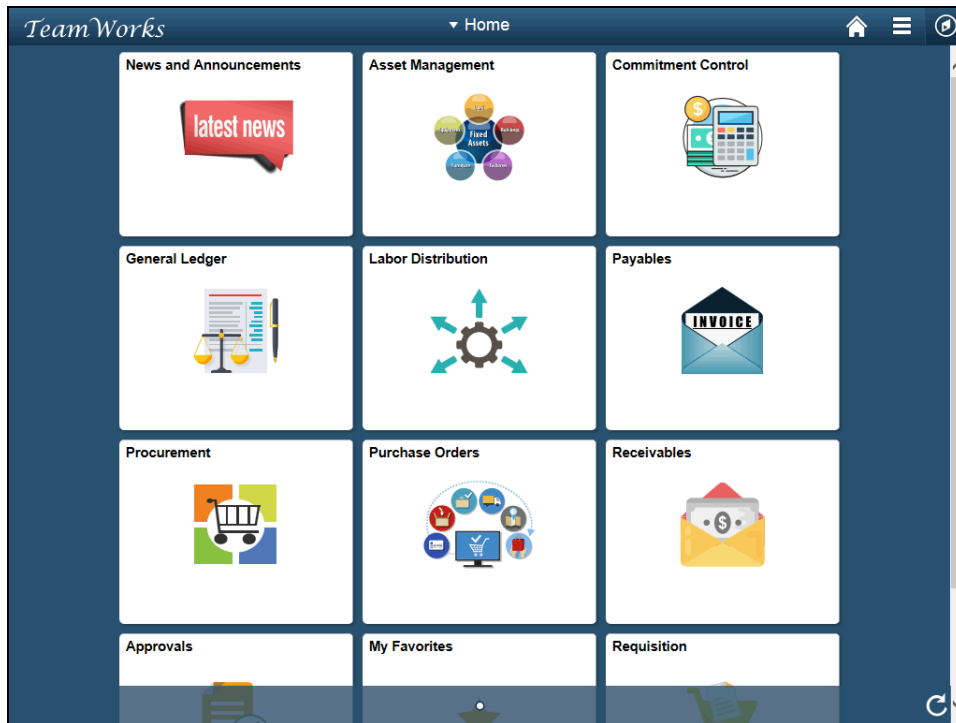

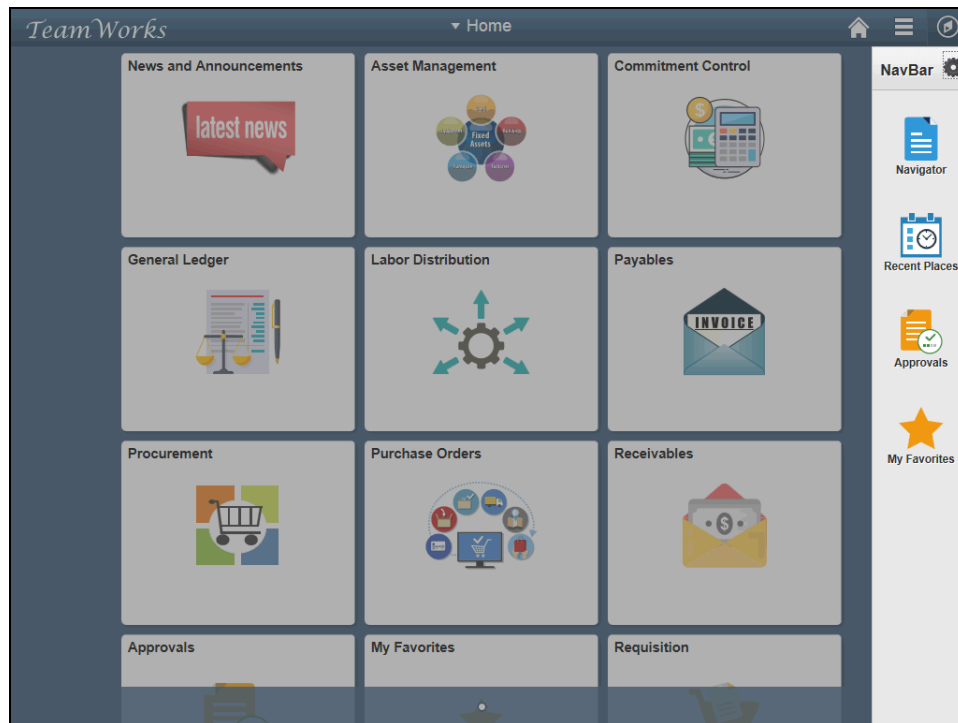



Changing Procurement Security Access

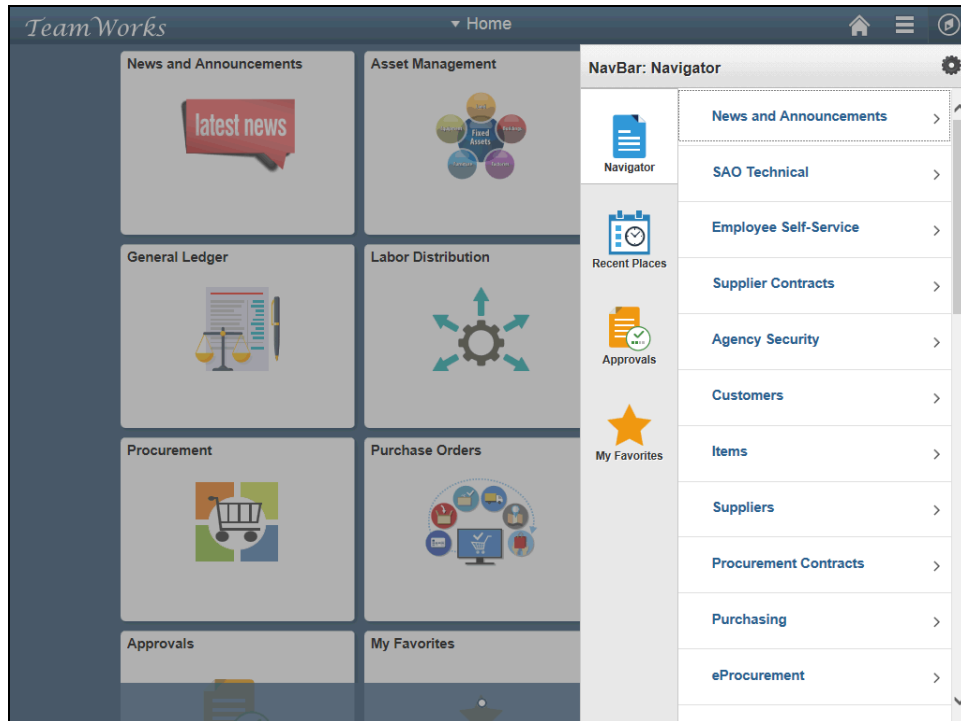
Below are the process steps to Change Procurement Security Access. As you are performing the task, use this document to be a Step-by-Step guide for completing this process. At the end, please click the link to complete a quick survey as to the usefulness of this document.



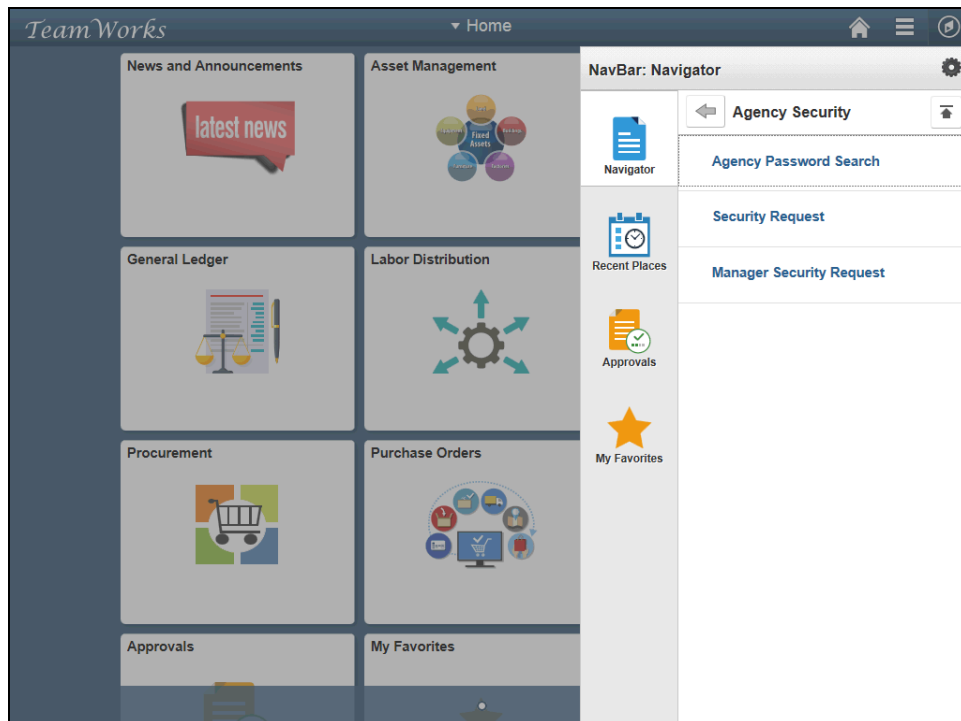
Step	Action
1.	<p>Begin by navigating to the Manager Security Request page.</p> <p>Note: This simulation is an example of a transaction. When entering a transaction in the live TeamWorks Financials system, please select all values and options based on agency policy, the paperwork on hand and the current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



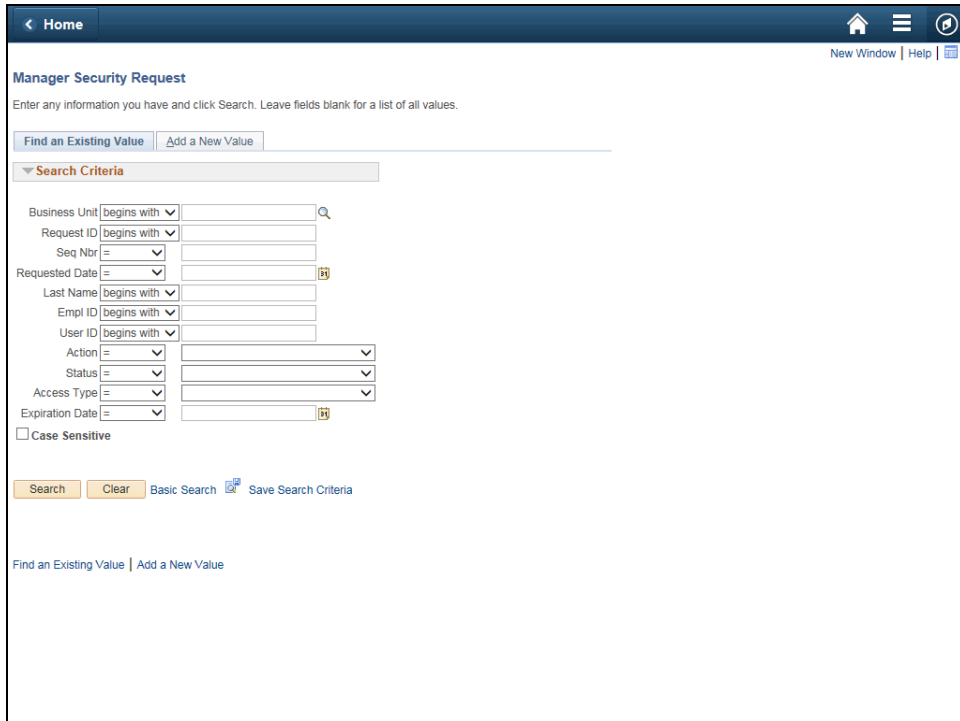
Step	Action
2.	Click the Navigator icon. <div style="text-align: center; margin-top: 10px;">  <p>Navigator</p> </div>



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



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



Home

Manager Security Request

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

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 [=] []

