

Reviewing the User Information Tab

Below are the process steps to Reviewing the User Information Tab. 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.	Begin by navigating to the Manager Security Report page.	
	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. Click the NavBar icon.	



TeamWorks		▼ Home	1	
News and	d Announcements	Asset Management	Commitment Control	NavBar
General L	edger	Labor Distribution	Payables	Recent Places
Procuren	nent	Purchase Orders	Receivables	My Favorites
Approval	s	My Favorites	Requisition	

Step	Action
2.	Click the Navigator icon.
	Navigator





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





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

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 > Seq Nor = Seg Nor = Search Seg Save Search Oriteria	Gecurity Request Immation you have and click Search. Leave fields blank for a list of all values. Idisting Value Add a New Value Criteria Unit begins with V Image: Criteria Vibre I ID begins with V Image: Criteria IID begins with V Image: Criteria Crear Basic Search Search Criteria			New Window Help
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Step	Action
5.	To view the User Information tab, a new Security Request needs to be started.
	Click the Add a New Value tab.



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Manager Security Request	New Window Help Har
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Business Unit	
Add	
Find an Existing Value Add a New Value	

Step	Action
6.	Click in the Business Unit field.
	Business Unit





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

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Manager Security Request	New Window Help 🗐 -
Eind an Existing Value Add a New Value	
Business Unit 40600 Q Request ID NEXT	
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Find an Existing Value Add a New Value	

Step	Action
8.	Click the Add button.
	Add



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curity Request Comments Activ	ity Security Procurement Securi	ity User Information	Security Approval	Status History	
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the Official Code of Georgia Annotat omputer/information laws.					
Security Request					
Requested Date: 08/06/2018		*Action: Add	-		
*Status: Draft	✓ *Req	uest Type: Employee	-		
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Source: Online		Support Number			
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Submitted By:	toni, and cony the treation	Entered on	00/02/2010		
Access Type					
Permanent	○ Temporary	Expiration Dat	e		
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*User ID:	Initia	l word:			
Empl ID:	Fuss	word.			
*First Name:	Middle Initial: *L	ast Name:			
Job Title:					
Job Hue:					
*Telephone:	Fa	x Number:			
*Telephone:	Fa	x Number:			
*Telephone: Email Address:	Fa	x Number:			
*Telephone:	Fa	IX Number:			
*Telephone:	Fa	IX Number:			

Step	Action
9.	We will be making changes to the User Information tab.
	Click the User ID tab.



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curity Request	Comments Activit	ty Security Procurem	tent Security U	ser Information	Security Approval	Status H	listory			
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derstanding that	applicant is legally r of Georgia Annotate	and Supervisor ackno esponsible for the pro ed, Georgia Computer	tection of said ID.	Password pursu	ant to Chapter 9	of Title 16				
Security Reques	t]			
Requested Date:	08/06/2018		*Actio	on: Add	·					
*Status:	Draft	~	*Request Typ	e: Employee	•					
Reject Reason:										
Source:	Online			Support Number:						
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Step	Action
10.	We will be making changes to the User Information tab.
	Enter the appropriate information into the User Information field.
	For this example, type HHENDERSON .



Home						۲
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ecurity Request	Comments Activity	y Security Procurement	t Security User Informatio	n Security Approval	Status History	í
Business Unit: 4	10600 Banking and F	inance, Dept of	Request ID: NEXT	Request Seq Num:	m: 1	
nderstanding that a	applicant is legally re of Georgia Annotate	esponsible for the protec	edges application, receipt fi tion of said ID/Password p ystem Protection Act, as w	ursuant to Chapter 9 of T	f Title 16	
Security Request						
Requested Date: 0	8/06/2018 🛐		*Action: Add	~		_
*Status:	Draft	~	*Request Type: Employee	× ×		
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Source: (Online		Support Nun	iber:		
Entered by: 1		Tom And Jerry 770/770/7	707 Entered	ion: 08/02/2018		_
Submitted By:		,				_
Access Typ	e					_
	Permanent	○ Temporary	Expiration	Date		
User Data						
*User ID: HHE	INDERSON	×	Initial Password:			
Empl ID:						
*First Name: Job Title:		Middle Initial:	*Last Name:			
*Telephone:			Fax Number:			
Email Address:						
Business Addr	ess					
Address Line	e 1:					

Step	Action
11.	Press [Tab].

