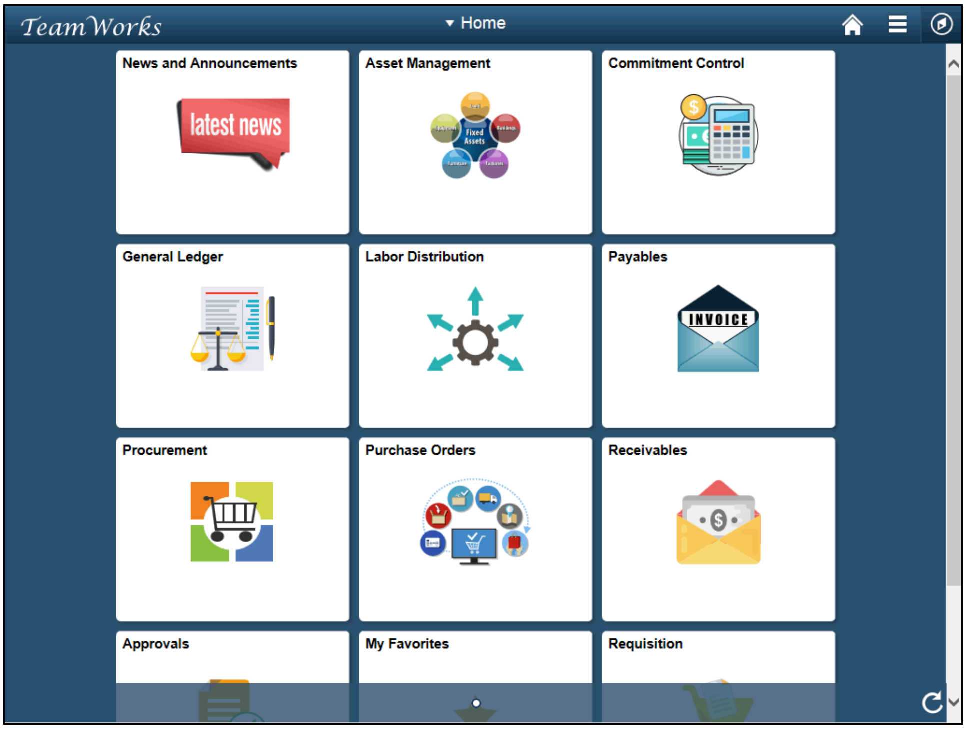
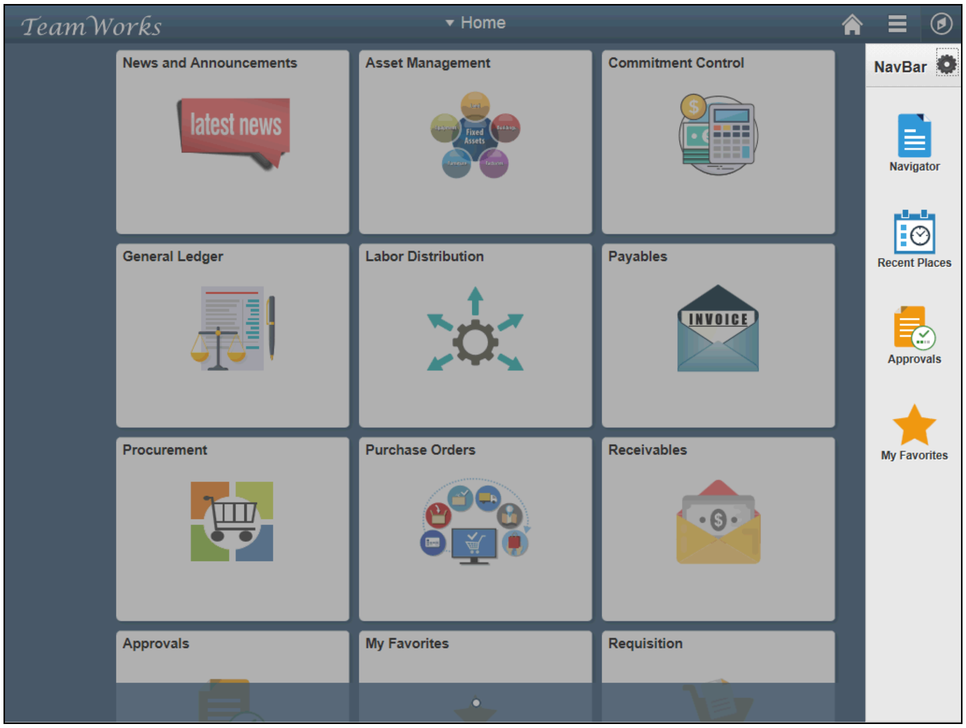
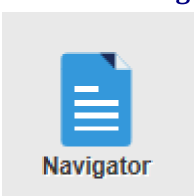
Changing Procurement Security Access

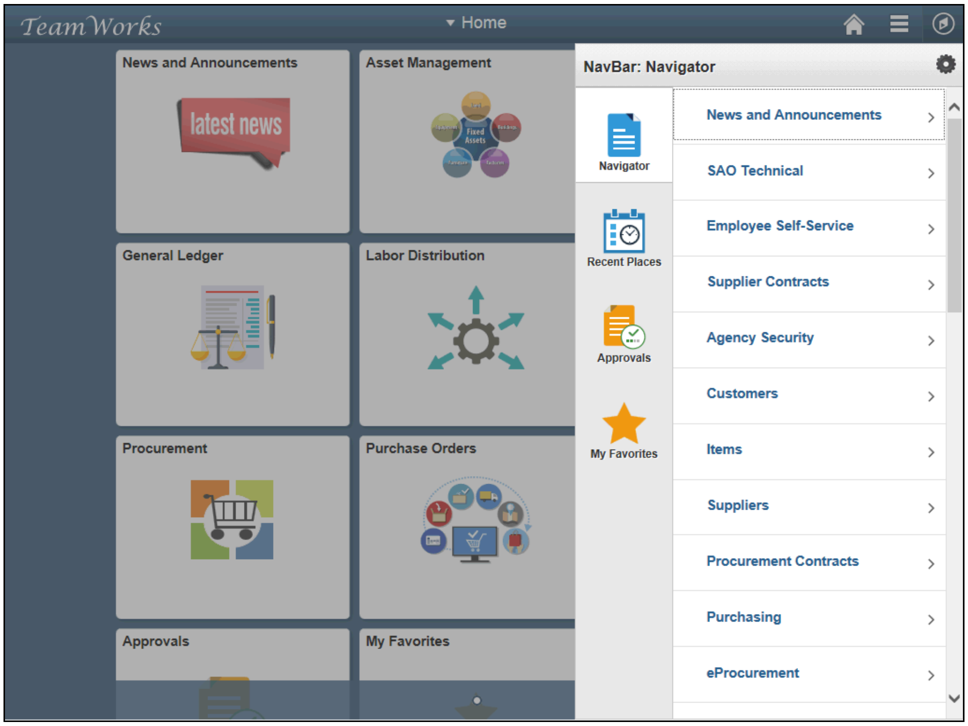
Below are the process steps to Change Procurement Security Access. As you are performing the task, use this document to be a Step-by-Step guide for completing this process. At the end, please click the link to complete a quick survey as to the usefulness of this document.



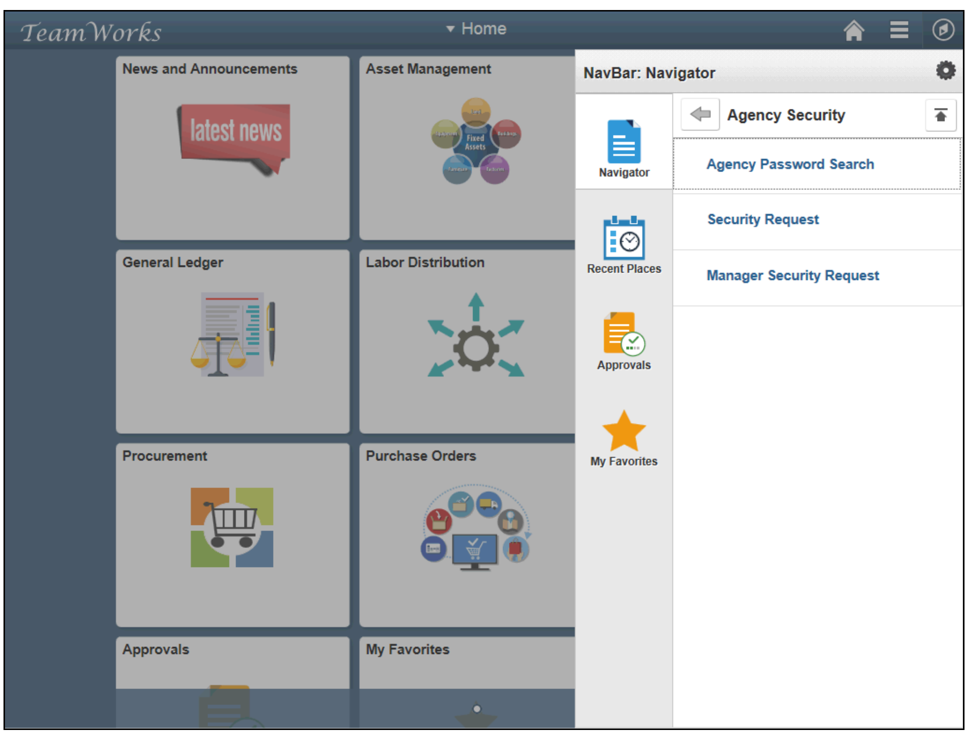
Step	Action
1.	Begin by navigating to the **Manager Security Request** page. **Note:** This simulation is an example of a transaction. When entering a transaction in the live TeamWorks Financials system, please select all values and options based on agency policy, the paperwork on hand and the current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



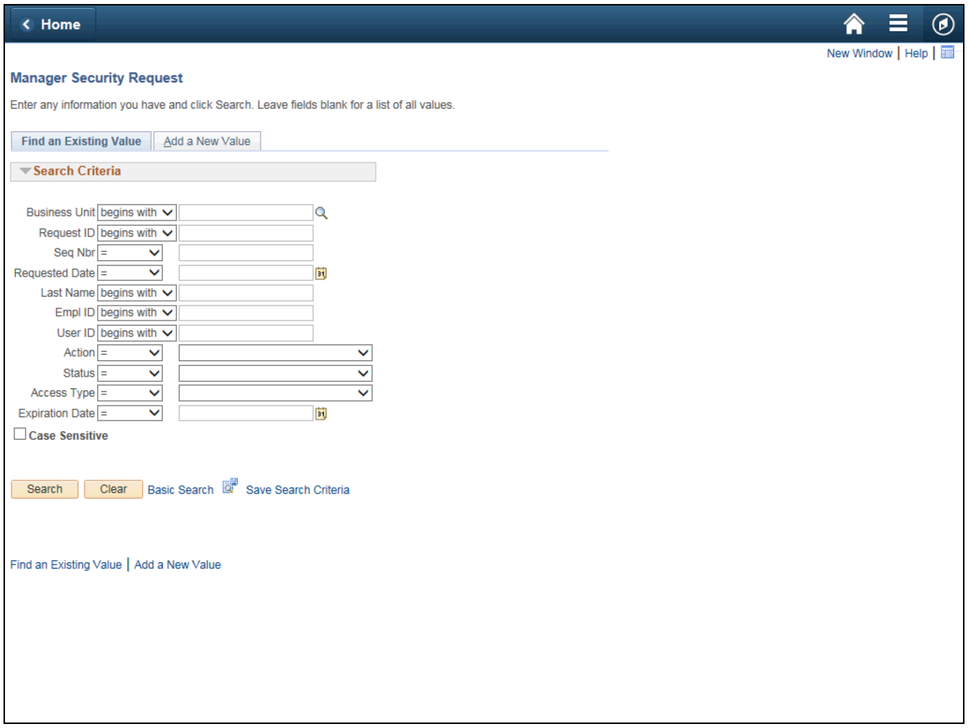
Step	Action
2.	Click the **Navigator** icon. 



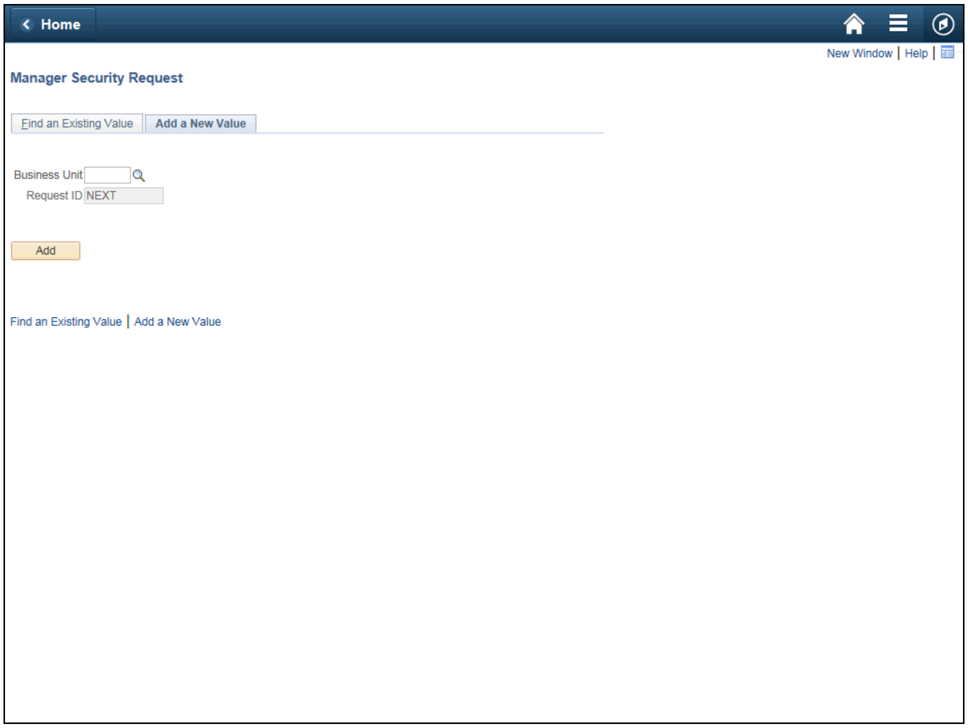
Step	Action
3.	Click the **Agency Security** link. Agency Security

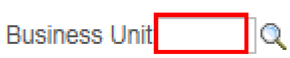


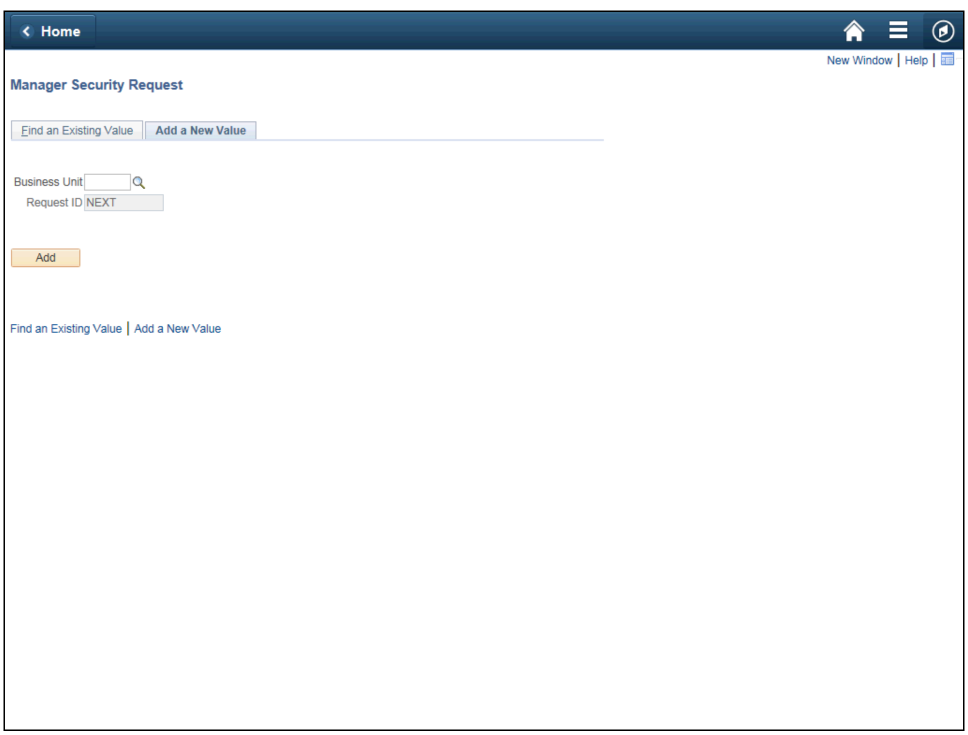
Step	Action
4.	Click the **Manager Security Request** link. Manager Security Request