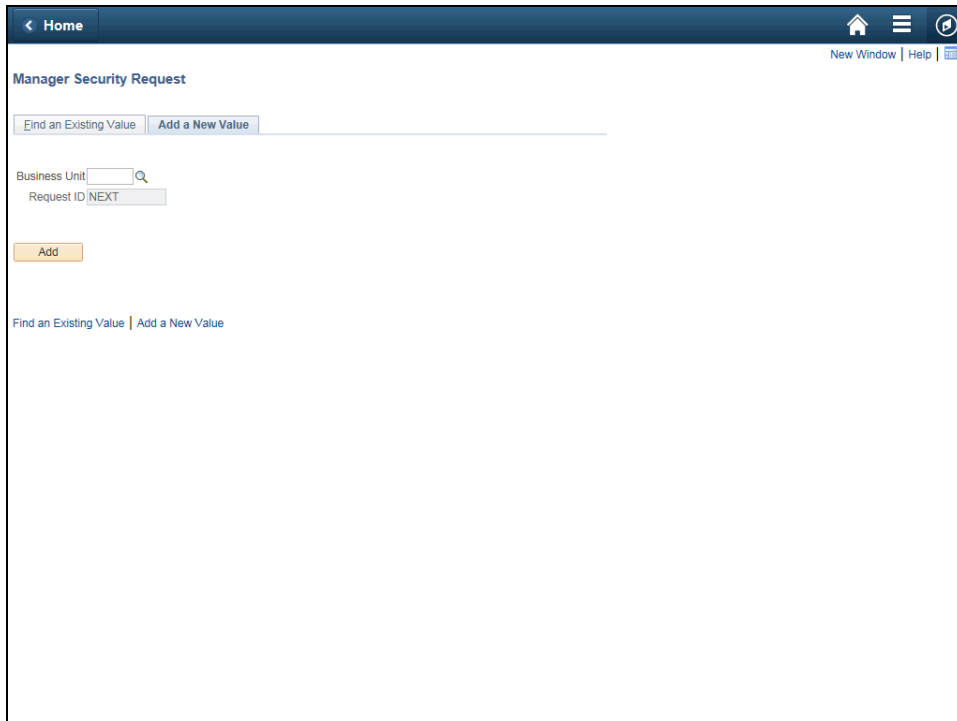
Expiration Date [=] []

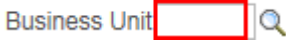
Case Sensitive

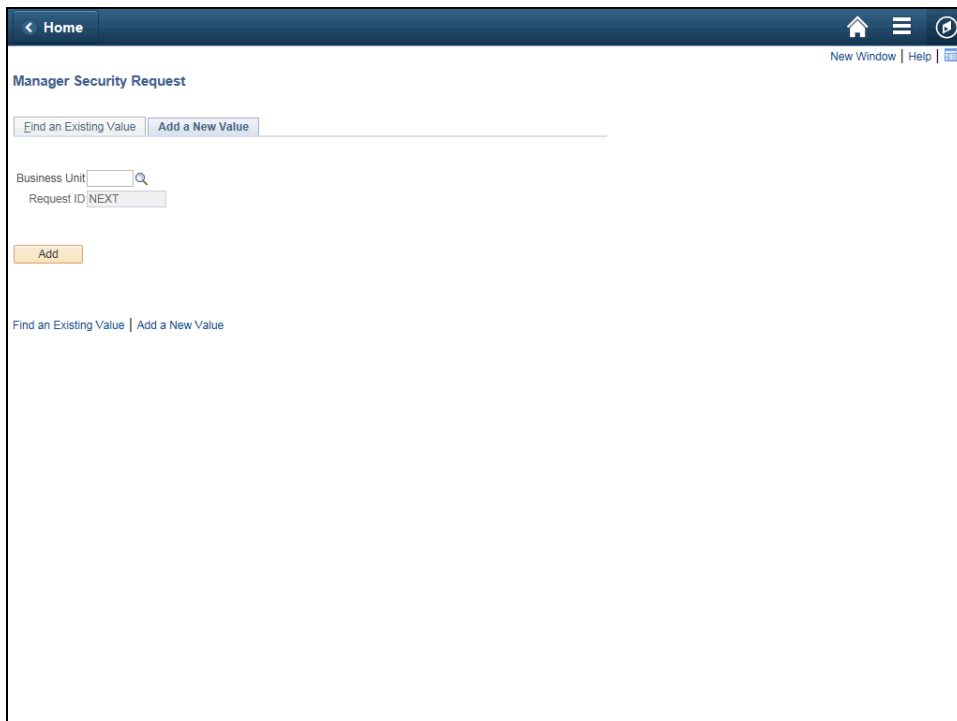
Search | Clear | Basic Search | Save Search Criteria

Find an Existing Value | Add a New Value

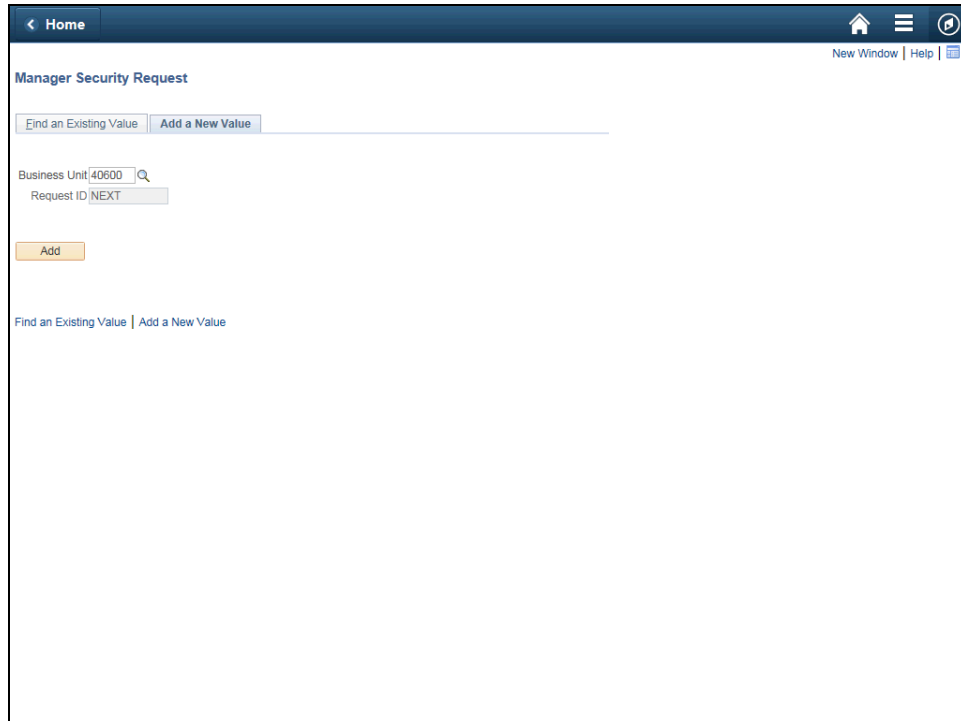
Step	Action
5.	For this example, a new security request will need to be created. Click the Add a New Value tab. Add a New Value

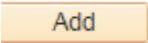


Step	Action
6.	Click in the Business Unit field. 



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



Step	Action
8.	Click the Add button. 

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: 08/03/2018
 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
9.	This is the initial page when entering a new Security Request.

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.

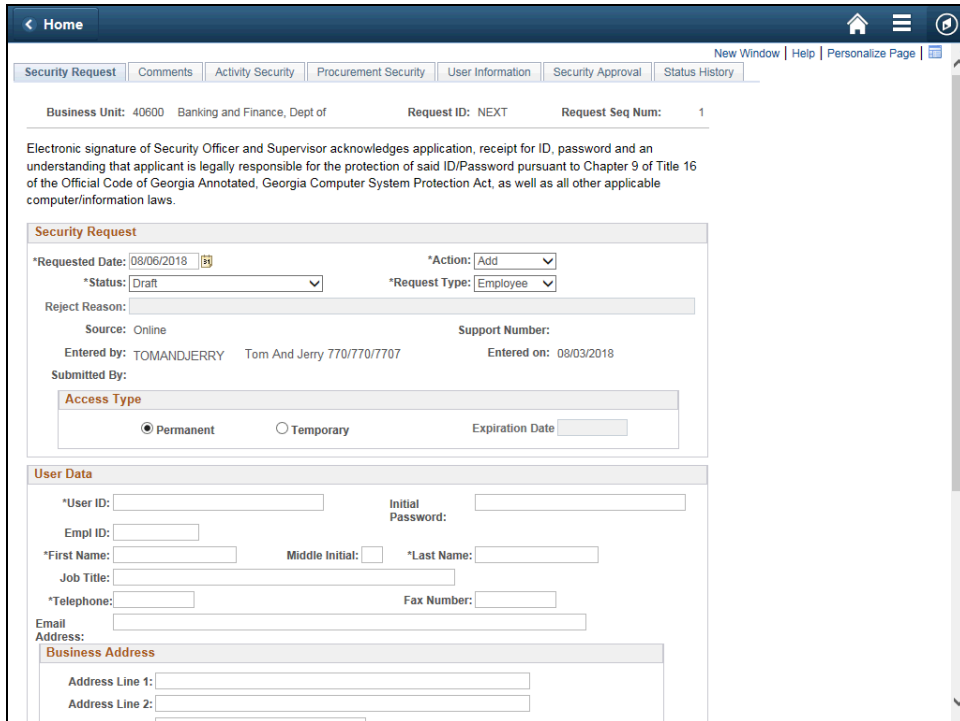
Security Request
 *Requested Date: 08/06/2018 *Action: Add
 *Status: Draft *Request Type: Employee
 Reject Reason: _____
 Source: Online Support Number: _____
 Entered by: TOMANDJERRY Tom And Jerry 770/770/7707 Entered on: 08/03/2018
 Submitted By: _____

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.	<p>In this exercise, a closer look will be taken at the Procurement Security tab.</p> <p>Click the User ID tab.</p> <p>*User ID: <input style="border: 2px solid red;" type="text"/></p>



The screenshot shows a web application interface for a Security Request. The 'User Information' tab is selected. The page displays the following information:

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

Below this is a disclaimer: "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."

The **Security Request** section includes:

- *Requested Date: 08/06/2018
- *Action: Add
- *Status: Draft
- *Request Type: Employee
- Reject Reason: (empty)
- Source: Online
- Support Number: (empty)
- Entered by: TOMANDJERRY Tom And Jerry 770/770/7707
- Entered on: 08/03/2018
- Submitted By: (empty)

The **Access Type** section includes:

- Permanent
- Temporary
- Expiration Date: (empty)

The **User Data** section includes several input fields:

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

The **Business Address** section includes:

- Address Line 1: (empty)
- Address Line 2: (empty)

Step	Action
11.	<p>Enter the appropriate information into the User ID field.</p> <p>For this example, type HHENDERSON.</p>

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: 08/03/2018
 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
12.	Press [Tab] .

