver 1-Up to 4,999
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Approver 2-Up to 9,999
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Approver 3-Up to 999,999,999
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Chartfield

Authorized Location (Origins) Personalize | Find | First 1-2 of 2 Last

Add	Remove	Route Control Profile
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Admin Area - PO <input type="text"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	PO Business Unit 40600 <input type="text"/>

Accounts Payable

Origin Personalize | Find | First 1 of 1 Last

Add	Remove	Value
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Origin (enter your site ID number or ONL for online): <input type="text"/>

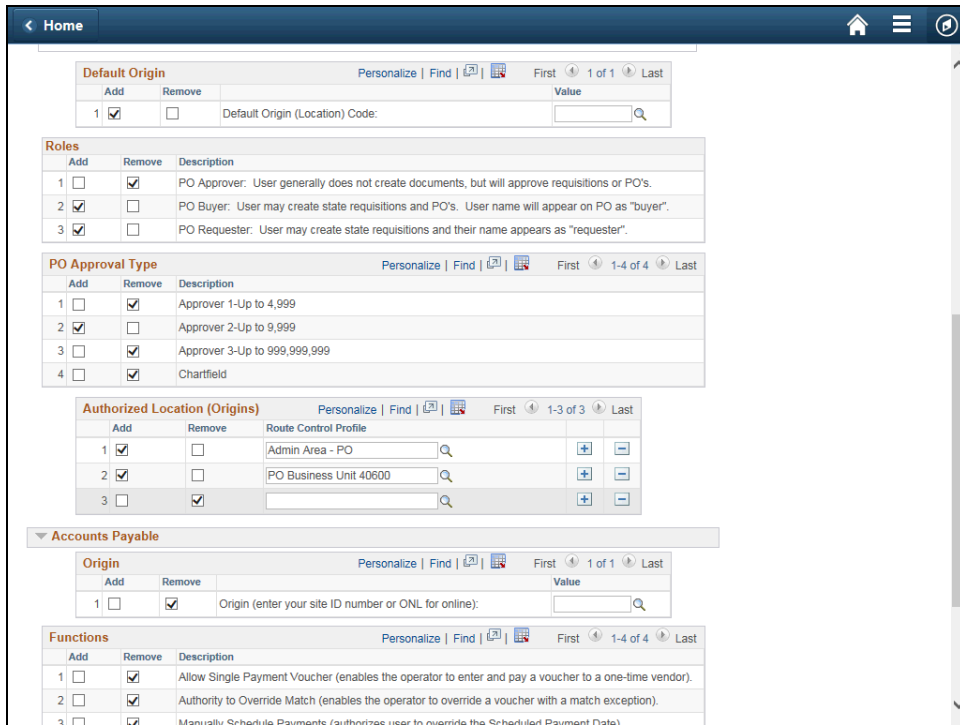
Functions Personalize | Find | First 1-4 of 4 Last

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Allow Single Payment Voucher (enables the operator to enter and pay a voucher to a one-time vendor).
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Authority to Override Match (enables the operator to override a voucher with a match exception).
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Manually Schedule Payments (authorizes user to override the Scheduled Payment Date).
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Record Payment (enables the operator to manually record a payment on the voucher payment page).

