


# Manually Assign FS User Preferences


 Set Up Requester process **must be complete before** Set Up Approver. Both processes are included in this document.

## Setting Up Requester

Purpose: Use this document to set up requester and approver for purchasing.

Audience: Finance

 A requester set up is completed in **Finance**.

 **In this article, the roles used are examples of roles that are eligible to have route control set up on - they are not exclusive roles.**

**Navigation: Main Menu > Set Up Financials/Supply Chain > Product Related > Procurement Options > Purchasing > Requester Set Up**

1. Search for the **User ID** that will be set up.
2. If User ID is unknown, click on **Add a New Value** tab.
3. Enter User ID and click **Add**.

[Favorites](#) > [Main Menu](#) > [Set Up Financials/Supply Chain](#) > [Product Related](#) > [Procurement Options](#) > [Purchasing](#) > [Requester Setup](#)

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## Requester Setup

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**

Requester:  begins with

Description:  begins with

☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

- Fill in the fields with information relevant to the user.
- Click **Save**.

## Requester Setup

Requester:  \*Status:  Active

**Requisition Defaults**

Ship To SetID:  WACTC  
 \*Location SetID:  WACTC  
 PO Origin SetID:  WACTC  
 Currency:   
 Phone:   
 Fax:

Ship To:   
 \*Location:   
 Origin:

☐ Override Auto Item Substitute  
☐ Use Only Assigned Catalogs  
☐ Consolidate with other Reqs

**Requisition Status**

☒ Open  
☐ Pending Approval

☒ Price Can Be Changed on Order  
☐ Defaults Inventory BU

**ChartFields**

Personalize | Find | View All | [Add](#) | [Remove](#)

GL Unit	Oper Unit	Account	Fund	Dept	Class	Program	Bud Ref	PC Bus Unit	Project	Activity	Source Type	Category
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Catalog Information**

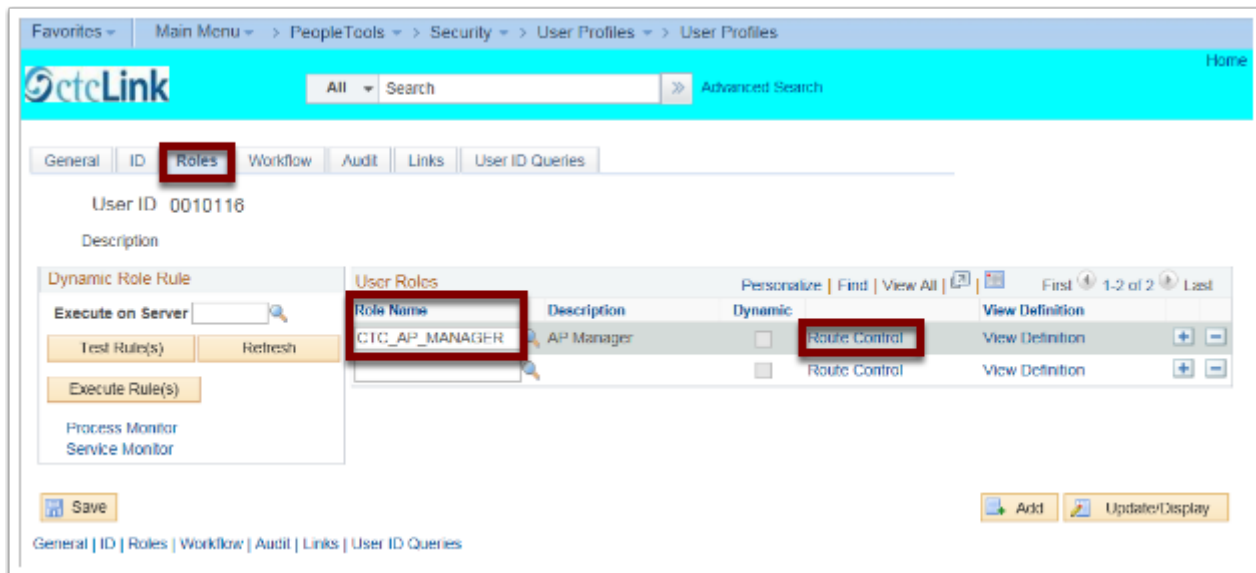
Personalize | Find | View All | [Add](#) | [Remove](#) | First 1 of 1 Last

Default	*SetID	*Catalog ID	Description
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

