LOS RIOS

COMMUNITY
COLLEGE
DISTRICT

American River College
Cosumnes River College
District Office
Folsom Lake College
Sacramento City College

**PeopleSoft
Access Request Form**

**General Services
Definitions of Roles**

NOTE:

- **Roles marked with a (C) are meant for campus staff only and campus-based security is enforced. The user ID for these roles will be "W + employee ID + C" (for example W0000000C).**

Role Name	Description	PS Role Name
PO Print Access	For staff that need to view purchase orders transactions. ➢ Purchasing – Print POs	LR_FS_PO_Purchase_Order_Print Primary Permission List: PPALL

PO Buyer Basic Access
 	
Note: given to DO staff only
	For staff that process purchase orders.
	➢ Accounts Payable
	   – Review PO
	   – Review vouchers
	➢ Commitment Control
	   – Review budget details
	   – Review PO budget exceptions
	   – Review requisition budget exceptions
	➢ Purchasing
	   – Add/Update Pos
	   – Run budget-check purchase order amounts
	   – Run processes to dispatch purchase orders to appropriate vendors
	   – Review a history of change orders associated with a purchase order
	   – Analyze, approve, dispatch, unapprove, cancel, close, preview and print Pos (Reconciliation Workbench)
	   – Reserve (add) a purchase order number or a sequence of purchase order numbers
	   – View receiving, invoicing, and matching activities for selected purchase orders (Activity Summary)
	   – View purchase order document status information
	   – Review document tolerance exceptions
	   – View accounting entries in the Commitment Control ledger activity log
	   – Print POs
	   – View purchase order information
	   – Verify the document tolerance
	   – Review online receivers
	   – Review receipts information
	   – Add or modify requisition header, line, schedule, and distribution information
	   – Budget-check requisition amounts or quantities against predefined budgets
	   – Run the Requisition Print report (PORQ010) to list details of requisitions
	   – View requisition accounting entries in a
		LR_FS_PO_Buyer
		
		Primary Permission List: PPALL

Role Name	Description	PS Role Name

	- Commitment Control ledger activity log
	- View requisition document status information
	- View requisition information in five stages
	➢ Set Up Financials/Supply Chain
	  - Add and update most frequently used comments as standard comments
	➢ Vendors
	  - Add and update vendor information
	  - Add and update approve vendor	

PO Buyer Senior Access
 	
Note: given to DO staff only
	For senior level staff that process purchase orders. This role includes <u>all access</u> of the PO Buyer Basic Access and the following:
	➢ Vendors
	  - Correct vendor information
	➢ Standard Industry Codes (SIC)
	  - Update SIC codes (Commodity Codes)
		LR_FS_PO_Senior_Buyer
		
		<u>Primary Permission List:</u> PPALL

PO Supervisor Access
 	
Note: given to DO staff only
	For senior staff that process purchase orders. This role includes <u>all access</u> of the PO Buyer Senior Access and the following:
	➢ Purchasing
	  - Reverse changes (add and update) made by the last run of the PO reconciliation process (Reopen POs)
	  - Reverse (reopen) changes made by the last run of the Requisition Reconciliation process
	  - View requisition change order header, line, and schedule history
	➢ Set Up Financials/Supply Chain
	  - Add, update, and correct address details for entities such as business units, assets, and banks (location)
	  - Add and update freight terms, including title passage and freight payment details
	  - Add and update a ship-via code and minimum and maximum shipping capacities
	  - Add and update general units of measure for the system
	  - Create and update ship to IDs from existing location IDs for receiving vendor shipments
	  - Add and update standard comment types to categorize standard comments.
		LR_FS_PO_Purchasing_Supv
		
		<u>Primary Permission List:</u> PPALL

Requisition View	For staff who need inquiry access to requisitions
	➢ Purchasing
	  - View "add/update" requisition
	  - Run the Requisition Print report (PORQ010) to list details of requisitions
	  - Review requisition information in five stages
		LR_FS_PO_Requisition_View
		
		<u>Primary Permission List:</u> PPALL

Requisition Entry Access	For staff who process requisitions
	➢ Commitment Control
	  - Review budget details
	  - Review requisition budget exceptions
	➢ Purchasing
	  - View receiving, invoicing, and matching
		LR_FS_PO_Requisition_Entry
		