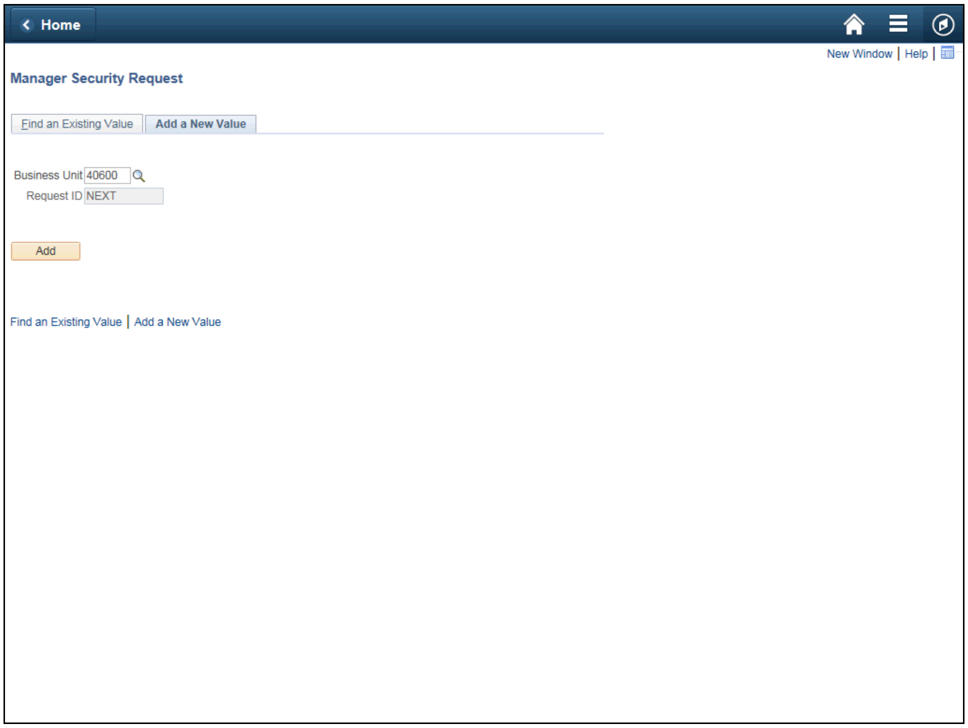
Step	Action
5.	For this example, a new security request will need to be created. Click the **Add a New Value** tab. Add a New Value



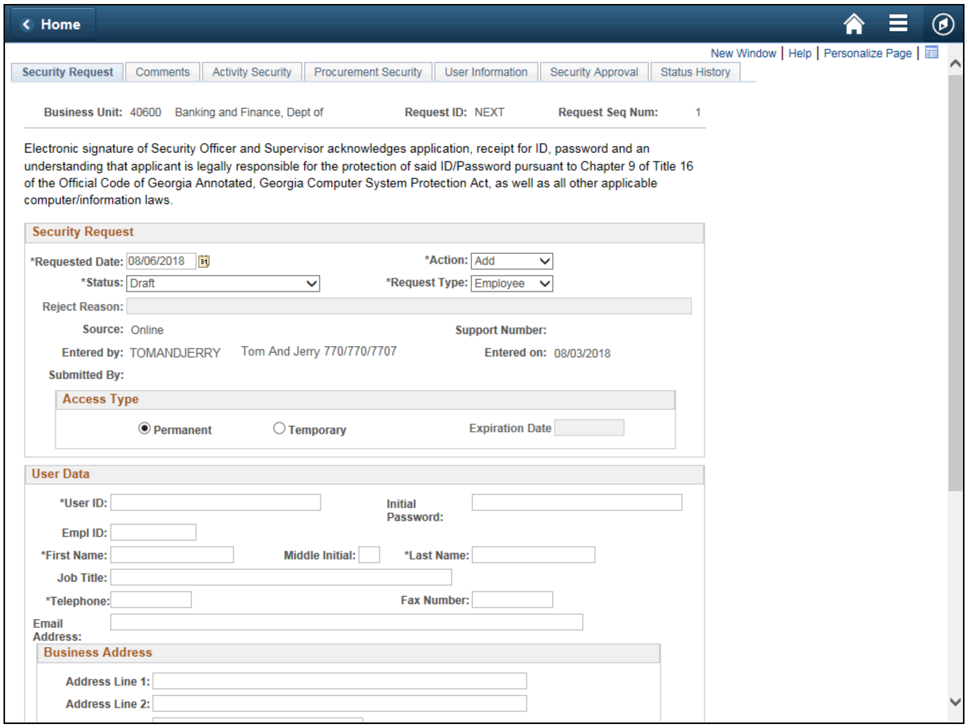
Step	Action
6.	Click in the **Business Unit** field. 



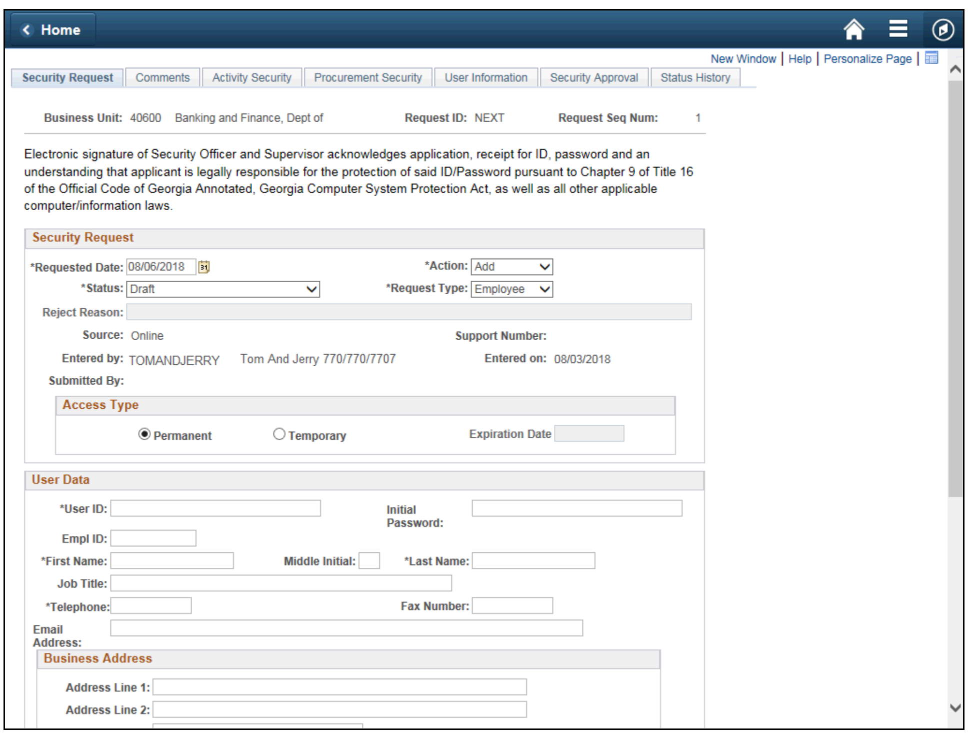
Step	Action
7.	Enter the appropriate information into the **Business Unit** field. For this example, type **40600**.



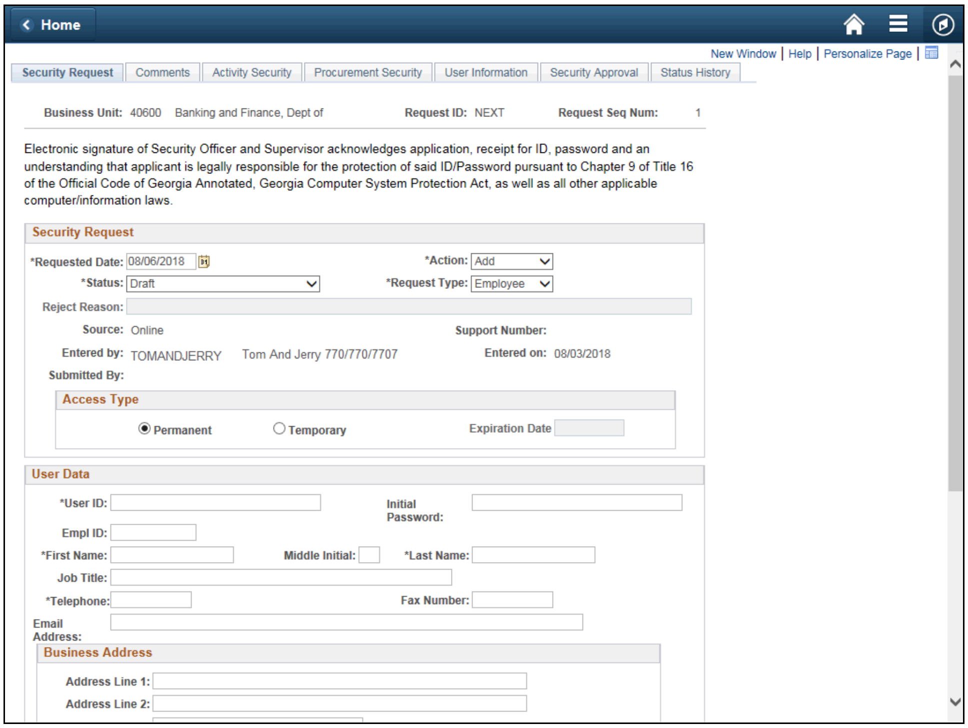
Step	Action
8.	Click the **Add** button. 



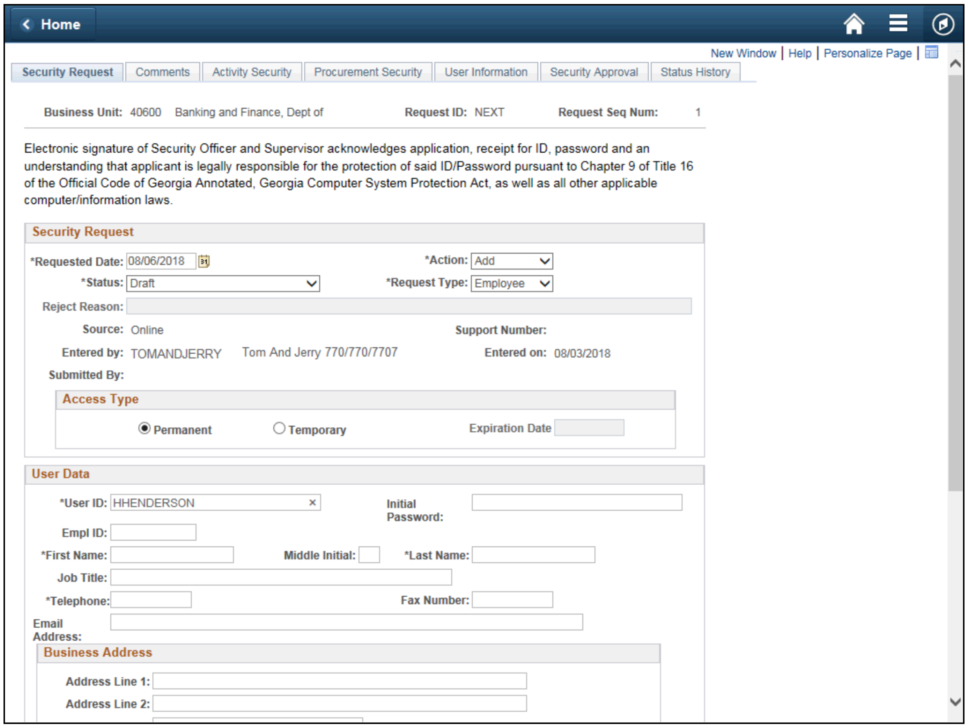
Step	Action
9.	This is the initial page when entering a new Security Request.



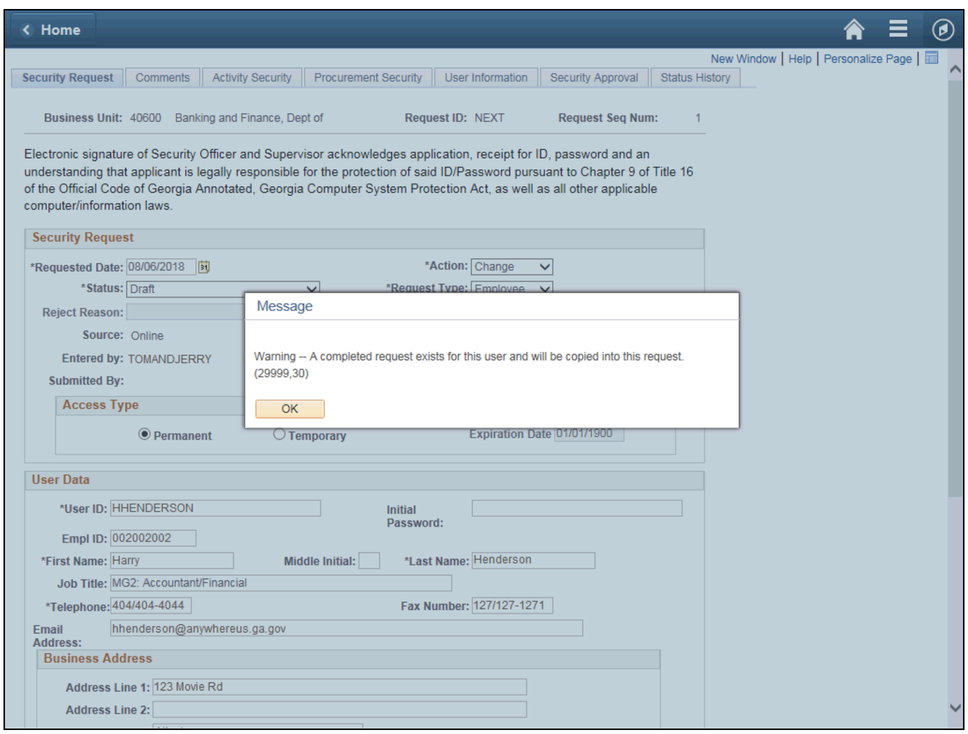
Step	Action
10.	In this exercise, a closer look will be taken at the **Procurement Security** tab. Click the **User ID** tab. 



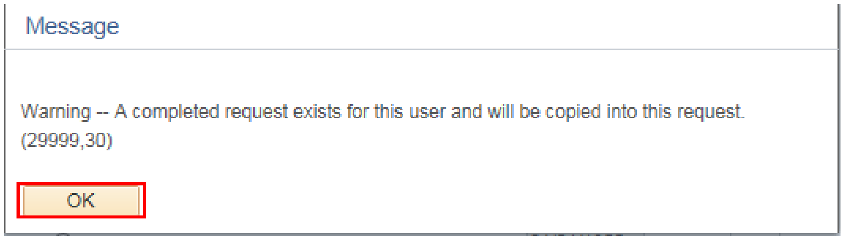
Step	Action
11.	Enter the appropriate information into the **User ID** field. For this example, type **HHENDERSON**.

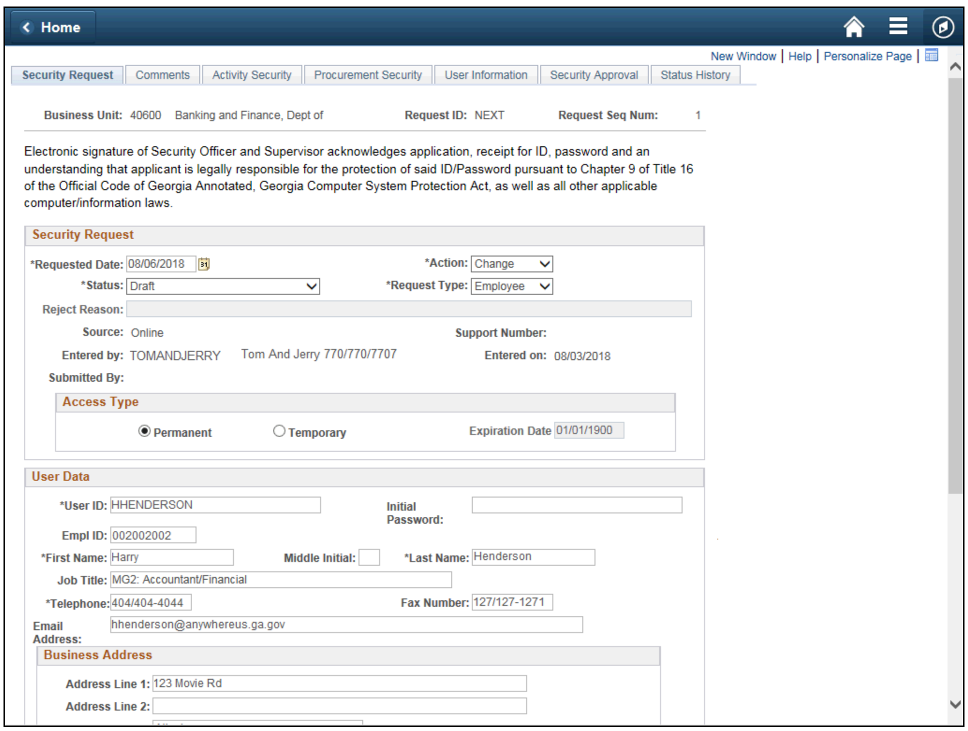


Step	Action
12.	Press **[Tab]**.