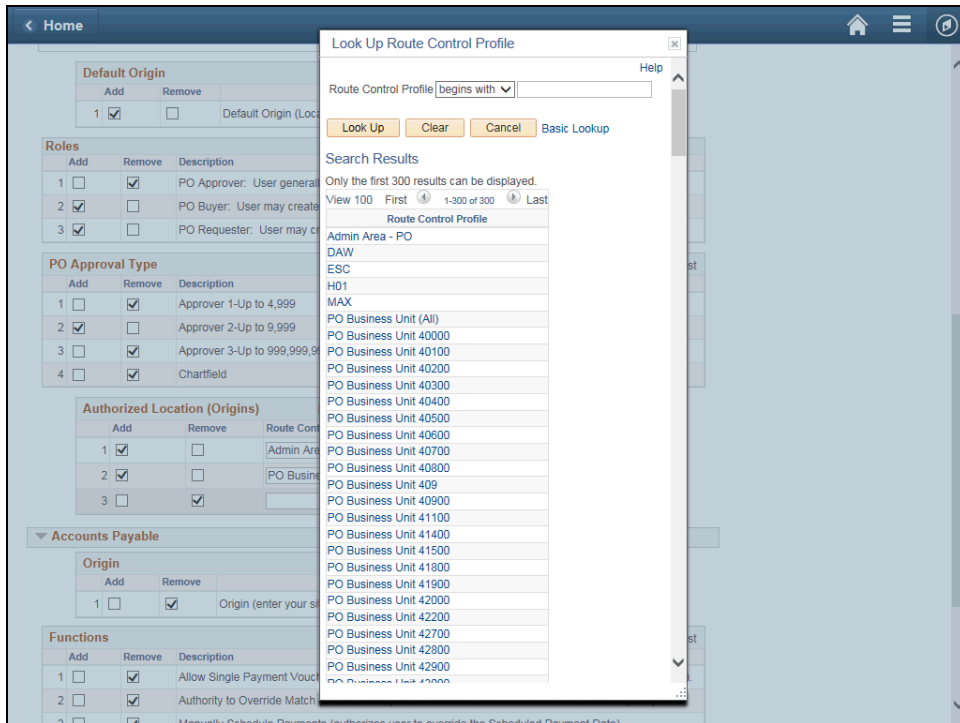
Step	Action
31.	Click the Add a new row at row button.