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: Change
 *Status: Draft *Request Type: Employee

Reject Reason:
 Source: Online Support Number:
 Entered by: TOMANDJERRY
 Submitted By:

Access Type

Permanent Temporary Expiration Date: 01/01/1900

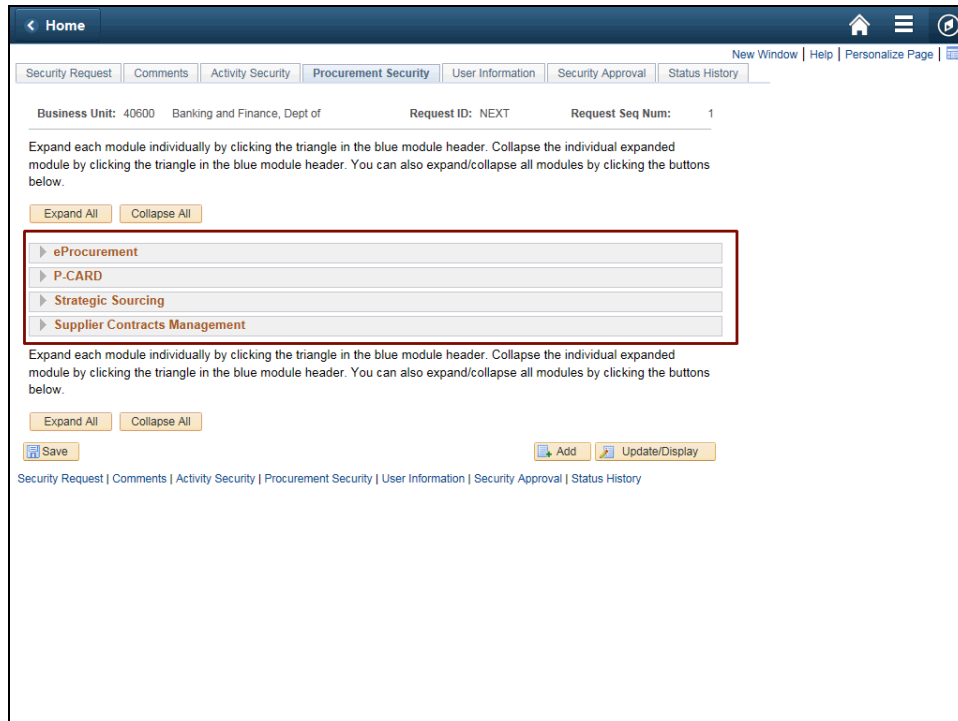
User Data

*User ID: HHENDERSON Initial Password:
 Empl ID: 002002002
 *First Name: Harry Middle Initial: *Last Name: Henderson
 Job Title: MG2: Accountant/Financial
 *Telephone: 404/404-4044 Fax Number: 127/127-1271
 Email Address: hhenderson@anywhereus.ga.gov
Business Address
 Address Line 1: 123 Movie Rd
 Address Line 2:

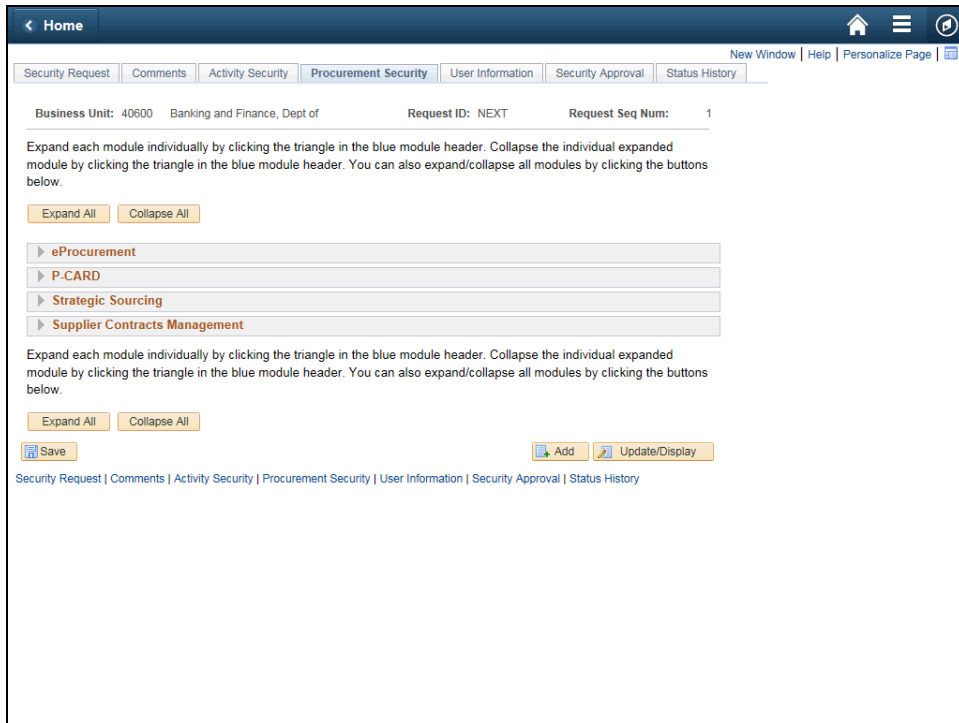
Message
 Warning -- A completed request exists for this user and will be copied into this request. (29999,30)
 OK

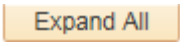
Step	Action
13.	<p>Note the warning message before preceding with the security request.</p> <p>Click the OK tab.</p> <div style="border: 1px solid black; padding: 5px;"> <p>Message</p> <p>Warning -- A completed request exists for this user and will be copied into this request. (29999,30)</p> <p style="text-align: center;">OK</p> </div>

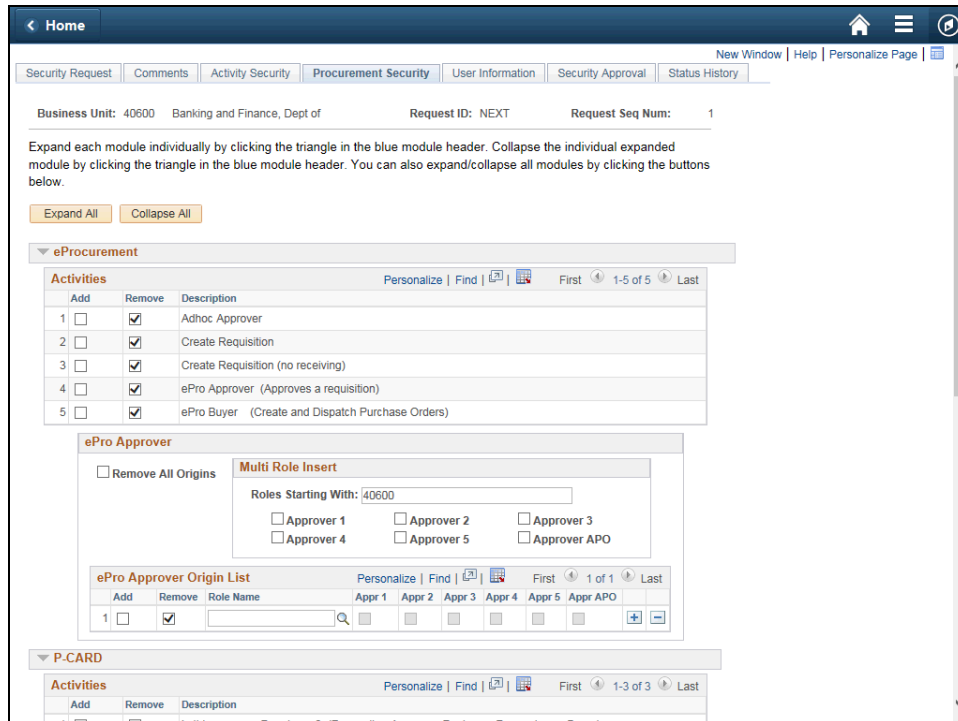
Step	Action
14.	<p>Click the Procurement Security tab.</p> <div style="border: 1px solid black; padding: 5px;"> <p>Procurement Security</p> </div>



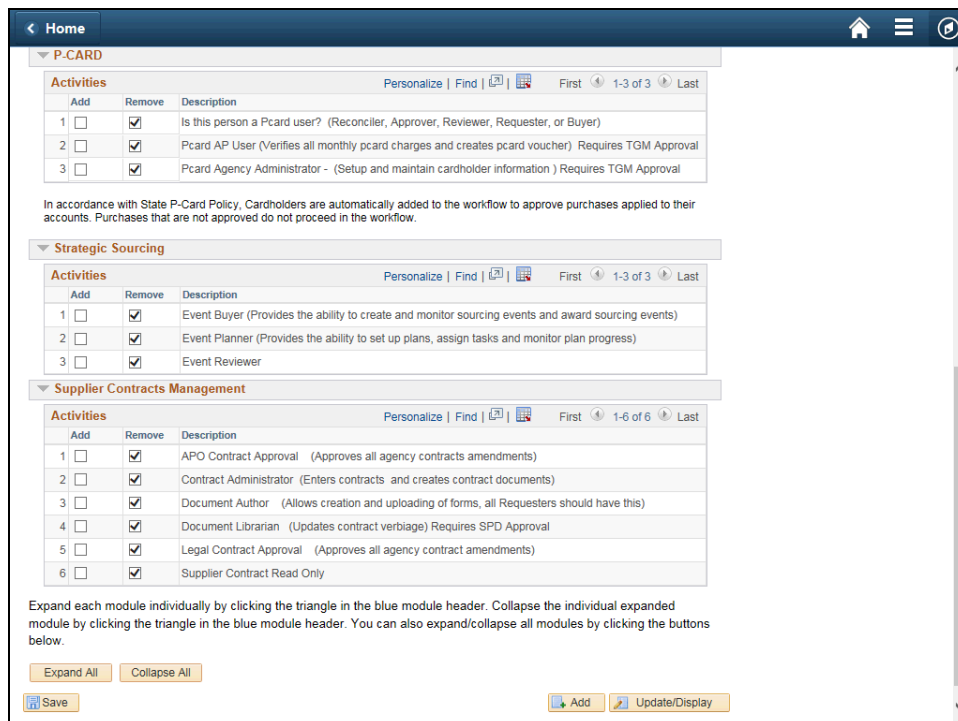
Step	Action
15.	<p>This is the Procurement Security page. This page allows the manager to specify TGM procurement roles access for employees and contractors. Access can be added or removed.</p> <p>To add access, click the Add button. To remove access, click the Remove button</p>

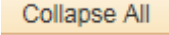


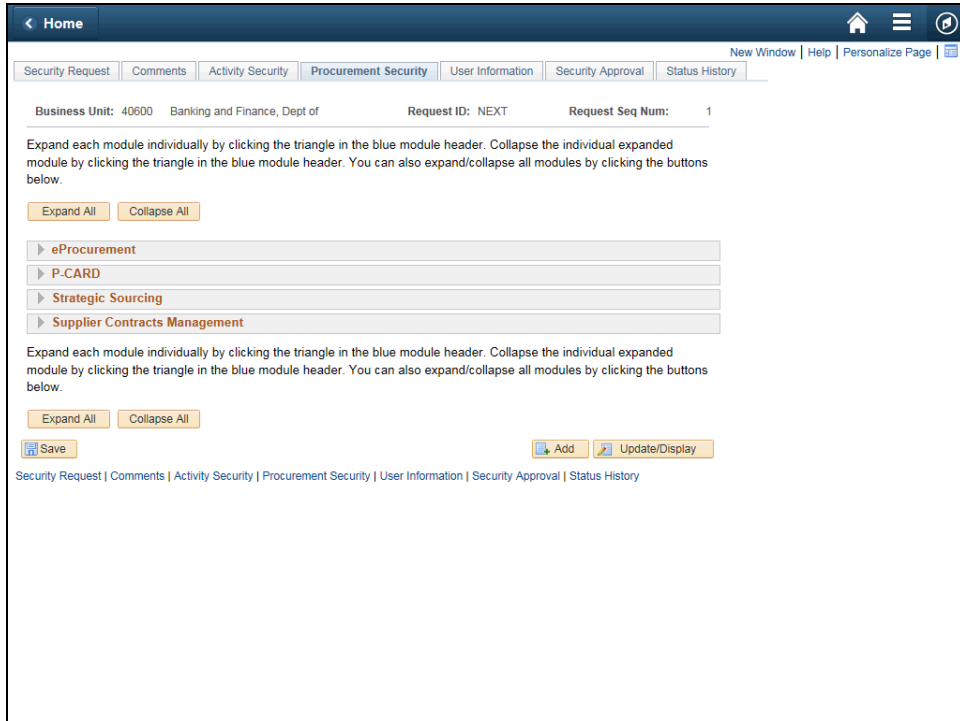
Step	Action
16.	<p>Currently, the various modules are not expanded. If the modules need to all be viewed simultaneously, there is an Expand All button.</p> <p>Click the Expand All button.</p> 