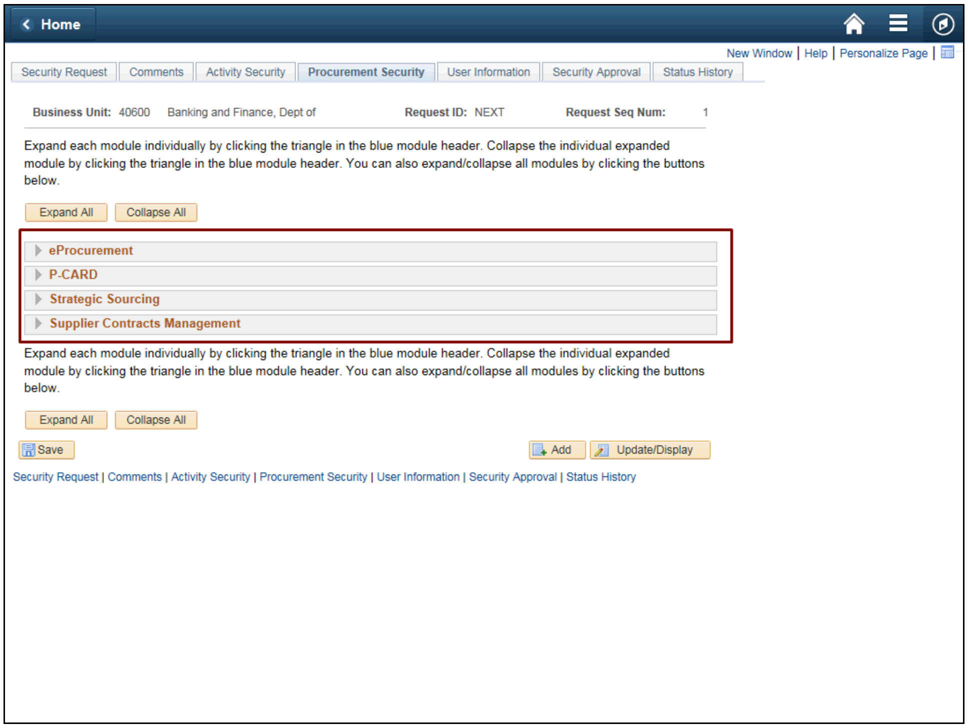


Step	Action
13.	Note the warning message before preceding with the security request. Click the **OK** tab.

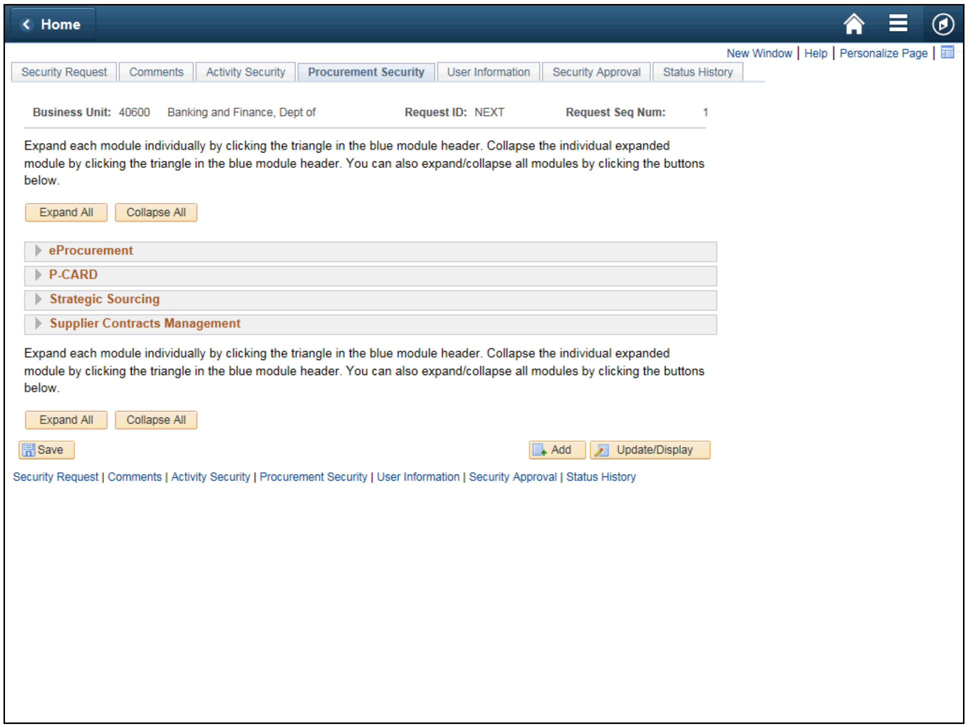


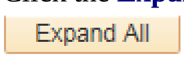


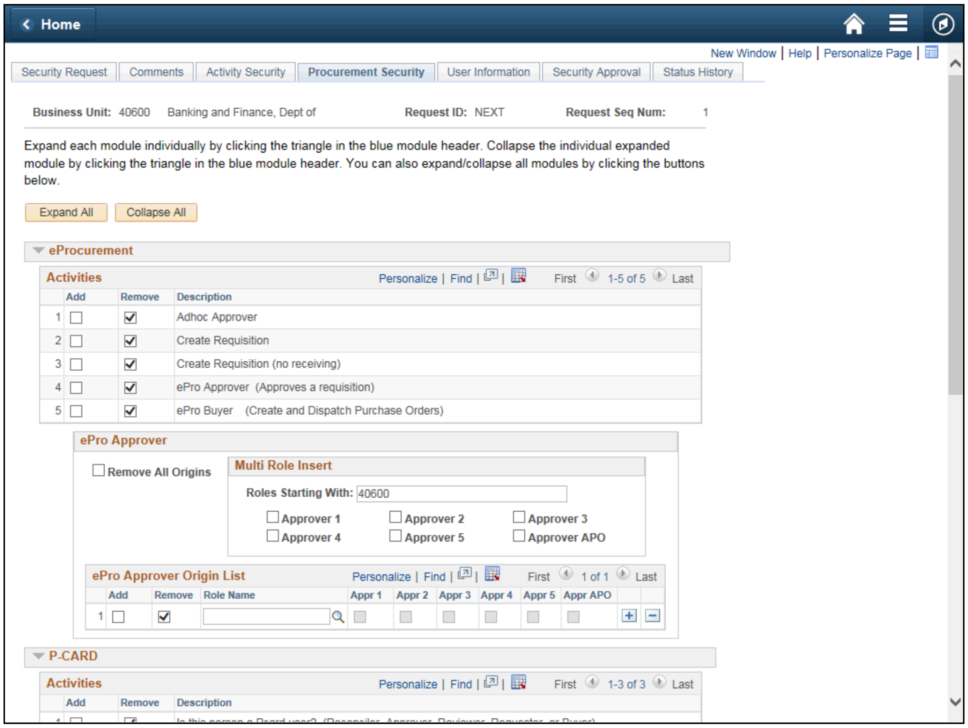
Step	Action
14.	Click the **Procurement Security** tab.



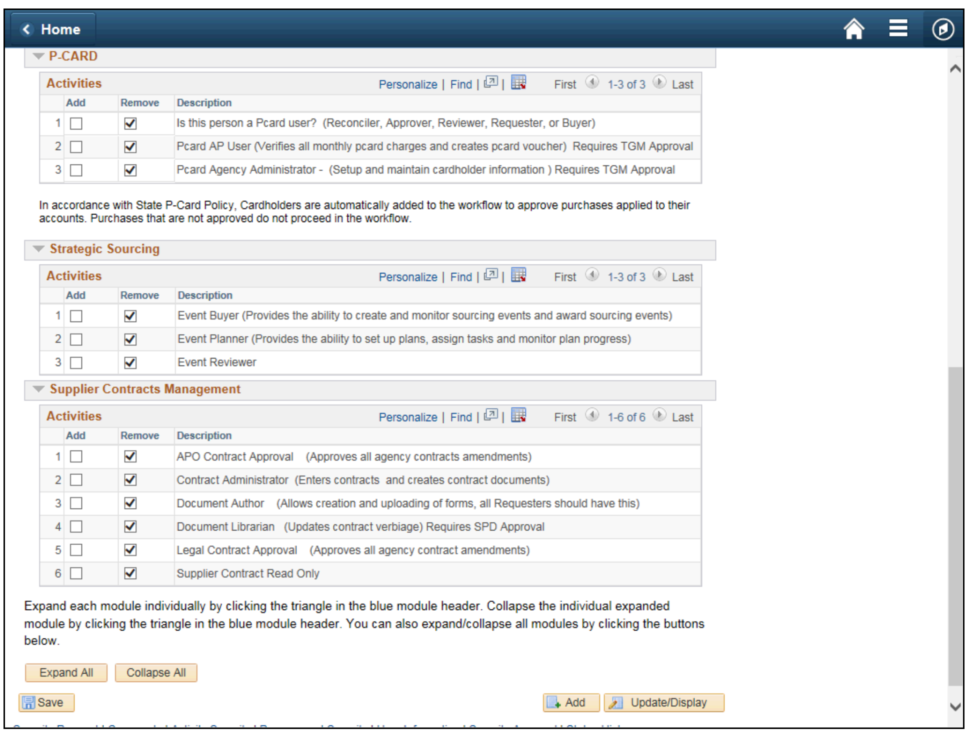
Step	Action
15.	This is the **Procurement Security** page. This page allows the manager to specify TGM procurement roles access for employees and contractors. Access can be added or removed. To add access, click the **Add** button. To remove access, click the **Remove** button



Step	Action
16.	Currently, the various modules are not expanded. If the modules need to all be viewed simultaneously, there is an **Expand All** button. Click the **Expand All** button. 



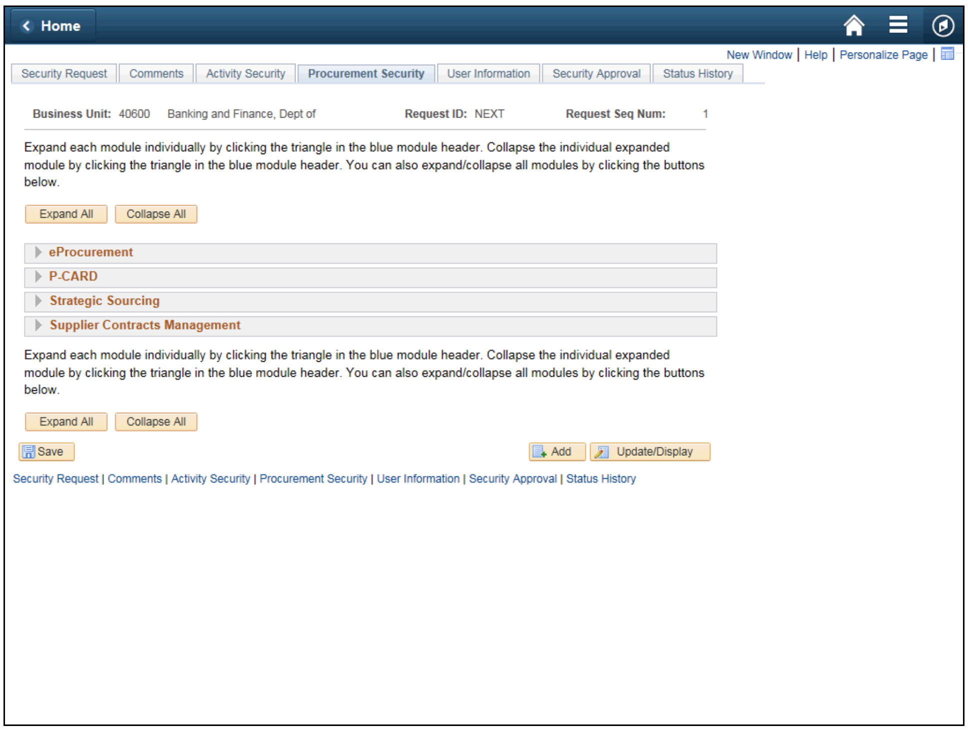
Step	Action
17.	Notice all of the modules are now expanded. Click the **Vertical** scrollbar to view the bottom of the page.



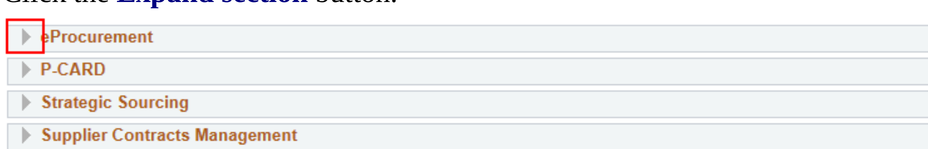
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>18.</td><td>Instead of closing each module individually, there is a Collapse All button that can close each module.

Click the Collapse All button.

</td></tr>
</table>



<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>19.</td><td>Now, let's look at the eProcurement module. Keep in mind that some access will require further information or may be associated with other pages.

Click the Expand section button.

