



Permissions Guide

Basware P2P 18.2

1 General Permissions

1.1 General

Access System (0)

This permission gives a user/group access to the system. User/groups with this permission can access the basic Main Menu configuration. Users/groups that do not have this permission cannot access the system and receive an error message when they attempt to log in.

Users without this permission cannot log into the system and could potentially lock up their terminal when repeatedly entering a login name and password. At this point, closing the browser is the only way to log out.



If system setting 820 – Grant New User Access to System is set to Yes, then this permission is automatically granted to each user/group created.

Restrict Access to Mobile App (3)

This restrictive permission prevents a user/group from accessing to the Basware - Verian mobile app to create expenses or perform approvals. User/groups with this permission cannot access the app dashboard.

This permission does not affect access to the mobile website, accessed through a mobile web browser.

Change Password (12)


This permission gives a user/group access to the change password option on the Main Menu. Users are required to enter their old password once and then their new password twice before clicking the Change Password action.

Organizations may want to grant all users or some users with the permission to change their password. A general policy of changing a user password every (3, 6, 12 months) is a standard policy for corporations wishing to create additional system security. A standard password policy can alleviate potential problems, which may occur if login IDs and passwords are compromised.

Send Broadcast Messages (17)

This permission gives a user/group access to the Broadcast Message link in the Administration Tools menu. This link enables users/groups to access the broadcast message function without receiving a permissions error.

The broadcast message function enables users/groups to send a message to every user. Usually this permission is reserved for the system administrator and/or purchasing manager. Companies must determine the appropriate users for this permission.

Can Change In/Out Status (74)	<p>This permission gives a user/group the ability to update their in/out status.</p> <p>The organization may find the vacation routing feature to be extremely useful. Users are able to change their in/out status as well as designate approvers when on vacation.</p>
Send Faxes to Any Number (32)	<p>This permission gives a user/group access to the Fax Message link on the Administration sidebar and users are able to see the Use Fax field on the Send Message page.</p> <p>Managers may need to communicate with vendors or other companies via fax. This option allows managers to send fax messages to any fax number.</p>
Send Faxes to Basware Users (31)	<p>This permission enables a user/group to communicate with users via fax. If this permission is granted then the user will be able to access the Use Fax field on the Send Message page. Once the field is checked, this user is able to send a fax message to an internal user.</p> <p>Managers may need to communicate with users via fax. This option can be used to enable managers to send faxed messages to any registered user with a fax number.</p>
	
<p>Users are able to send faxes to other users for internal communication purposes only faxes cannot be sent to persons not set up as users.</p>	
Run Reports (23)	<p>This permission enables a user/group to run existing reports. Users are not able to add, edit, or delete reports unless they have permission 22 – Manage Reports .</p> <p>Report management and security is an essential function of the system. It is not necessary for all individuals involved in reporting to have the ability to add, edit, or delete reports. Typical users of this permission may include report manager assistants.</p> <p>A user/group with this permission has access to Spend Manager Ad Hoc Reporting when the user/group does not have access to the Spend Manager module or when Spend Manager is not configured for the instance.</p>
View All Directories (28)	<p>This permission gives a user/group access to the Directories menu in the Reports menu. This option enables the user/group to view the following directories: users, locations, vendors, vendors-location specific, and manufacturers.</p> <p>Directories provide users with valuable information including names, address information, email and telephone information for all users and vendors. This information may be beneficial to different users/groups.</p>

- View Users (70)** This permission enables a user/group to access basic information about users using the directories functionality. The information displayed for each user includes name (ID), location, phone, and email address. In addition, the Name (ID) link enables access to additional information about the user including fax number, last login, bill to location, and ship to location. The link in the user's email address column enables users to access the external email system to send an email to the selected user. This functionality is available to aid information flow in the purchasing process.
- Users can see four types of directories (users, locations, vendors, and manufacturers). However, it is not important for all users/groups to be able to see this information. Therefore, users/groups may be limited in the types of directories they have access to view.
- View Locations (68)** This permission gives a user/group access to the locations directory. In addition, users need to have permission 16 – Manage Locations and Location Groups to be able to access the Locations link under the Reports menu.
- This directory includes basic information about all of the locations that have been added to the system. The information displayed includes the location ID, location name, address, city, state, zip, and phone number. The Location ID link provides access to the accounting code and tax information for the selected location. This information may be helpful during the purchasing process.
- Users can see four types of directories (users, locations, vendors, and manufacturers). However, it is not important for all users/groups to be able to see this information. Therefore, users/groups may be limited in the types of directories they have access to view.
- View Manufacturers (69)** This permission gives a user/group access to the manufacturer directory. For users to be able to view the Manufacturers link in the Reports menu, they need to have Manage Manufacturers (20) Permission.
- This directory includes basic information about the manufacturers that have been added to the system. The information displayed includes the Manufacturer ID, Name, Address, City, State, Zip, and Notes fields. The Manufacturer ID link provides access to the URL address for the manufacturer (if any). This information may be helpful during the purchasing process.
- Users can see four types of directories (users, locations, vendors, and manufacturers). However, it is not important for all users/groups to be able to see this information. Therefore, users/groups may be limited in the types of directories they have access to view.
- View Purchasing Vendors (71)** This permission gives a user/group access to the Vendor and Vendors-Location specific links under Directories in the Reports menu.

This directory includes basic information about the vendors that have been added to the system. The information displayed includes the Vendor ID, Name, Phone, Account Number, Contract, and Notes fields. The Vendor ID link provides access to the vendor type, payment terms, how orders are processed (fax, EDI, email, manual), accounting code, address information, URL, email, contact information, and minimum order requirements. This information may be helpful during the purchasing process.


Users can see four types of directories (users, locations, vendors, and manufacturers). However, it is not important for all users/groups to be able to see this information. Therefore, users/groups may be limited in the types of directories they have access to view.

View Selected Projects (137)

This permission enables users to be able to view projects in the system from the Projects link.

Can Manage WeAchievements (200)

This permission enables users to manage WeAchievements, including starting, stopping, and deleting WeAchievement events. These actions occur on the

WeAchievement Administration List page, found under  > **Other Data** > **Manage WeAchievements**.

Data Extract Utility Manager (4205)

This permission enables tenant users to access the Data Extract Utility and run or test all data extracts currently configured for the tenant. The user cannot add, edit, or delete the extracts.

Use Chatbot (4206)

This permission enables users to access the chatbot in the UI. Chatbot must be configured for the tenant, and the user must have access to Purchase Manager module.

1.2 Security

Global Administrator (15) [Hidden Permission]

This permission enables the global administrator to perform administrative tasks in Basware P2P. The first global administrator is created automatically during a multi-company installation.

This permission is available only in the global administrator list of permissions. Only the global administrator can assign this permission to another user/group.

Manage System Settings (18)

This permission gives a user/group access to the Administration Tools on the Main Menu. On the Administration page, these links are available in the System menu group and Other Data menu group. These links are

- System Settings
- Reset System

- Colors
- Lookups

This permission enables a user to change the system settings within Basware P2P. Altering system settings affect the display and behavior of the system. It is recommended that the system administrator is the only user with this permission.

Manage Import Specifications (62)

This permission gives a user/group access to the Administration Tools on the Main Menu. From the Administration Tools the user/group can access the **Import Specifications** link under System menu group. Users are able to perform add, edit, and run import functions for the system.

Import specifications are an important part of the system administrator's job. This permission helps manage what specific information the organization can import. This permission is usually reserved for the system administrator.

