



Manage roles and users

Table of Contents

Manage roles and users i

Manage roles and users

In Security Administration, set up the necessary purchasing roles (originators, approvers, etc.). Once the purchasing roles are established, assign the roles to the appropriate users. If a component (i.e., menu item) has a subcategory that is not selected, the upper-level title is displayed in italics. For example, if Utilities has sublevels, one of which has been cleared, then Utilities is displayed in italics denoting that not everything under Utilities is selected for permission.



To avoid any system issues related to roles, be sure to keep Business and Student roles separate and ensure that Business roles do not have campuses assigned.

You can generate the [Security Administration > Reports > List of Users by Permission](#) report to review user details such as the last login date and then modify as needed.

Security Administration > Manage Roles

Review the suggested minimum access for Purchasing originators and approvers.

Role Name:

MANAGE PERMISSIONS:

- Purchasing*
 - Inquiry*
 - Contract Requisition Status Inquiry
 - General Ledger Inquiry
 - Requisition Status Inquiry
 - Maintenance*
 - Actual Cost
 - Approve Bundle Requisitions
 - Approve Requisition
 - Bid Processing
 - Bundle Requisitions
 - Contract Table/Format
 - Create/Modify Contract Requisition
 - Create/Modify Requisition
 - Receiving
 - Reverse Purchase Order
 - Vendor Order Addresses (read-only)
 - Next Year
 - Reports*
 - Utilities*

Role Name:

MANAGE PERMISSIONS:

- Purchasing**
 - Inquiry**
 - Maintenance**
 - Actual Cost
 - Approve Bundle Requisitions
 - Approve Requisition**
 - Bid Processing
 - Bundle Requisitions
 - Contract Table/Format
 - Create/Modify Contract Requisition
 - Create/Modify Requisition
 - Receiving
 - Reverse Purchase Order
 - Vendor Order Addresses (read-only)**
 - Next Year
 - Reports**
 - Utilities

Use the [Security Administration > Manage Users](#) page to assign the appropriate roles to the appropriate users.