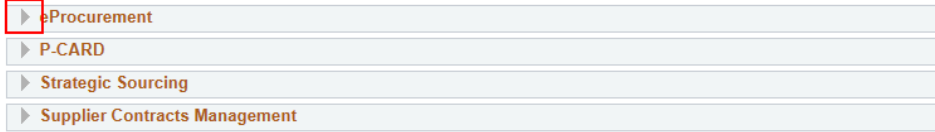


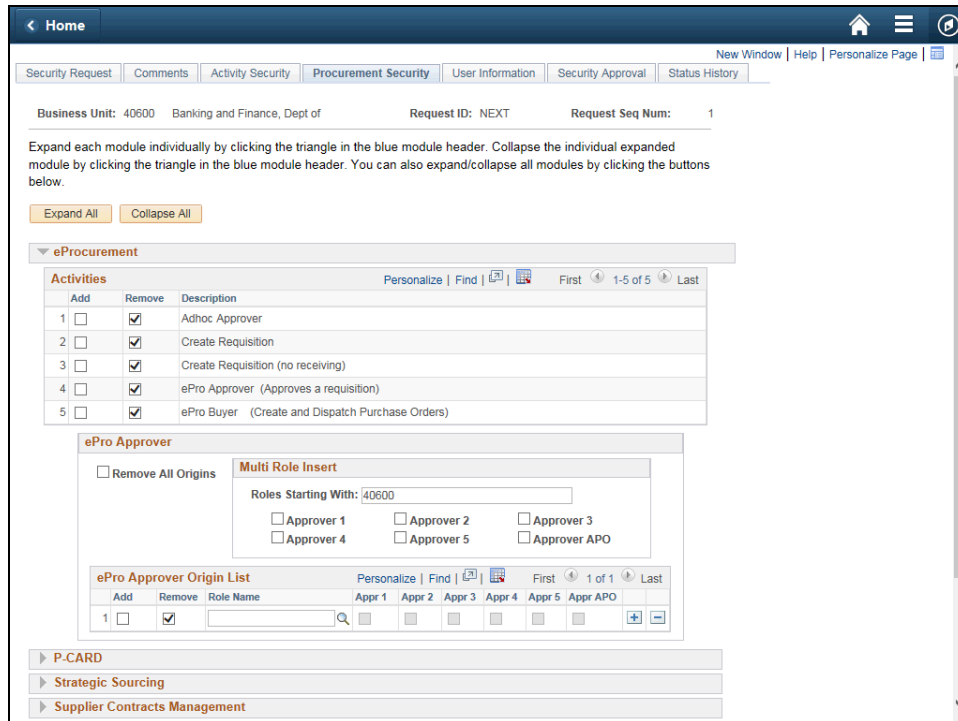
Step	Action
17.	<p>Notice all of the modules are now expanded.</p> <p>Click the Vertical scrollbar to view the bottom of the page.</p>



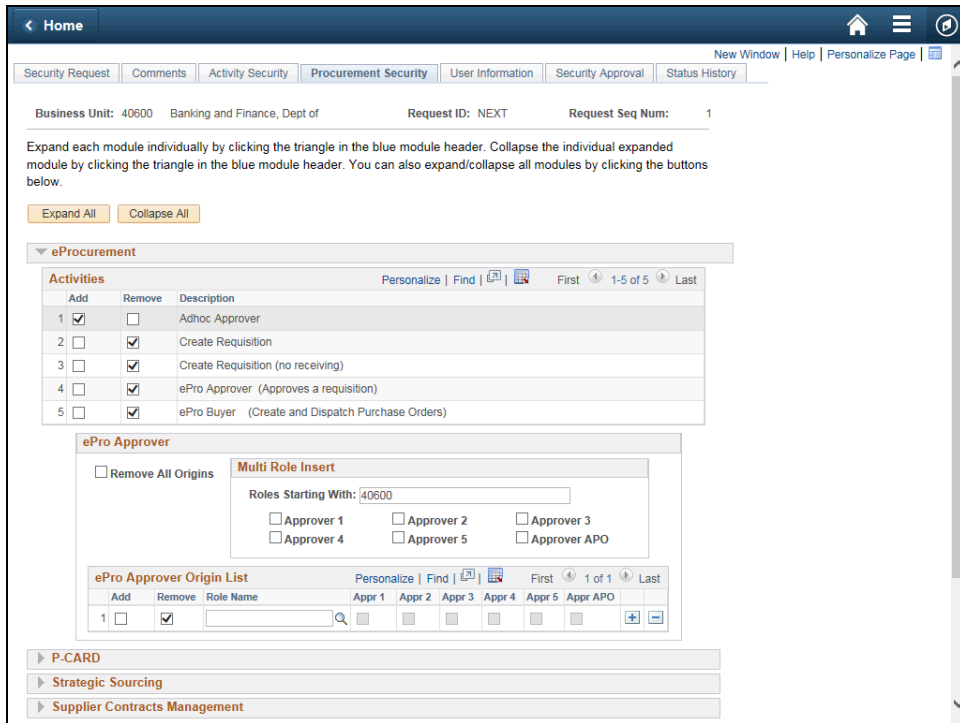
Step	Action
18.	<p>Instead of closing each module individually, there is a Collapse All button that can close each module.</p> <p>Click the Collapse All button.</p> 



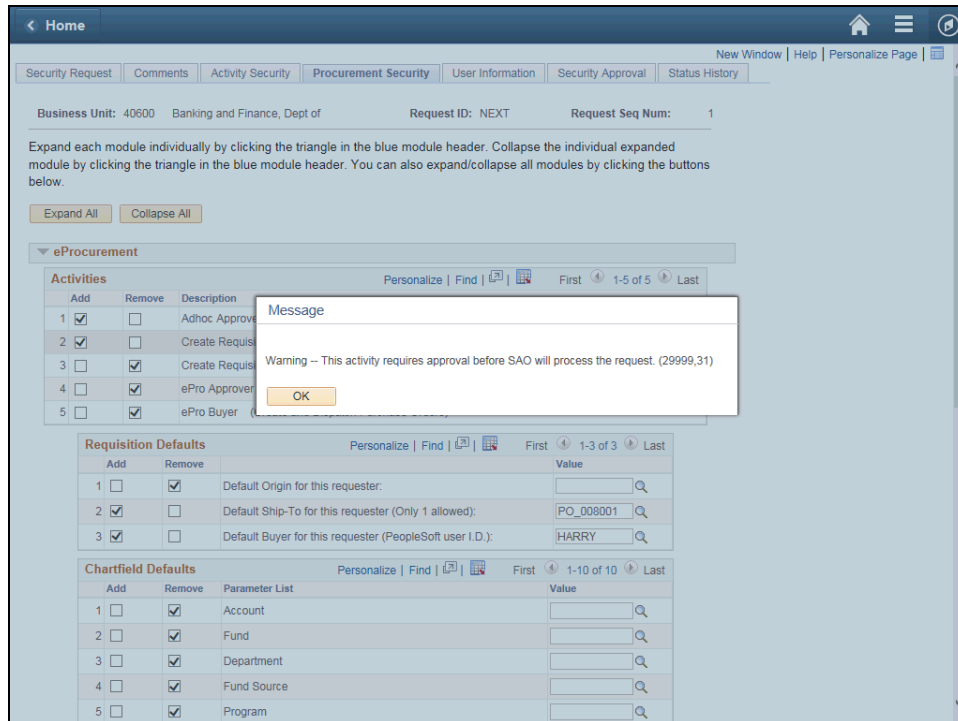
Step	Action
19.	<p>Now, let's look at the eProcurement module. Keep in mind that some access will require further information or may be associated with other pages.</p> <p>Click the Expand section button.</p> 



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



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



Step	Action
22.	<p>Notice this is an activity requiring further approval.</p> <p>Click the OK button.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>Message</p> <hr/> <p>Warning -- This activity requires approval before SAO will process the request. (29999,31)</p> <p style="text-align: center;">OK</p> </div>

Home

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

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

eProcurement

Activities Personalize | Find | First 1-5 of 5 Last

Add	Remove	Description
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Adhoc Approver
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Create Requisition
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Create Requisition (no receiving)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ePro Approver (Approves a requisition)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ePro Buyer (Create and Dispatch Purchase Orders)

Requisition Defaults Personalize | Find | First 1-3 of 3 Last

Add	Remove	Value
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Default Origin for this requester:
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Ship-To for this requester (Only 1 allowed): PO_008001
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Buyer for this requester (PeopleSoft user I.D.): HARRY

Chartfield Defaults Personalize | Find | First 1-10 of 10 Last

Add	Remove	Parameter List	Value
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Account	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fund	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Department	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fund Source	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Program	

Step	Action
23.	<p>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.</p> <p>Click the Add button.</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: NEXT 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

eProcurement

Activities Personalize | Find | [?] [] First 1-5 of 5 Last

Add	Remove	Description
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Adhoc Approver
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Create Requisition
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Create Requisition (no receiving)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ePro Approver (Approves a requisition)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ePro Buyer (Create and Dispatch Purchase Orders)

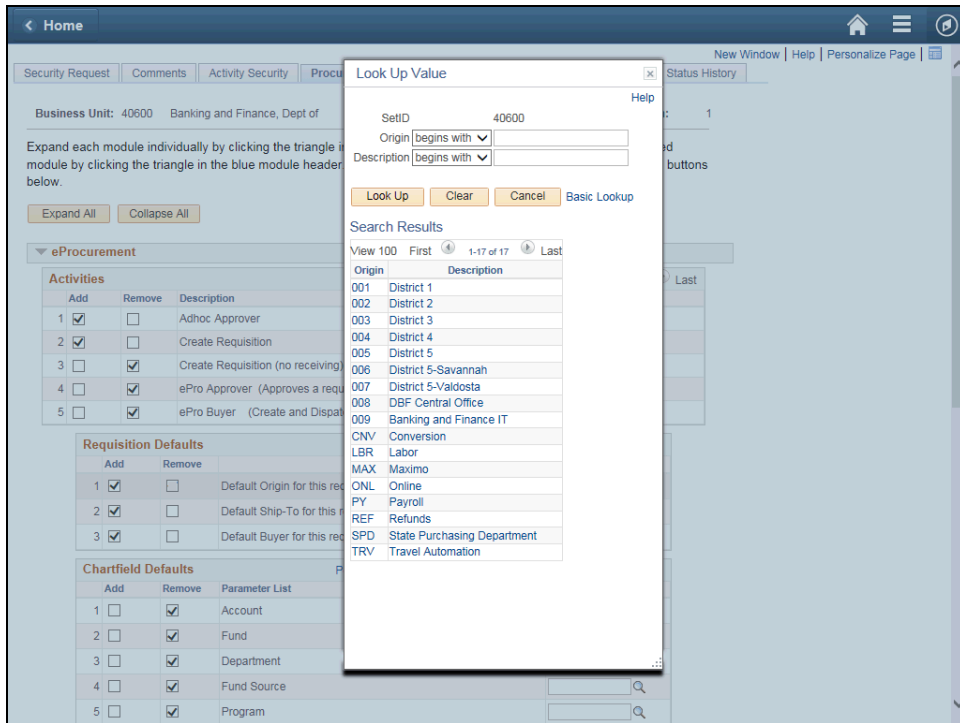
Requisition Defaults Personalize | Find | [?] [] First 1-3 of 3 Last


Add	Remove	Value
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Origin for this requester:
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Ship-To for this requester (Only 1 allowed): PO_008001
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Buyer for this requester (PeopleSoft user I.D.): HARRY

Chartfield Defaults Personalize | Find | [?] [] First 1-10 of 10 Last

Add	Remove	Parameter List	Value
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Account	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fund	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Department	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fund Source	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Program	

Step	Action												
24.	<p>Click the Look up Value button for the Default Origin.</p> <p>Requisition Defaults Personalize Find [?] [] First 1-3 of 3 Last</p> <table border="1"> <thead> <tr> <th>Add</th> <th>Remove</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>Default Origin for this requester: [] Look up Value</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>Default Ship-To for this requester (Only 1 allowed): PO_008001</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>Default Buyer for this requester (PeopleSoft user I.D.): HARRY</td> </tr> </tbody> </table>	Add	Remove	Value	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Origin for this requester: [] Look up Value	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Ship-To for this requester (Only 1 allowed): PO_008001	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Buyer for this requester (PeopleSoft user I.D.): HARRY
Add	Remove	Value											
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Origin for this requester: [] Look up Value											
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Ship-To for this requester (Only 1 allowed): PO_008001											
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Buyer for this requester (PeopleSoft user I.D.): HARRY											



