
Roles in AggieBuy

Each user in AggieBuy is assigned a role or roles. Each role carries certain permissions. Following is a brief description of the roles:

Window Shopper



Window Shoppers can fill a shopping cart and assign the cart to another user, but cannot place an order. Every user in AggieBuy who doesn't have another role is automatically assigned the Window Shopper role.

Requester



Requesters can fill a shopping cart, and can also place an order. In fact, only users with the Requester role can place an order. Requesters also have the option of assigning a shopping cart to another Requester. Each department should have at least two requesters, in case one is unavailable when an order needs to be placed.

Department Approver



Some departments have designated a Department Approver who can be added to the routing sequence ahead of the Fiscal Approver. To route a Requisition to the Department Approver, the Window Shopper or Requester chooses the Department Approver from a menu in the General section of the Requisition before it's submitted.

If ordering for another department, the Window Shopper or Requester should change the department under "Shopping on Behalf Of" in the General section of the Requisition. Then, if a Department Approver is being selected, the menu options will include Department Approvers from the appropriate department.

Fiscal Approver



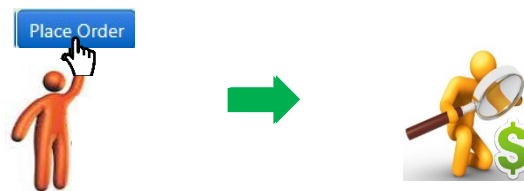
Fiscal Approvers are the Fiscal Officers assigned to accounts in KFS, and their chosen delegates.

Note that any Approver has the ability to change the Requisition, reject the entire Requisition, reject individual line items in the Requisition, or return the Requisition to the Requester for changes.

Following are some scenarios that demonstrate the various roles in AggieBuy:

Employee with Requester Role makes Purchase

Rebecca, an employee in the Human Resources department, orders supplies for the office. She has the Requester role, so after filling her cart, she places the order. Before submitting the order, she enters the number of the appropriate account for this purchase. The Requisition will route to the Fiscal Approver who is assigned to the account.



Requisition Needs to Route to Department Approver

Edward works in a lab on a research project. He knows that any purchases made for this project need to be approved by Marie, the lab manager. Marie has been set up in AggieBuy as a Department Approver for this department. Before submitting the order, Edward selects Marie's name from a drop-down list of Department Approvers related to his department. The Requisition will route to Marie, then to the Fiscal Approver.



Window Shopper Fills Cart for Requester

Laura, a member of the faculty, asks Robert, her student assistant who is an employee, to order some supplies for her. Robert, who has the Window Shopper role in AggieBuy, adds the items to a shopping cart and assigns the cart to Laura, who has the role of Requester. Laura can make changes, if necessary, and submit the order.



Window Shopper Fills Cart for Requester, Requisition Needs to Route to Department Approver

Michael, who works in the School of Medicine, asks Daniel, his assistant, to add syringes to a shopping cart and assign the cart to him. Daniel, the assistant, has the Window Shopper role, and Michael has the Requester role.

Michael knows that Kay, who is in charge of tracking syringe inventory for his department, wants to review and approve this order before it routes to the Fiscal Approver. Kay has been set up as a Department Approver for this department. Once Daniel assigns the cart to Michael, Michael can choose Kay's name from a list of Department Approvers before submitting the order. The order will route to Kay, then to the Fiscal Approver.