Manage Permissions (6)

This permission gives a user/group access to the Administration Tools on the Main Menu. On the Administration sidebar, the Permissions link is available. Selecting this permission enables a user to change user and group permissions.

Manage Locations and Location Groups (16)

This permission gives a user/group access to the Administration Tools on the Main Menu. With this permission, the links available to the user/group are Locations and Location Groups.

Some users need the permission to add, edit, or delete locations and location groups. This permission is required in order to perform these functions. Normally the only user who has this permission is the system administrator.

Manage Users and Groups (5)

This permission gives users/groups access to the Administration Tools on the Main Menu. This permission allows user to change, update, and deactivate/delete users and groups under the Users menu group. It also allows users with this permission to set another user's in/out status.

With this permission, users are able to access the Groups and Users links.

Manage User Attribute Types (89)

This permission enables a user/group to add, edit, or delete user attribute types. These attribute types are used to provide a field of entry on the user profile for additional information about a user. For example, if a manager wants to record specific skills for users, an attribute type of skills would be created. This attribute type would display on the user profile.

Manage Rules (26)

This permission gives a user/group access to the Administration Tools on the Main Menu. This gives the user access to the Rules link under the Users menu group. Users may create, edit, delete, enable, and disable specific rules.

Rules aid in the effective management of users and/or groups. Rules may be established for item selection, budget, approval, request conditions, and invoice

functions. Creation of rules helps a company manage its purchasing process. The typical user of this permission is the system administrator.

**Manage Reports
(22)**

This permission gives a user/group access to Reports on the Main Menu. It enables the user to add, edit, run, and delete reports. This is a general permission, which gives the user access to all report functions.

Report management is an essential function of Basware P2P. All levels of management can use various reports in order to make strategic, tactical, and operational decisions. Generally, users who are given this permission include report managers, purchasing managers, and system administrators.

A user/group with this permission has access to Spend Manager Ad Hoc Reporting when the user/group does not have access to the Spend Manager module or when Spend Manager is not configured for the instance.

**Manage
Accounting Codes
(61)**

This permission gives a user/group access to the Administration Tools on the Main Menu. This permission will allow the user to access the Accounting Codes link under the Other Data menu group. From this point, the user may be able to add, edit, and delete accounting codes.

The establishment of accounting codes depends on each organization's individual process design. Some organizations may not use accounting codes, yet others may have an accounting code for each item ordered through a vendor and/or items in the warehouse. Accounting codes should match the organization's accounting process. These accounting codes can then be verified during data entry. In addition, these fields can be designated as mandatory fields.

**Manage Currency
Rates (87)**

This permission enables a user/group to add, edit, and delete exchange rates.


**Manage Print
Queues (150)
(Deprecated)**

This permission enables a user/group to add, edit, and delete print queues. Users who have this permission are able to see the Print Queues link under Administration Tools menu.


**Manage
Accounting Code
Groups (151)**

This permission enables a user/group to manage accounting code groups. Users who have this permission are able to see the Accounting Code Groups link under Administration Tools menu.

**Manage Alerts
(4012)**

This permission enables a user/group to access the Manage Alerts administration grid by clicking  > **Other Data > Manage Alerts..**


**Manage Delegate
Users (4120)**

This permission allows the administrative user to manage delegate users by accessing  > **Users > User Delegates.** The administrator can assign

delegate users to handle purchasing and/or expense requests for other users, groups, locations, or location groups.


1.3 Base Data

Can Manage Work Queues (3607)

This permission gives the user access to the  > **Other Data** > **Work Queues** menu item. The user can add, edit, delete, enable, or disable any work queues.

Work queues make user actions more visible and accessible by adding things such as receipt inspection, receiving/financial discrepancies, approvals, and more to the dashboard.

Can Manage Files (3690)

This permission give the user access to the  > **Other Data** > **Basware File Manager** menu item. The user can upload, download, or delete files from this page.

Basware File Manager stores files uploaded into the system, most often from imports.

Manage Condition Codes (3700)

This permission allows users to manage condition codes for items. This permission allows access to the Condition Codes link in the Other Data menu group under the Administration Tools.

The users with this permission have the ability to set the values for condition codes in the system.

Manage Catalogs (19)

This permission gives a user/group access to the Administration Tools on the Main Menu. This permission is a general setting that will give a user access to all links under the Catalog menu group. The user has the ability to add, edit, or delete information for the following links: Contracts, Items, Item Assemblies, Manufacturers, Vendors, Vendor Types, Payment Types, Payment Terms, and Item Categories.

Companies grant this permission to users who need to have access to all links under the Catalog menu group. This permission is usually reserved for the system administrator. Other permissions may be given to users to access individual links under the Catalog menu group.

Restrict Catalog Management to Selected Item Categories (84)

This permission gives a user/group catalog administration privileges for a specific item category. This is a restrictive permission. Once a user/group is assigned to administer catalog permissions by an item category, the user/group is no longer able to add, edit, or delete any catalog items that do not belong to that specific item category.

Group permissions for catalog management must be given before users can be assigned. If group permissions are assigned, but not distributive permissions, the user is not able to administer for any group or location.

This feature aids large organizations with many users to distribute administrative responsibilities across many organizational units and employees while maintaining global control.

Restrict Catalog Management to Selected Item Types (85)

This permission enables a user/group to manage catalog data for a specific item type. This is a restrictive permission. Once assigned the user/group can only manage catalog data for the selected item type. In addition, other user/groups with catalog permissions are not able to manage the catalog data for this item type.

Restrict Catalog Management to Selected Vendors (86)

This permission enables a user/group to manage catalog data for a specific vendor. This is a restrictive permission. Once assigned the user/group can only manage catalog data for the selected Vendor. In addition, other user/groups with catalog permissions are not be able to manage the catalog data for this vendor.

Review Suggested/Custom Items (78)

This permission gives a user/group the ability to review suggested items. Without assigning this permission, anybody with manage catalog or manage items permissions would be able to review a suggested item. This permission narrows down the list of reviewers/approvers for a suggested item.

Many organizations often allow multiple people to have access to manage catalogs and/or manage items. However, there is usually a much smaller list of approvers who can add items to the master catalog. This permission allows the organization to specify which individual and/or group have the right to review suggested items.

Manage Vendors (11)

This permission enables a user/group to manage vendors and vendor types. This permission is required in order to perform these functions. Typical users with this permission include catalog managers and purchasing managers.

Not all users need to have access to every link under the Catalog menu group. Users may be granted individual permissions based on specific job functions. Typical users with this permission include catalog managers and purchasing managers.

Manage Contracts (25)

This permission gives a user/group access to the Administration Tools on the Main Menu. This permission give the user access to Catalog menu group. This is an individual user permission and only allows access to the Contract link, as well as linked contract names on the Shopping Cart, View Order Request, View Purchase Order, Approval Detail view, Items to Order, and Withdraw Bin pages. Not all users need to have access to every link under the Catalog menu group. Users may be granted individual permissions based on specific job functions.