Step	Action
25.	<p>The Look Up Value gives a list of Origins to choose from.</p> <p>Click the 002 - District 2 link.</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: NEXT 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

eProcurement

Activities Personalize | Find | First 1-5 of 5 Last

Add	Remove	Description
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Adhoc Approver
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Create Requisition
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Create Requisition (no receiving)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ePro Approver (Approves a requisition)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ePro Buyer (Create and Dispatch Purchase Orders)

Requisition Defaults Personalize | Find | First 1-3 of 3 Last

Add	Remove	Value
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Origin for this requester: 002
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Ship-To for this requester (Only 1 allowed): PO_008001
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Buyer for this requester (PeopleSoft user I.D.): HARRY

Chartfield Defaults Personalize | Find | First 1-10 of 10 Last

Add	Remove	Parameter List	Value
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Account	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fund	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Department	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fund Source	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Program	

Step	Action
26.	<p>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.</p> <p>For this example, accept the current Default Ship-To 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: NEXT 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

eProcurement

Activities Personalize | Find | [?] [x] First 1-5 of 5 Last

Add	Remove	Description
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Adhoc Approver
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Create Requisition
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Create Requisition (no receiving)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ePro Approver (Approves a requisition)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ePro Buyer (Create and Dispatch Purchase Orders)

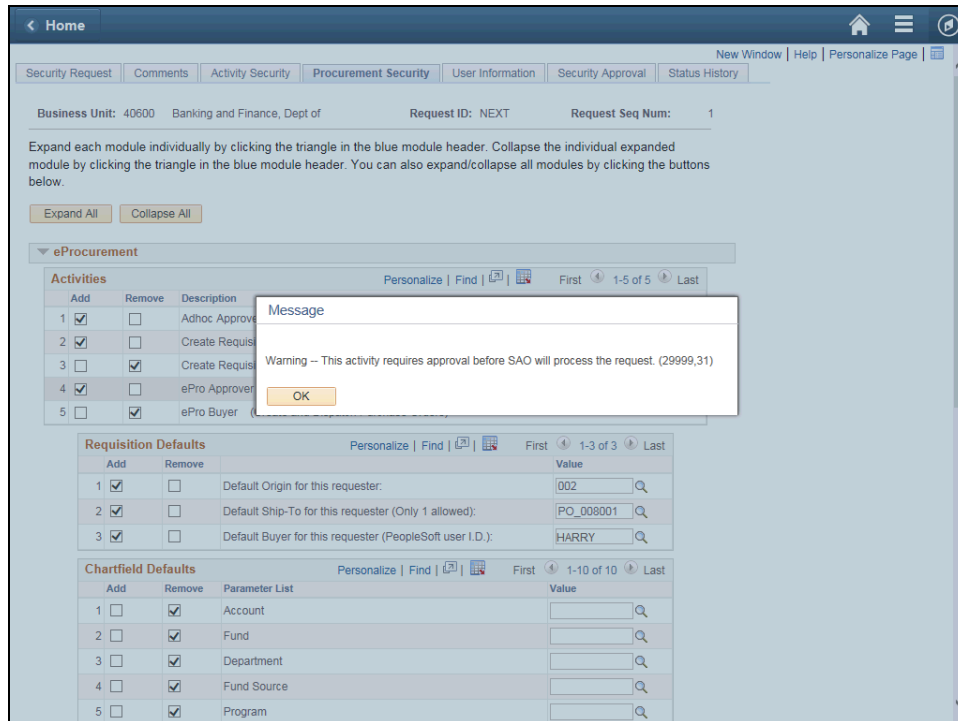
Requisition Defaults Personalize | Find | [?] [x] First 1-3 of 3 Last

Add	Remove	Value
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Origin for this requester: 002
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Ship-To for this requester (Only 1 allowed): PO_008001
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Buyer for this requester (PeopleSoft user I.D.): HARRY

Chartfield Defaults Personalize | Find | [?] [x] First 1-10 of 10 Last

Add	Remove	Parameter List	Value
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Account	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fund	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Department	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fund Source	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Program	

Step	Action																		
27.	<p>Now let's add the ePro Approver activity. This activity will require further information.</p> <p>Click the Add option.</p> <p>eProcurement</p> <p>Activities Personalize Find [?] [x] First 1-5 of 5 Last</p> <table border="1"> <thead> <tr> <th>Add</th> <th>Remove</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>Adhoc Approver</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>Create Requisition</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td>Create Requisition (no receiving)</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td>ePro Approver (Approves a requisition)</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td>ePro Buyer (Create and Dispatch Purchase Orders)</td> </tr> </tbody> </table>	Add	Remove	Description	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Adhoc Approver	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Create Requisition	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Create Requisition (no receiving)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	ePro Approver (Approves a requisition)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	ePro Buyer (Create and Dispatch Purchase Orders)
Add	Remove	Description																	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Adhoc Approver																	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Create Requisition																	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Create Requisition (no receiving)																	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ePro Approver (Approves a requisition)																	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ePro Buyer (Create and Dispatch Purchase Orders)																	



Step	Action
28.	<p>Notice that this activity requires further approval.</p> <p>Click the OK button.</p> <div data-bbox="354 1136 1263 1360" style="border: 1px solid gray; padding: 5px;"> <p>Message</p> <p>Warning -- This activity requires approval before SAO will process the request. (29999,31)</p> <p style="text-align: center;">OK</p> </div>

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

eProcurement

Activities Personalize | Find | [?] [x] First 1-5 of 5 Last

Add	Remove	Description
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Adhoc Approver
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Create Requisition
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Create Requisition (no receiving)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	ePro Approver (Approves a requisition)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ePro Buyer (Create and Dispatch Purchase Orders)

Requisition Defaults Personalize | Find | [?] [x] First 1-3 of 3 Last

Add	Remove	Value
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Origin for this requester: 002
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Ship-To for this requester (Only 1 allowed): PO_008001
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Buyer for this requester (PeopleSoft user I.D.): HARRY

Chartfield Defaults Personalize | Find | [?] [x] First 1-10 of 10 Last

Add	Remove	Parameter List	Value
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Account	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fund	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Department	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fund Source	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Program	

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

ePro Approver

Remove All Origins

Multi Role Insert

Roles Starting With: 40600

Approver 1 Approver 2 Approver 3
 Approver 4 Approver 5 Approver APO

ePro Approver Origin List Personalize | Find | [?] [x] First 1 of 1 Last

Add	Remove	Role Name	Appr 1	Appr 2	Appr 3	Appr 4	Appr 5	Appr APO
<input type="checkbox"/>	<input checked="" type="checkbox"/>							


P-CARD
Strategic Sourcing
Supplier Contracts Management

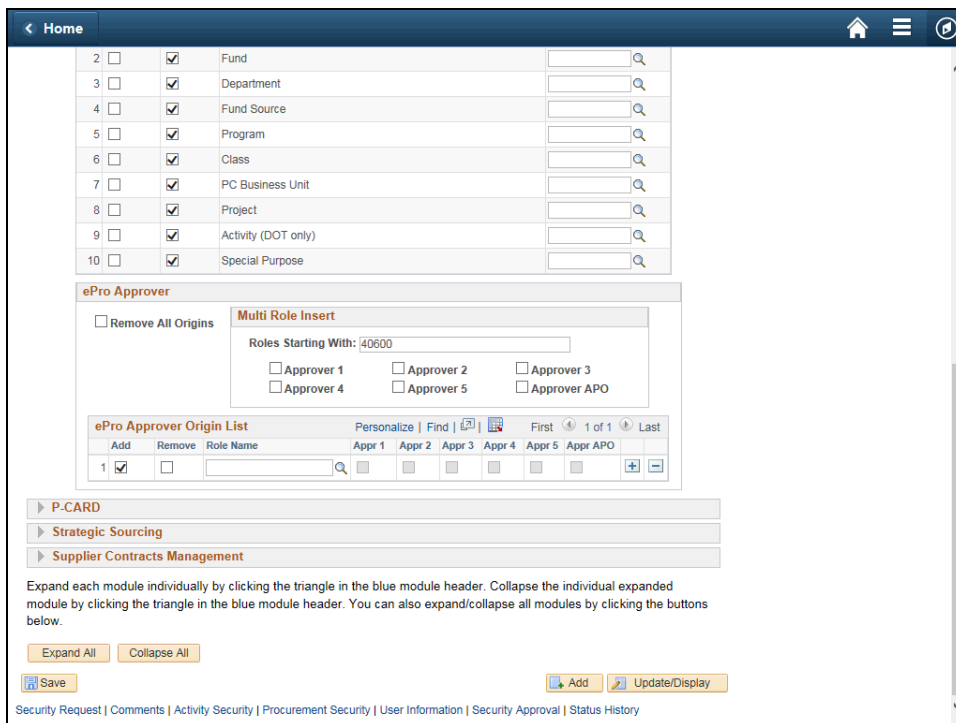
Expand each module individually by clicking the triangle in the blue module header. Collapse the individual expanded module by clicking the triangle in the blue module header. You can also expand/collapse all modules by clicking the buttons below.

Expand All Collapse All

Save Add Update/Display

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

Step	Action
30.	<p>With the ePro Approver, you must provide the workflow roles which describe the origin code and level of approval for that origin code.</p> <p>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.</p> <p>Click the Add option.</p> 

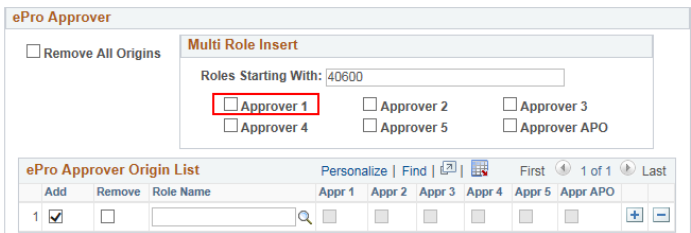


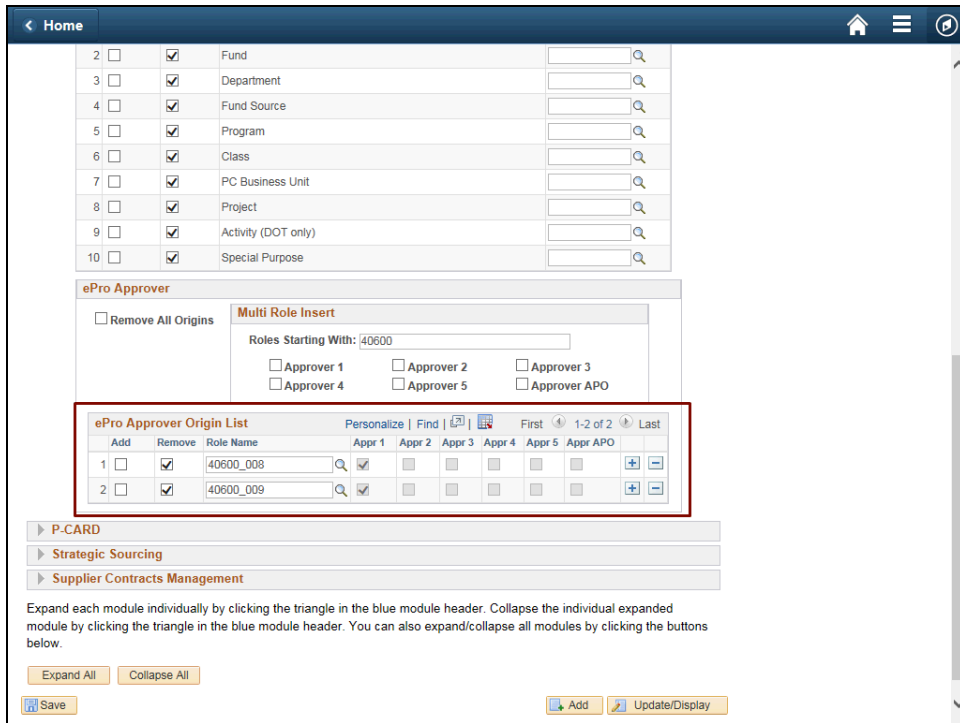
The screenshot shows the ePro Approver interface. At the top, there is a navigation bar with a home icon and a menu icon. Below the navigation bar is a list of origin codes with checkboxes for selection:

2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fund	<input type="text"/>	<input type="text"/>
3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Department	<input type="text"/>	<input type="text"/>
4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fund Source	<input type="text"/>	<input type="text"/>
5	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Program	<input type="text"/>	<input type="text"/>
6	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Class	<input type="text"/>	<input type="text"/>
7	<input type="checkbox"/>	<input checked="" type="checkbox"/>	PC Business Unit	<input type="text"/>	<input type="text"/>
8	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Project	<input type="text"/>	<input type="text"/>
9	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Activity (DOT only)	<input type="text"/>	<input type="text"/>
10	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Special Purpose	<input type="text"/>	<input type="text"/>

Below this list is the 'ePro Approver' section, which includes a 'Multi Role Insert' dialog box. The dialog box has a 'Remove All Origins' checkbox and a 'Roles Starting With' field containing '40600'. There are checkboxes for 'Approver 1' through 'Approver 5' and 'Approver APO'. Below the dialog box is a smaller version of the 'ePro Approver Origin List' table, where the 'Add' button is checked.