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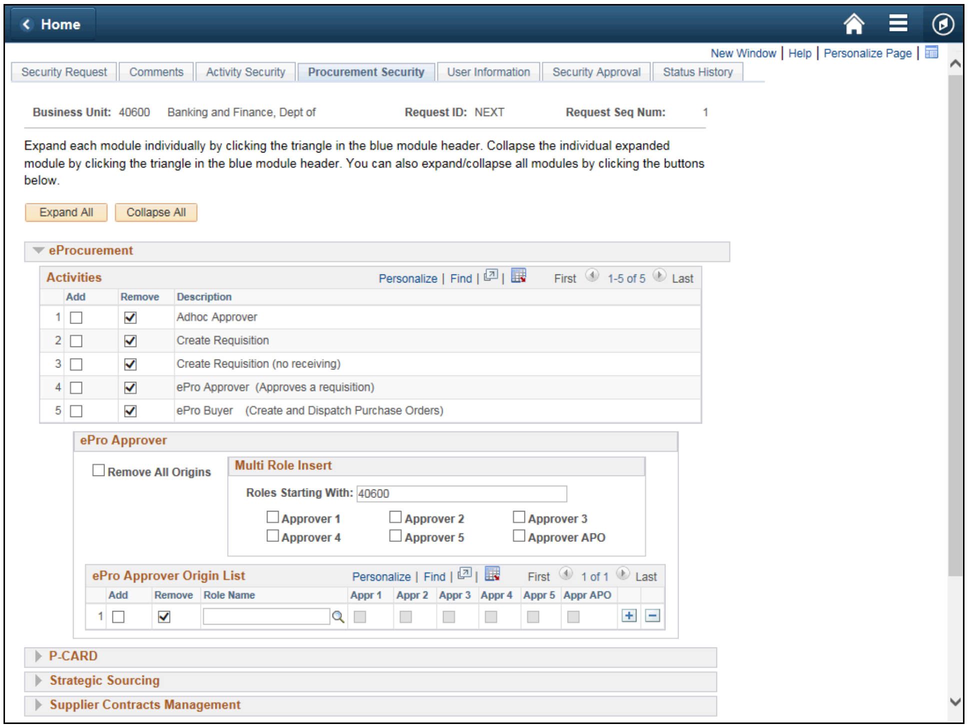
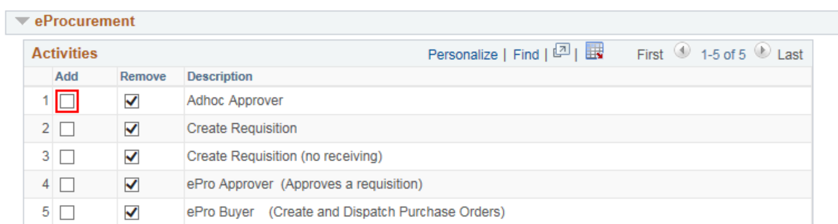
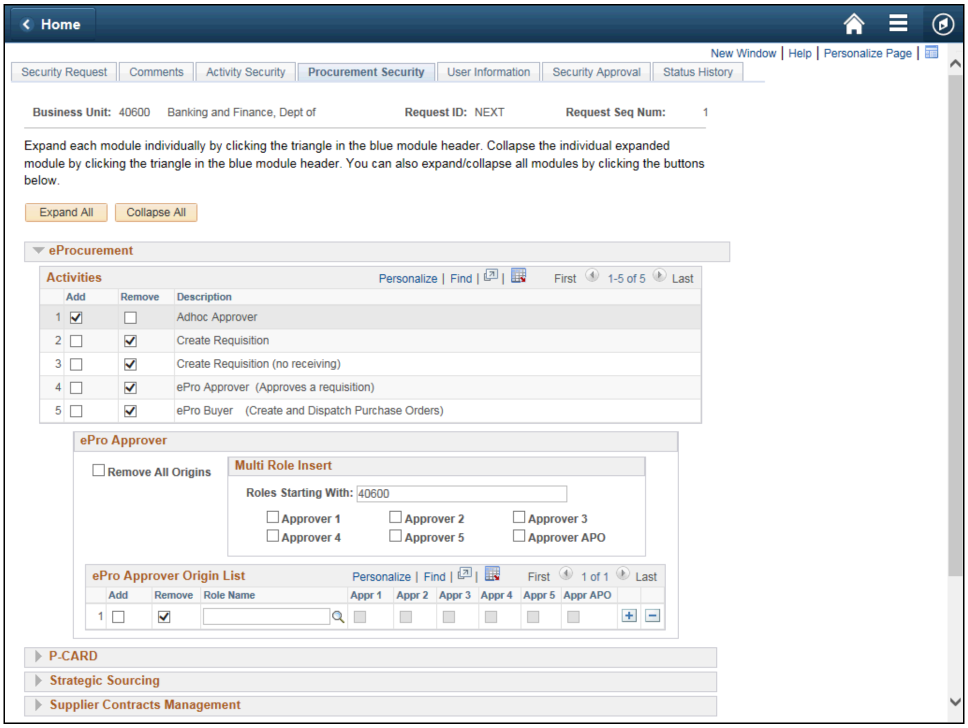
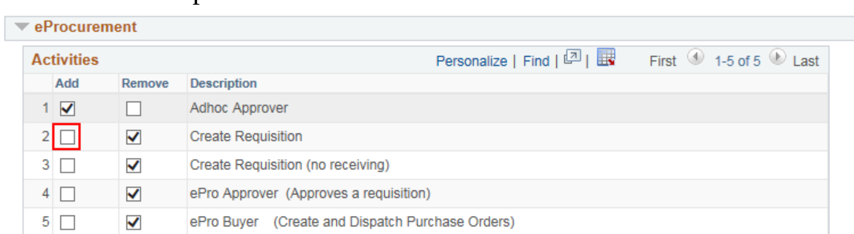
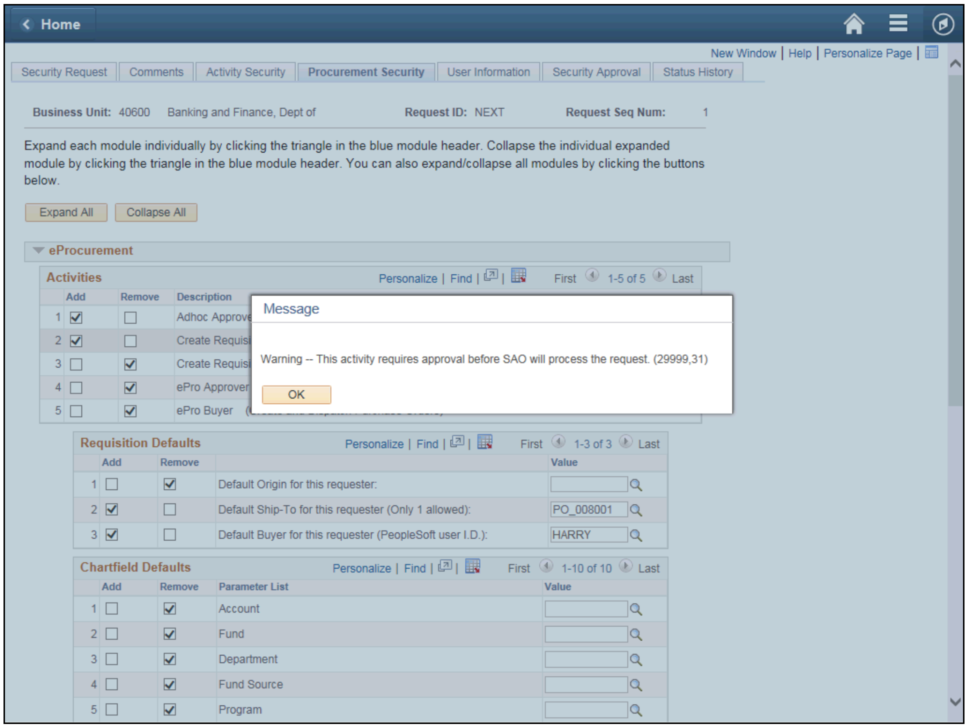
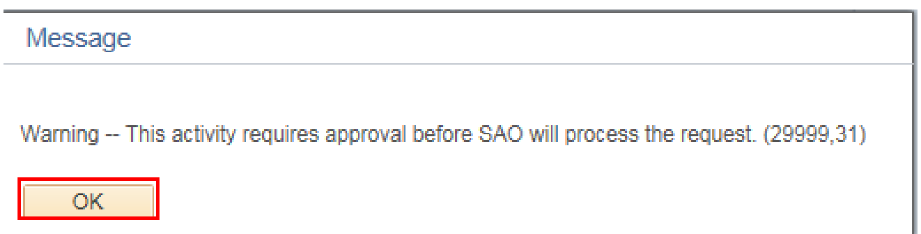


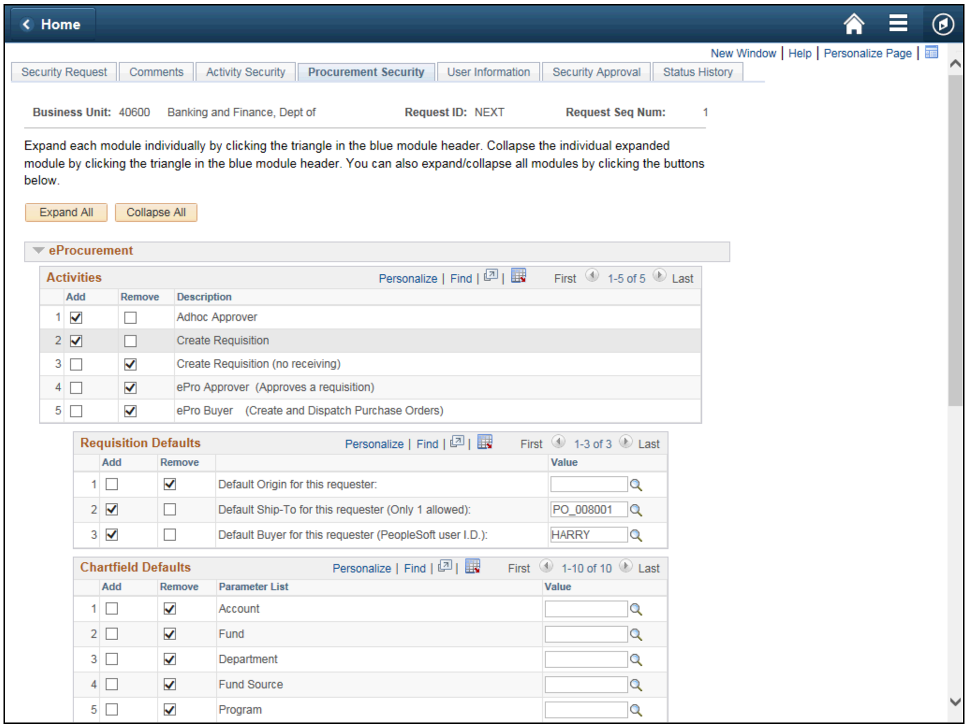
Step	Action
20.	To add access, click the **Add** button. To remove access, click the **Remove** button. We will add the **Adhoc Approver** access. Click the **Add** option. 

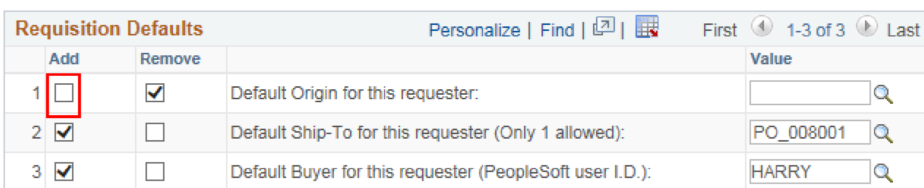


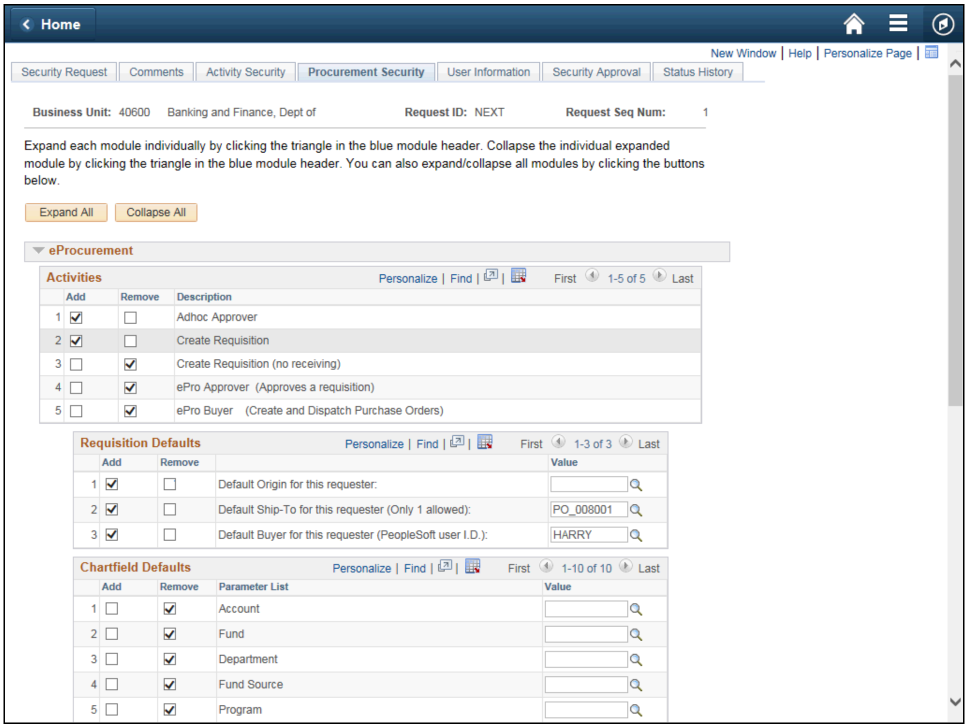
Step	Action
21.	Now, we will add the **Create Requisition** access. This access requires further information. Click the **Add** option. 

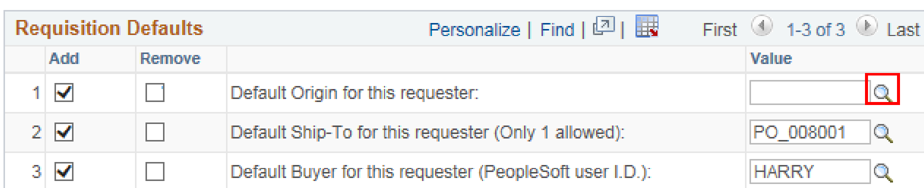


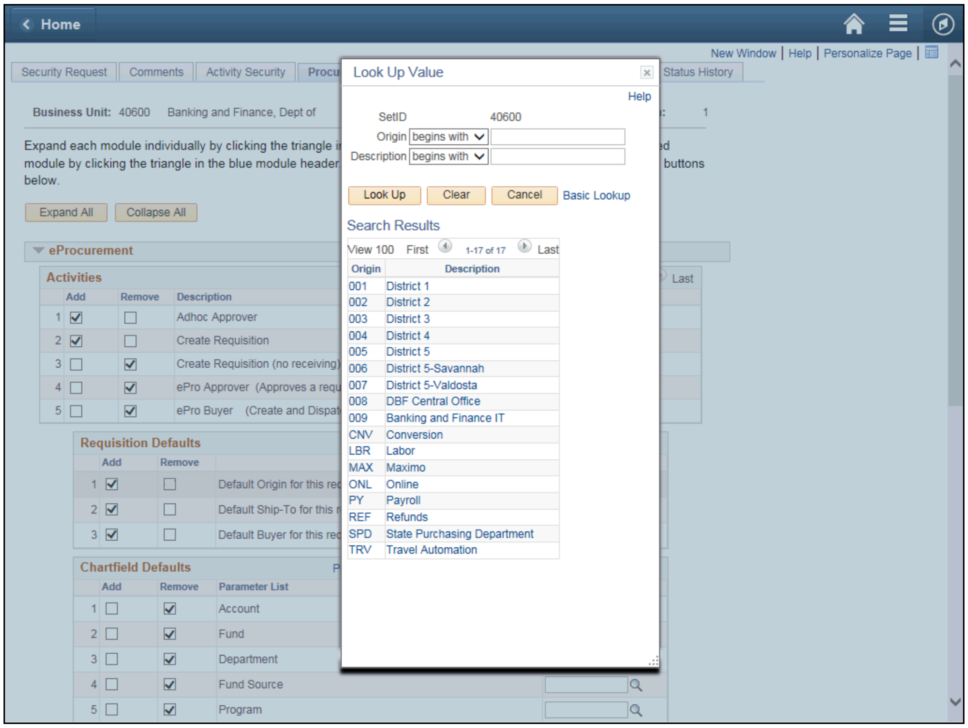
Step	Action
22.	Notice this is an activity requiring further approval. Click the **OK** button. 



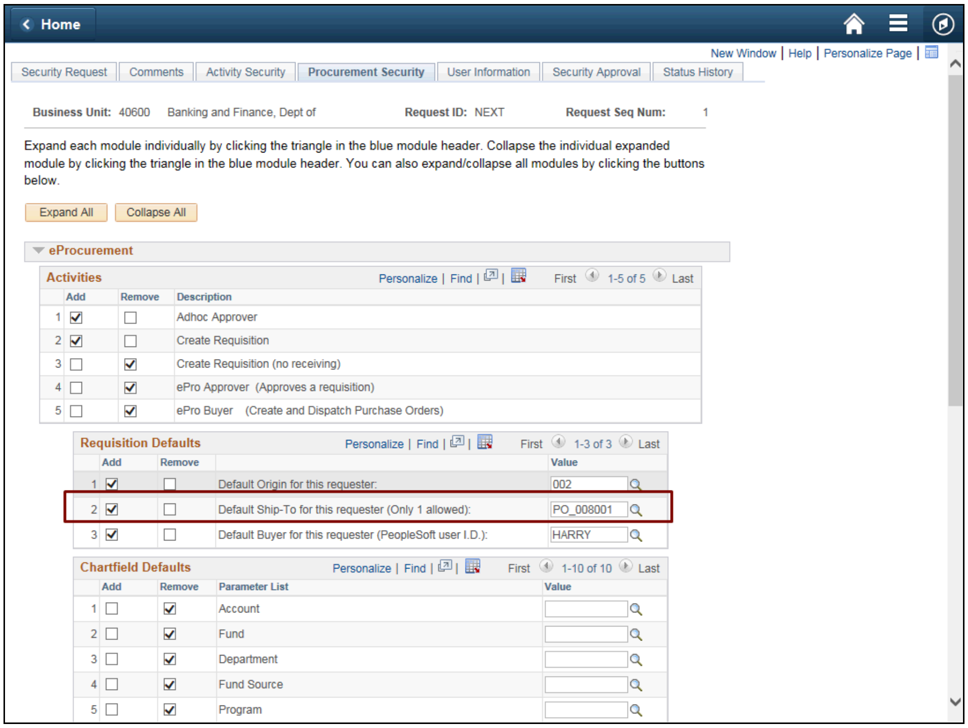
Step	Action
23.	The **Requisition Defaults** are required fields. We will use the Look Up button to find the required information. But if you know the value, simply enter it. Click the **Add** button. 