+

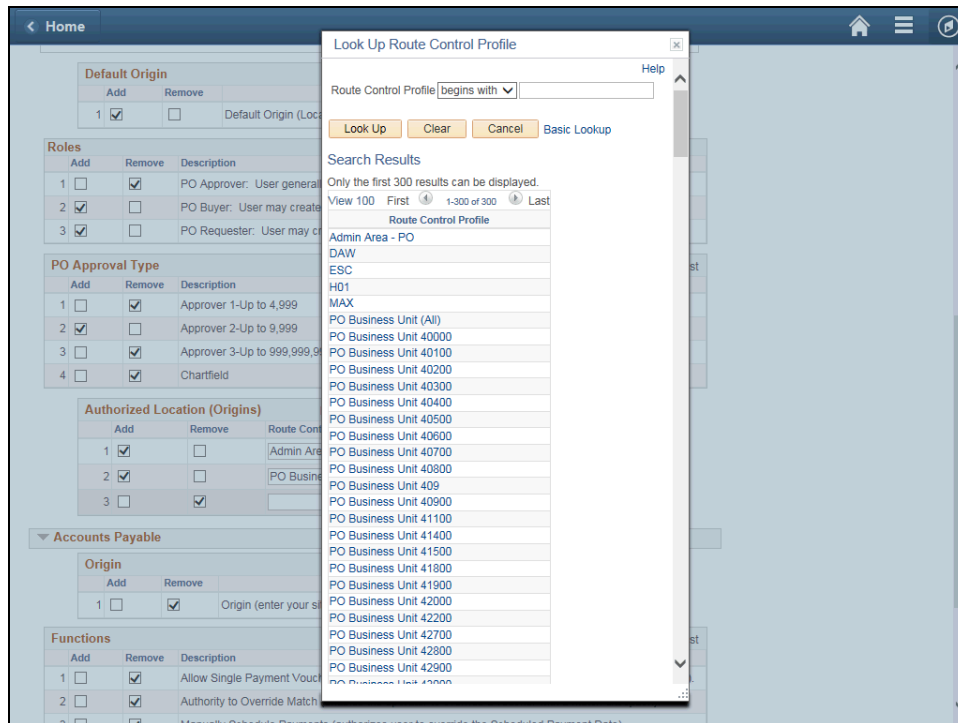
-



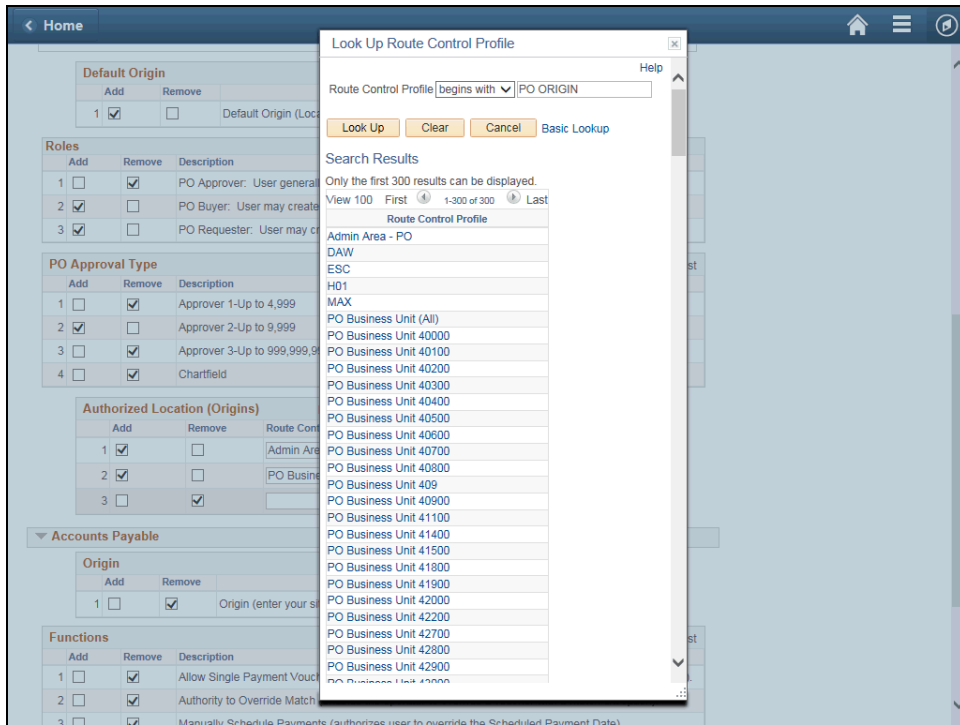
Step	Action
32.	Click the Route Control Profile look-up button.



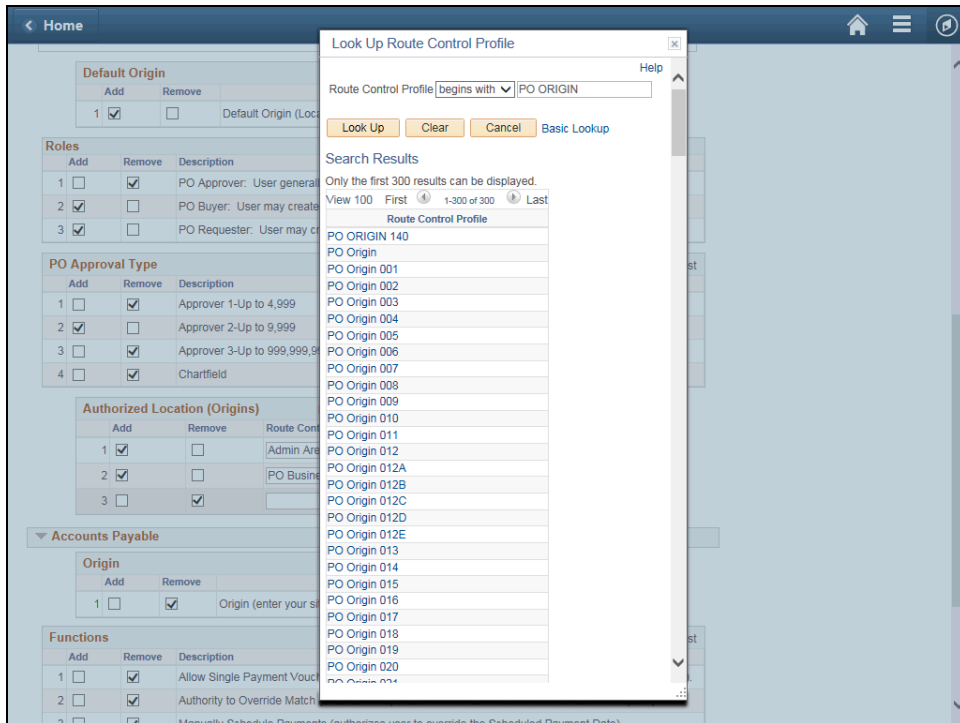
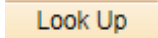
Step	Action
33.	Click in the Route Control Profile field. Route Control Profile begins with <input type="text"/>