At the bottom of the interface, there are several expandable sections: 'P-CARD', 'Strategic Sourcing', and 'Supplier Contracts Management'. Below these sections is a text block explaining how to expand and collapse modules, followed by 'Expand All' and 'Collapse All' buttons. At the very bottom, there are 'Save', 'Add', and 'Update/Display' buttons, and a footer with navigation links: 'Security Request | Comments | Activity Security | Procurement Security | User Information | Security Approval | Status History'.

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



The screenshot shows the 'ePro Approver Origin List' table with the following data:

Add	Remove	Role Name	Appr 1	Appr 2	Appr 3	Appr 4	Appr 5	Appr APO
<input checked="" type="checkbox"/>	<input type="checkbox"/>	40600_008	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	40600_009	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

The screenshot shows the 'ePro Approver' interface. At the top, there is a list of categories with checkboxes: Fund, Department, Fund Source, Program, Class, PC Business Unit, Project, Activity (DOT only), and Special Purpose. Below this is the 'ePro Approver' section, which includes a 'Multi Role Insert' area with a 'Roles Starting With' field set to '40600' and checkboxes for Approver 1 through Approver APO. The main section is the 'ePro Approver Origin List' table, which has columns for 'Add', 'Remove', 'Role Name', and five approver columns (Appr 1-5) plus an 'Appr APO' column. The table contains two rows: one for role '40600_008' and another for '40600_009'. Below the table are expand/collapse buttons and a 'Save' button.

Step	Action
33.	<p>We will now Add the appropriate origin role.</p> <p>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.</p> <p>Click the Add option.</p>

< Home

2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fund		
3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Department		
4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fund Source		
5	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Program		
6	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Class		
7	<input type="checkbox"/>	<input checked="" type="checkbox"/>	PC Business Unit		
8	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Project		
9	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Activity (DOT only)		
10	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Special Purpose		

ePro Approver

Remove All Origins

Multi Role Insert

Roles Starting With: 40600

Approver 1 Approver 2 Approver 3
 Approver 4 Approver 5 Approver APO

ePro Approver Origin List

Add	Remove	Role Name	Appr 1	Appr 2	Appr 3	Appr 4	Appr 5	Appr APO	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	40600_008	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	40600_009	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Step	Action
34.	<p>Now, let's add the ePro Buyer activity.</p> <p>Click the Vertical scrollbar to return to the top of the page.</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: NEXT 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.

eProcurement

Activities


Add	Remove	Description
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Adhoc Approver
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Create Requisition
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Create Requisition (no receiving)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	ePro Approver (Approves a requisition)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ePro Buyer (Create and Dispatch Purchase Orders)

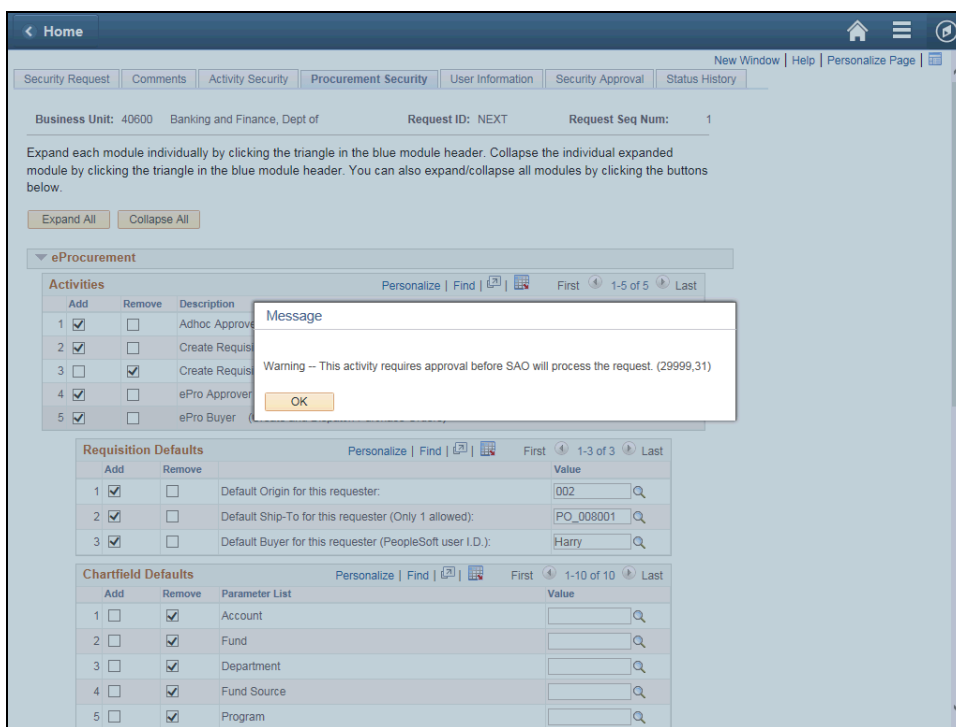
Requisition Defaults

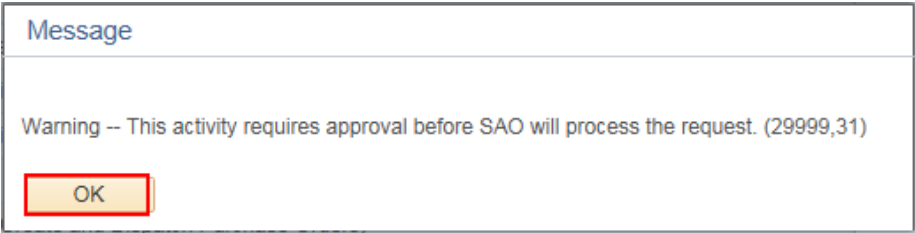
Add	Remove	Value
<input checked="" type="checkbox"/>	<input type="checkbox"/>	002
<input checked="" type="checkbox"/>	<input type="checkbox"/>	PO_008001
<input checked="" type="checkbox"/>	<input type="checkbox"/>	HARRY

Chartfield Defaults

Add	Remove	Parameter List	Value
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Account	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fund	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Department	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fund Source	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Program	

Step	Action
35.	<p>Now, let's add the ePro Buyer activity.</p> <p>Click the Add option.</p> 



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

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

eProcurement

Activities Personalize | Find | [?] [] First 1-5 of 5 Last

Add	Remove	Description
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Adhoc Approver
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Create Requisition
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Create Requisition (no receiving)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	ePro Approver (Approves a requisition)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	ePro Buyer (Create and Dispatch Purchase Orders)

Requisition Defaults Personalize | Find | [?] [] First 1-3 of 3 Last

Add	Remove	Value
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Origin for this requester: 002
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Ship-To for this requester (Only 1 allowed): PO_008001
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Default Buyer for this requester (PeopleSoft user I.D.): HARRY

Chartfield Defaults Personalize | Find | [?] [] First 1-10 of 10 Last

Add	Remove	Parameter List	Value
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Account	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fund	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Department	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fund Source	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Program	

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

3 Department

4 Fund Source

5 Program

6 Class

7 PC Business Unit

8 Project

9 Activity (DOT only)

10 Special Purpose

ePro Approver

Remove All Origins

Multi Role Insert

Roles Starting With: 40600

Approver 1 Approver 2 Approver 3
 Approver 4 Approver 5 Approver APO

ePro Approver Origin List Personalize | Find | [?] [] First 1-2 of 2 Last

Add	Remove	Role Name	Appr 1	Appr 2	Appr 3	Appr 4	Appr 5	Appr APO
<input type="checkbox"/>	<input checked="" type="checkbox"/>	40600_008	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	40600_009	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

▶ P.CARD

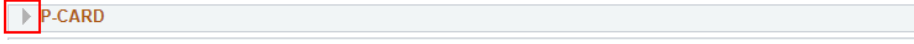
▶ Strategic Sourcing

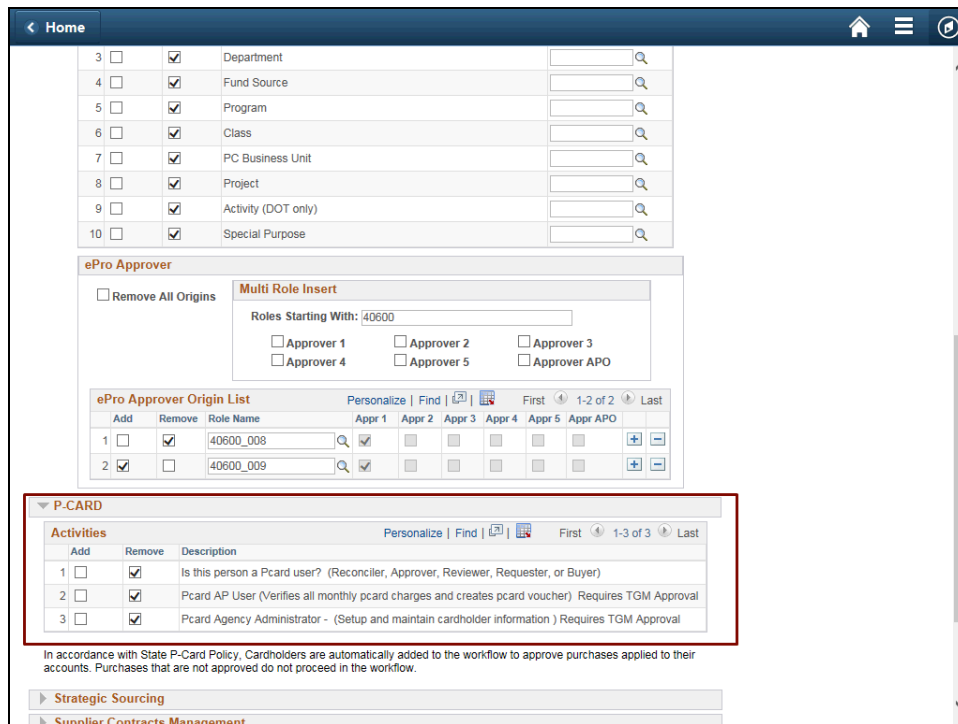
▶ Supplier Contracts Management

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

Save Add Update/Display

Step	Action
38.	<p>Let's look at the P-Card module.</p> <p>Click the Expand section button.</p> 



ePro Approver

Remove All Origins

Multi Role Insert

Roles Starting With: 40600

Approver 1 Approver 2 Approver 3
 Approver 4 Approver 5 Approver APO

ePro Approver Origin List Personalize | Find | [?] | [] First 1-2 of 2 Last

Add	Remove	Role Name	Appr 1	Appr 2	Appr 3	Appr 4	Appr 5	Appr APO
<input type="checkbox"/>	<input checked="" type="checkbox"/>	40600_008	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	40600_009	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

P-CARD

Activities Personalize | Find | [?] | [] First 1-3 of 3 Last

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Is this person a Pcard user? (Reconciler, Approver, Reviewer, Requester, or Buyer)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Pcard AP User (Verifies all monthly pcard charges and creates pcard voucher) Requires TGM Approval
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Pcard Agency Administrator - (Setup and maintain cardholder information) Requires TGM Approval

In accordance with State P-Card Policy, Cardholders are automatically added to the workflow to approve purchases applied to their accounts. Purchases that are not approved do not proceed in the workflow.