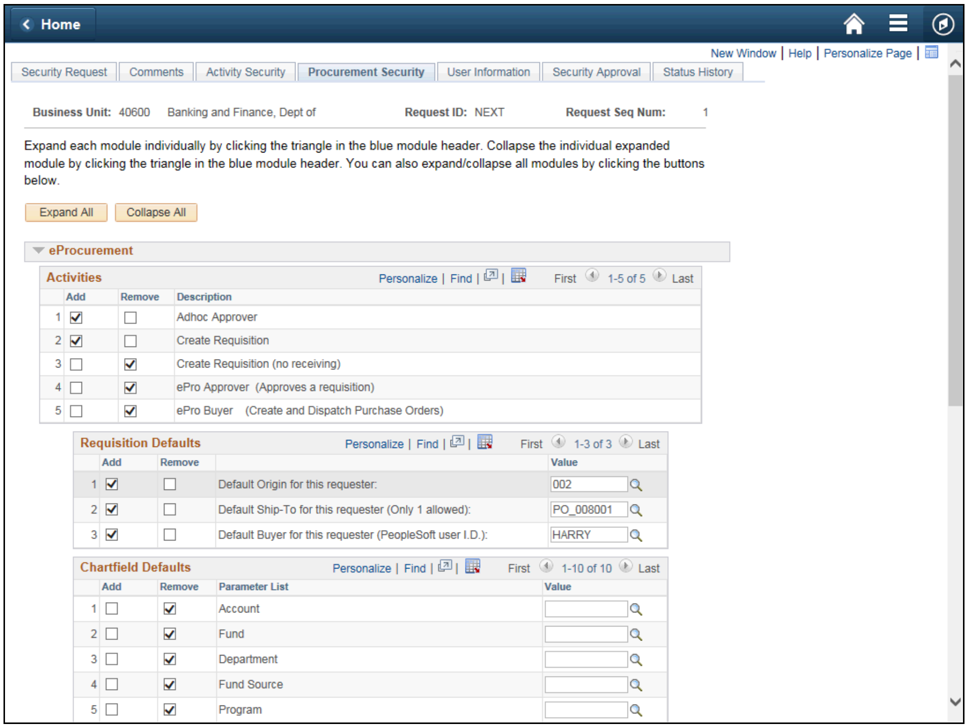
Step	Action
24.	Click the **Look up Value** button for the **Default Origin**. 



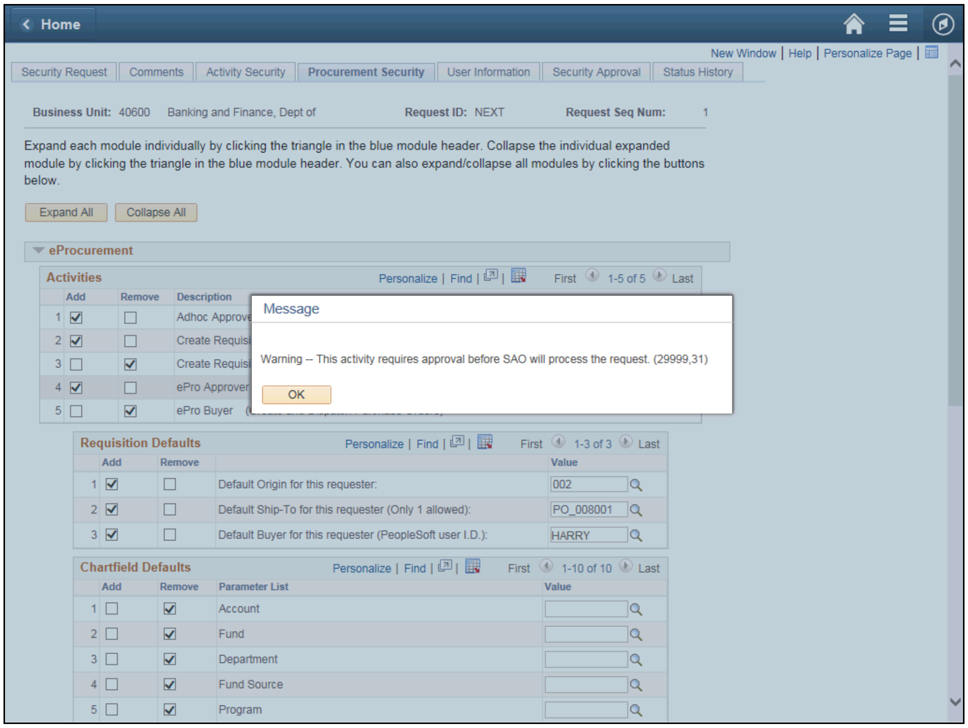
Step	Action
25.	The Look Up Value gives a list of Origins to choose from. Click the **002 - District 2** link. 

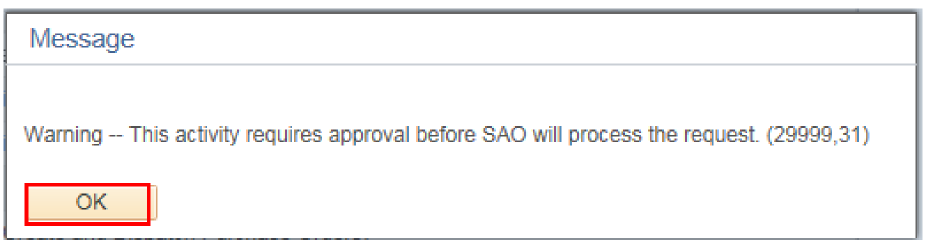


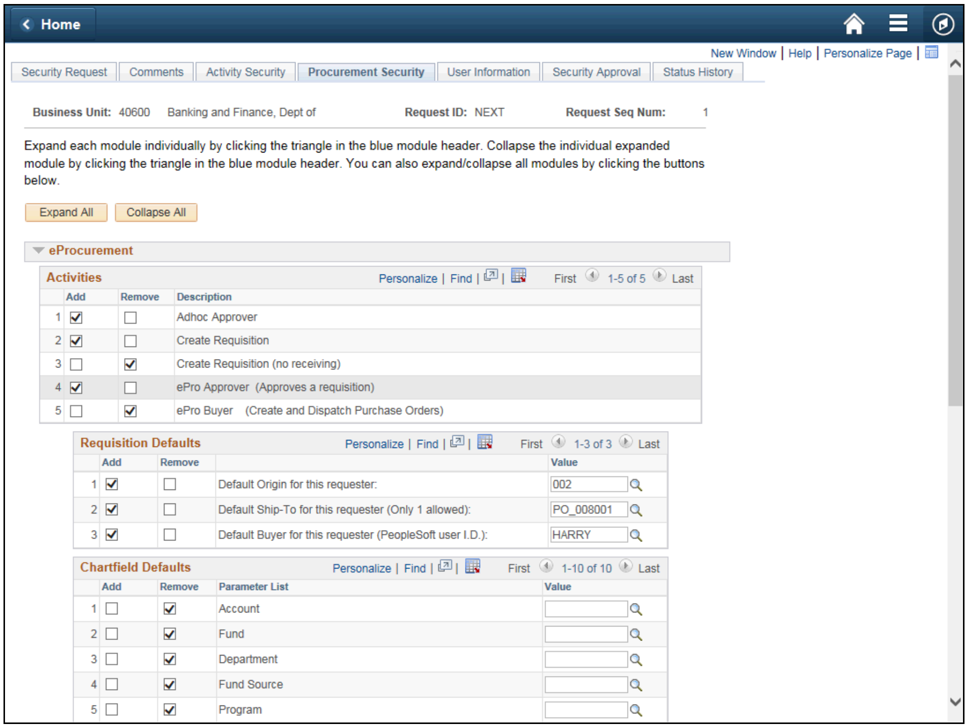
Step	Action
26.	The **Default Ship-To** is also needed. Users may use the look up value button to find the **Default Ship-To** or if you know the value, simply enter it. For this example, accept the current Default Ship-To option.



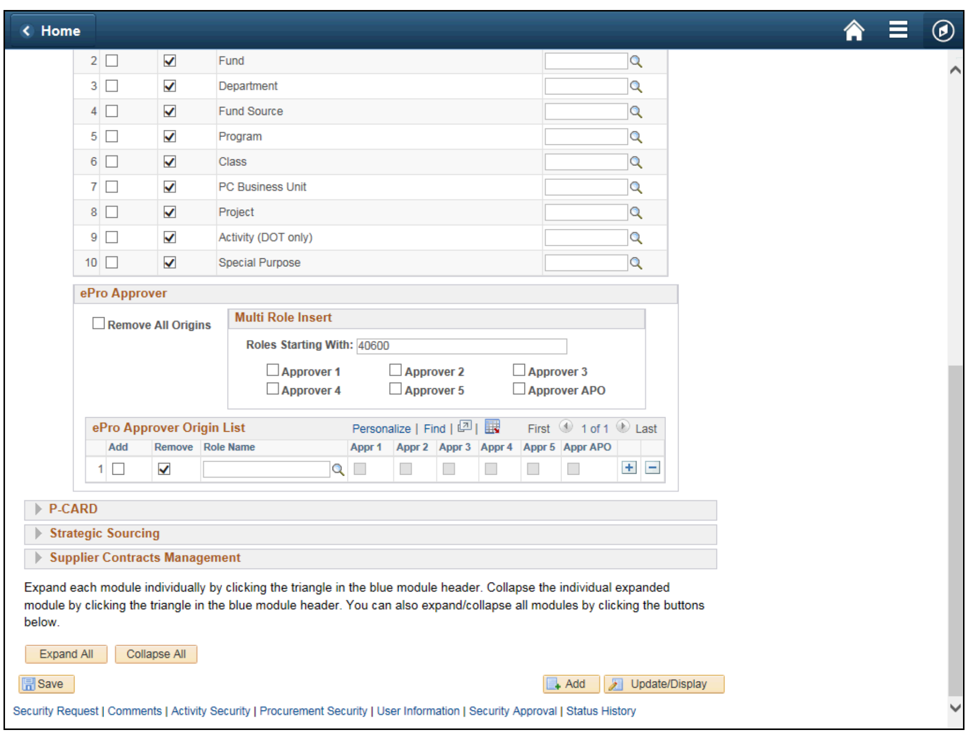
Step	Action
27.	Now let's add the ePro Approver activity. This activity will require further information. Click the **Add** option. 



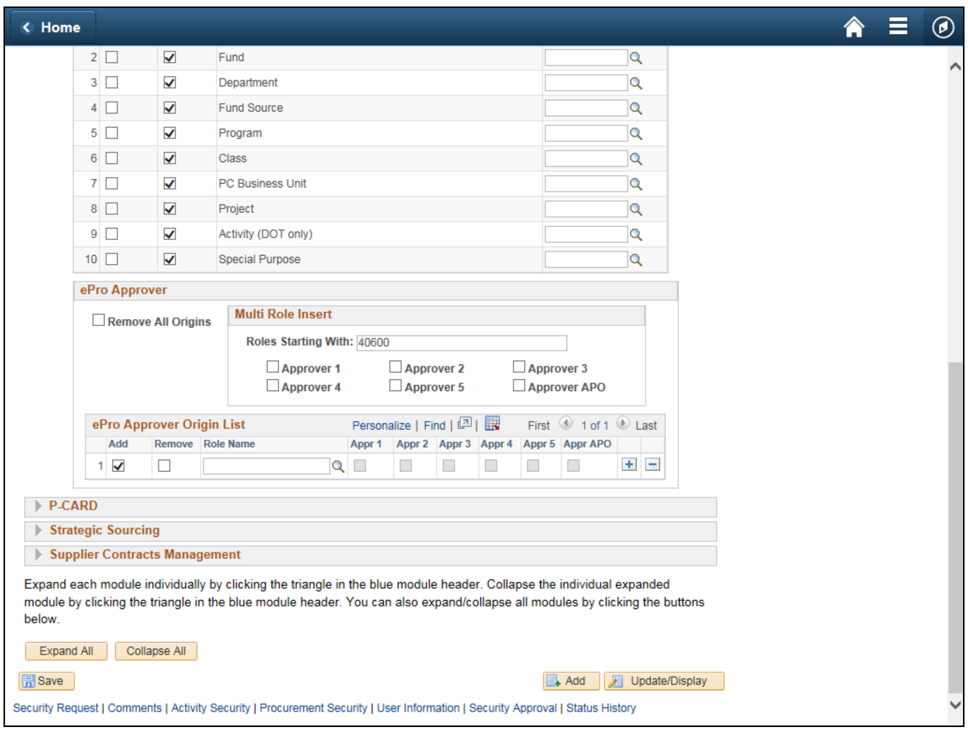
Step	Action
28.	Notice that this activity requires further approval. Click the **OK** button. 

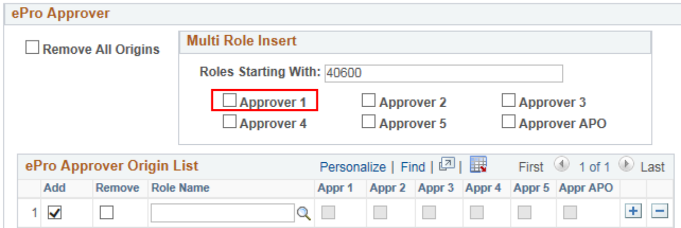


Step	Action
29.	Click the **Vertical** scrollbar to view the bottom of the page.



Step	Action
30.	With the ePro Approver, you must provide the workflow roles which describe the origin code and level of approval for that origin code. Click on add option and you can enter the approval workflow role if you know it or proceed to the next step to view a list of available role for your agency. Click the **Add** option. 



<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>31.</td><td>
Notice the Roles Starting With defaults to your Agency.
Most Agencies will have Approver 1, Approver 2 and APO. A small number of Agencies may have access to Approver 3, 4 and 5
Click the Approver 1 option.


</td></tr>
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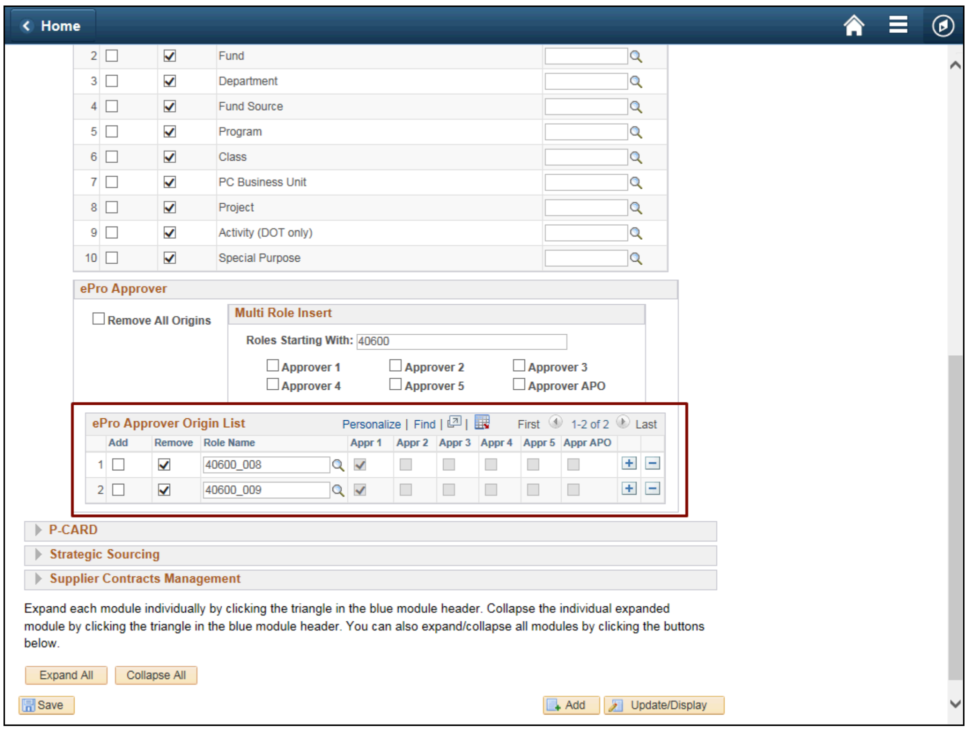
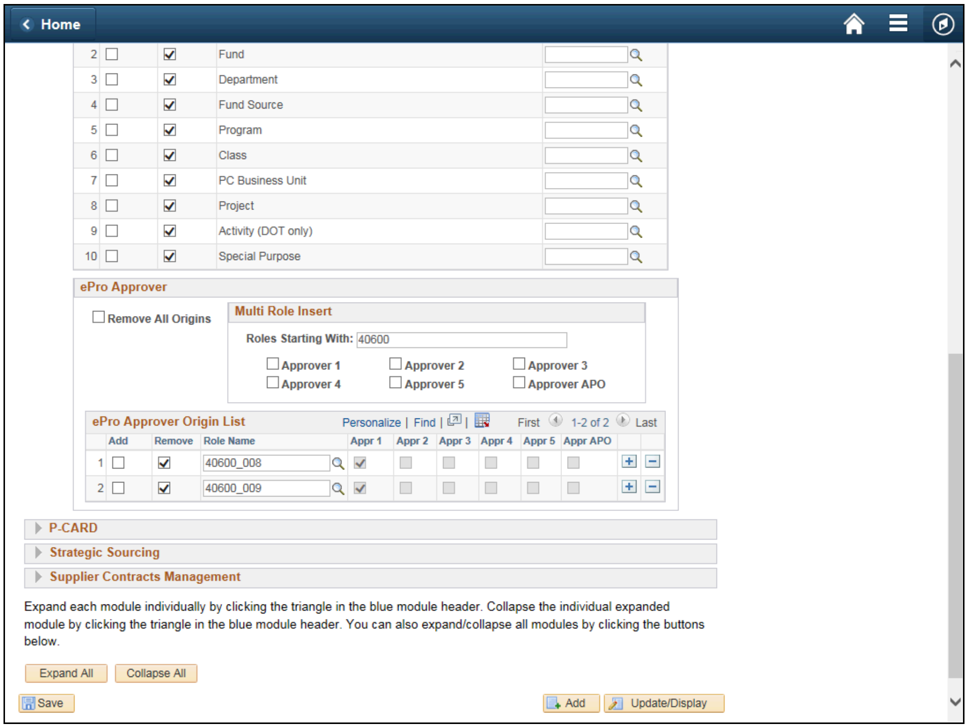
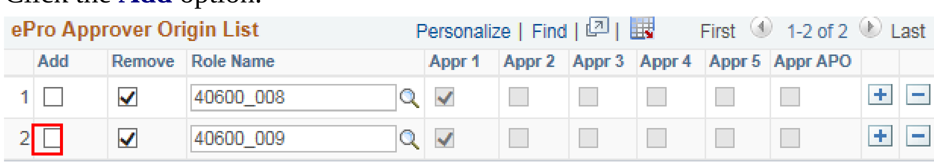
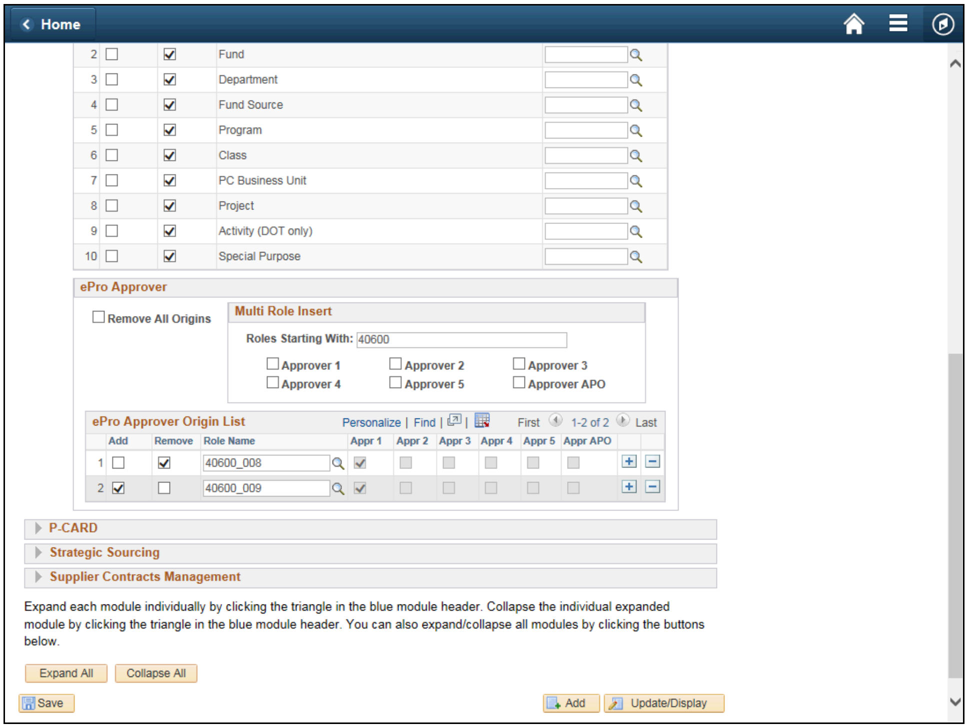


