Defining User Preferences Overview

Each functionality in PeopleSoft Financials System to version 9.1 relies on every user having access (and not having access) to carry out certain actions in order for the system to function correctly and avoid costly errors. Business Unit security administrators and designates are responsible for setting up user preferences.

<table>
<thead>
<tr>
<th>Process Frequency</th>
<th>When setting up a new employee in SFS or when the role of an existing employee changes.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dependencies</td>
<td></td>
</tr>
<tr>
<td>Assumptions</td>
<td></td>
</tr>
<tr>
<td>Responsible Parties</td>
<td>Business Unit security administrators and designates</td>
</tr>
<tr>
<td>Alternate Scenarios</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Process Detail

Navigation: Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences

1. Enter User ID or search for an employee by typing the employee’s name into the Description field (name format will be last, first)

2. Click Search
I. Define Overall User Preferences

Navigation: Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences

1. Select Overall Preferences hyperlink
2. Enter or Search for Business Unit
3. Enter or Search for SetID
4. Enter or Search for Localization Country
5. Click Save

Note: Selecting an Overall Business Unit and SetID will be needed to be able to complete many other user preference setup steps.
II. Define Process Group Preferences

*Navigation: Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences*

**Note:** This is the setup for online processing. If you do not define a process group, the user cannot perform “on-line” activities such as Budget Check vouchers, Voucher Post, etc. You can also copy the authority of another user here. Ensure that the process groups you assign match the responsibilities of the user you are setting up.