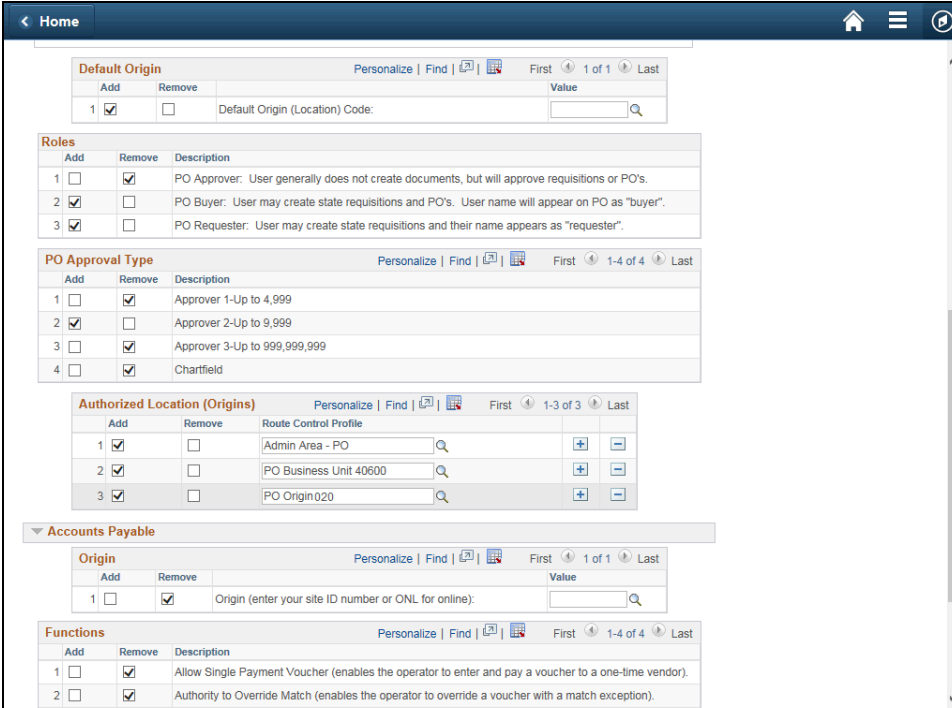
Step	Action
34.	Enter the appropriate information into the Route Control Profile field. For this example, type PO Origin .



Step	Action
35.	Click the Look Up button.

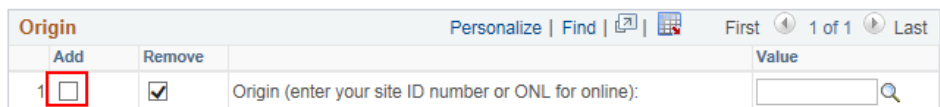


Step	Action
36.	<p>For this example, click the PO Origin 020 link.</p> 



Authorized Location (Origins)

Add	Remove	Route Control Profile	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Admin Area - PO	+ -
<input checked="" type="checkbox"/>	<input type="checkbox"/>	PO Business Unit 40600	+ -
<input checked="" type="checkbox"/>	<input type="checkbox"/>	PO Origin 020	+ -

Step	Action
37.	<p>If the employee needs access to a particular AP Origin, click the add button.</p> <p>Click the Add option.</p> 

Home

Default Origin Personalize | Find | First 1 of 1 Last

Add	Remove	Value
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Origin (Location) Code: <input type="text"/>

Roles

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PO Approver: User generally does not create documents, but will approve requisitions or PO's.
<input checked="" type="checkbox"/>	<input type="checkbox"/>	PO Buyer: User may create state requisitions and PO's. User name will appear on PO as "buyer".
<input checked="" type="checkbox"/>	<input type="checkbox"/>	PO Requester: User may create state requisitions and their name appears as "requester".

