PO Admin Checklist
UNDERSTANDING PURCHASING ROLES

The following should help identify which roles should be assigned to individuals in your agency.

Job Duty	PeopleSoft Role	Permissions
BUYER:	NDS_ALL_BUYER	Ability to enter POs in addition to contract administration and online PO inquiries.

Job Duty	PeopleSoft Role	Permissions
PO APPROVER:	NDS_ALL_PO_APPVR	This role is in conjunction with one, some, or all of the workflow roles below, based upon approval authority within the agency. PO Approval works in steps by dollar amount.
All workflow roles need an origin code assigned. This is determined and set up by the PO Administrator.	NDS_WF_ALL_PO_APPVR_1000	The individual has authority to approve POs up to $1,000.
	NDS_WF_ALL_PO_APPVR_2500	The individual has authority to approve POs between $1,001 and $2,500.
	NDS_WF_ALL_PO_APPVR_5000	The individual has authority to approve POs between $2,501 and $5,000.
	NDS_WF_ALL_PO_APPVR_ UNLIMITED	PO Approval for amounts $5,001 or more. Users with this role cannot have the PO Agency Admin role or the All Buyer role.
	NDS_PO_INQ	This gives approvers access to view POs and online PO inquiries.
Note:	A buyer may have initial approval authority up to one of these amounts as well, just never the Unlimited role.	

Job Duty	PeopleSoft Role	Permissions
RECEIVING:	NDS_ALL_RECEIVER	Shipment management, including entering the receipt of goods.
Note:	There are no restrictions on which personnel can be receivers. That is an agency decision; therefore it is a separate role.	

Job Duty	PeopleSoft Role	Permissions
PO ADMINISTRATION:	NDS_ALL_PO_AGENCY _ADMIN	Access to all procurement menus including reconciliation, contract mgmt., procurement analysis, POs, requisitions, inventory item definition, location definition, shipment mgmt., procurement card mgmt., and workflow administration.
Note:		OMB looks to the PO Administrator to train and support the buyers, requesters, approvers, and receivers for their agency.

Job Duty	PeopleSoft Role	Permissions
PO RECONCILIATION:	NDS_PO_RECON	The ability to close and reconcile purchase orders. Users with the PO Agency Admin role do not need this one in addition.
Note:		This role is usually assigned only to agency personnel who have the Unlimited Approval role or who may work in accounting and PO vouchers.

Job Duty	PeopleSoft Role	Permissions
REQUESTER:	NDS_ALL_REQUESTER	Requisition entry, maintenance, approval, and reconciliation. Includes online inquiries of requisitions.

Job Duty	PeopleSoft Role	Permissions
REQUISITION APPROVER:	NDS_ALL_REQ_APPVR	Requisition approval. Need to be used in conjunction with one of the workflow roles below for final.
	NDC_WF_ALL_REQ_ APPOVER	Final Requisition Approver.
	NDC_WF_ALL_REQ_ ACCTNG_APPRVL	Final requisition approver in accounting.