**A. Copying An Existing User’s Process Groups**

1. Select **Process Groups** hyperlink

```
<table>
<thead>
<tr>
<th>General Preference</th>
<th>Product preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall Preference</td>
<td>Planning</td>
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<tr>
<td>OLE information</td>
<td>Procurement</td>
</tr>
<tr>
<td>Process Group</td>
<td>Project Costing</td>
</tr>
<tr>
<td></td>
<td>Promotions Management</td>
</tr>
<tr>
<td></td>
<td>Receivables Data Entry 1</td>
</tr>
<tr>
<td></td>
<td>Receivables Data Entry 2</td>
</tr>
<tr>
<td></td>
<td>Staffing - General Preferences</td>
</tr>
<tr>
<td></td>
<td>Staffing - Job Data</td>
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<tr>
<td></td>
<td>Strategic Sourcing</td>
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<tr>
<td></td>
<td>Supplier Contract Management</td>
</tr>
<tr>
<td></td>
<td>Orders - Quotations</td>
</tr>
<tr>
<td></td>
<td>Orders - Other</td>
</tr>
<tr>
<td></td>
<td>Orders - Sales</td>
</tr>
<tr>
<td></td>
<td>Paycycle</td>
</tr>
<tr>
<td></td>
<td>IT Asset Management</td>
</tr>
<tr>
<td></td>
<td>Billing</td>
</tr>
<tr>
<td></td>
<td>Contracts</td>
</tr>
<tr>
<td></td>
<td>General Ledger</td>
</tr>
<tr>
<td></td>
<td>Inventory</td>
</tr>
<tr>
<td></td>
<td>Lease Administration</td>
</tr>
<tr>
<td></td>
<td>Maintenance Management</td>
</tr>
<tr>
<td></td>
<td>Manufacturing</td>
</tr>
<tr>
<td></td>
<td>MRPIIB Mobile inventory</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```
2. Enter an already-defined user ID in the Copy From User ID field from which the system is to copy the source transaction specifications. This allows you to set up template user ID's that can then be used to copy source transaction process groups to other users with the same responsibilities.

3. Click Copy
4. Check **Allow Processing** checkbox to enable on-demand processing for this **User ID**

5. Click **Save**
B. Manually Adding a Source Transaction and Process Group

1. Select a Source Transaction (see Section C, below for Accounts Payable)
   AR Source Transactions
   a. ‘ARMNTWS’ (Maintain Receivables Worksheet).
   b. ‘AROPIE’ (Online Pending Item Entry).
   c. ‘ARPAYWS’ (Payment Worksheet).
   d. ‘ARTRNWS’ (Transfer Worksheet).
   e. ‘ARUNPOST’ (Unpost).

2. Select a Process Group (see Section C, below for Accounts Payable)
   AR Process Groups
   a. ‘ARACTIONA’: Do Not Post (Receivables).
   b. ‘ARACTIONL’: Batch Standard (Receivables).
   c. ‘ARACTIONN’: Batch Priority (Receivables).
   d. ‘ARPOST’: Post Now (Receivables).
   e. ‘ARPOSTGL’: Post Now to GL (Receivables).

3. Click to Save
### C. Accounts Payable Process Groups Explained

<table>
<thead>
<tr>
<th>Source Transaction</th>
<th>Source Transaction Description</th>
<th>Process Group</th>
<th>Process Group Description</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>VOUCHER</td>
<td>Voucher Entry</td>
<td>BUDGET_CHK</td>
<td>Budget Checking</td>
<td>Allows the user to run Budget Check from the Online Voucher Page</td>
</tr>
<tr>
<td>VOUCHER</td>
<td>Voucher Entry</td>
<td>PST_VCHR</td>
<td>All processes through Voucher Post</td>
<td>Allows the use to run the Voucher Post Process from the Online Voucher Page</td>
</tr>
<tr>
<td>VCHMASSCLS</td>
<td>Voucher Mass Maintenance Close</td>
<td>MASSMAINT</td>
<td>Voucher Mass Maintenance</td>
<td>Allows the user to perform the Voucher Mass Close</td>
</tr>
<tr>
<td>VCHMASSCLS</td>
<td>Voucher Mass Maintenance Close</td>
<td>MASSPOST</td>
<td>Voucher Mass Maintenance</td>
<td>Allows the user to perform the Voucher Mass Close and run the Voucher Post process</td>
</tr>
<tr>
<td>VCHMASSDEL</td>
<td>Voucher Mass Maintenance Del</td>
<td>MASSMAINT</td>
<td>Voucher Mass Maintenance</td>
<td>Allows the user to perform a Voucher Mass Delete</td>
</tr>
<tr>
<td>VCHMASSFLD</td>
<td>Voucher Mass Maintenance Fld</td>
<td>MASSMAINT</td>
<td>Voucher Mass Maintenance</td>
<td>Allows the user to perform a Voucher Mass Field Update</td>
</tr>
<tr>
<td>VCHMASSFLD</td>
<td>Voucher Mass Maintenance Fld</td>
<td>MASSMNTVB</td>
<td>Mass Maintenance and Voucher Build</td>
<td>Allows the user to perform a Voucher Mass Field Update and Voucher Build process</td>
</tr>
<tr>
<td>VCHMASSUNP</td>
<td>Voucher Mass Maintenance Unpst</td>
<td>MASSMAINT</td>
<td>Voucher Mass Maintenance</td>
<td>Allows the user to perform a Voucher Mass Unpost</td>
</tr>
<tr>
<td>VCHMASSUNP</td>
<td>Voucher Mass Maintenance Unpst</td>
<td>MASSPOST</td>
<td>Voucher Mass Maintenance</td>
<td>Allows the user to perform a Voucher Mass Unpost and run the Voucher Posting process</td>
</tr>
<tr>
<td>APMASSCNL2</td>
<td>Mass Payment Cancellation v2</td>
<td>APPMTCNL1</td>
<td>Mass Cancellation</td>
<td>Allows the user to perform a Payment Mass Cancellation</td>
</tr>
<tr>
<td>APMASSCNL2</td>
<td>Mass Payment Cancellation v2</td>
<td>APPMTCNL2</td>
<td>Cancel, Payment Post</td>
<td>Allows the user to perform a Payment Mass Cancellation and run Payment Post</td>
</tr>
<tr>
<td>APMASSCNL2</td>
<td>Mass Payment Cancellation v2</td>
<td>APPMTCNL2A</td>
<td>Cancel, Payment Post, Voucher Post</td>