		<u>Primary Permission List:</u> PPALL

Role Name	Description	PS Role Name

	activities for selected purchase orders (Activity Summary)
	    – View accounting entries in the Commitment Control ledger activity log
	    – View PO information
	    – Add and update requisition
	    – Run the Requisition Print report (PORQ010) to list details of requisitions
	    – View requisition accounting entries in a Commitment Control ledger activity log
	    – Review requisition information in five stages
	 ➢ Vendors
	    – View "add/update vendor" information
	
	Note: Requires completion of Requisition Authorizations Form – Requisition Entry Access	

Requisition Update Access	For staff who review requisitions prior to final approval
	 ➢ Commitment Control
	    – Review budget details
	    – Review requisition budget exceptions
	 ➢ Purchasing
	    – View accounting entries in the Commitment Control ledger activity log
	    – View PO information
	    – Update requisition
	    – Run the Requisition Print report (PORQ010) to list details of requisitions
	    – Review requisition information in five stages
	
	Note: Requires completion of Requisition Authorizations Form – Requisition Update Access
		LR_FS_PO_Requisition_Update
		
		Primary Permission List: PPALL

Requisition Approver Access	For staff who approve requisitions
	 ➢ Commitment Control
	    – Review budget details
	    – Review requisition budget exceptions
	 ➢ Purchasing
	    – View accounting entries in the Commitment Control ledger activity log
	    – View PO information
	    – Update requisition
	    – Run the Requisition Print report (PORQ010) to list details of requisitions
	    – Review requisition information in five stages
	
	Note: Requires completion of Requisition Authorizations Form – Requisition Approver Access
		LR_FS_PO_Requisition_Approver
		
		Primary Permission List: PPALL

Requisition DO-IT Approver Access	For DO IT supervisors, directors, and above whom review and approve requisitions for District Wide IT procurement purchases. **Note: Requires completion of Requisition Authorizations Form – Requisition DO-IT Approver Access**	LR_FS_PO_Requisitn_IT_Approver Primary Permission List: PPALL

Receiving View	For staff who need inquiry access to receiving information.	LR_FS_PO_Receiving_View

	➢ Accounts Payable
	    – Review PO
	➢ Purchasing
	    – Review a history of change orders associated with a purchase order
	    – View receiving, invoicing, and matching activities for selected purchase orders (Activity Summary)
	    – View requisition accounting entries in a Commitment Control ledger activity log
	    – View purchase order information
	    – View only access to receipts
	    – Run the Receiver Delivery and Shop Floor
	    – Receipt Delivery reports
	    – View receipt information
	
	Note: Requires completion of Receiving Authorization Form – Receiving View Access
		Primary Permission List: PPALL

Receiving Access	For staff who process receiving information.	LR_FS_PO_Receiving_Staff

	➢ Accounts Payable
	    – Review PO
	    – Review vouchers
	➢ Purchasing
	    – Review a history of change orders associated with a purchase order
	    – View receiving, invoicing, and matching activities for selected purchase orders (Activity Summary)
	    – View requisition accounting entries in a Commitment Control ledger activity log
	    – View purchase order information
	    – Add and update receipts
	    – Enter asset tag and serial# on receipts
	    – Update asset serial numbers
	    – Run the Receiver Delivery and Shop Floor Receipt Delivery reports
	    – View receipt information
	
	Note: Requires completion of Receiving Authorization Form – Receiving Access
		Primary Permission List: PPALL

AP Campus Vendor Access (C)	For campus staff who enter and approve vendors in campus based business units. Access is restricted to the campus business units. ➢ Vendors – Add and update vendors	LR_FS_AP_Campus_Vendor_Staff Primary Permission List: determined by campus: ARC = PPARC CRC = PPCRC FLC = PPFLC SCC = PPSCC
FS After Hours	This is an add-on role granted on a temporary basis and only in special circumstances when access to FS PeopleSoft is required outside of normal business hours. *Note: the system is normally available to users Monday through Saturday 7:00 AM – 7:00 PM and Sunday 9:00 AM to 7:00 PM.*	LR_FS_GBL_AFTER_HOURS

Role Name	Description	PS Role Name