View Contracts (39)	This permission gives a user/group access to view, but not edit, contracts in the system. The user may click on the hyperlinked Contract action while viewing an item under contract to see all contract details. If this permission is denied, the Contract action is disabled.
Restrict to Manage Own Contracts (402)	This restrictive permission limits users with permission 25 - Manage Contracts to only managing the contracts on which they are designated Contract Owner.
Restrict to Manage Selected Contracts Types (403)	This restrictive permission limits users with permission 25 - Manage Contracts to only managing the contract types selected using the Select Contract Type action.
Manage Items (10)	<p>This permission gives a user/group access to the Administration Tools on the Main Menu. The links that can be accessed are items, item categories, and item assemblies under the Catalog menu group.</p> <p>Some users need permission to add, edit, or discontinue items in the catalog. This permission is required in order to perform these functions. Not all users need to have access to every link under the Catalog menu group. Users may be granted individual permissions based on specific job functions.</p>
Manage Item Assemblies (67)	<p>This permission enables a user/group to add, edit, discontinue, and view information about the item assembly. Users need to have permission 10 – Manage Items to be able to have the ability to manage Item Assemblies.</p> <p>Users are able to see the catalog item that trigger the assembly and the subsequent items that makeup the assembly. It is extremely important to note that users that have permission to manage items and manage catalogs will also be able to perform functions on the item assemblies in the system.</p> <p>Item assemblies are extremely useful tools for companies that use kitting modules. Kitting modules are also known as bill of materials files (BOMs). The creation and maintenance of item assemblies for purchasing software will streamline the purchasing process. As item assemblies are added, businesses will realize significant cost savings during the purchasing process, as selecting the main item assembly places orders for an entire list of products.</p>
Can Add Items to Item Assemblies (66)	This permission gives a user/group access to the Add to Item Assembly action after clicking Special Functions in the shopping cart. Users are able to add items to an existing assembly only. In order to be able to create a new assembly users would have to have one of the following three permissions: manage item assemblies, manage items, or manage catalogs. It is not recommended that end users have any of the permissions listed previously. Normally, one individual will be responsible for the management and maintenance of items assemblies. If end users could access the Item Assembly Maintenance Page then they could inadvertently edit, discontinue, or add additional item assemblies.

Organizations that use kitting or bill of materials files (BOM) find this permission extremely beneficial to the end user. After authorized personnel have created item assemblies, requesters may add the necessary items to the assembly. Once all items have been added to the assembly, requesters will only have to order the item assembly name from the master catalog instead of each individual item that makes up the entire assembly. The initial work required for creating item assemblies will produce long-term time management benefits for end users.

Manage

Manufacturers (20)

This permission gives a user/group access to the Administration Tools on the Main Menu. This permission gives the user access to the Catalog menu group. The permission acts as an individual permission in order to add, edit, or delete manufacturers. The user is able to access only the Manufacturer link.

Not all users need to have access to every link under the Catalog menu group. Users may be granted individual permissions based on specific job functions.

Manage Clients/ Sites (125)

Manage Clients/Sites (125)

This permission gives a user/group access to the Administration Tools on the Main Menu. Users are able to access the Clients/Sites link under the Geographic menu group with this permission. This permission enables user/group to add, edit, or delete clients/sites information.

Manage Projects (126)

This permission gives a user/group access to the Administration tab on the Main Menu. Users are able to access the Projects link under the Geographic menu group with this permission. Users are able to manage the projects information such as adding, editing, and closing.

Manage Payment Terms and Types (21)

This permission gives a user/group access to the Administration option on the Main Menu. This will give the user access to the Catalog menu group. This permission acts as an individual permission to add, edit, and delete payment terms and payment types. The user is able to access only the Payment Term and Payment Types links.

Not all users need to have access to every link under the Catalog menu group. Users may be granted individual permissions based on specific job functions.

Manage Shipping Options (27)

This permission adds the Administration tab to Main Menu. This permission gives the user access to the Other Data menu group. This allows access to the Shipping Options link. Users may add, edit, delete, enable, or disable user defined shipping options.

The effective creation and management of shipping options allows organizations to streamline the selection of shipping methods by end users. When a requester creates an order request, he/she is able to select from a list of possible shipping options that have been added to the system. Typically, system administrators or purchasing managers need access to this permission.

Manage Catalog Import Maps (167)	This permission give the user access to the Admin Tools > Catalog Imports > Catalog Maps menu item. A user with this permission can perform all administrative tasks related to Catalog maps, including adding, editing, deleting, enabling, disabling, and starting catalog imports.
Upload Catalog Files (168)	This permission give the user access to the Admin Tools > Catalog Imports > Upload Catalog menu item. The user can upload catalog information according to the selected map.
Manage Data Attributes (172)	This permission give the user access to the Admin Tools > Other Data > Manage Data Attributes menu item. The user can add, edit, publish, disable, delete, or manage data attributes and data attribute types for all areas of the system. Data attributes facilitate further customization and control for items, groups, vendors, categories, and other data types.
Manage AP Export Batches (180)	This permission gives the user access to the Invoice Batch Manager administration grid, found in Admin Tools > Invoice > Invoice Batch Manager. From there, the user can view the invoices included in each batch and download the batch to an Excel spreadsheet.
Restrict Access to Mobile Accounts Coding (4011)	A user with this restrictive permission enabled cannot see the add Account Code option when adding expense line items within the mobile app.
Manage Accounting Periods (94)	This permission gives the user access to the Accounting Periods management grid, found in Admin Tools > Accounting > Accounting Periods. From there, the user can add, edit, and view custom accounting periods. Only relevant if system setting <i>2310 - Credit Card Expense Report Cycle Frequency</i> is set to Custom Accounting Period.

2 Purchase Manager Permissions

2.1 Requesting

**Manage All
Order Requests
(30)**

This permission gives a user/group access to the Manage Requests link on the Requisitions menu. Anyone with this permission can see ALL requests in the system, even if they do not have receiving and requesting assignments to all locations. This permission is generally reserved for system administrators.

Users who have this permission have access to the following actions

- Delete Requests
- Recall Requests
- Restart Receiving
- End Receiving
- Receive Items
- Return Items
- View Requests
- Update Status
- Clear Entries

**Manage Own
Order Requests
(29)**

This permission gives a user/group access to the Manage Requests link on the Requisitions menu. This permission allows the user to perform basic editing functions for their requests only.

Companies must define which users and/or groups need to have permission to manage their own requests. This permission is usually granted to users who also have permission to receive own items.

**Can View
Purchase Orders
For Requests
(149)**

This permission enables a user/group to view purchase orders for requests that the user has access to, even without manage purchase orders permission.

This permission is useful when giving requesters access to view purchase order information, but not be able to edit or manage the purchase order.

**Can Change
Requester Name
on Order
Requests (14)**

This permission enables a user/group to edit the Requester field on the Create Order Request page. If users have this permission then they are able to change the requester name. If not, then this field is gray.

Some organizations may have users who need to make requests for others. A typical example would be a manager of users. If one or more of the users were out of the office and needed to make a request, then the manager would be able to make the request and key the appropriate requester's name.

**Can Suggest
Items (7)**

This permission gives a user/group access to the Suggest Item link on the Requisitions menu.

This permission allows users to enter proposed catalog items for approval and addition to catalog. Organizations must determine if this permission is part of their current requisitioning process.

For example:

Organization A might only allow users to order items in the existing catalog while Organization B allows users to suggest items.

**View Item
Pricing (38)**

This permission gives a user/group access to item pricing information on the Search Results page. The impact of this permission is found in the Search Results page. After the user clicks the Request Items/Search Items action, the Search Results page appears. Next to each item's name and description is a link for the SKU (ID). The SKU label may be different depending on the system setting. If the user clicks the ID link and scrolls to the bottom of the page, they see specific price information as it relates to the item.

Some users may have a need to view item-pricing information. If so, then this permission should be given to all users and/or groups that require this information in order to perform their daily job requirements.

**Can Specify
Preferred
Warehouse
during
Requesting (48)**

This permission enables a user/group that requests and receives, to select a default warehouse. If a user has requesting and receiving permissions for more than one warehouse then they will see a Default to Warehouse drop-down box in the Shopping Cart. It allows the user to select a warehouse to order goods for, from the Shopping Cart.