<td>Allows the user to perform a Payment Mass Cancellation, run Payment Post, and Voucher Post</td>
</tr>
</tbody>
</table>
III. Define Asset Management User Preferences

*Navigation: Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences*

1. **Select** Asset Management hyperlink
2. Enter Accounting Date. This value will default on Asset entry pages, when set here.
   Note: This is the date when you want this transaction distributed to your General Ledger.
   The Accounting Date is validated against the open periods you establish for Asset Management in the FIN_OPEN_PERIOD table to determine to which period the system posts. The difference between the Transaction Date and the Accounting Date will determine if any prior period depreciation must be calculated. For example, suppose a computer was acquired and placed in service on March 15, 2013 but wasn't entered in Asset Management until August 1, 2013. All General Ledger periods prior to August are closed. In this case, PeopleSoft Asset Management automatically calculates depreciation starting in March and posts it to the General Ledger in August.

3. Enter Transaction Date. This value will default on Asset entry pages, when set here.
   Note: The Transaction Date typically represents the date you actually acquired the asset and must always be less than or equal to the Accounting Date.

4. Click Edit Optns for Interface Tabls section.

5. Set this option to ‘All’ for all AP To AM Interface users which allows the user to make changes to Accounts Payable staged transactions as needed before creating the asset.
6. Click **Save**

IV. Define Contracts User Preferences

*Navigation: Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences*

1. **Select** *Contracts* hyperlink
2. **Enter** or **Search** for *Business Unit*

3. **Click** **Save**
V. Define General Ledger User Preferences

*Navigation: Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences*

1. **Select** *General Ledger* hyperlink
2. Enter or Search for Ledger

3. Enter or Search for Ledger Group

4. Enter or Search for Source
   Note: Source will default in all the user’s online entered journals.

5. Check boxes that apply to user under Journal Entry Options:
   - Change Date on Correction Journals: A security feature that enables you to change the journal date on the corrections journal (found on the Journal Suspense Correction page).
   - Use Next Journal ID: Select to limit this User ID to the NEXT Journal ID that is automatically entered by the system during online journal entry. If selected, the Journal ID field becomes unavailable to this User ID and the user cannot enter a Journal ID manually.
   - Change Journals from Journal Generator: Select this option to allow a specific user to update the ChartField and amounts in the Journal Entry Page for a journal that was created by the Journal Generator process.
   Warning: If you select Change Journals from Journal Generator and then you change the ChartField values and re-edit the journal, you can create inconsistencies between the subsystem data and the general ledger data. Also, for journals that are generated for a subsystem that supports Commitment Control, the journal will not be re-budget checked even though the ChartField values or the amounts are changed.
   Note: PeopleSoft General Ledger uses these defaults whenever you edit journals from the Journal Entry pages using the Edit button.
• **Save Journal Incomplete Status:** When you select this option for a specific user and the user adds a new journal, the selected option displays on the Journal Header page of various journal entry options. This option enables this specific user to save journal entry transactions with an incomplete status and prevents them from being edited or posted until they are complete.

  **Note:** The option is a default option. When it is not checked (clear), it does not prevent the user from seeing the option on the header but the default journal header status cannot be set to incomplete status by that user.

6. Check boxes that apply to user under Journal Entry Options.

  **Note:** Re-Edit Previously Edited allows user to Re-edit journals marked as valid and is usually set up for a user.

7. Click [Save]

### VI. Define Pay Cycle User Preferences

*Navigation: Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences*

1. **Select** Paycycle **hyperlink**
2. **Enter** Server File Destination ‘/opt/pssfprod/pt852/sfs/uw/ACH’ (for Production)
3. **Enter** Server: ‘PSUNX’
4. **Click** Save
VII. Define Procurement User Preferences

*Navigation: Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences*

1. **Select** *Procurement* hyperlink
2. **Enter** or **Search** for *Location*: Default *Location* where requested items should be delivered once they are received from the vendor.

3. **Enter** or **Search** for *Origin*: Default *Origin* of this user's purchase orders. The *Origin* is used for reporting purposes.

4. **Leave** *Requester* Blank – Not used at UW.

5. **Enter** or **Search** for *Buyer*: This is the user's default *Buyer*

6. **Click** **Save**