▶ Strategic Sourcing

▶ Supplier Contracts Management

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

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3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Department	<input type="text"/>	🔍
4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fund Source	<input type="text"/>	🔍
5	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Program	<input type="text"/>	🔍
6	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Class	<input type="text"/>	🔍
7	<input type="checkbox"/>	<input checked="" type="checkbox"/>	PC Business Unit	<input type="text"/>	🔍
8	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Project	<input type="text"/>	🔍
9	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Activity (DOT only)	<input type="text"/>	🔍
10	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Special Purpose	<input type="text"/>	🔍

ePro Approver

Remove All Origins

Multi Role Insert

Roles Starting With:

Approver 1 Approver 2 Approver 3
 Approver 4 Approver 5 Approver APO

ePro Approver Origin List		Personalize	Find	🔍	📄	First	1-2 of 2	Last
Add	Remove	Role Name	Appr 1	Appr 2	Appr 3	Appr 4	Appr 5	Appr APO
1	<input type="checkbox"/>	<input checked="" type="checkbox"/> 40600_008	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	<input checked="" type="checkbox"/>	<input type="checkbox"/> 40600_009	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

P-CARD

Activities			Personalize	Find	🔍	📄	First	1-3 of 3	Last
Add	Remove	Description							
1	<input type="checkbox"/>	<input checked="" type="checkbox"/> Is this person a Pcard user? (Reconciler, Approver, Reviewer, Requester, or Buyer)							
2	<input type="checkbox"/>	<input checked="" type="checkbox"/> Pcard AP User (Verifies all monthly pcard charges and creates pcard voucher) Requires TGM Approval							
3	<input type="checkbox"/>	<input checked="" type="checkbox"/> Pcard Agency Administrator - (Setup and maintain cardholder information) Requires TGM Approval							

In accordance with State P-Card Policy, Cardholders are automatically added to the workflow to approve purchases applied to their accounts. Purchases that are not approved do not proceed in the workflow.

▶ **Strategic Sourcing**

▶ **Supplier Contracts Management**

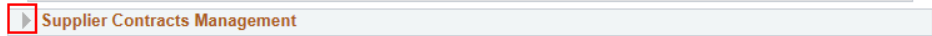
Step	Action
40.	<p>Let's look at the Strategic Sourcing module.</p> <p>Click the Expand section button.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> ▶ Strategic Sourcing </div>

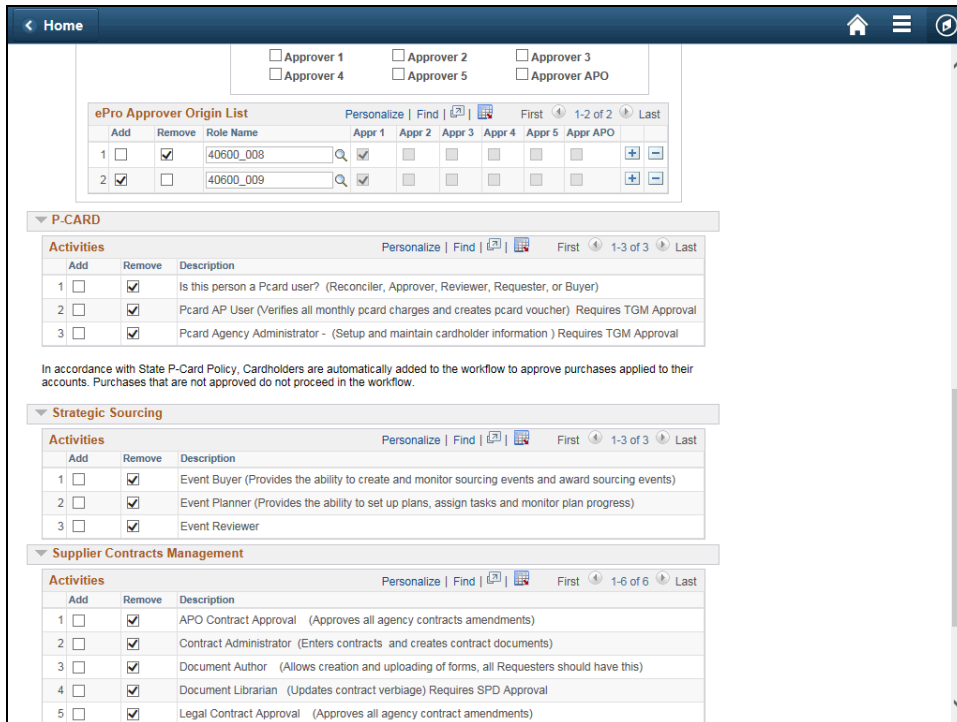
The screenshot shows a web application interface with a dark blue header containing a home icon, a menu icon, and a refresh icon. Below the header, there are several sections:

- Configuration List:** A table with 10 rows, each containing a checkbox, a checked checkbox, and a label (e.g., Department, Fund Source, Program, Class, PC Business Unit, Project, Activity (DOT only), Special Purpose). Each row has a search icon to its right.
- ePro Approver:** A section with a "Multi Role Insert" sub-section containing a "Roles Starting With: 40600" field and checkboxes for Approver 1 through Approver 5 and Approver APO. Below this is an "ePro Approver Origin List" table with columns for Add, Remove, Role Name, and five Approver columns (Appr 1-5, Appr APO).
- P-CARD:** A section with an "Activities" table containing three rows with checkboxes and descriptions related to P-card users and agency administrators.
- Strategic Sourcing:** A section with an "Activities" table containing three rows with checkboxes and descriptions related to Event Buyer, Event Planner, and Event Reviewer.

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

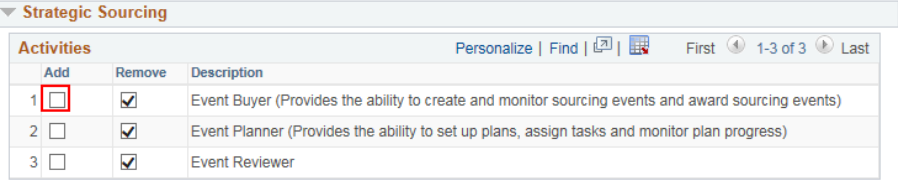
This screenshot shows the same interface as above, but with the **Supplier Contracts Management** section expanded. The "Supplier Contracts Management" section header is now visible, and below it, there is a "Supplier Contracts Management" section with a description: "Expand each module individually 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." Below this text are two buttons: "Expand All" and "Collapse All". At the bottom of the interface, there are "Save", "Add", and "Update/Display" buttons, and a footer with navigation links: "Security Request | Comments | Activity Security | Procurement Security | User Information | Security Approval | Status History".

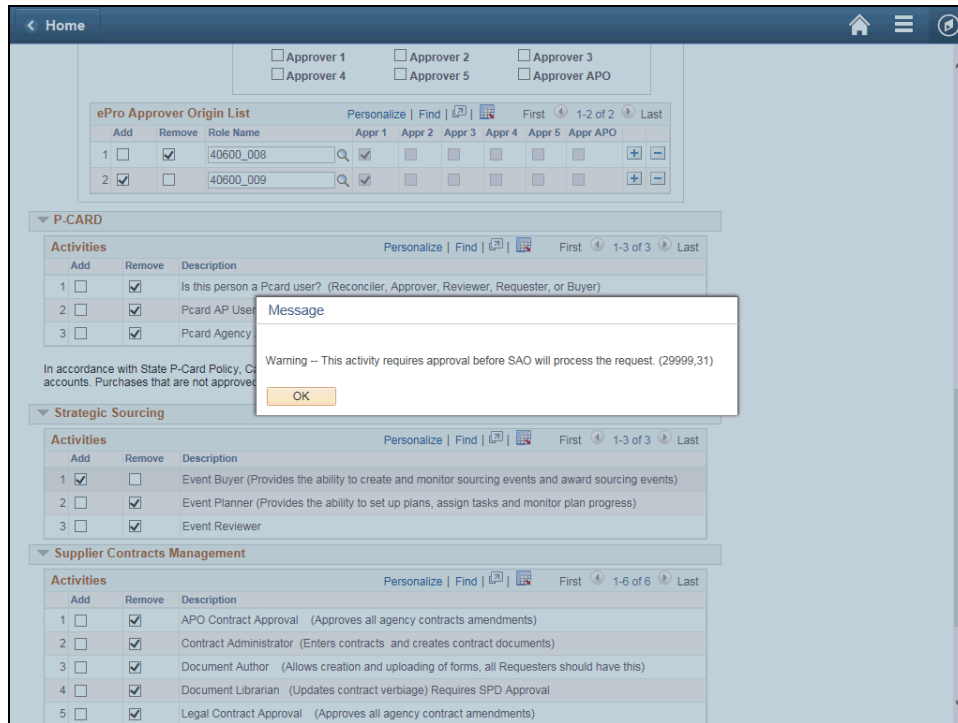
Step	Action
42.	<p>Let's also expand the Supplier Contract Management section.</p> <p>Click the Expand section button.</p> 



Supplier Contracts Management

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	APO Contract Approval (Approves all agency contracts amendments)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Contract Administrator (Enters contracts and creates contract documents)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Document Author (Allows creation and uploading of forms, all Requesters should have this)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Document Librarian (Updates contract verbiage) Requires SPD Approval
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Legal Contract Approval (Approves all agency contract amendments)

Step	Action
43.	<p>Let's add the Event Buyer activity. This activity requires the default information entered earlier: Origin, Ship-To and Default Buyer</p> <p>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.</p> <p>Click the Add option.</p> 



Step	Action
44.	<p>This activity will require DOAS/TGM approval.</p> <p>Click the OK button.</p> <div data-bbox="354 1136 1252 1360" style="border: 1px solid gray; padding: 10px;"> <p>Message</p> <p>Warning -- This activity requires approval before SAO will process the request. (29999,31)</p> <p style="text-align: center;">OK</p> </div>

Home

Approver 1 Approver 2 Approver 3
 Approver 4 Approver 5 Approver APO

ePro Approver Origin List Personalize | Find | [2] | [grid] First 1-2 of 2 Last

Add	Remove	Role Name	Appr 1	Appr 2	Appr 3	Appr 4	Appr 5	Appr APO
<input type="checkbox"/>	<input checked="" type="checkbox"/>	40600_008	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	40600_009	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

P-CARD

Activities Personalize | Find | [2] | [grid] First 1-3 of 3 Last

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Is this person a Pcard user? (Reconciler, Approver, Reviewer, Requester, or Buyer)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Pcard AP User (Verifies all monthly pcard charges and creates pcard voucher) Requires TGM Approval
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Pcard Agency Administrator - (Setup and maintain cardholder information) Requires TGM Approval

In accordance with State P-Card Policy, Cardholders are automatically added to the workflow to approve purchases applied to their accounts. Purchases that are not approved do not proceed in the workflow.