PO Approval Type Personalize | Find | First 1-4 of 4 Last

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Approver 1-Up to 4,999
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Approver 2-Up to 9,999
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Approver 3-Up to 999,999,999
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Chartfield

Authorized Location (Origins) Personalize | Find | First 1-3 of 3 Last

Add	Remove	Route Control Profile
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Admin Area - PO <input type="text"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	PO Business Unit 40600 <input type="text"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	PO Origin020 <input type="text"/>

Accounts Payable

Origin Personalize | Find | First 1 of 1 Last

Add	Remove	Value
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Origin (enter your site ID number or ONL for online): <input type="text"/>

Functions Personalize | Find | First 1-4 of 4 Last

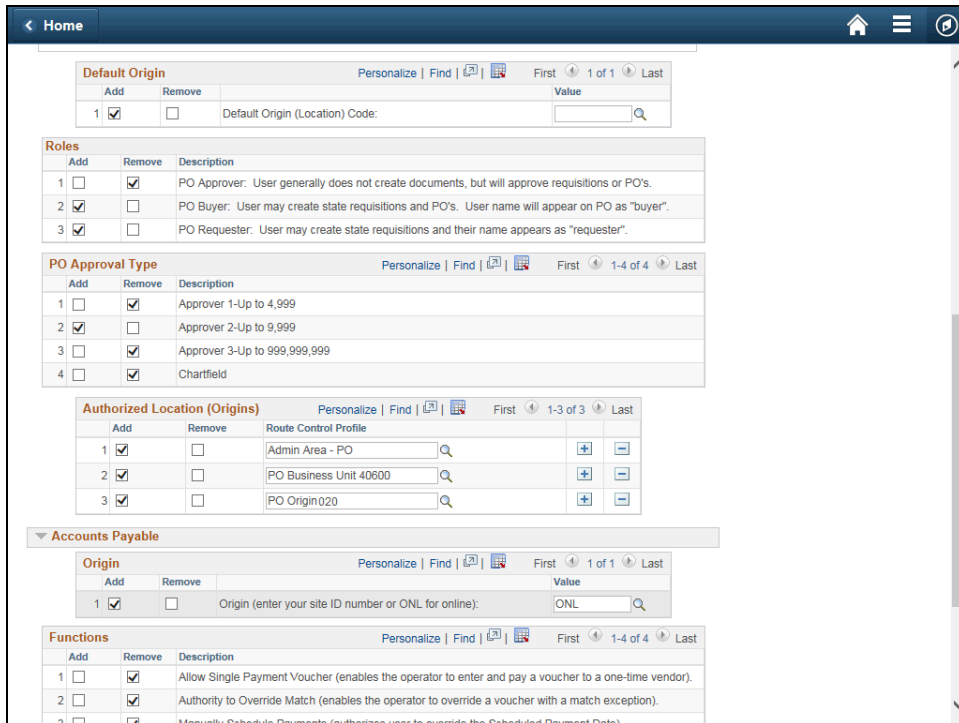
Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Allow Single Payment Voucher (enables the operator to enter and pay a voucher to a one-time vendor).
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Authority to Override Match (enables the operator to override a voucher with a match exception).
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Manually Schedule Payments (authorizes user to override the Scheduled Payment Date).

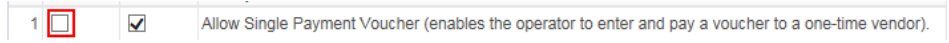
Step	Action
38.	<p>The appropriate value will need to be entered. If the AP Origin is not known, use ONL as the default AP Origin in the Origin box.</p> <p>Click in the Value field.</p>

The screenshot shows a web application interface with a dark blue header containing a home icon, a menu icon, and a refresh icon. The main content area is divided into several sections:

- Default Origin:** A table with columns 'Add', 'Remove', and 'Value'. Row 1 has 'Add' checked and 'Value' set to 'Default Origin (Location) Code:'.
- Roles:** A table with columns 'Add', 'Remove', and 'Description'. Row 1 has 'Remove' checked. Row 2 has 'Add' checked. Row 3 has 'Add' checked.
- PO Approval Type:** A table with columns 'Add', 'Remove', and 'Description'. Row 1 has 'Remove' checked. Row 2 has 'Add' checked. Row 3 has 'Remove' checked. Row 4 has 'Remove' checked.
- Authorized Location (Origins):** A table with columns 'Add', 'Remove', and 'Route Control Profile'. Row 1 has 'Add' checked and 'Route Control Profile' set to 'Admin Area - PO'. Row 2 has 'Add' checked and 'Route Control Profile' set to 'PO Business Unit 40600'. Row 3 has 'Add' checked and 'Route Control Profile' set to 'PO Origin020'.
- Accounts Payable:** A section with a sub-section 'Origin' containing a table with columns 'Add', 'Remove', and 'Value'. Row 1 has 'Add' checked and 'Value' set to 'Origin (enter your site ID number or ONL for online):'.
- Functions:** A table with columns 'Add', 'Remove', and 'Description'. Row 1 has 'Remove' checked. Row 2 has 'Remove' checked. Row 3 has 'Remove' checked.

Step	Action
39.	<p>For this example, enter ONL as the AP Origin.</p> <p>Enter the appropriate information into the Value field.</p> <p>For this example, type ONL.</p>



Step	Action
40.	<p>If Create Express Checks, Process Vouchers, Payment Processing, and Voucher Entry activities are selected within the Accounts Payable module on the Activity Security tab, click the Add button for the appropriate Account Payable Function.</p> <p>For this example we will choose Allow Single Payment Voucher and Record Payment.</p> <p>Click the Add option.</p> 

The screenshot shows a web application interface with a dark blue header containing a home icon, a menu icon, and a refresh icon. The main content area is divided into several sections, each with a title and a set of controls (Add, Remove, Personalize, Find, etc.).

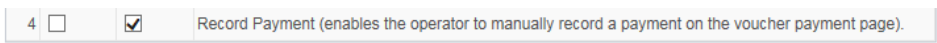
- Default Origin:** A table with one row containing a checked checkbox and the text "Default Origin (Location) Code:".
- Roles:** A table with three rows. Row 1: PO Approver. Row 2: PO Buyer. Row 3: PO Requester.
- PO Approval Type:** A table with four rows. Row 1: Approver 1-Up to 4,999. Row 2: Approver 2-Up to 9,999. Row 3: Approver 3-Up to 999,999,999. Row 4: Chartfield.
- Authorized Location (Origins):** A table with three rows. Row 1: Admin Area - PO. Row 2: PO Business Unit 40600. Row 3: PO Origin.020.
- Accounts Payable:** A section with a sub-section "Origin" containing one row with a checked checkbox and the text "Origin (enter your site ID number or ONL for online):".
- Functions:** A table with three rows. Row 1: Allow Single Payment Voucher. Row 2: Authority to Override Match. Row 3: Manually Schedule Payments.

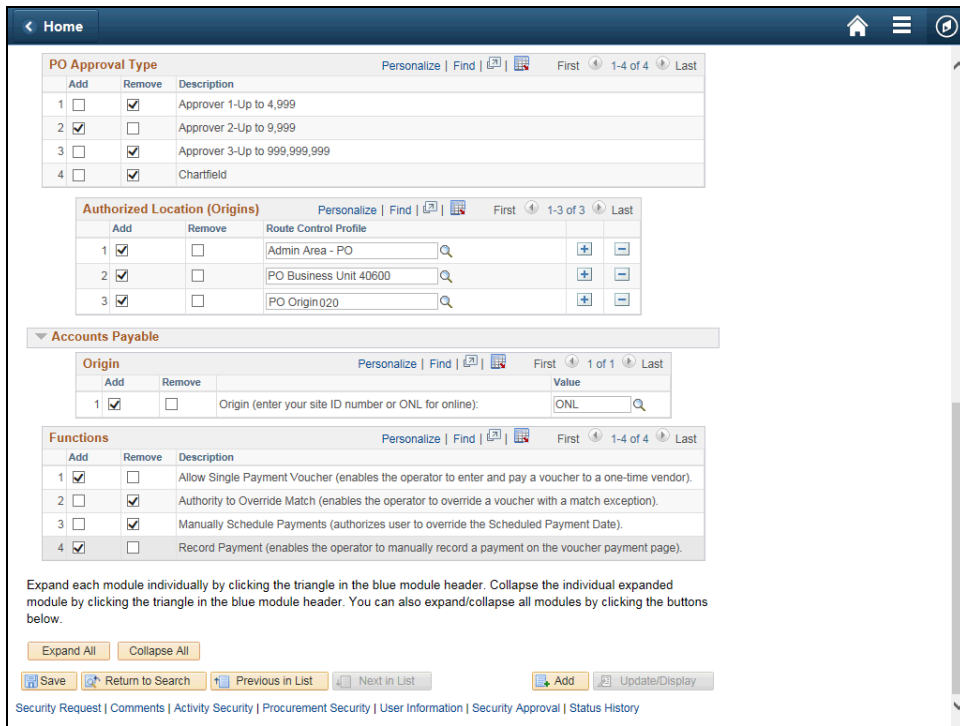
Step	Action
41.	Click the Vertical scrollbar.