For example:

Warehouses A and B both stock five items. An order request is created for the five items and Warehouse A has the full quantities in stock for four of the items. Warehouse B has the quantity in stock for the fifth item. A purchase order is created and four items are requested from Warehouse A, and the last item is requested from Warehouse B.

This is useful for locations served by multiple warehouses. If an item is not established in the selected warehouse, then the request is rerouted to the next available warehouse [with the highest priority], which has stock of the item.

**Can Create Free
Form Order
Requests (36)**

Free Form Order Requests are better known in the system as Off Catalog Requests.

This permission gives a user/group access to the Off Catalog Request link on the Requisitions menu.

Companies may or may not want certain groups to be able to create off catalog order requests.

Therefore, this permission may be granted to users and/or groups depending on the specific purchasing protocols for each company.

Can Specify Line Udefs/Account Codes on Request Lines (54)	<p>This permission gives a user/group access to the Set Line Codes action in Special Functions. This is one of the permissions that enables the [Special Functions] drop-down in the shopping cart.</p> <p>This permission allows users to enter accounting codes on a line-item basis or other line specific information.</p>
Can Split Accounting Codes (63)	<p>This permission enables a user/group to distribute costs of one item to multiple accounts. If the user has this permission, then he/she can see the Split icon next to the item name on the Shopping Cart page.</p> <p>Companies may need to be able to split accounting codes in order to allocate costs between different departments. This is an essential permission for companies who need to perform this activity.</p>
Can Assign Location Shipments (163)	<p>This permission enables a user/group to assign multiple ship to locations. If the user has this permission, then he/she can see the [L] link next to the item name in the Shopping Cart.</p> <p>This permission allows users to create one order request and have the items shipped to multiple locations.</p>
Can Attach Document for Purchase Orders and Expenses (76)	<p>This permission enables a user/group to attach a document to an order request for external delivery to a vendor. Users with this permission will be able to access the Attach File action by clicking the [Special Functions] drop-down in the shopping cart. Documents may include formats such as .txt, Excel, Word, and HTML files.</p> <p>Many companies send additional documents to vendors when purchase orders are delivered. Additional documents typically include specification files and special requirement documents. The requester can attach documents to order requests, which will be delivered to independent vendors.</p>
Can Establish Vendor Connect Sessions (90)	<p>This permission gives a user/group access to Vendor Punchouts link on the Requisitions menu. Users with this permission is able to connect to an online vendor to request items. This option is turned off or on by the company administrator.</p>
Can Associate Requests to Projects (139)	<p>This permission gives a user/group access to the project field when creating an order request. By selecting an existing project in this field, users will be able to associate the order request to the project.</p>

Restrict to Available Inventory during Requesting (102)	<p>This is a restrictive permission, which restricts the catalog items displayed to users. Users with this permission will only be able to view items that are established in the warehouse. The user will not be able to search for items from the entire catalog.</p>
Restrict to Order from Pick Lists (35)	<p>This permission restricts a user/group only to order items that have been established in favorites. The user will not be able to search for items from the entire catalog.</p> <p>Situations do exist in corporate purchasing which may require users to be restricted to a certain amount of items. Restricting a user to his/her favorites is a valuable tool in order to ensure that items are not selected from the entire catalog.</p>
Restrict to Select only Parent Vendors during Requesting (100)	<p>This permission restricts the user/group from seeing any subsidiaries that are associated with a parent vendor in the system.</p>
Restrict To View Base Units of Catalog Items (72)	<p>This permission restricts the user/group to view only the base units of the items. This permission works in conjunction with system setting 849 – Suppress Additional Units in Item Search. If Yes is selected for this system setting then all users/groups are not able to see additional base units when performing an item search. However, if No is selected for this system setting then all user/groups are able to view additional unit multiples when performing an item search. The organization may want to limit certain users/groups from being able to see and order large unit multiples.</p> <p><u>Example</u></p> <p>Managers are be able to see additional unit multiples when performing a search. In a simple case, managers are allowed to order either a box or a case of an item. Yet, different users/groups are restricted from being able to order a case. These users/groups are only able to order the box (the base unit). This permission gives the ability to limit specific users/groups to only viewing and ordering items from the master catalog in the base unit.</p> <p>Many companies have complicated purchasing rules and requirements. There are occasions when only managers have the ability to order in unit multiples other than the base unit. End users may be restricted to ordering items in their lowest base unit such as EACH or BOX. This permission allows companies to maintain their complicated purchasing rules when they install Basware P2P.</p>
Can Change Bill-to Location during Requesting (96)	<p>This permission enables a user/group to edit the bill to location on an order request. If selected, the Bill to Location drop-down box in the request header populates with locations for which user has receiving and requesting permissions. Companies may wish to grant certain users permission to change the bill to location on an order request per company policy. In addition, also consider giving user permission to receive.</p>

	If users do not have this permission then the order requests created are billed to the bill to location set in the user profile.
Can Change Ship-to Location during Requesting (13)	<p>This permission enables a user/group to edit the ship to location on an order request. If selected, the Ship to Location drop-down box in the request header populates with locations for which user has receiving and requesting assignments. Organizations may wish to grant certain users permission to change the ship to location on an order request per company policy.</p> <p><u>Example</u></p> <p>If an office is damaged by weather or fire, then they will not be able to receive their own items. In this case, an alternate ship to location must be chosen to ensure the delivery is sent to the correct location. In addition, also consider giving the user permission to receive.</p> <p>This permission can be assigned by locations or location group groups.</p>
Can Change Charge-To Location during Requesting (9)	<p>This permission gives a user/group the ability to change the location to which their order request is charged during requesting. The administrator can control which locations each user/group can access using the (Select Locations) action to the right of the permission.</p>
Can Create Custom Favorites List (37)	<p>This permission gives a user/group access to the Favorites link in the Requisitions menu. This is one of the permissions that enables the [Special Functions] drop-down in the shopping cart.</p> <p>Favorites represent a way for users to store items that are frequently requested in a central location. Requesters may save valuable time by creating favorites, which can be accessed easily and quickly. The favorites acts as a quick search mechanism of frequently requested items by the user.</p>
Restrict Users from making Requests (152)	<p>This restrictive permission disables any user/group from creating requests.</p>
Can Change system selected Vendor during Requesting (153)	<p>This permission enables a user/group to change the vendor from whom the item is ordered from the Shopping Cart page. Users with this permission will have access to the Change Vendor action under the [Special Functions] drop-down.</p>
Restrict to View-only Order Requests (156)	<p>This is a restrictive permission allows users to only access the View Requests link on Request List page.</p> <p>This permission works in conjunction with permission 30 – Manage All Order Requests.</p> <p>This permission can be assigned by locations or location group groups.</p>

Can Manage Other Users' Shopping Carts (164)	<p>This permission allows assigned users/groups to insert items into other users' shopping carts via the REQUESTBIN > ADD VAPI method.</p> <p>Users/groups not assigned this permission can only add items to their own carts via the REQUESTBIN > ADD VAPI method.</p>
Restrict to Accounts Coding Types (176)	<p>This permission sets which accounts coding types the user/group can select in the Shopping Cart or Expense Draft Creation pages. Accounts coding types allow for specific configurations for different accounts coding scenarios.</p> <p>Click Select Accounts Coding Types, then choose which types to restrict permission to in the pop-up.</p> <p>If no Accounts Coding Types are selected, the user/group can select from all enabled accounts coding types.</p>
Can View User Reviews (301)	When assigned, allows the user to view ratings and reviews of vendors and products other users have written in Purchase Manager.
Can Create User Reviews (302)	When assigned, allows the user to give ratings and reviews of vendors and products in Purchase Manager for other users to view.
Can Create Urgent Requests (310)	When assigned, user can create urgent requests using the Special Functions menu on the Shopping Cart. Urgent requests bypass all approvals and immediately go to Items to Order or a purchase order with the appropriate vendor settings.