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Descrite Description Auto	New Window Help Personalize Pag	e 🖬
Security Request Comments Activ	ity Security Procurement Security User Information Security Approval Status History	
Business Unit: 40600 Banking and	1 Finance, Dept of Request ID: NEXT Request Seq Num: 2	
understanding that applicant is legally	and Supervisor acknowledges application, receipt for ID, password and an responsible for the protection of said ID/Password pursuant to Chapter 9 of Title 16 ted, Georgia Computer System Protection Act, as well as all other applicable	
Security Request		
*Requested Date: 08/06/2018	*Action: Change	
*Status: Draft	*Request Type: Employee	
Reject Reason:	Message	
Source: Online		
Entered by: TOMANDJERRY	Warning A completed request exists for this user and will be copied into this request.	
Submitted By:	(29999,30)	
Access Type	OK	
Permanent	O Temporary Expiration Date 01/01/1900	
User Data		
*User ID: HHENDERSON	Initial	
Empl ID: 003003003	Password:	
cirst Name: Harry	Middle Initial: *Last Name: Henderson	
Job Title: Accounting Director 1		
Telephone: 770/770-7707	Fax Number: 986/986-9869	
Email hhenderson@anywhere.s	state.ga	
Address: Business Address		
Address Line 1: 2100 Tick Tock		
Address Line 2:		



Step	Action
12.	We will be making changes to the User Information tab.
	Click the OK button.
	Message
	Warning A completed request exists for this user and will be copied into this request. (29999,30)

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Comments Activity	/ Security Procurement S	Security User Information	Security Approval	Status Hist	ory		
Business Unit: 40600 Banking and F	inance, Dept of	Request ID: 0000000016	Request Seq Num:	1			
Electronic signature of Security Officer a understanding that applicant is legally re of the Official Code of Georgia Annotate computer/information laws.	sponsible for the protection	on of said ID/Password pursu	ant to Chapter 9 of T				
Security Request							
*Requested Date: 08/06/2018		*Action: Add	•				
*Status: Manager Submitted	~	*Request Type: Employee	•				
Reject Reason:							
Source: Online		Support Number:					
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Step	Action
13.	We will be making changes to the User Information tab.
	Click the User Information tab.



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ecurity Request Comments	New Window Help Personalize Pag Activity Security Procurement Security User Information Security Approval Status History	e 🔳
contry Request Continents	Activity Security Procurement Security User mormation Security Approval Status history	
Business Unit: 40600 Ban	king and Finance, Dept of Request ID: 0000000016 Request Seq Num: 1	
	ally by clicking the triangle in the blue module header. Collapse the individual expanded e in the blue module header. You can also expand/collapse all modules by clicking the buttons	
none of the information liste the application.	ed below applies to your PeopleSoft Security request, there is no need to return this page of	
 Purchasing 		
Default Ship To Address		
ShipTo SetID: 4060	00 Q Ship To: Q	
Address Line 1:		
Address Line 2:		
Address Line 3:	State: Postal Code:	
City:	State: Postal Code:	
Default Location		
Location Set ID: 4060	00 Q Location Code: Q	
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Address Line 2:		
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Default Origin	Personalize Find 🖾 🚟 First 🐠 1 of 1 🕑 Last	
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Step	Action
14.	Currently both of the modules are expanded. Scroll down the page to see the access options.
	Click the Vertical scrollbar.



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	Add	Remove	Description							
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2		\checkmark	PO Buyer: U	Iser may create state requisitions and PO's. User name	e will appear on PO as "buyer".					
3		✓	PO Requeste	er: User may create state requisitions and their name a	appears as "requester".					
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	Add	Remove	Description							
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2		\checkmark	Manually Sci	ledule i aymenta (autionzea user to overnue the oche	dalou r dymont Dato).					

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





Step	Action
16.	Click the Vertical scrollbar to return to the top of the page.

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Add	Remove Descr	intion							

Step	Action
17.	You can expand all the modules by clicking the Expand All button and you can collapse all modules by clicking the Collapse All button. Click the Collapse All button.