VIII. Define Originator Purchase Order Authorization User Preferences

At UW, the term “Originator” refers to the user who enters the purchase order into the system. In this section we will define limitations on the abilities of Originators to perform actions relating to the Purchasing process.

Navigation: Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences

1. Select **Procurement** hyperlink
2. **Select Purchase Order Authorizations**
3. **Check** the *Approval* checkbox – this will allow the user to approve POs.
4. **Check** the boxes in the *Allowed Purchase Order Actions* section that apply to user:
   
   **Note:** For Originators, do not check any other boxes in the *Allowed Purchase Order Actions* section because we typically don’t want them to have access to the following:
   
   a. *Cancel* – Allows the user to view the *Cancel PO* icon on a PO, but not the ability to cancel a PO unless defined in the *Buyers User Authorization* section.
   
   b. *Delete* – Allows the user to delete POs (if the BU setup allows).
   
   c. *Close* – Allows the user to close POs.
   
   d. *Reopen* – Allows the user to Reopen POs.
   
   e. *Can Work Approved PO’s* – Allows the user to make changes to POs that have already gone through the PO Approval process and been approved.
   
   f. *Can Dispatch Un-Approved POs* – Allows the user to dispatch POs before they have completed the PO Approval process.
   
   g. *Full Authority for All Buyers* – Allows the user to Add/Update/Cancel/Delete/Close POs for any Buyer (and therefore any Business Unit) in the system.
   
   h. *Override Non-Qualified POs for Close* – Allows the user to close POs that are non-qualified for close.

5. *Rebate ID Security Control* should never be set to Update because it allows the user to make changes to the Vender rebate agreement fields while maintaining POs (should only be set to *View Only* or *Hidden* so no changes can be made).

6. **Enter** or **Search** for *Buyers* under *Buyers User Authorization* section.
   - *Buyers User Authorized For* Buyers for whom this user can enter purchase orders.
   
   - *Add, Update, Cancel, Delete, Close* Select to enable the user to add, update, cancel, delete, or close requisitions for this buyer.

   **Note:** You can restrict the user to a specific Buyer(s) or specific activities. To add additional rows click +, to remove rows click -. If you are unable to select a person as a Buyer, they have not been set up yet as a Buyer, see Define Buyer Setup section.

   **Warning:** With the usage of electronic signatures for Buyers, if a user has access to enter POs on behalf of a Buyer in a Business Unit where workflow is not in place, then that user has access to create a PO with the buyers’ signature. This is why Originators should only have authorization to enter POs for Buyers in their Business Unit.

7. **Click** the following checkboxes next to each Buyer:
   - *Add* – This allows the user to create new POs with the specified Buyer listed on the PO.
   - *Update* – This allows the user to make changes to POs with the specified Buyer listed.

   **Note:** Do not check any other boxes in the *Buyers User Authorization* section because we don’t want Originators to have access to the following:
   
   a. *Cancel* – Allows the user to cancel POs that list the specified buyer.
   
   b. *Delete/Close* – Functionality works only with Requisitions.

8. **Click** OK
9. Click ☐️ on the Procurement page.

IX. Define Ad Hoc Approver Purchase Order Authorization User Preferences

For Campuses using workflow, all users have the potential to be added as Ad Hoc Approvers. Accordingly, it is necessary grant each user the Allowed Purchase Order Action of Approval.

Navigation: Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences

1. Select **Procurement** hyperlink
2. **Select Purchase Order Authorizations**
3. **Check** the Approval checkbox – this will allow the user to approve POs. 
   **Note:** For Ad Hoc Approvers, do not check any other boxes in the Allowed Purchase Order Actions section because we typically don’t want them to have access to the following:
   a. **Cancel** – Allows the user to view the Cancel PO icon on a PO, but not the ability to cancel a PO unless defined in the Buyers User Authorization section.
   b. **Delete** – Allows the user to delete POs (if the BU setup allows).
   c. **Close** – Allows the user to close POs.
   d. **Reopen** – Allows the user to Reopen POs.
   e. **Can Work Approved PO’s** – Allows the user to make changes to POs that have already gone through the PO Approval process and been approved.
   f. **Can Dispatch Un-Approved POs** – Allows the user to dispatch POs before they have completed the PO Approval process.
   g. **Full Authority for All Buyers** – Allows the user to Add/Update/Cancel/Delete/Close POs for any Buyer (and therefore any Business Unit) in the system.
   h. **Override Non-Qualified POs for Close** – Allows the user to close POs that are non-qualified for close.

4. **Rebate ID Security Control** should never be set to Update because it allows the user to make changes to the Vendor rebate agreement fields while maintaining POs (should only be set to View Only or Hidden so no changes can be made).

