

Requesting Security for myUF Market Purchasing



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Agenda

- What is myUF Market?
- Who will be impacted?
- New Security Roles for myUF Market
- Former End User Purchasing Roles
- ARS Requests for myUF Market
- Questions and Comments

What is myUF Market?

- Purchasing Simplified !!
- A new way of doing UF Purchasing business at the University of Florida.
- User-friendly marketplace designed to streamline the way your department purchases its goods and services.
- Faculty and staff can make purchases, initiate requisitions, verify budgets, and route approvals in a “one-stop” environment.



Who will use myUF Market?

- **Shoppers:** Quick and easy access to a variety of vendors and products. Point and click to compare prices and purchase with ease.
- **Requisitioners:** Streamlined processes mean easier shopping, approval routing, budget-checking, and tracking.
- **Approvers:** Enjoy flexible approval processes. Perform a range of actions on entire requisitions or individual line items.

New Security Roles for myUF Market

- There are three (3) end-user roles for myUF Market. Only two require DSA requests:
- Shoppers: have a self service role
UF_N_MKT_SHOPPER is automatically assigned as self-service role based on employee directory affiliation entries. The role is available to permanent staff and faculty.
- No ARS request is needed or allowed for this role.
- Note: There is evaluation underway for an additional role for shoppers who do not qualify for self service shopper access.

New Security Roles for myUF Market

- **UF_N_MKT_REQUESTOR (1 of 2)**
 - Must attend training prior to the role request in ARS.
 - DSAs can then request the role once the employee has received credit for attending PST073 (Intro to Purchasing in myUF Market).
 - Attendance information will be updated within one business day.



New Security Roles for myUF Market

- **UF_N_MKT_REQUESTOR (2 of 2)**
 - Ensure that Requestors have the myUFL role **UF_PO_ePro_Inquiry** so they can both receive and research purchase orders in myUFL.
 - Ensure that FI Setup pages include:
 - "Data Entry Default" tab the "business unit" field is populated with "UFLOR" (unless you are in a DSO).
 - "Requisition" tab the business unit is either blank or represents the 1st four digits of the Dept ID of the employee. This business unit must not be "UFLOR".



New Security Roles for myUF Market

- **UF_N_MKT_FINANCIAL_APPROVER**
 - are not required to attend hands-on training
 - the role requires approval by Purchasing
 - Approval is required to ensure Financial Approvers are routed requisitions on the appropriate 8 digit department ID.
 - Initial campus-wide roll out the list of Financial Approvers by DeptID is being collected by Purchasing.
 - After roll-out ... a form will be required listing the DeptIDs routing to the Financial Approver.
- Please indicate the DeptID (or range of DeptIDs) the person will be approving in the comment.



Former End User Purchasing Roles (1of2)

- **UF_PO_ePro Inquiry** will be modified to handle receiving. All myUF Market requestors must have this role. Shoppers and Approvers may have the role assigned if desired.
- To view reports in Enterprise Reporting, obtain the role **UF_ER_FI_PURCHASING**. DSAs should evaluate if a user does not have this role if they should.

Former End User Purchasing Roles (2of2)

- **UF_PO_INITIATOR** will become obsolete. This role will be disabled on 7/1/2009. Remove role from users when new security for myUF Market is requested.
- **UF_WF_PO_INITIATOR** will become obsolete. This role will be disabled on 7/1/2009. Remove role from users when new security for myUF Market is requested.
- **UF_PO_DEPARTMENT_APPROVER** will become obsolete. This role will be disabled on 7/1/2009. Remove role from users when new security for myUF Market is requested.
- **UF_WF_PO_DEPARTMENT_APPROVER** will become obsolete. This role will be disabled on 7/1/2009. Remove role from users when new security for myUF Market is requested.



ARS Requests for myUF Market

- ARS requests for **Shoppers** include:
 - Automatically get assigned self service **UF_N_MKT_SHOPPER** role if staff or faculty.
 - DSA should evaluate if **UF_PO_ePro Inquiry** or **UF_ER_FI_PURCHASING** are needed by the user. These are optional.
 - Remove **UF_PO_DEPARTMENT_APPROVER** and/or **UF_PO_INITIATOR** !
 - Remove **UF_WF_PO_DEPARTMENT_APPROVER** and/or **UF_WF_PO_INITIATOR** workflow roles.



ARS Requests for myUF Market

- ARS requests for **Requestors** include:
 - DSA Request **UF_N_MKT_REQUESTOR** for all purchasing requestors. This new role is required for requestors. Training is required (PST073).
 - DSA Request **UF_PO_ePro Inquiry** if not already assigned . This is required for requestors.
 - To view reports in Enterprise Reporting, obtain the role **UF_ER_FI_PURCHASING**. DSAs should evaluate if the requestor does not have this role if they should.
 - Always remove **UF_PO_DEPARTMENT_APPROVER** and/or **UF_PO_INITIATOR**.
 - Remove **UF_WF_PO_DEPARTMENT_APPROVER** and/or **UF_WF_PO_INITIATOR** workflow roles.



ARS Requests for myUF Market

- ARS requests for **Approvers** (1 of 2)
 - DSA Request **UF_N_MKT_FINANCIAL_APPROVER** for all purchasing approvers. This new role is required for approvers. Remember to include the department(s) this approver covers in the comment.
 - DSA Request **UF_PO_ePro Inquiry** if not already assigned . This is optional for approvers.
 - To view reports in Enterprise Reporting, obtain the role **UF_ER_FI_PURCHASING**. DSAs should evaluate if their approver desires this role. (Optional)
 - Always remove **UF_PO_DEPARTMENT_APPROVER** and/or **UF_PO_INITIATOR !!**
 - Remove **UF_WF_PO_DEPARTMENT_APPROVER** and/or **UF_WF_PO_INITIATOR** workflow roles.



ARS Requests for myUF Market

- ARS requests for **Approvers** (2 of 2)
 - Second step of the Approvers role setup is performed by Purchasing.
 - Purchasing will confirm the department that the approver should be setup for and then implement that setup.
- Info on the Web:
 - <http://www.purchasing.ufl.edu/myufmarket/default.htm>
 - <http://www.bridges.ufl.edu/security/roles.html>

Questions and Comments



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