This screenshot is similar to the previous one, but the "Accounts Payable" section is expanded, revealing the "Origin" sub-section. The "Functions" table now has four rows, including "Record Payment (enables the operator to manually record a payment on the voucher payment page)".

Below the main content area, there is a text instruction: "Expand each module individually by clicking the triangle in the blue module header. Collapse the individual expanded module by clicking the triangle in the blue module header. You can also expand/collapse all modules by clicking the buttons below." This is followed by two buttons: "Expand All" and "Collapse All".

At the bottom of the interface, there is a navigation bar with buttons for "Save", "Return to Search", "Previous in List", "Next in List", "Add", and "Update/Display". Below this bar is a footer with the text: "Security Request | Comments | Activity Security | Procurement Security | User Information | Security Approval | Status History".

Step	Action
42.	<p>Click the Add option.</p> 

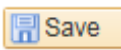


The screenshot shows the SAO system interface with the following sections:

- PO Approval Type:** A table with columns 'Add', 'Remove', and 'Description'. Row 4 is checked.
- Authorized Location (Origins):** A table with columns 'Add', 'Remove', and 'Route Control Profile'. Row 1 is checked.
- Accounts Payable:** A section with an 'Origin' table and a search field.
- Functions:** A table with columns 'Add', 'Remove', and 'Description'. Row 4 is checked.

Below the tables, there is a note: "Expand each module individually by clicking the triangle in the blue module header. Collapse the individual expanded module by clicking the triangle in the blue module header. You can also expand/collapse all modules by clicking the buttons below." followed by "Expand All" and "Collapse All" buttons.

At the bottom, there are navigation buttons: "Save", "Return to Search", "Previous in List", "Next in List", "Add", and "Update/Display".

Step	Action
43.	<p>Be sure to review the page entries.</p> <p>Always be sure to save your work.</p> <p>Click the Save button.</p> 

< Home Home Menu Refresh

Expand All Collapse All

If none of the information listed below applies to your PeopleSoft Security request, there is no need to return this page of the application.

Purchasing

Default Ship To Address

ShipTo SetID: 40600 Ship To: PO_001001

Address Line 1: Department of Banking & Finance
 Address Line 2: 645 Molly Lane
 Address Line 3: Suite 140
 City: Woodstock State: GA Postal Code: 30189-3733

Default Location

Location Set ID: 40600 Location Code: 406+++406+

Address Line 1: 2990 Brandywine Road
 Address Line 2: Suite 200
 Address Line 3:
 City: Atlanta State: GA Postal Code: 30341

Default Origin Personalize | Find | | First 1 of 1 Last

Add	Remove	Value
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Origin (Location) Code: ONL <input type="text"/>

Roles

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PO Approver: User generally does not create documents, but will approve requisitions or PO's.
<input checked="" type="checkbox"/>	<input type="checkbox"/>	PO Buyer: User may create state requisitions and PO's. User name will appear on PO as "buyer".
<input checked="" type="checkbox"/>	<input type="checkbox"/>	PO Requester: User may create state requisitions and their name appears as "requester".

PO Approval Type Personalize | Find | | First 1-4 of 4 Last

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Approver 1-Up to 4,999
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Approver 2-Up to 9,999

Step	Action
44.	Click here (https://www.surveymonkey.com/r/25KG2HH) to take a quick survey.

Thank you!