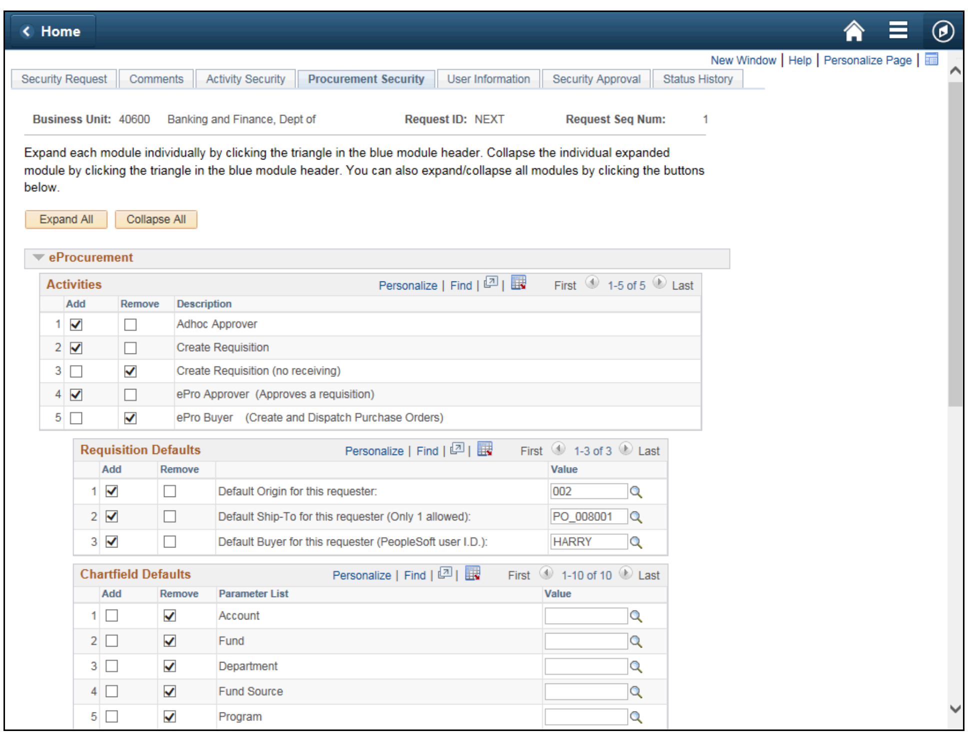
Step	Action
32.	We are given a list of all the first level approval roles for our Agency.

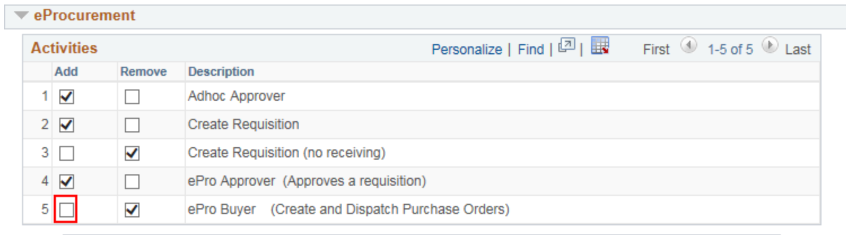


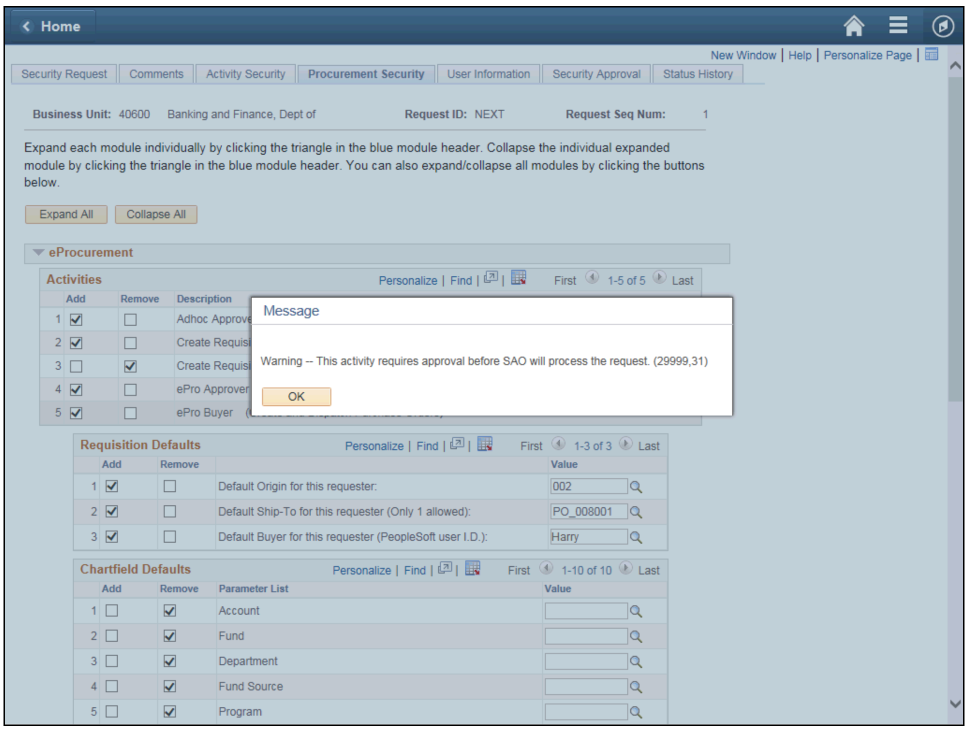
Step	Action
33.	We will now Add the appropriate origin role. The same steps can be followed for Approver 2, 3, 4 and 5. You can use the list lookup for other approvals or add the user id if you know it. Click the **Add** option. 

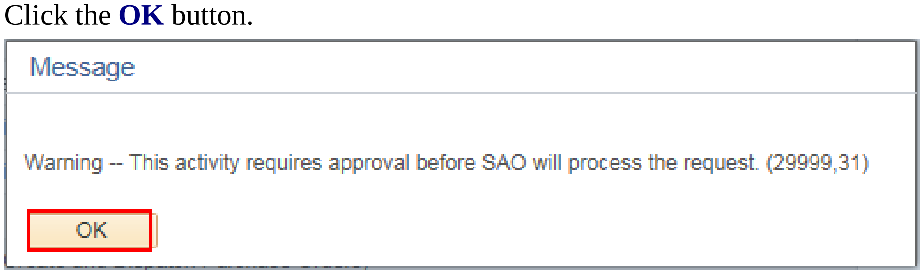


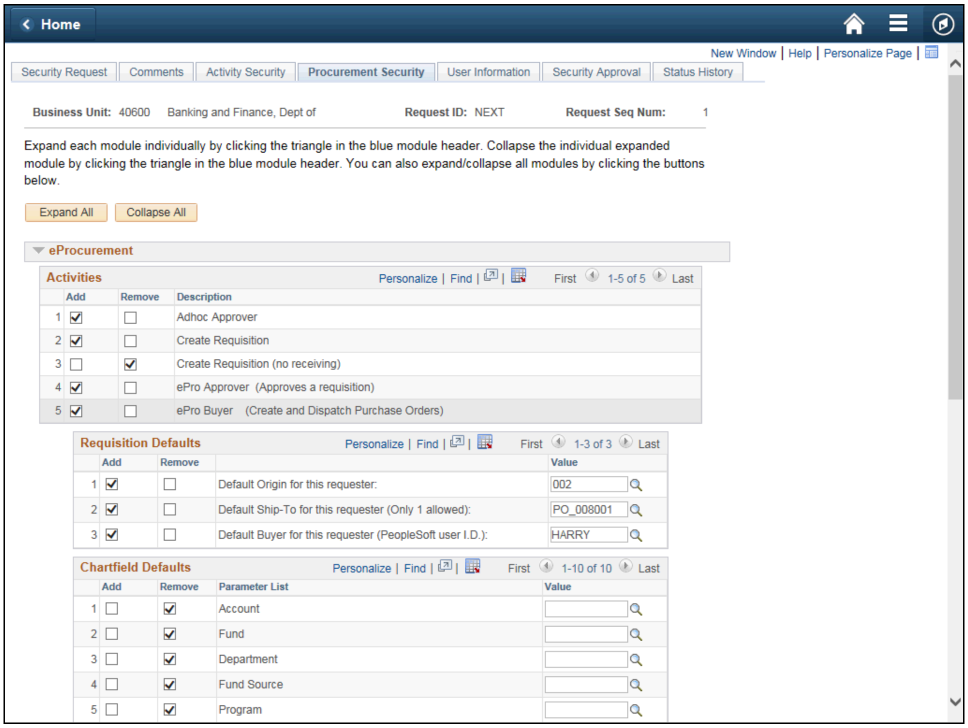
Step	Action
34.	Now, let's add the ePro Buyer activity. Click the **Vertical** scrollbar to return to the top of the page.



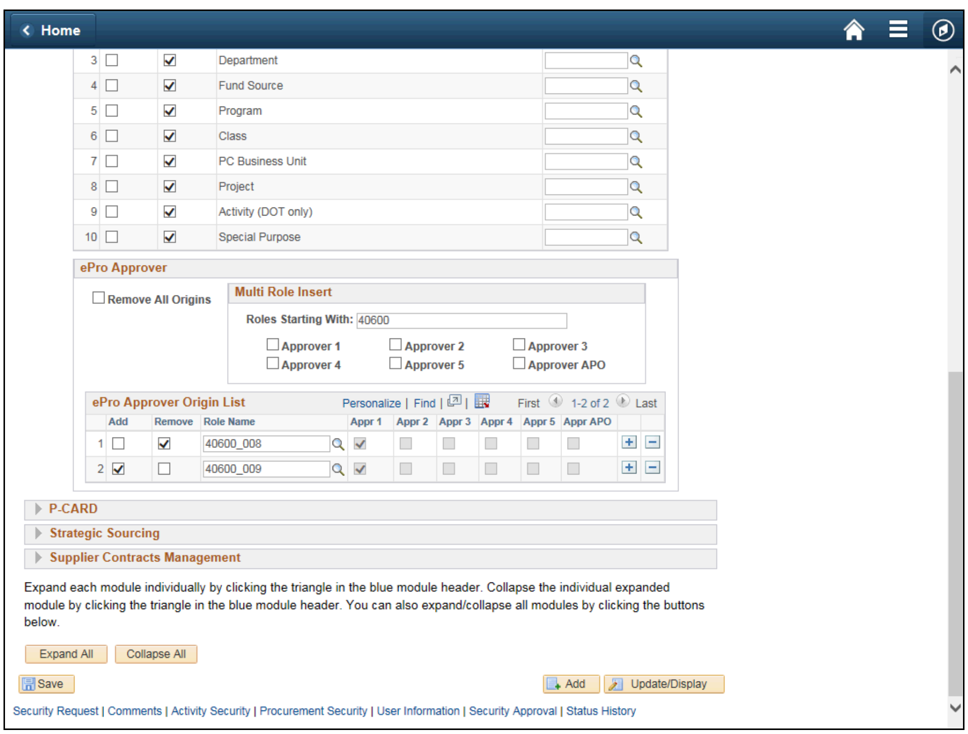
Step	Action
35.	Now, let's add the ePro Buyer activity. Click the **Add** option. 

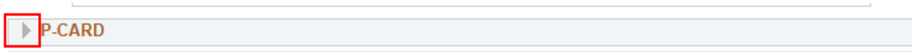


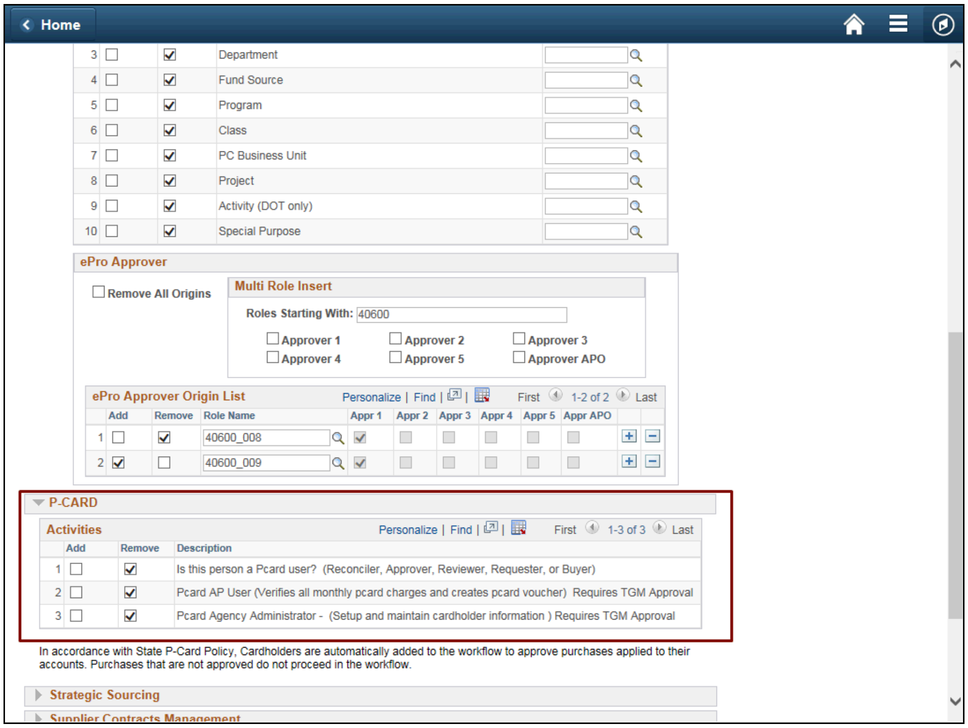
Step	Action
36.	The ePro Buyer requires DOAS/TGM approval. Any Procurement Security access must be approved by DOAS/TGM. Click the **OK** button. 