Strategic Sourcing

Activities Personalize | Find | [2] | [grid] First 1-3 of 3 Last

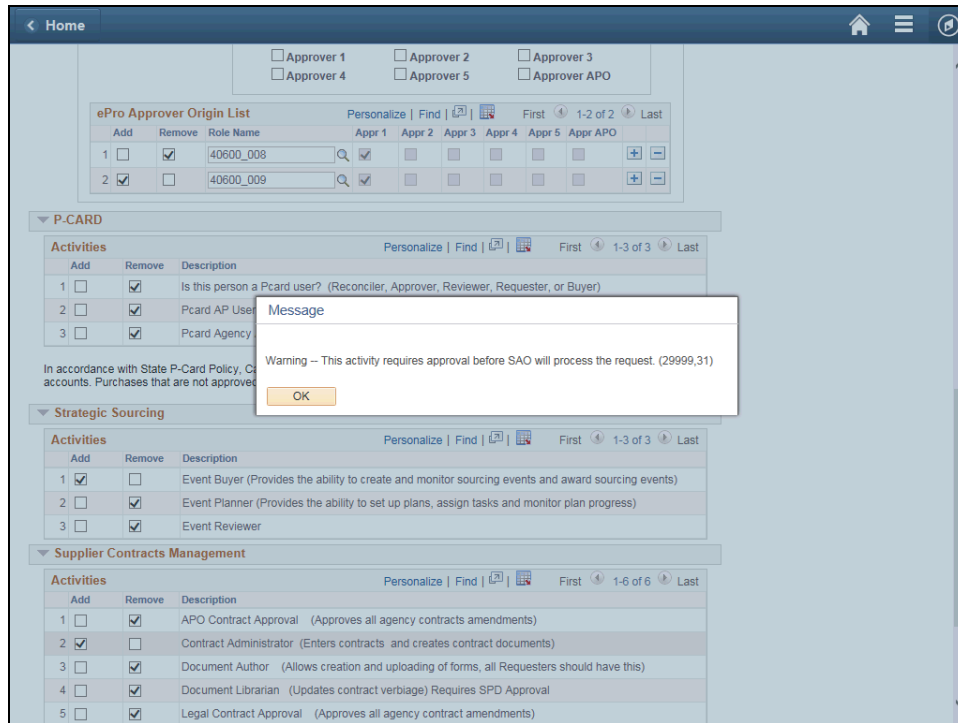
Add	Remove	Description
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Event Buyer (Provides the ability to create and monitor sourcing events and award sourcing events)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Event Planner (Provides the ability to set up plans, assign tasks and monitor plan progress)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Event Reviewer

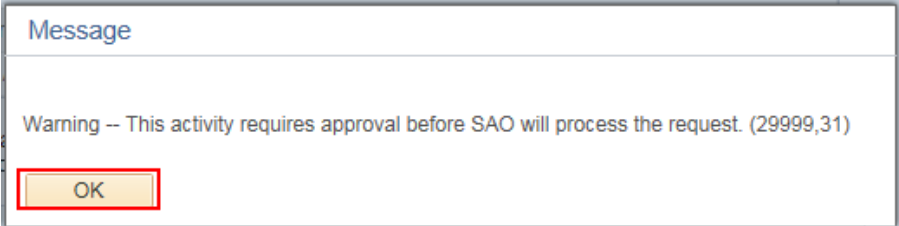
Supplier Contracts Management

Activities Personalize | Find | [2] | [grid] First 1-6 of 6 Last

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	APO Contract Approval (Approves all agency contracts amendments)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Contract Administrator (Enters contracts and creates contract documents)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Document Author (Allows creation and uploading of forms, all Requesters should have this)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Document Librarian (Updates contract verbiage) Requires SPD Approval
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Legal Contract Approval (Approves all agency contract amendments)

Step	Action																		
45.	<p>The Contract Administrator activity will be added.</p> <p>Click the Add option.</p> <p>Supplier Contracts Management</p> <p>Activities Personalize Find [2] [grid] First 1-6 of 6 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>APO Contract Approval (Approves all agency contracts amendments)</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td>Contract Administrator (Enters contracts and creates contract documents)</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td>Document Author (Allows creation and uploading of forms, all Requesters should have this)</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td>Document Librarian (Updates contract verbiage) Requires SPD Approval</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td>Legal Contract Approval (Approves all agency contract amendments)</td> </tr> </tbody> </table>	Add	Remove	Description	<input type="checkbox"/>	<input checked="" type="checkbox"/>	APO Contract Approval (Approves all agency contracts amendments)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Contract Administrator (Enters contracts and creates contract documents)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Document Author (Allows creation and uploading of forms, all Requesters should have this)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Document Librarian (Updates contract verbiage) Requires SPD Approval	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Legal Contract Approval (Approves all agency contract amendments)
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<input type="checkbox"/>	<input checked="" type="checkbox"/>	Legal Contract Approval (Approves all agency contract amendments)																	



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

Home

Approver 1 Approver 2 Approver 3
 Approver 4 Approver 5 Approver APO

ePro Approver Origin List Personalize | Find | [2] | [3] First 1-2 of 2 Last

Add	Remove	Role Name	Appr 1	Appr 2	Appr 3	Appr 4	Appr 5	Appr APO	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	40600_008	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	[+/-]
<input checked="" type="checkbox"/>	<input type="checkbox"/>	40600_009	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	[+/-]

P-CARD

Activities Personalize | Find | [2] | [3] First 1-3 of 3 Last

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Is this person a Pcard user? (Reconciler, Approver, Reviewer, Requester, or Buyer)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Pcard AP User (Verifies all monthly pcard charges and creates pcard voucher) Requires TGM Approval
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Pcard Agency Administrator - (Setup and maintain cardholder information) Requires TGM Approval

In accordance with State P-Card Policy, Cardholders are automatically added to the workflow to approve purchases applied to their accounts. Purchases that are not approved do not proceed in the workflow.

Strategic Sourcing

Activities Personalize | Find | [2] | [3] First 1-3 of 3 Last

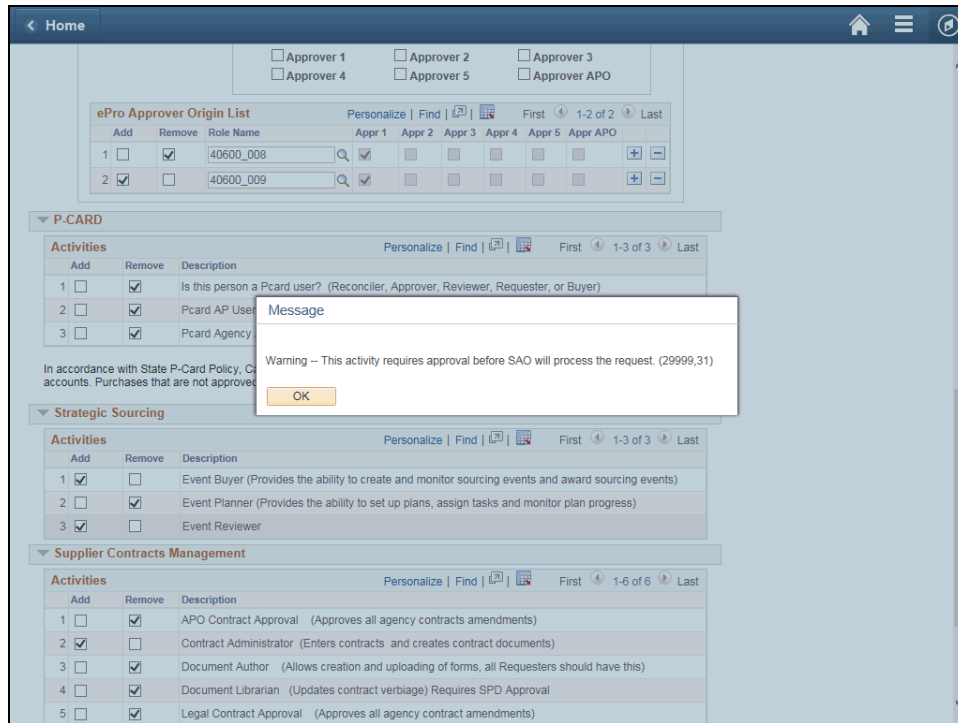
Add	Remove	Description
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Event Buyer (Provides the ability to create and monitor sourcing events and award sourcing events)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Event Planner (Provides the ability to set up plans, assign tasks and monitor plan progress)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Event Reviewer

Supplier Contracts Management

Activities Personalize | Find | [2] | [3] First 1-6 of 6 Last

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	APO Contract Approval (Approves all agency contracts amendments)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Contract Administrator (Enters contracts and creates contract documents)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Document Author (Allows creation and uploading of forms, all Requesters should have this)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Document Librarian (Updates contract verbiage) Requires SPD Approval
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Legal Contract Approval (Approves all agency contract amendments)

Step	Action
47.	<p>The Event Reviewer activity will also be added.</p> <p>Click the Add option.</p>



Step	Action
48.	<p>This activity requires DOAS/TGM approval.</p> <p>Click the OK button.</p> <div data-bbox="354 1136 1256 1360" style="border: 1px solid gray; padding: 5px;"> <p>Message</p> <p>Warning -- This activity requires approval before SAO will process the request. (29999,31)</p> <p style="text-align: center;">OK</p> </div>

Home

Approver 1 Approver 2 Approver 3
 Approver 4 Approver 5 Approver APO

ePro Approver Origin List Personalize | Find | | First 1-2 of 2 Last

Add	Remove	Role Name	Appr 1	Appr 2	Appr 3	Appr 4	Appr 5	Appr APO	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	40600_008	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	40600_009	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

P-CARD

Activities Personalize | Find | | First 1-3 of 3 Last

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Is this person a Pcard user? (Reconciler, Approver, Reviewer, Requester, or Buyer)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Pcard AP User (Verifies all monthly pcard charges and creates pcard voucher) Requires TGM Approval
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Pcard Agency Administrator - (Setup and maintain cardholder information) Requires TGM Approval

In accordance with State P-Card Policy, Cardholders are automatically added to the workflow to approve purchases applied to their accounts. Purchases that are not approved do not proceed in the workflow.

Strategic Sourcing

Activities Personalize | Find | | First 1-3 of 3 Last

Add	Remove	Description
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Event Buyer (Provides the ability to create and monitor sourcing events and award sourcing events)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Event Planner (Provides the ability to set up plans, assign tasks and monitor plan progress)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Event Reviewer

Supplier Contracts Management

Activities Personalize | Find | | First 1-6 of 6 Last

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	APO Contract Approval (Approves all agency contracts amendments)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Contract Administrator (Enters contracts and creates contract documents)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Document Author (Allows creation and uploading of forms, all Requesters should have this)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Document Librarian (Updates contract verbiage) Requires SPD Approval
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Legal Contract Approval (Approves all agency contract amendments)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Supplier Contract Read Only

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

Home

Activities Personalize | Find | | First 1-3 of 3 Last

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Is this person a Pcard user? (Reconciler, Approver, Reviewer, Requester, or Buyer)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Pcard AP User (Verifies all monthly pcard charges and creates pcard voucher) Requires TGM Approval
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Pcard Agency Administrator - (Setup and maintain cardholder information) Requires TGM Approval

In accordance with State P-Card Policy, Cardholders are automatically added to the workflow to approve purchases applied to their accounts. Purchases that are not approved do not proceed in the workflow.

Strategic Sourcing

Activities Personalize | Find | | First 1-3 of 3 Last

Add	Remove	Description
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Event Buyer (Provides the ability to create and monitor sourcing events and award sourcing events)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Event Planner (Provides the ability to set up plans, assign tasks and monitor plan progress)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Event Reviewer


Supplier Contracts Management

Activities Personalize | Find | | First 1-6 of 6 Last

Add	Remove	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	APO Contract Approval (Approves all agency contracts amendments)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Contract Administrator (Enters contracts and creates contract documents)
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<input type="checkbox"/>	<input checked="" type="checkbox"/>	Legal Contract Approval (Approves all agency contract amendments)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Supplier Contract Read Only

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.

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

Step	Action
50.	<p>Always be sure to save your work.</p> <p>Click the Save button.</p> 

The screenshot shows the 'eProcurement' configuration page. It includes three main sections:

- Activities:** A table with 5 rows. Row 1: Adhoc Approver (Add checked, Remove unchecked). Row 2: Create Requisition (Add checked, Remove unchecked). Row 3: Create Requisition (no receiving) (Add unchecked, Remove checked). Row 4: ePro Approver (Approves a requisition) (Add checked, Remove unchecked). Row 5: ePro Buyer (Create and Dispatch Purchase Orders) (Add checked, Remove unchecked).
- Requisition Defaults:** A table with 3 rows. Row 1: Default Origin for this requester: 002. Row 2: Default Ship-To for this requester (Only 1 allowed): PO_008001. Row 3: Default Buyer for this requester (PeopleSoft user I.D.): CARTER.
- Chartfield Defaults:** A table with 10 rows. All 'Remove' checkboxes are checked. The 'Parameter List' and 'Value' columns are empty.

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

Thank you!