2.2 Approval

Approve Requests (1)	<p>This permission gives a user/group access to the Approve menu on the Procurement sidebar. Users will be able to access the Order Request and All Approvals links under the Approve menu group. This option enables a user to decline requests and approve requests. A user with this permission can access the Approval List page to view and approve requests. The organization determines who needs to access this list and approve requests.</p>
Can Add Users to Approval Route (75)	<p>This permission gives a user/group access to an additional box called edit approval routing when performing a line item approval on an order request. The user is able to add additional users who have approval permissions to the existing approval route.</p> <p>There are times in the organizations where a user may need or want to send an order request to an additional approver. With this permission, users can add additional approvers to the existing approval chain.</p>

Can Replace Users in Approval Route (401)	<p>This permission gives a user/group access to the Replace Approval Users action on the Manage Request page, Manage Expenses page, and the Manage Invoice page. This permission allows users to change the immediate approver on the approval route.</p> <p>There are times in an organization where a user may need change the approver on the route. This is helpful when a user forgets to change his/her in/out status. It is recommended that only certain users have this permission.</p>
Can Edit Unit Cost of Line Items While Approving (140)	<p>This permission can be given to approvers. Users/groups with this permission are able to edit the cost of line items when approving requests. Users need to have permission 1–Approve Requests to be able to change the line item cost.</p> <p>This is helpful if the approvers are more aware of price fluctuations than the requesters are.</p>
Can Change Vendor Assignment during Approval (143)	<p>This permission can be given to approvers. Users/groups with this permission will be able to edit the vendor on the order request when approving requests. Users need to have permission 1–Approve Requests to be able to change the vendor assignment.</p> <p>This is useful if the approver is more familiar with the vendor base than the requester is.</p>
Can Add and Remove Line Items during Approval (105)	<p>This permission allows approvers to delete line items on the Detailed Approval page for order requests. Approvers can also add items from a shopping cart to the order request from the Detailed approval page.</p> <p>Users need to have permission 1–Approve Requests.</p>

2.3 Purchasing

Manage POs (8)	<p>This permission gives a user/group access to the Items to Order and Purchase Orders links on the Procurement sidebar menu.</p> <p>This setting allows users to order items and perform general maintenance functions for purchase orders. This permission is usually reserved for users in the purchasing departments.</p> <p>This permission can be assigned by locations or location group groups.</p> <p>Users with this permission have access to the following actions on the Purchase Order List page</p> <ul style="list-style-type: none"> • Reconcile PO • Return PO • Receive PO
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- Delete POs
- Close POs
- Edit PO
- View PO
- Print Preview
- Deliver
- Mark as Placed
- Mark as Confirmed

Restrict Management of POs to Selected Vendors (79)

In conjunction with permission 8 - Manage POs, this restrictive permission allows users/groups to manage purchase orders only from certain vendors. The administrator selects these vendors using the Select Vendors link to the right.

Restrict Management of POs to Selected Item Categories (80)

In conjunction with permission 8 - Manage POs, this restrictive permission allows users/groups to manage purchase orders only from certain item categories. The administrator selects these categories using the Select Item Categories link to the right.

Restrict to Own Purchase Orders (57)

This permission in combination with the Manage Purchase Orders permission gives a user/group access to the purchase orders option on the Main Menu. The user must be associated with a location, but he/she only see his/her individual purchase orders. They do not see all of the purchase orders.

This permission is an effective way to alleviate confusion among users. Users may become confused if they see purchase orders that they have not created. However, if this permission is enabled, then the user will only see the purchase orders they have created; not the entire Purchase Order list for the location that the user belongs to.

Manage Standing Orders (42)

This is one of the permissions that enables the [Special Functions] drop-down in the shopping cart. This permission affects the Standing Orders link, which is accessed from the Requisition menu. It will allow the user to edit the items on the standing order, edit the order, or delete the order.

Standing orders have been created in order to automate routine and/or commodity orders that happen on a specific time interval. It is highly recommended that only purchasing managers have access to this permission.

Manage Own RFQs (43)

This is one of the permissions that enables the [Special Functions] drop-down in the shopping cart. The user/groups with this permission have access to the Manage RFQs link in the Requisitions menu. This permission gives the user the ability to perform maintenance functions only for quotes that he/she has created. If this permission is not given to the user then the user may or may not see the

[Special Functions] drop-down above the shopping cart. Quotes can be an effective way for purchasing managers to verify prices before an order is placed.

Manage All Quotes (144) The user/groups with this permission have access to the Manage RFQs link in the Requisitions menu. This permission gives the user the ability to perform maintenance functions for all quotes. If this permission is not given to the user then the user may or may not see the Special Functions link above the shopping cart. Quotes can be an effective way for purchasing managers to verify prices before an order is placed.

Bypass Vendor Minimum/Item Quantity Restrictions during Requisition Creation (65) This permission affects the approval process on order requests. This permission only affects the requisitioning process. Either the requester can bypass the vendor minimum or maximum or he cannot. Even when the vendor minimum or maximum is bypassed, a warning message is displayed. If the item being requested has a vendor minimum and maximum and the request is smaller than the minimum or larger than the maximum, then a warning message is displayed.

In certain scenarios, the purchasing department may need to bypass a vendor minimum and generate the purchase order.



This is the only permission that allows users to bypass vendor minimum and maximum order quantity restrictions.

Can Change Price/Qty on Purchase Orders (64)

This permission allows the user to decrease the price and/or quantity on purchase orders. Users need to have Permission 8 – Manage POs or 57– Restrict to Own Purchase Orders to be able to change the price or quantity. Users can only decrease the quantity or price they will not be able to change the values to a higher level than what is on the purchase order.

This permission allows users to adjust the unit cost on a purchase order when the Edit PO button is clicked from the Manage Purchase Orders page.

In order to control effectively purchasing activity, certain management members must be able to adjust prices and quantities in order to meet the purchasing requirements and/or operational objectives of the firm. Therefore, users will need the permission to adjust quantities down and to change prices in the event of a special promotion or some other viable reason.

Can Increase Item Quantities and Item Prices on Purchase Orders (98)

This permission allows user/groups to increase the quantities and prices on purchase orders. Users need to have permission 8 – Manage POs or 57– Restrict to Own Purchase Orders to be able to change the price or quantity. This permission allows the user/group to increase the price and quantity of an item on a purchase order.

Can Change Item Price on Items to Order Page (56)

This permission displays the Change Price action on the Items to Order page, which is accessed by the Items to Order link. This allows a user to change the price on an order request.

Changing the price on an order request is an essential management function. A purchasing manager may receive an irregular price discount on a bulk purchase that requires a price change. Taking the initiative to change this information before the purchase order is sent to the vendor will alleviate possible confusion and efforts from the vendor's billing standpoint and the company's disbursement of funds when invoices/statements are paid.

Can Change Ship-to Location on Purchase Orders (103)

This permission allows the user/group to change the shipping location on the Purchase Order page. This can be before or after the purchase order is submitted. The ship to locations available are determined by the selected locations in the Manage Order Request page.

Can Change Currency on Purchase Orders (88)

This permission enables the user/group to change the currency on a purchase order.

This permission is only needed if the organization works with foreign currency.