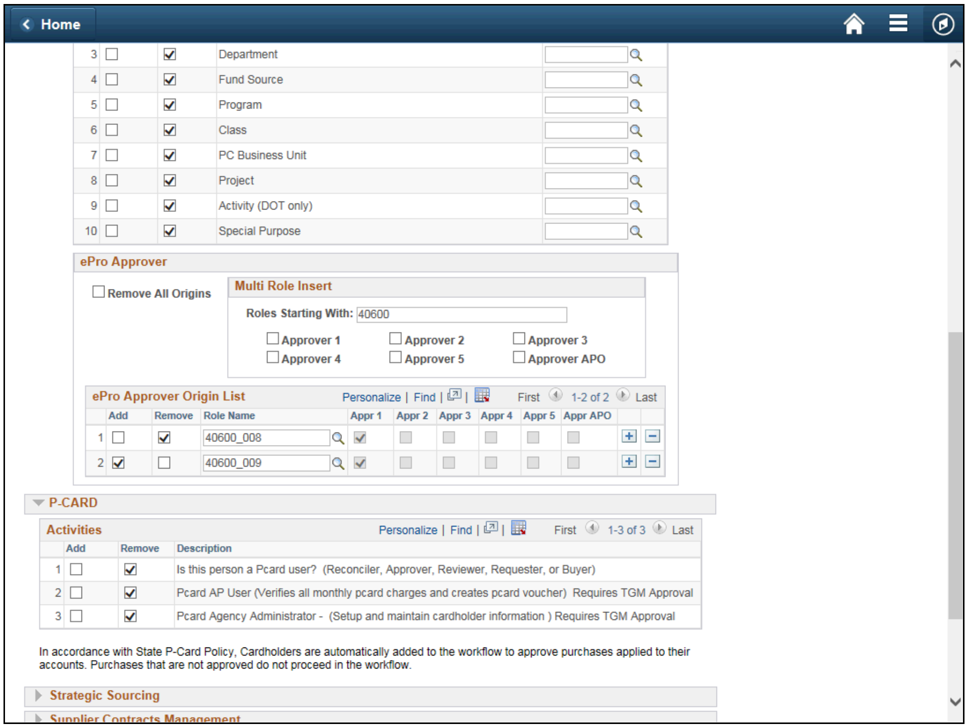
Step	Action
37.	Let's look at some of the other modules. Click the **Vertical** scrollbar to return to the bottom of the page.



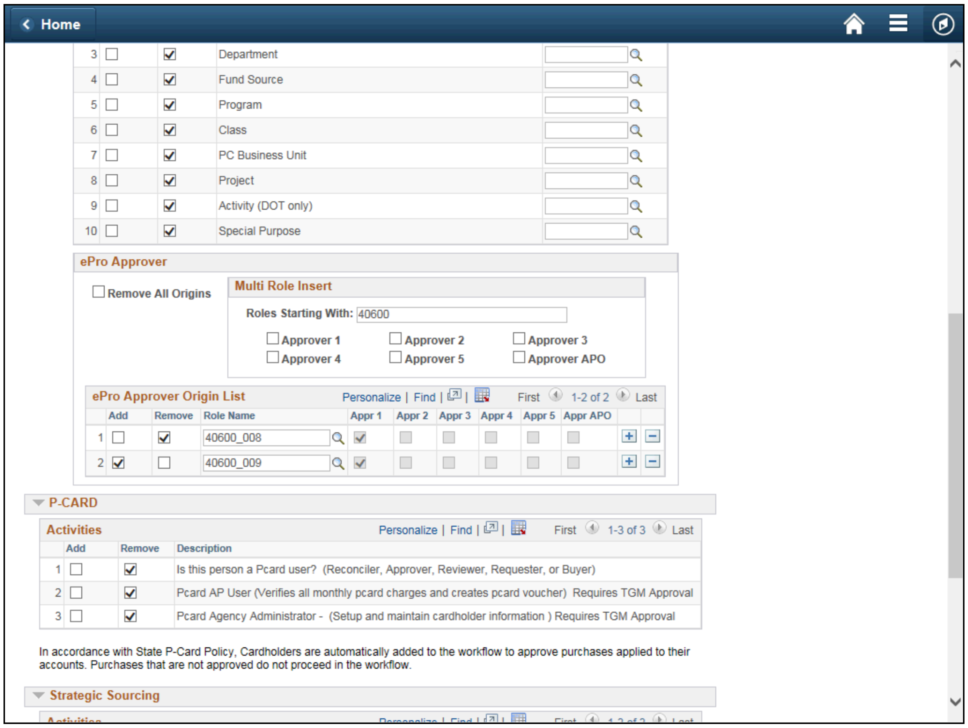
Step	Action
38.	Let's look at the **P-Card** module. Click the **Expand section** button. 



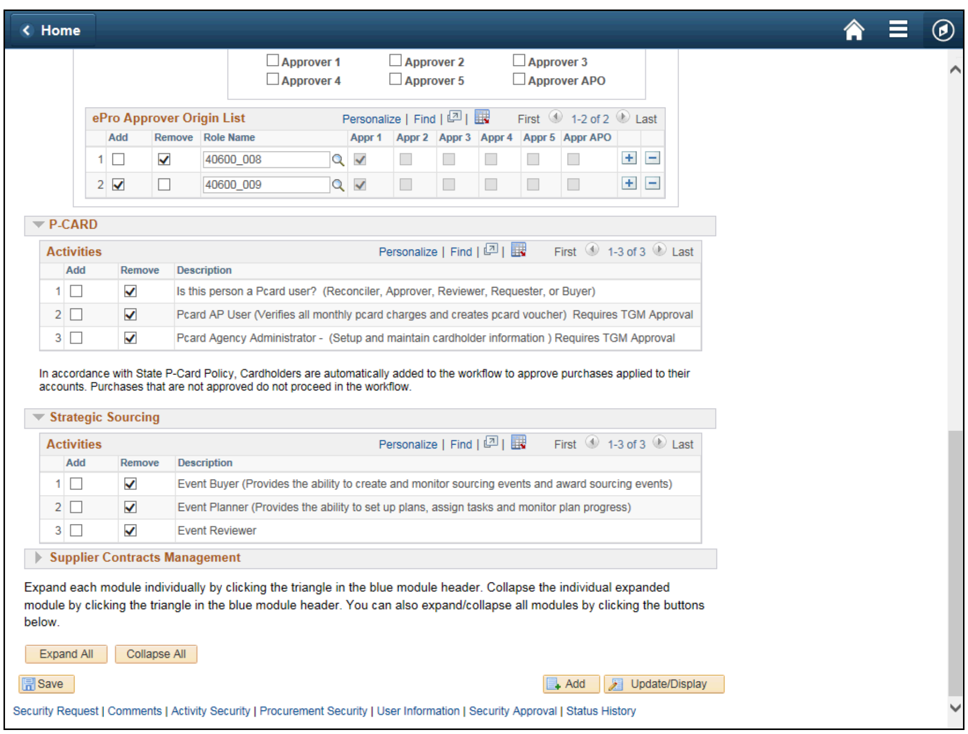
Step	Action
39.	Notice the different roles captivities within the P-Card module that can be added or removed.



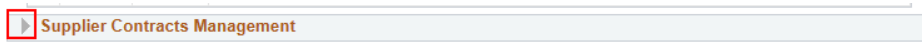
Step	Action
40.	Let's look at the Strategic Sourcing module. Click the **Expand section** button. 

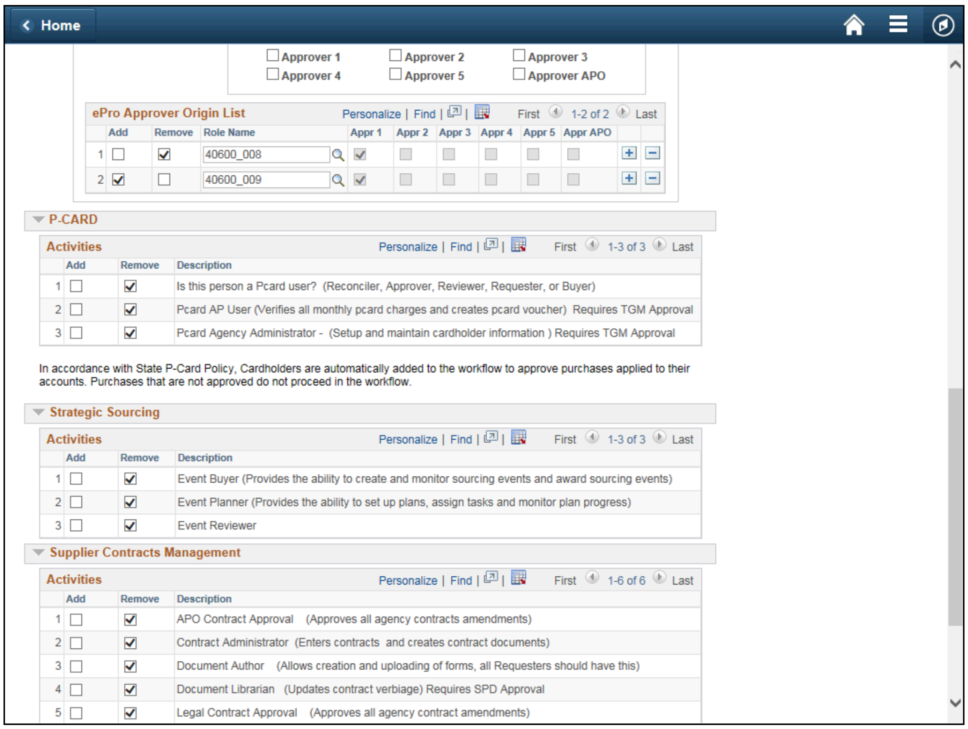


Step	Action
41.	Let's also expand the **Supplier Contract Management** section. Click the **Vertical** scrollbar.

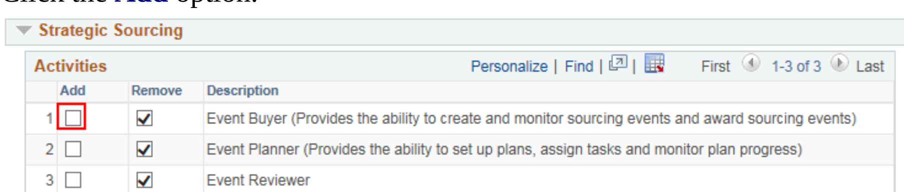


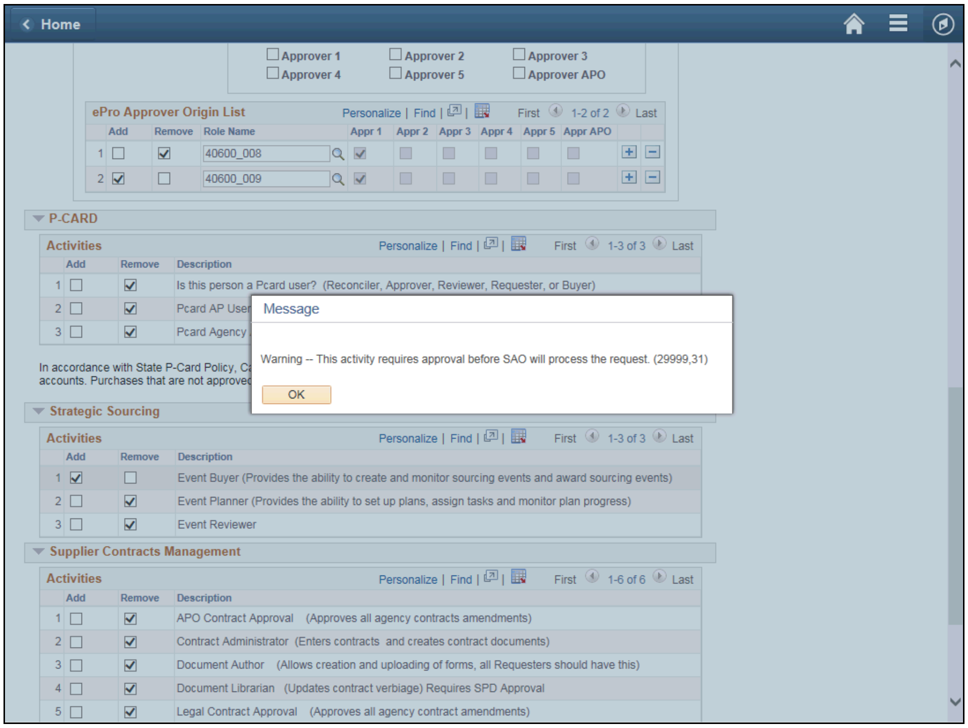
Step	Action
42.	Let's also expand the **Supplier Contract Management** section. Click the **Expand section** button.

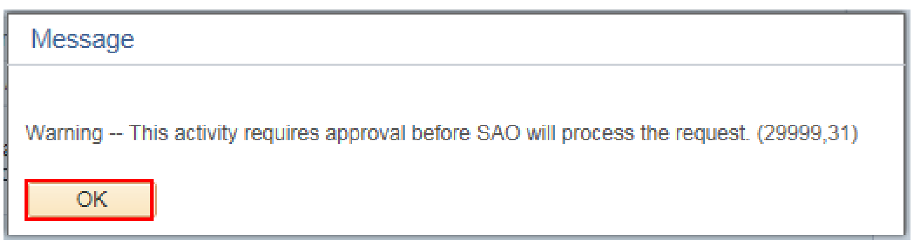


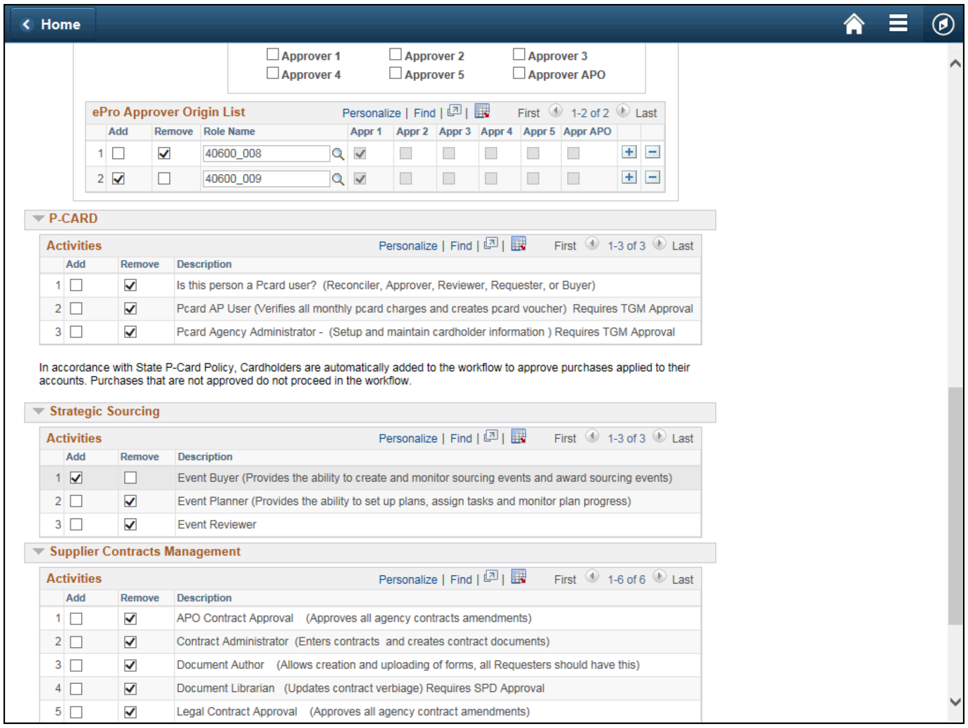


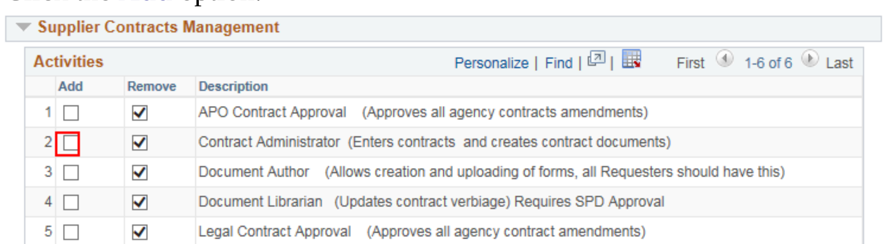
Step	Action
43.	Let's add the Event Buyer activity. This activity requires the default information entered earlier: Origin, Ship-To and Default Buyer The Ship To and Location Code will also need to be inputted on the **User Information** tab. For further information regarding the **User Information** tab, review the **"Reviewing the User Information Tab"** training. Click the **Add** option.