Step	Action
18.	Click the Expand All button.
	Expand All

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Add	Remove Descrip	otion									



Step	Action
19.	If Create Requisition, ePro Buyer, Event Buyer are selected on the Procurement Security tab and PO Buyer and PO Requestor are selected in the User Information tab, enter: -the Ship To value in the Default Ship to Address -the Location Code value in the Default Location -the Default Origin (Location) Code

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Step	Action
20.	Click the Add option.
	Add



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Step	Action
21.	Click the Vertical scrollbar to view additional fields on the page.

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		Add F	emove		Value			
	1		Defa	ult Origin (Location) Code:	٩			
Rol	es							
	Add	Remove	Description					
1		✓	PO Approver	User generally does not create documents, but	t will approve requisitions or PO's.			
2		V	PO Buyer: U	ser may create state requisitions and PO's. Us	er name will appear on PO as "buyer".			
3		✓	PO Requeste	r: User may create state requisitions and their	name appears as "requester".			
PO	Appr	oval Type		Personalize Find	First 🕢 1-4 of 4 🛞 Last			
	Add	Remove	Description					
1		~	Approver 1-U	p to 4,999				
2		~	Approver 2-U	p to 9,999				
3		Image: A start of the start	Approver 3-U	p to 999,999,999				
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		Add	Remove	Route Control Profile				
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Step	Acti	0 n		
22.	Requ	ester.	button for any roles. For this example, the employee is a PO Buy option.	yer and PO
	Roles			
	Roles Ad		Description	
		d Remove	Description PO Approver: User generally does not create documents, but will approve requisitions or PO's.	
	Ad	d Remove		



Step	Action		
23.	Click th	e Add o	option.
	Roles		
	Add	Remove	Description
	1	\checkmark	PO Approver: User generally does not create documents, but will approve requisitions or PO's.
	2 🖌		PO Buyer: User may create state requisitions and PO's. User name will appear on PO as "buyer".
	3	\checkmark	PO Requester: User may create state requisitions and their name appears as "requester".



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2	\checkmark		PO Buyer: Use	r may create sta	te requisitio	ns and PO's. U	ser name wi	II appear on	PO as "bu	yer".		
3			PO Requester:	User may creat	e state requ	isitions and the	r name appe	ars as "requ	iester".			
PO	Appr	oval Type			Pe	rsonalize Fin	1 🗖 I 🔣	First	1-4 of 4	Last		
	Add	Remove	Description									
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ep	Action		
4.			Approver and/or PO Chartfield Approver are selected on the Activit lick the Add button for the appropriate PO Approval type.
	For this	exampl	le, the employee is Approver 2-Up to 9,999
	Click th	e Add o	option.
	Click th		option. Personalize Find 🖅 🔣 First 🕢 1-4 of 4 🕢 Last
			Personalize Find 🔄 🔣 First 🕢 1-4 of 4 🕐 Last
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	A	dd F	temove		Value		
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Rol	es						
	Add	Remove	Description				
1		✓	PO Approver	r: User generally does not create docume	ents, but will approve requis	itions or PO's.	
2	✓		PO Buyer: U	Jser may create state requisitions and PO	's. User name will appear	on PO as "buyer".	
3			PO Requeste	er: User may create state requisitions and	d their name appears as "re	equester".	
PO	Approv	al Type		Personalize	Find 🗖 🔜 First	🕚 1-4 of 4 🕑 Last	
	Add	Remove	Description				
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	Add	Remove	Description				
1		✓	Allow Single	Payment Voucher (enables the operator t	to enter and pay a voucher	to a one-time vendor).	
2		√	Authority to C	Override Match (enables the operator to o	verride a voucher with a ma	atch exception).	
-			Manually Sch	hedule Payments (authorizes user to over	ride the Scheduled Payme	nt Date)	
3			mandally our		nde the benedaled i dynie.	ni Duto).	

