

Purchasing Permissions - DA3000

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District Administration > Maintenance > User Profiles > Purchasing Permissions

This tab allows you to select Purchasing options for a specific user that is authorized to create requisitions, approve requisitions, or inquire about requisitions.

Note: Refer to the Accounts tab for more information about the **Add User**, **Delete User**, and **Remove Process** buttons.

Set purchasing permissions:

Retrieve User	Click to retrieve a user. Click ⌄ to select a user and click **Retrieve User**. By default, this drop down only displays “employed” users. **Notes**: The drop-down list is sorted alphabetically by last name and then first name. All users who are set up on the Personnel > Staff Demo page and have been previously added to the Maintenance > User Profiles page are displayed in the drop down.	OR	**Lookup User**	Click to lookup a user. Click to search for an employee in the User Directory. The User Directory is displayed. To search for a specific user, type data in the desired search fields. • **First Name** • **Last Name** • **Employee Number** Select one of the following employee statuses to narrow your search: • **Employed** • **Not Employed** Click **Retrieve**. A list of users that match the search criteria is displayed. The following information is retrieved: • **Employee Nbr** • **Last Name** • **First Name** • **Employed** Select an employee number. The directory is closed and the page is populated with the selected user record. Otherwise, click **Cancel** to close the directory.

Field	Description
Employee Number	The employee number of the selected employee is displayed.
Global Access	Select to allow the user to view all account codes in reports and inquiries. If not selected, only accounts and inquiries for the account codes listed on the user's Accounts tab can be viewed.
Override	Select allow the user to create an encumbrance that is greater than the budget amount for the account code when creating or submitting a requisition. It is important to note that the override capability is tied to the requestor (not the originator) on the Create/Modify Requisition page in Purchasing. When creating a requisition and this user is selected as a requestor, then the override is applicable. If this user is selected as an originator but not as a requestor, and the requestor does not have override capability, then no override occurs. If selected, then **Overexpend** is cleared, and the **Overexpend Pct** field is reset to zero. Neither fields can be modified. If not selected and the user (originator) attempts to create an encumbrance that is greater than the budget amount of the account code for the requestor, an error message that the encumbrance exceeds the budget amount for the account code is displayed when the user (originator) attempts to submit or save the requisition. The user (originator) cannot submit or save the requisition.
Overexpend	Select to allow the user to expend an amount greater than what was provided in the requisition. If the field is selected, you must indicate the maximum percentage over the expenditure in the **Overexpend Pct** field. The system will calculate using any percent entered (e.g., 999%).
Req Max	Type the maximum dollar amount per requisition the user is allowed to expend per requisition. Even if the user is allowed to overexpend, the user cannot exceed the amount in the **Req Max** field. The requisition maximum amount must be less than or equal to 999,999,999.99.
YTD Amt	Indicates the total dollar amount already expended by the user in the fiscal year. It also includes soft encumbrances. The field is display only.
YTD Max	Type the maximum dollar amount that the user can expend in the fiscal year. If the amount in the **YTD Amt** field is greater than the amount in the **YTD Max** field, the requisition is not created. The amount is based on the user, not the account. The year-to-date maximum amount must be less than or equal to 999,999,999.99.
Bundle Requisitions	Select to allow the user access to bundle requisitions in Purchasing.

Click **Save**.

Other functions and features:

Retrieve	Retrieve data. Click to retrieve information from the last save. If you click **Retrieve**, any unsaved changes will be lost.
Print	Print the report. Click to print the User Profiles, User List report. Review the report.