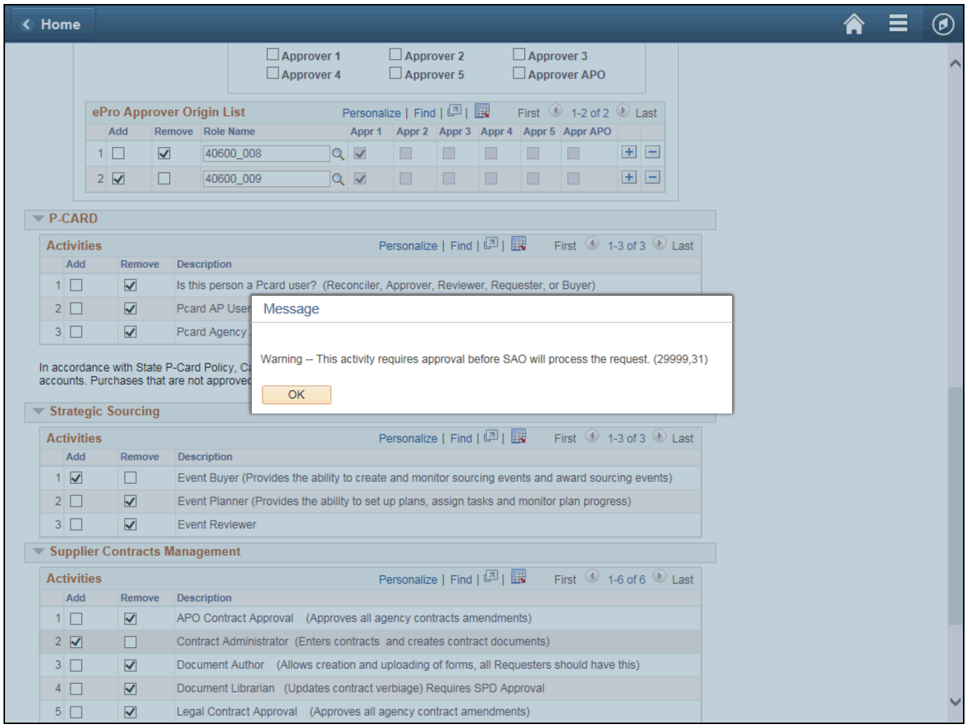


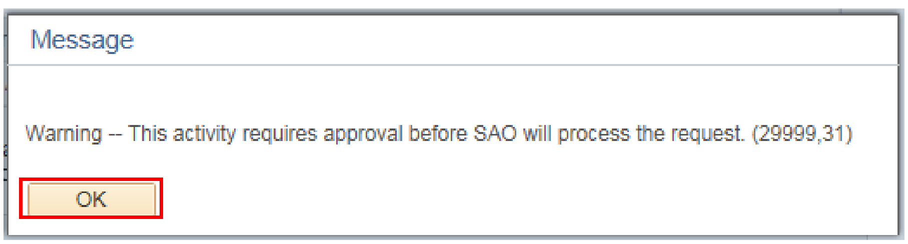


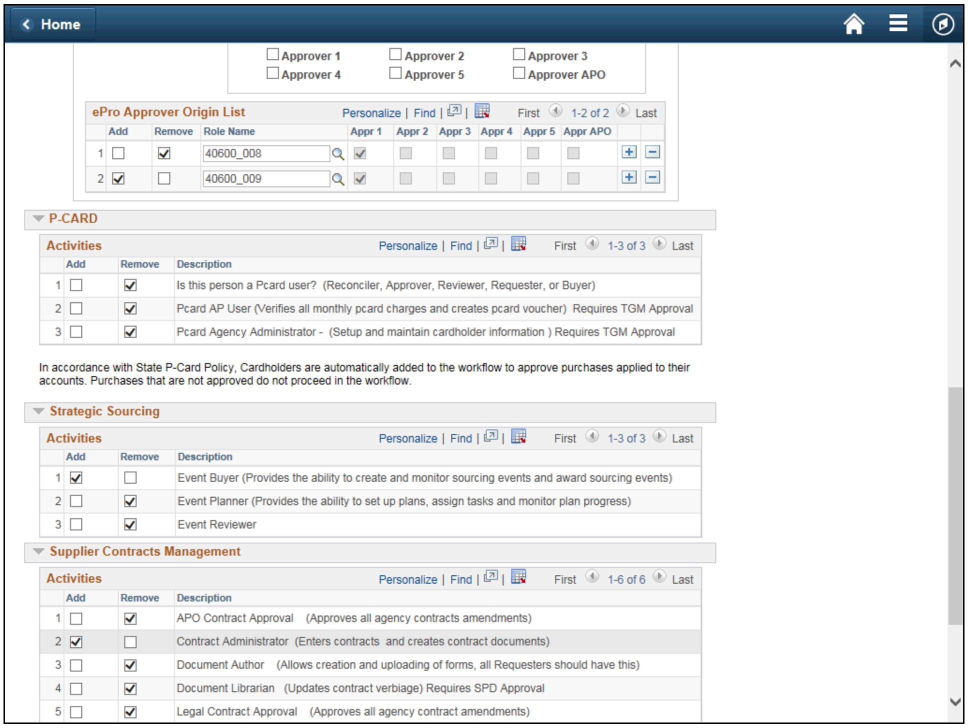
Step	Action
44.	This activity will require DOAS/TGM approval. Click the **OK** button. 

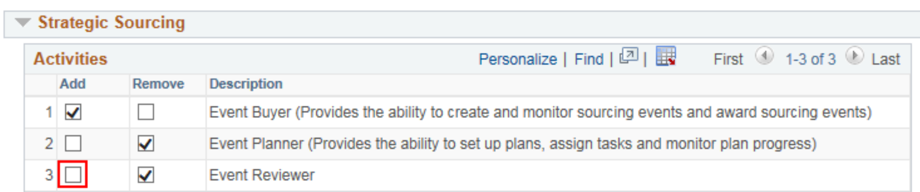


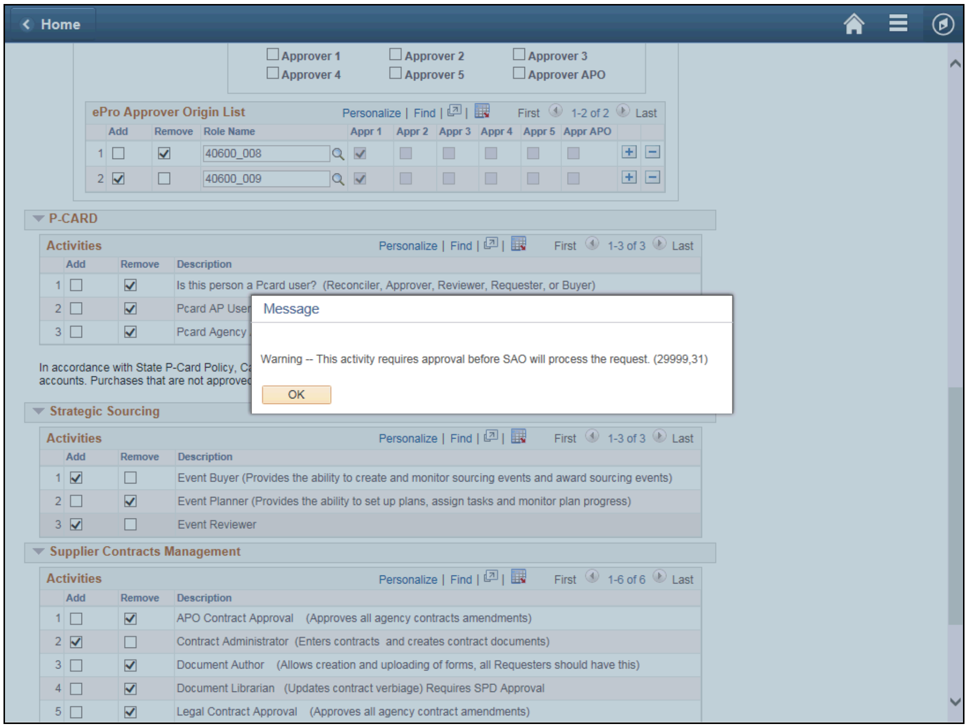
Step	Action
45.	The **Contract Administrator** activity will be added. Click the **Add** option. 

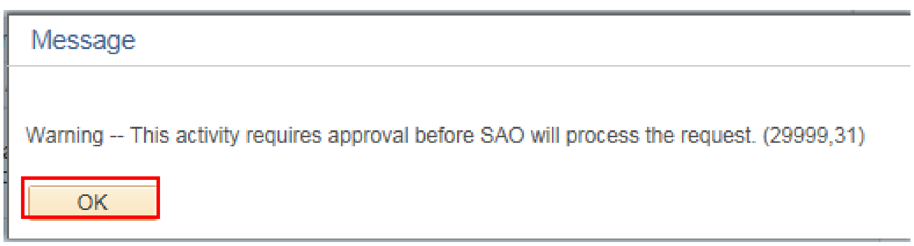


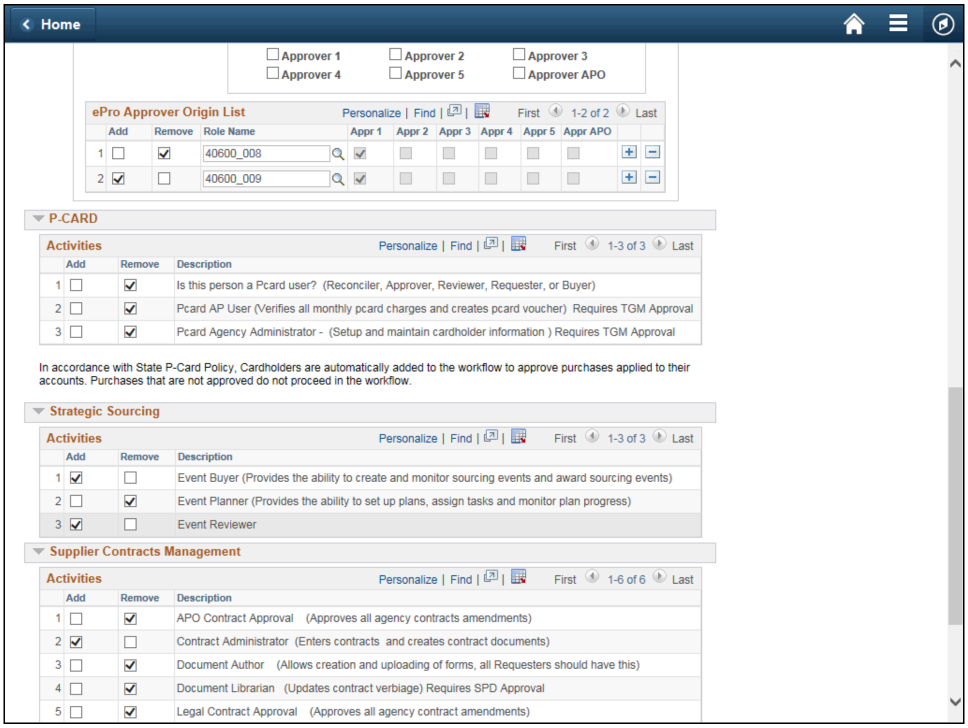
Step	Action
46.	This activity will need DOAS/TGM approval. Click the **OK** button. 



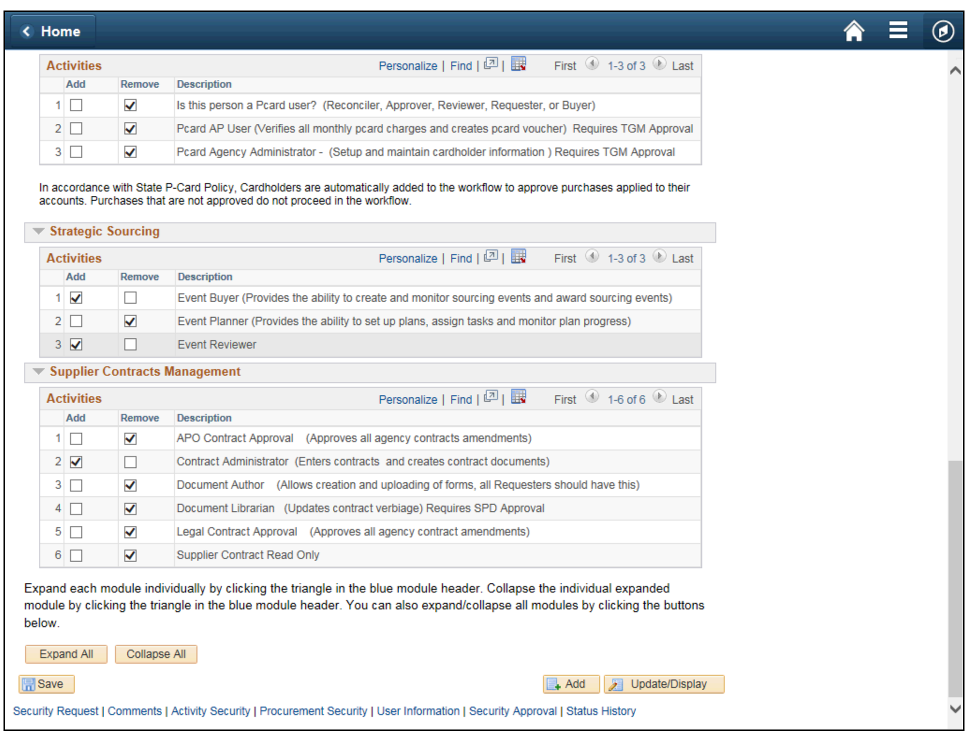
Step	Action
47.	The **Event Reviewer** activity will also be added. Click the **Add** option. 



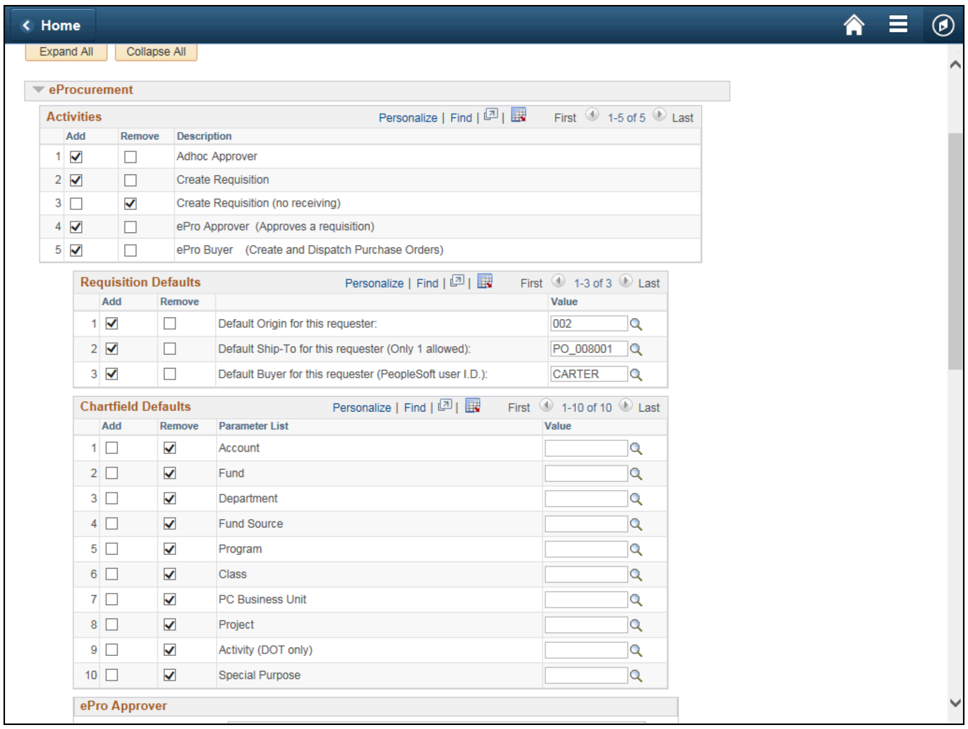
Step	Action
48.	This activity requires DOAS/TGM approval. Click the **OK** button. 



Step	Action
49.	We are finished with adding and removing activities. Click the **Vertical** scrollbar to view the bottom of the page.



Step	Action
50.	Always be sure to save your work. Click the **Save** button. 



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

Thank you!