Step	Action						
25.		o, add the app	and/or PO Chartfield Approver are propriate origins in the Authorized				
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Rol	es						
	Add	Remove	Description				
1		\checkmark	PO Approver:	User generally does not create documents, b	out will approve requisitions or PO's.		
2	✓		PO Buyer: U	ser may create state requisitions and PO's. U	ser name will appear on PO as "buyer".		
3	✓		PO Requeste	er: User may create state requisitions and their	name appears as "requester".		
PO	Appro	oval Type		Personalize Find	💷 🎆 First 🕚 1-4 of 4 🛞 Last		
	Add	Remove	Description				
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2	✓		Approver 2-U	p to 9,999			
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Step	Action
26.	By clicking the magnifying glass symbol, you can use the search function to find the correct value.
	Click the Route Control Profile look-up button.
	Route Control Profile



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				Route Control Profile	
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4 [Chartfield		PO Business Unit 40200	
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2 [Authority to Ov	erride Match		
				PO Rusiness Linit 42000	
3 [Manually Sche	dule Paymen	DO Dusiness List 4000	

Step	Action
27.	For this example we want the Admin-Area-PO as an Authorized Location.
	Click the Admin Area - PO link.
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2	\checkmark		PO Buyer: Us	er may create state requisitions and PO's. User name will	appear on PO as "buyer".	
3	•		PO Requester	User may create state requisitions and their name appea	ars as "requester".	
PO	Аррі	roval Type		Personalize Find 🖾 🔣	First 🕚 1-4 of 4 🕑 Last	
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Step	Action
28.	To add additional values, click the + symbol to add an additional row. Click the Add a new row at row 1 button.
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	1	✓		Default Origin (Location) Code:			٩		
ol	es								
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1		\checkmark	PO Appro	ver: User generally does not cre	ate documents, but wi	I approve requisition	is or PO's.		
2	✓		PO Buyer	: User may create state requisiti	ons and PO's. User na	ame will appear on F	O as "buyer".		
3	✓		PO Reque	ester: User may create state req	uisitions and their nam	e appears as "reque	ster".		
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1		Authority to Override Match (enables the operator to override a voucher with a match exception).							
		\checkmark	Authority 1	to Override Match (enables the o	perator to oreinae a r				
2		 ✓ 		schedule Payments (authorizes					

Step	Action						
29.	Use the magnifying glass again to assist in the search.	Use the magnifying glass again to assist in the search.					
	Click the Route Control Profile look-up button.						



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PO Business Unit 42900	
3 Manually Schedule Paymen	

Step	Action
30.	Click the PO Business Unit 40600 link.



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3	✓		PO Requeste	er: User may create state requisit	ions and their nam	ne appears as "requ	ester".			
PO	Appro	val Type		Perso	onalize Find 🖾	🔜 First 🤇	🖗 1-4 of 4 🛞	Last		
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2		✓	Authority to C	Override Match (enables the operation	ator to override a v	oucher with a matc	h exception).			
3		V	Manually Sch	nedule Payments (authorizes use	r to override the Se	cheduled Payment (Date).			
						ment on the youche				

Step	Action
31.	Click the Add a new row at row button.



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2	✓		PO Buy	ver: User n	may create state requisitions	s and PO's. User nan	ne will appear on F	O as "b	uyer".		
3	~		PO Rec	quester: U	lser may create state requisi	itions and their name	appears as "reque	ster".			
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Step	Action				
32.	Click the Ro	ute Contro	ol Profile look-up button.		
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	Add	Remove	Description		H01
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2			Approver 2-Up	to 9 999	PO Business Unit (All)
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1		\checkmark	Allow Single Pa	ayment Vouc	DO Dusiness Unit 42500
2			Authority to Ov	erride Match	
					ts (authorizes user to override the Scheduler Payment Date)



Step	Action
33.	Click in the Route Control Profile field.
	Route Control Profile begins with 🗸



Step	Action
34.	Enter the appropriate information into the Route Control Profile field.
	For this example, type PO Origin .



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	Add	Remove	Description		PO Origin 019
			Allow Single F	Payment Vouc	PO Origin 020
			Authority to O		
3			Manually Sch	edule Paymen	ate (authorizes user to override the Scheduled Payment Date)



Step	Action
36.	For this example, click the PO Origin 020 link.

