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

> ℹ️ 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**.

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

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

1. Enter the **User ID**.
2. Click **Search**.
3. On the next page, Click the **Roles** tab.
4. Find the role name **CTC_AP_MANAGER** (if unable to locate, it can be added).
5. Click on **Route Control** link.
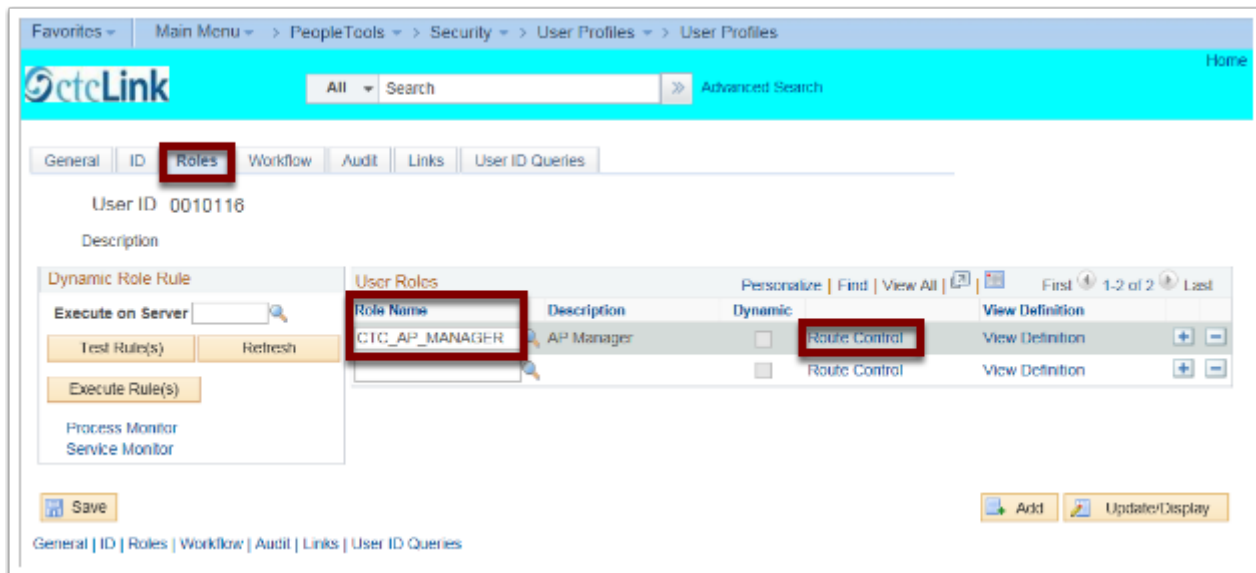
6. Click the look up icon (magnifying glass).
7. Under **Route Control Profile**, click on item that relates to user/institution.
8. Click **OK**.
9. Follow the same process for the **CTC_AP_SPECIALIST**.
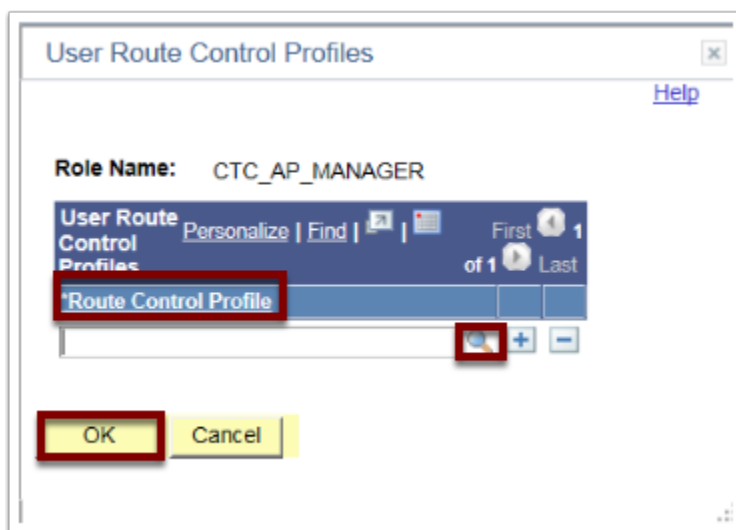
Setting Up Approver

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

1. Enter the **User ID**.
2. Click **Search**.

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

4. Enter information into:
    - **Business Unit**
    - **SetID**
    - **As of Date**

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

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

9. Click on **Requisition Authorizations** link.

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.