Can Substitute/Delete PO Items (101)

Users need to have Permission 8 – Manage POs or 57– Restrict to Own Purchase Orders to be able to substitute or delete line items on a purchase order. This permission enables users to substitute or delete line items on a purchase order. This permission is useful when items on a purchase order are not available and may need to be replaced by another item or deleted from the purchase order.

Can Add Line Items to Open POs or TOs (142)

This permission allows the user to add line items in the shopping cart to an existing purchase order or transfer order that were not on the original request.

Manage Group Pick Lists (95)



Pick Lists are better known as Favorites in the system.

This permission allows the user/group to add, delete, or edit favorites for user groups.

Manage Users' Pick Lists (91)



Pick Lists are better known as Favorites in the system.

This permission allows the user/group to add, delete, or edit favorites for other users.

Manage Payments (147)	This permission enables a user/group to access the Payment link under the Payment menu group under Invoicing. Users with this permission are able to manage payment information such as editing, deleting, and viewing.
Add Payments (148)	This permission gives the user/group access to Enter Payments action on the Purchase Order or Received Purchase Order page. With this permission, users are able to enter payment information against purchase orders that they have access to.
Restrict to View-only Purchase Orders (157)	<p>This restrictive permission allows users only to access the View PO link on Purchase Order List page.</p> <p>This permission works in conjunction with permission 8 – Manage Purchase Orders.</p>
Can Export Items for Sourcing (4013)	This permission gives the user/group the ability to export requested items to the Bravo sourcing system for negotiating. The permission only affects users on tenants with Bravo integration configured.
Manage Tax Codes (199)	This permission gives the user/group the ability to store and manage Tax Codes under Administration > Geographic. Users will be allowed to add, edit, delete, enable or disable tax codes

2.4 Receiving

Can Receive Items on Own ORs (2)	<p>Allows users to receive items they have requested. This permission affects the Open Requests, All Requests, and Manage Requests links to the Purchase Orders submenu.</p> <p>If a user does not have this permission, then he/she will not be able to receive his/her own items.</p> <p>Organizations have many different policies and procedures on what types of users may receive their own items.</p>
Can Receive Items for Selected Locations (33)	<p>This permission adds the Manage Requests, Purchase Order, Received POs links to the Requisitions and Purchase Orders menus. This permission affects the Receiving pages, as the user may be able to receive items for different locations.</p> <p>Certain organizational structures require receiving to be performed by a central location. For example, Wal-Mart receives goods into central warehouse hubs, which it then ships to different store locations (spokes). An organization of this type may need permission to receive items for all locations.</p> <p>This permission can be assigned by locations or location group groups.</p>

Can Add Additional Line Items while Receiving (92)	Occasionally there will be changes on the purchase order that the supplier did not make the buyer aware. This permission allows the user to add line items from the Receiving page. This displays the Add Lines action on the Open Items on Purchase Order page.
Restrict Adding Line Items during Receiving to a Preset Value (93)	<p>This permission works in conjunction with system settings 908 and 909 for adding line item tolerances when receiving items.</p> <p>System Setting 908 – Max. Percentage Increase Allowed for Adding New Line Items in PO</p> <p>System Setting 909 – Max. Amount Increase Allowed for Adding New Line Items in PO</p>
Restrict from Opening/Closing a Request for Receiving (97)	This permission restricts the user from opening or closing a request that has not been completed or that has been fully received.
Can Receive for Default Location (166)	<p>This permission allows the user to receive for his/her default location. If the user has this permission and the user's default ship to location matches the location of the purchase order, then the user has the ability to receive that order request/ purchase order shipment even if he does not have permission 33 – Can Receive Items for Selected Locations.</p> <p>If the user has permission 33 – Can Receive Items for Selected Locations, this permission works in conjunction with it.</p>

3 Inventory Manager Permissions

3.1 Inventory Manager Permissions

Manage Warehouses (44)	<p>Adds the Inventory tab to the Main menu. Allows the user to add, edit, and delete warehouse groups and warehouses.</p> <p>Organizations that hold items in inventory usually want to create warehouses for the items. Effective management of warehouses is essential in order to control the inventory process. It is recommended that users with management responsibilities have access to this permission.</p>
Manage Inventory in Warehouse (45)	<p>Adds the Inventory tab to the Main menu. Allows the user access to different links</p> <p>Maintenance</p> <ul style="list-style-type: none"> • Inventory List • Global ROP ROQ Edit • Global Inv. Data Edit • Enter Item Count <p>Execute Tasks</p> <ul style="list-style-type: none"> • Process all JIT Orders • Process Vendor Specific JIT Orders • Process All Replenishment Orders • Process Vendor Specific Replenishment Orders • Update Pending Qty <p>Withdraw Items</p> <ul style="list-style-type: none"> • Withdraw Bin <p>Allow the user to perform basic functions in each of these links. Users must have permission 52 –Warehouse Assignment in order for this permission to work properly.</p> <p>Warehouse managers frequently need to add, load, edit, count, and perform automated inventory tasks. This permission is essential in order for the purchasing department to perform their daily task assignments.</p> <p>This setting allows the user to access the Inventory List link from the Inventory main menu. The permission directly affects the user's ability to use the Inventory Details action in order to adjust quantities. In addition, the user must have permission 45 – Manage Inventory or he is not able to access the Inventory List page. In addition, the user should be assigned a warehouse to manage using permission 52 – Warehouse Assignment.</p>

Catalog managers or purchasing managers need to adjust inventory counts on a pre-determined basis. Therefore, this permission and permission 45 – Manage Inventory become essential in order for these users to be able to complete their job requirements.

Load Inventory or Update Inventory Count in Warehouse (47)	<p>This setting allows the user to access the Initial Stock link from Inventory. In addition, the user can use the Load Inventory action from the Inventory List link. In addition, the user must have another permission 45 – Manage Inventory or they are not able to access the Inventory List page. If the user only wants to load initial inventory then permission 45 is not required, but the user should be assigned a warehouse to manage using permission 52 –Warehouse Assignment.</p> <p>Catalog managers and/or purchasing managers need to load inventory into the warehouse on a frequent basis. Therefore, this permission and permission 45 – Manage Inventory become essential in order for these users to be able to complete their job requirements.</p>
Requesting: Can Specify Preferred Warehouse during Requesting (48) [Hidden Setting]	<p>This permission affects the Request Bin page. If a user has requesting permissions for more than one warehouse then he sees a drop-down box named default to warehouse on the Request Bin page. This permission allows the user to select a warehouse to order goods from the Request Bin page.</p> <p><u>Example</u></p> <p>Warehouses A and B both stock five items. An order request is created for the five items and Warehouse A has the full quantities in stock for four of the items. Warehouse B has the quantity in stock for the fifth item. A purchase order is created and four items will be requested from Warehouse A and the last item will be requested from Warehouse B.</p> <p>This is useful for locations served by multiple warehouses. If an item is not established in the selected warehouse then the request will be rerouted to the next available warehouse [with the highest priority] that has the most stock quantity of the item.</p>
Manage Inventory Reports (49)	<p>Allows users to edit, run, copy, or delete inventory reports. Users access the inventory reports from the Reports tab on the Main menu.</p> <p>Report management is an essential function of the system. Various managers need this permission to manage the inventory reports for short and long-term strategic decision-making.</p>
Run Inventory Reports (50)	<p>Allows users to run inventory reports. Users are be able to use the Run Report action only.</p> <p>Organizations may or may not want to give users the ability to manage every aspect of the inventory report. This permission was designed for an assistant to run the</p>

report manager. His or her job would be to generate the reports, not the management of the reports. This allows effective protocols and security to follow a corporate management structure.