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	De	fault Origir Add	Remove	Personali	ze Find 🖙 🏛	First 1 0	of 1 🐨 Last		
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Role	De .								
	Add	Remove	Description						
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2	✓		PO Buyer:	Jser may create state requisitions	and PO's. User name	e will appear on F	O as "buyer".		
3	✓		PO Request	er: User may create state requisi	itions and their name a	ppears as "reque	ester".		
PO	Арр	roval Type		Pers	onalize Find 🗖	First 🕢) 1-4 of 4 🕑 Last		
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2	✓		Approver 2-	Up to 9,999					
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4		\checkmark	Chartfield						
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		\checkmark		Payment Voucher (enables the o			and time uppdar)		

Step	Action			
37.	If the em	ployee ne	eeds access to a particular AP Origin, clic	k the add button.
	Click the Origin	e Add opt		First 🚯 1 of 1 🕑 Last
	Add	Remove		Value
	1	\checkmark	Origin (enter your site ID number or ONL for online):	٩



Default Origin Personalize Find Image: First i	Hor											(1
Image: Control of the sector prior Add Remove Add Remove PO Approver: User may create state requisitions and PO's. User name will appear on PO as "buyer". Image: PO Requester: User may create state requisitions and their name appears as "requester". PO Approver: Type Personalize Find Image: Personalize Find		De	fault Origi	n		Personaliz	te Find 🗖 🔣	First 🕚 1	of 1 🛞	Last		
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Add Remove Description 1 Image: PO Approve: User may create state requisitions and PO's. User name will appear on PO as "buyer". 2 Image: PO Buyer: User may create state requisitions and PO's. User name will appear on PO as "buyer". 3 Image: PO Requester: User may create state requisitions and their name appears as "requester". PO Approve: Type Personalize Find Image: Pirst		1	\checkmark		Default	Origin (Location) Code:				Q		
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1 Allow Single Payment Voucher (enables the operator to opter and pay a yousher to a not time younder)		Add	Remov	e Descrip	tion							
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Authority to Override Match (enables the operator to override a voucher with a match exception).												

Step	Action
38.	The appropriate value will need to be entered. If the AP Origin is not known, use ONL as the default AP Origin in the Origin box. Click in the Value field.
	Value



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	- \dd	Remove	Descrip	tion						
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2	~		PO Buy	ver: User may	create state requisitions	and PO's. User name	will appear on P	O as "buyer"		
3 [~		PO Rec	quester: User	may create state requisiti	ions and their name a	ppears as "reque	ster".		
PO /	Appro	val Type			Perso	nalize Find 💷	First 🕚	1-4 of 4	Last	
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Step	Action
39.	For this example, enter ONL as the AP Origin.
	Enter the appropriate information into the Value field.
	For this example, type ONL .



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Step	Action
40.	If Create Express Checks, Process Vouchers, Payment Processing, and Voucher Entry activities are selected within the Accounts Payable module on the Activity Security tab, click the Add button for the appropriate Account Payable Function. For this example we will choose Allow Single Payment Voucher and Record Payment. Click the Add option.
	1 Image: Allow Single Payment Voucher (enables the operator to enter and pay a voucher to a one-time vendor).



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2	✓		PO Buyer: U	ser may create state requisitions	and PO's. User name	will appear on P	O as "buyer".		
3	✓		PO Requeste	r: User may create state requisiti	ions and their name ap	opears as "reque	ster".		
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Step	Action
41.	Click the Vertical scrollbar.

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V	Authority to C	Override Match (enables the oper	rator to override a vo	ucher with a match	exception	1).			
V	Manually Sch	hedule Payments (authorizes use	er to override the Sch	neduled Payment D	ate).				
V	Record Payn	ment (enables the operator to mar	nually record a paym	ent on the vouche	payment	page).			
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Step	Action				
42.	Click the Add option.				
	4		Record Payment (enables the operator to manually record a payment on the voucher payment page).		

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ow.	CICKI	ng me th	ingre in u			also expand/collaps	s an modules by	enerting	The buttons	,	
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Step	Action
43.	Be sure to review the page entries.
	Always be sure to save your work.
	Click the Save button.
	Rave



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	of the informatio lication.	on listed below applies to your PeopleSoft Security request, there is no need to return this page of	
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	Address Line	1: Department of Banking & Finance	
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	Step	Action
F	44.	Click here (https://www.surveymonkey.com/r/25KG2HH) to take a quick survey.

Thank you!