5. **Note:** Do not check any boxes in the Buyers User Authorization section because we don’t want Ad Hoc Approvers to have access to Add, Update, Cancel, Delete, Close, or Reopen Purchase Orders.

6. **Click** OK
7. Click on the Procurement page.

X. Define Buyer Setup

A user is unable to be listed as a Buyer on a PO unless they have been setup as a Buyer in the system. Setting up a Buyer correctly in the system is essential for the Purchasing process to function properly.

Navigation: Set Up Financials/Supply Chain > Product Related > Procurement Options > Purchasing > Buyer Setup

1. Click the tab.
2. Enter the User ID in Buyer.
3. Click Add.
4. Enter the Buyer’s Business Unit (‘UW****’) in the following fields:
   a. Enter or Search 🗿️ for Department SetID
   b. Enter or Search 🗿️ for ShipTo SetID
   c. Enter or Search 🗿️ for Location Set ID
   d. Enter or Search 🗿️ for PO Origin SetID

   **Note:** SetID values should always equal the Business Unit values except where the SetID ‘SHARE’ is used.

5. Enter the Buyer’s default values for the following (on the PO, these will overwrite the user defaults from the user preference section):
   • Enter Phone – Default phone # for the Buyer
   • Enter Fax – Default fax # for the buyer
   • Enter or Search 🗿️ for Department
   • Enter or Search 🗿️ for Ship To
   • Enter or Search 🗿️ for Location
   • Enter or Search 🗿️ for Origin

   You do not need to input a value for PO Dispatch Signature Location on this page because of a system customization that specifies the signature file location. However, to use an electronic signature for a given buyer you must contact UWSA Problem Solvers (uwsaproblemsolvers@maillist.uwsa.edu) to have the signature image file copied to the SFS server.

6. Select Open in the Default PO Status section.
   **Note** This ensures all POs for the specific Buyer must be manually submitted for approval (by clicking ✅ in the PO Status section) instead of automatically submitting once the PO is created in the system. For Buyers where their Business Unit is not using workflow and they do not want to manually submit POs for approval, select ‘Pending Approval/Approved’ in the Default PO Status section (POs will be submitted for approval/approved upon being saved into the system).
7. **Select Status**: ‘Active’  
   **Note:** All Buyers with locked accounts should have Status set to ‘Inactive’; otherwise they can still be listed as the Buyer on a new PO.

8. Click ![Save Button]

**XI. Define Buyer Purchase Order Authorizations User Preferences**

The term “Buyer” refers to the user listed as the *Buyer* on the purchase order and manages the PO throughout the Purchasing process. In this section we will define limitations on the abilities of Buyers to perform actions relating to the Purchasing process.

*Navigation: Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences*

1. **Select** *Procurement* hyperlink
2. **Select Purchase Order Authorizations**
3. **Click** the checkboxes next to the following in the Allowed Purchase Order Actions section:
   a. **Approval** – Allows the user to approve Purchase Orders either in workflow or on the PO page if workflow is not implemented.
   b. **Cancel** – This allows the user to view the **Cancel PO** icon on a PO, but not the ability to cancel a PO unless defined in the Buyers User Authorization section.
   c. **Delete** – Allows the user to delete POs (only if this option is also enabled for your Business Unit).
   d. **Close** – Allows the user to close POs.
   e. **Reopen** – Allows the user to Reopen POs.
   f. **Can Work Approved PO’s** – This allows the user to make changes to POs after they have already been approved.

   **Note:** Do not check the following boxes in the Allowed Purchase Order Actions section because we don't want Buyers to have access to the following:
   g. **Can Dispatch Un-Approved POs** – Allows the user to dispatch POs before they have reached a status of Approved.
   h. **Full Authority for All Buyers** – Allows the user to Add/Update/Cancel/Delete/Close POs for any Buyer (and therefore any Business Unit) in the system.
   i. **Override Non-Qualified POs for Close** – Allows the user to close POs that are non-qualified for close.
   j. **Rebate ID Security Control** should never be set to ‘Update’ because it allows the user to make changes to the Vender rebate agreement fields while maintaining POs (should only be set to 'View Only' or 'Hidden' so no changes can be made).

4. **Enter** the ‘User ID’ of each Buyer the user is authorized to create/edit PO’s for (including themselves) in the Buyers User Authorization For section.

   **Note:** To add additional rows **click** +, to remove rows **click** –

   **Warning:** With the usage of electronic signatures for Buyers, if a user has access to enter POs on behalf of a Buyer in a Business Unit where workflow is not in place, then that user has access to create a PO with the buyers’ signature. This is why Buyers should only have authorization to enter POs for themselves and sometimes other Buyers in their Business Unit where appropriate.

5. **Click** the following checkboxes next to each Buyer:
   a. **Add** – This allows the user to create new POs with the specified Buyer listed on the PO.
   b. **Update** – This allows the user to make changes to POs with the specified Buyer listed.
   c. **Cancel** – Allows the user to cancel POs that list the specified buyer.

   **Note:** Do not check any other boxes in the Buyers User Authorization section because the rest only work for requisitioning, which is not used at UW.

6. **Click** OK

7. **Click** Save
XII. Define Payables User Preferences

The AP Operator Profile report (APY0003) displays accounts payable user defaults by SetID.

**Navigation:** Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences

1. **Select** Procurement hyperlink
2. Select **Payables Online Vouchering**
3. **Enter** or **Search** for Origin: The system tags all vouchers entered by this user with this Origin, and uses the processing settings for this Origin when it processes the voucher.

   **Warning:** Without Voucher Origin identified, users cannot enter a voucher. Users would get the following Error Message: "Operator ID must equal Logon Operator ID. You may not process vouchers under another Operator ID."

4. **Check** boxes that apply to User:
   - **Copy Matched and Closed PO** (copy matched and closed purchase orders) **Select** to enable the user to copy matched and closed purchase orders.
   - **Override Accounting Date Edit** **Select** to enable the user to override the accounting date edit option on the Procurement Control>General Controls page.
   - **Security for Voucher Styles** **Click** to open the Voucher Styles page on which you can define the user authority for each of the voucher styles by selecting the appropriate check boxes.
   - **Do Not Check Voucher** **Select** one of these options to determine if the
Amount and Check Voucher Amount  
- **Entry Limit**  
  If you select *Check Voucher Amount*, specify the voucher entry limit amount for this user. When you specify the entry limit, you must also specify its *Currency* and a *Rate Type*.

- **Enter Vouchers Only in Groups**  
  Select to enable the user only to enter vouchers that are attached to a control group ID as defined on the Control Group Information page.

- **Post Vouchers**  
  Select to enable the user to post approved vouchers.

- **Manually Schedule Payments**  
  Select to enable the user to schedule payments manually, overriding the system’s automatic payment scheduling. If you do not select this option, the user will not be able to modify any of the scheduled payment information on the Voucher - Payments page.

5. **Click** on the *Security for Voucher Styles* hyperlink in the Operator Voucher Authorities section

**Note:** Checking *Manually Schedule Payments* allows changes to be made on the Payments page based on separation of duties, uses can be restricted by voucher style.
6. Click **OK**

7. Click **Save**
XIII. Define Vendor Processing Authority User Preferences

Navigation: Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences

1. Select *Procurement* hyperlink
2. **Select Vendor Processing Authority**

![Screenshot of Vendor Processing Authority window]

3. **Check** boxes that apply to User.
   - **Check Authority to Enter** to allow the user to Enter Vendors
   - **Check Authority to Approve** to allow the user to Approve Vendors
   - **Check Authority to Inactivate** to allow the user to Inactivate Vendors
Note: Users cannot enter, approve or inactivate a vendor without these options identified here. Depending on the role, users without vendor processing authority may be able to enter updated information for a vendor, but that vendor status will revert to ‘Unapproved’. This can work to enforce separation of duties but allow the end users to update vendor information and then request appropriate staff to approve the vendor.

XIV. Running a User Preference Report

Navigation: Set Up Financials/Supply Chain > Common Definitions > User Preferences > User Preferences Report

1. Select
2. Enter a Run Control ID
3. Click Add
4. Select the Report Parameters
5. Add User IDs for the report to include.
6. Click to add more User IDs
7. Click Run

8. Select Server Name ‘PSUNX’
9. Click **OK**, you will return to the User Preferences Report page.

10. Click the **Process Monitor** hyperlink

11. Click **Refresh** until the **Run Status** and **Distribution Status** are ‘Success’ and ‘Posted’

12. Click the **Details** hyperlink
13. **Click** View Log/Trace hyperlink

14. **Select** the hyperlink with the .PDF extension
15. The report will show you the User Preferences for the select User IDs

Revision History

<table>
<thead>
<tr>
<th>Author</th>
<th>Version</th>
<th>Date</th>
<th>Description of Change</th>
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<td>Ben Biltz</td>
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<td>2.3</td>
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<td>Linda Diring</td>
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