Manage Shipments (51)

This permission allows the user to access the shipping related links from the Inventory sidebar. The user is able to access the following three sub-menu links

- Open Shipments
- Backorders
- Previous Shipments

Warehouse Assignment (52)

This permission allows a user to be assigned to a warehouse using the inventory permissions. This permission is considered the parent for the following child permissions

- Manage Warehouses (44)
- Manage Inventory Items in Warehouse (45)
- Adjust Inventory in Warehouse (46)
- Loading Inventory or Inventory Count in Warehouse (47)
- Manage Shipments (51)

In order for other inventory and/or warehouse permissions to work correctly, this permission must be granted to the user(s) required.

Direct Warehouse Withdrawals (53)

Adds withdraw items and withdraw bin links to Inventory sidebar. These permissions are used to allow users to withdraw directly an item from an associated warehouse without creating a requisition. The user's profile must have access to the warehouse(s) that they are trying to withdraw items. Therefore, the user must belong to a group that is associated with a warehouse group.

Some purchasing systems may allow users to withdraw items from a warehouse without creating an order request. This permission can reduce the amount of transactions that take place for warehouse items. Companies must determine which users will be given this permission.

Can Auto Receive Inventory Shipments (55)

This setting affects the shipment links that is displayed when the Inventory tab is clicked. The specific impact occurs when the user clicks Create Shipment from the Open Shipments or Backorders page. If this permission is given then the user has access to Auto Receive, which has a checkbox.



In order for auto receiving to work properly, the user must have requesting and receiving permissions for the location(s) of the department(s) that the shipment is being sent.

Auto receiving is a permission that can aid in the shipping automation process

Example

Warehouse A is located in Building A and a shipment is being sent to an office in the same building. By using auto receive; you can transfer ownership of the items to the correct location immediately. This greatly benefits the corporation in the purchasing process.

**Can Return
Internal
Shipment (73)**

This permission is only used if the company has purchased P2P Inventory Manager. The permission works in conjunction with three other permissions

- Permission to Receive Own Items (2)
- Permission to Receive Items for Locations (33)
- Permission to Manage All Order Requests (30)

When returning an internal shipment (transfer order) to a warehouse, the warehouse manager must make an adjustment in the stock quantity for the item. If this permission is enabled, then the stock adjustment will take place automatically. It is highly recommended that a user in the purchasing group have this permission instead of end user. The probability of warehouse stock error will increase as additional users are given this permission. For example, you are going to return 3 units of XYZ to the warehouse and you have been given this permission. However, you forget actually to send the goods back to the warehouse. What happens next could lead to a disaster in the future. The stock quantity in the warehouse is automatically adjusted to show 3 more units of XYZ on the shelf, but they are not there. As additional requests are generated for XYZ, the warehouse manager may not be able to fill the orders due to inaccurate available stock.

There are many occasions when departments need to return items to a warehouse. Historical business processes would include an actual item return to a designated person/location in the warehouse. Once the warehouse has received the item(s), it would be the responsibility of the warehouse manager to make the necessary stock adjustments. Companies can make item return adjustments electronically and quickly. It is recommended that end users are not given this permission, but rather some user associated with the purchasing group.

**Can Change
Shipment
Warehouse on
POs (107)**



With this permission, a user can change the warehouse from which items on a transfer order are shipped. To select a new warehouse, the user must also have permission to access that warehouse via permission 52 - *Warehouse Assignment*. The warehouse must have all transfer order items stocked.

The user can change the shipment warehouse from the Open Shipments administration list using **Change Warehouse** or **Create Shipment**.

4 Asset Manager Permissions

4.1 Asset Tracking

Manage Assets (81)	<p>This permission enables a user/group to:</p> <ul style="list-style-type: none"> • Track assets including the leasing details, maintenance schedule, and other attributes. • Check assets in and out of inventory. • Record costs associated with an asset (for example, maintenance, depreciation, and repair) and calculate the book value at any point in time. • Define custom attributes for an asset and record values for these attributes. • Change the asset status at any time and keep a corresponding history record. • Categorize assets into different categories for reporting purposes. • Record asset parameters on per asset basis.
Restrict Asset Management to Selected Locations (111)	<p>This permission works in conjunction with permission 81 – Manage Assets to give restrictive asset management rights for the user/group to manage assets in the selected locations.</p>
Restrict Asset Management to Selected Asset Categories (112)	<p>This permission works in conjunction with permission 81 – Manage Assets to give user/group restrictive Asset Management rights to specific categories selected using the Select Asset Categories link.</p>
Register Assets (123)	<p>This permission gives users access to My Assets link from where users can register items as assets for the system to be able to recognize it as an asset. Assets created from the Items page are to be registered for Asset Manager to recognize them as assets.</p> <p>To be able to view the My Assets link and register assets users need to have one of the following permissions</p> <ul style="list-style-type: none"> • Manage Assets (81) • View All Assets (118)
Associate Requests with Assets (120)	<p>This permission enables users to associate requests created with assets established in the system and to trade in existing assets with new items. This permission displays the Special Functions link on the Shopping Cart page.</p>

Establish Assets on Receiving (119)	This permission displays a link to edit assets on the Receive Confirmation page. This enables users to add or edit attributes for the item being received as asset.
Manage Jobs (113)	This permission allows the user to manage jobs via the Job Queue. The Job Queue can be found by navigating to  > Other Data > Job Queue .
Manage Asset Maintenance (121)	<p>This permission allows user's access to maintenance related links in the Assets menu. Users are able to access the following links and perform related activities:</p> <ul style="list-style-type: none"> • Maintenance List • Maintenance Types <p>Users need permission 81 – Manage Assets to be able to perform tasks on the Maintenance List page such as add task, edit task, run task, etc.</p>
Add Maintenance Records (145)	This permission enables a user/group to upload schedules for maintenance. Users are required to have permission 121 – Manage Asset Maintenance in order to add maintenance records.
Modify Maintenance Records (146)	This permission allows a user/group to modify the maintenance schedules. Users are required to have permission 121 – Manage Asset Maintenance and permission 145 – Add Maintenance Records in order to modify maintenance records.
Manage Asset Depreciation (131)	This permission allows users access to the Depreciation link in the Assets menu. Users are able to add, edit, view, or delete depreciations.
Manage Work Order Types/ Categories (127)	This permission allows users access to Work Order Types and Work Order Categories in the  > Work Orders menu. This permission allows users to set up work order types and work order categories.
Manage Work Order Priorities (134)	This permission allows users access to Work Order Priorities in the Administration Tools à Assets menu. Users are able to set up work order priorities.
Manage Work Order Requests (124)	<p>This permission allows users access to the following work order request related features in the Assets menu</p> <ul style="list-style-type: none"> • Create WO Request • WO Request List <p>For users to be able to associate a work order request to asset items, permission 81 – Manage Assets is required.</p>
Manage Work Orders (114)	This permission enables a user/group access to the following work order related features in the Assets menu

- Create Work Order
- Open Work Orders
- Old Work Orders
- Service Invoices
- Search WOs

Users need to have permission 132 – Can Create Service/Work Order Invoices to be able to create service invoices using Create Invoice on the Old Work Orders List page.

View All Work Orders (174)

Users/groups assigned this permission are allowed to view open and old work orders without having permission 114 – Manage Work Orders. The one action available in the More Actions drop-down is Print Preview.

Restrict Work Orders to Default Location (175)

This restrictive permission restricts users to work orders and work order requests assigned to the default location (ship to location) assigned to them on the Add/Edit User page.