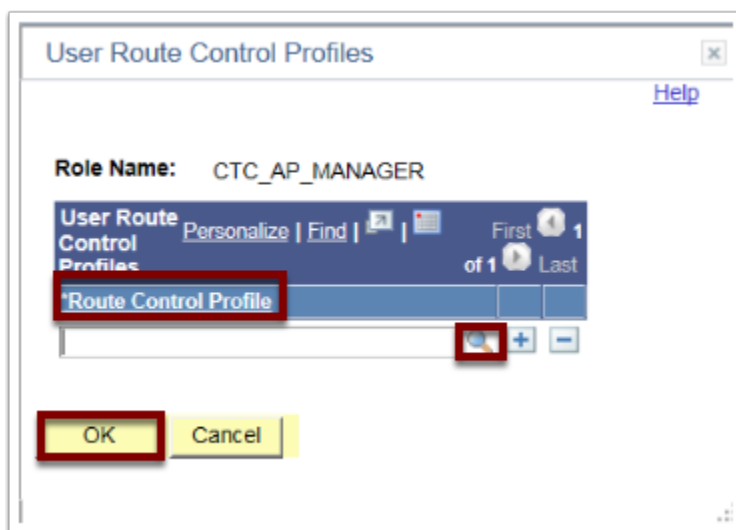
[Save](#) [Notify](#) [Add](#) [Update/Display](#)

**Navigation: Main Menu > People Tools > Security > User Profiles > User Profiles**

- Enter the **User ID**.
- Click **Search**.
- On the next page, Click the **Roles** tab.
- Find the role name **CTC\_AP\_MANAGER** (if unable to locate, it can be added).
- Click on **Route Control** link.



- Click the look up icon (magnifying glass).
- Under **Route Control Profile**, click on item that relates to user/institution.
- Click **OK**.
- Follow the same process for the **CTC\_AP\_SPECIALIST**.



## Setting Up Approver

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

- Enter the **User ID**.
- Click **Search**.

[Favorites](#) > [Main Menu](#) > [Set Up Financials/Supply Chain](#) > [Common Definitions](#) > [User Preferences](#) > [Define User Preferences](#)

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## ctcLink

### User Preferences

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

**User ID:**

**Description:**

☐ Case Sensitive

3. Click on the **Overall Preference** link.

[Favorites](#) > [Main Menu](#) > [Set Up Financials/Supply Chain](#) > [Common Definitions](#) > [User Preferences](#) > [Define User Preferences](#)

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## ctcLink

### User Preferences

General Preference

**Overall Preference**  
[OLE Information](#)  
[Process Group](#)

Product Preference

Asset Management	Planning
IT Asset Management	Procurement
Billing	Project Costing
Contracts	Promotions Management
General Ledger	Receivables Data Entry 1
Inventory	Receivables Data Entry 2
Lease Administration	Staffing - General Preferences
Maintenance Management	Staffing - Job Data
Manufacturing	Strategic Sourcing
Mobile Inventory	Supplier Contract Management
Mobile Inventory - Fluid	
Orders - Quotations	
Orders - Other	
Orders - Sales	
Paycycle	

4. Enter information into:

- **Business Unit**
- **SetID**
- **As of Date**

5. Click **Save**.

6. Click on the **User Preferences** link

**User Preferences** Overall Preferences

User ID CTC\_FUNCTIONAL  
Name ctcLink Functional Setup

Business Unit WA220 Tacoma Community College  
SetID WACTC SBCTC HQ  
As of Date 11/13/2013

Localization Country USA USA

☐ Alternate Character Enabled  
☐ Display Debit/Credit Amounts in Subsystems

Save Return to Search Notify Refresh

**User Preferences** Overall Preferences

7. Click on the **Procurement** link.
8. Enter information into:
  - **Location**
  - **Origin**
  - **Department**
  - **Ship to Location**
  - **Requester**
  - **Buyer**
9. Click on **Requisition Authorizations** link.

**User Preferences** Procurement

User CTC\_FUNCTIONAL ctcLink Functional Setup

Location 7D-RP1  
Origin ONL On Line Entry  
Department  
Ship To Location 7D-CENTRL  
Requester  
Buyer

Contract Process Payables Online Vouchering Purchase Order Authorizations Supplier Onboarding  
Rebate Authorizations Receiver / RTV Setup Supplier Processing Authority  
Request for Quote Process Requisition Authorizations Doc Tolerance Authorizations

Save Return to Search Notify Refresh

User Preferences | Procurement

1. Check appropriate boxes and/or enter information into **Allowed Requisition Actions** area.
2. Enter in **Requesters User Auth For** field.
3. Click **OK**.
4. Click **Save**.
5. Click **Return to Search** for next authorization.

Requisition Authorizations

User: CTC\_FUNCTIONAL

ctcLink Functional Setup

Allowed Requisition Actions

☒ Approval
 ☒ Can Work Approved Req's

☒ Cancel
 ☒ Full Auth for All Requesters

☒ Delete
 ☒ Override Preferred Supplier

☒ Close
 ☒ Override RFQ Required Flag

☒ Reopen
 ☐ View/Override VAT Details

☐ Override Non-Qualified Requisitions for Close
 ☒ Can Send Approval Reminder

Requesters: User Authorization

Personalize | Find | View All | 1 of 1 | First | Last

Requesters User Auth For	Description	Add	Update	Cancel	Delete	Close	Reopen
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

OK

Cancel

Refresh