If service technicians (users assigned permissions 114 - Manage Work Orders and 4002 - Restrict to Assigned Work Orders) are assigned work orders for multiple locations, do not assign them permission 175 - Restrict Work Orders to Default Location. Users assigned this permission are only able to view work orders assigned to their default location.

Restrict to Own Work Orders/Work Order Requests (117)

This restrictive permission restricts users to their work orders; this only works in conjunction with Manage Work Order/Manage Work Order Requests permissions. The user/group, granted this permission, is only able to Manage Work Orders or Work Order Requests that the user/group has created.

Users are required to have the following permissions for this permission to work

- Manage Work Orders (114)
- Manage Work Order Requests (124)

Restrict from Creating Multiple Open Work Orders against an Asset (133)

This restrictive permission restricts users from creating duplicate work order for an asset.

Users are required to have permission 114 – Manage Work Orders for this permission to work.

Restrict Work Order/Work Order Request by Work Order Type (128)

This restrictive permission restricts users to their work orders and work order requests to the selected work order types, which are selected using the Select Work Order Types link.

	Users are required to have permission 114 – Manage Work Orders for this permission to work.
Restrict Work Order/Work Order Request by Location (116)	<p>This restrictive permission restricts users to their work orders and work order requests to the selected locations, which are selected using Select Locations.</p> <p>Users are required to have the following permissions for this permission to work</p> <ul style="list-style-type: none"> • Manage Work Orders (114) • Manage Work Order Requests (124)
Restrict Work Order/Work Order Request by Project (136)	<p>This restrictive permission restricts users to their work orders and work order requests to the selected projects.</p> <p>Users are required to have the following permissions for this permission to work</p> <ul style="list-style-type: none"> • Manage Work Orders (114) • Manage Work Order Requests (124)
View All Assets (118)	<p>Users who have this permission are able to view</p> <ul style="list-style-type: none"> • View Location Assets • My Assets • View Asset List • Select Assets when Creating a Work Order Request • Select Assets when Creating a Work Order <p>Users need to have the following permissions in order to view</p> <ul style="list-style-type: none"> • Register Assets (123) • Manage Assets (81) <p>Users are required to have the following permissions in order to create one or both of the following</p> <ul style="list-style-type: none"> • Manage Work Orders (114) • Manage Work Order Requests (124)
Restrict View Assets to Default Location Assets (122)	<p>This permission restricts users to assets that are assigned to the users' default location.</p> <p>Users must have the following permission in order to view this link</p> <ul style="list-style-type: none"> • View All Assets (118) <p>Users must have the following permissions in order to perform the following actions</p> <ul style="list-style-type: none"> • Register All Assets (123) • Manage Work Order Requests (124) • Manage Work Orders

Restrict View Assets for Selected Locations (129)	<p>The permission restricts users to assets that are assigned to the selected locations on the Permission pages for the users.</p> <p>Users must have the following permissions in order to view</p> <ul style="list-style-type: none"> • View All Assets (118) <p>Users must have the following permissions in order to perform the following actions</p> <ul style="list-style-type: none"> • Register All Assets (123) • Manage Work Order Requests (124) • Manage Work Orders
Restrict View Assets to Selected Asset Categories (170)	<p>This permission restricts users to assets that are assigned to the selected categories on the Permissions page.</p> <p>Users must have the following permissions in order to view</p> <ul style="list-style-type: none"> • View All Assets (118) <p>Users must have the following permissions in order to perform the following actions</p> <ul style="list-style-type: none"> • Register All Assets (123) • Manage Work Order Requests (124) • Manage Work Orders
Restrict to Assigned Work Orders (4002)	<p>This restrictive permission allows users to manage and view only the work orders on the Work Order Admin List page that they are assigned to as the labor resource for the work order.</p>
Restrict View Assets to Own Assets (171)	<p>This restrictive permission allows users to view only assets that are only assigned to them.</p> <p>Users must have the following permissions in order to view</p> <ul style="list-style-type: none"> • View All Assets (118) <p>Users must have the following permissions in order to perform the following actions</p> <ul style="list-style-type: none"> • Register All Assets (123) • Manage Work Order Requests (124) • Manage Work Orders
View Costs Associated with Assets (115)	<p>This permission allows users/groups to view the costs associated with the assets they are allowed to view.</p>

View Work Order Task Center (130) [Hidden Permission]	<p>This permission gives a user/group access to My Work Orders on the Assets menu.</p> <p>From this page, users are able to create work orders if they have permission 114</p> <ul style="list-style-type: none"> – Manage Work Orders or view work order requests if they have permission 124 – Manage Work Order Requests.
Restrict from Transferring Assets without a Work Order (169)	<p>This permission restricts users from seeing the Transfer Assets action on the Asset List page. Therefore, the only way users with this permission can create a transfer work order is if they are able to create work orders.</p>

5 Invoice Manager Permissions

5.1 Invoice

Can Create PO Invoice (34)

This permission adds the Purchase Orders link to the Purchase Orders menu or Manage Invoice link to the Invoicing menu. Users with this permission are able to access Reconcile PO or Invoice Entry in order to perform accounting functions.

Accounting departments and/or AP clerks need access to this permission in order to perform daily tasks. It is recommended that the accounting department be the only group of users who has access to this permission.

This permission can be assigned by locations or location group groups.

Can Enter a Duplicate Invoice (41)

This permission affects the Reconciliation page. A message appears for the user that reconciliation is being attempted on an invoice that has already been paid.

There are times in the accounting cycle when invoices are received more than once. In these cases, accounting department does not want to disburse checks for the same invoice twice. This permission is critical to effective cash flow management.

Can Void Invoice (40)

This permission affects all purchase orders that have been reconciled. Users who have this permission are able to click the Void link found in the history section of the purchase order. The user is asked to click yes/no in order to process the request. If Yes is selected, then the purchase order is un-reconciled.

Errors can occur in the reconciliation process for purchase orders. AP clerks and/or accounting departments typically need access to this permission in order to make an adjustment. This permission acts as a back end security setting in order to make adjustments for errors that might occur in the reconciliation process.

Once an invoice is voided, the same invoice number can be used again to enter a different invoice.

Can Create Service/ Work Order Invoices (132)

This permission allows the user/group to create work order invoices. The Asset and Work Order module must be installed for the user to be able to create invoices for work orders.

Manage Invoice Settings	This permission allows users access to Invoice Settings under the  > Invoice > Invoice Setting . This is where all invoice-processing settings are setup (such as Discrepancy Settings for % value or amount, and so on).
Can Import Invoice Data from External Source (3506)	This permission allows users access to Import Invoices via the Administration Tool à Imports. If an import specification is added for importing invoices, end users can import invoices using this link.
Can Import Payment Data from External Sources (3511)	This permission allows users access to Import Payments via the Administration Tool à Imports. If an import specification is added for importing payments, end users can import payments using this link.
Can Create a Check Request (3500)	This permission adds the Check Request Entry tab to the Invoice Manager. This permission enables users to submit check requests.
Manage Invoices (3502)	This permission adds the Manage Invoices tab to the Invoice Manager. When users have this permission they can edit, view, void, reject, and delete invoices.
Can Create Non-PO Invoice (3503)	This permission adds the Invoice Entry tab and Manage Invoices tab to the Invoice Manager. This permission enables users to enter non-PO related invoice details.
Can Access Invoice Inquiry (3504)	This permission adds the Inquiries tab to the Invoice Manager. This permission enables users to view invoices that are in sync with their permissions.
Restrict Manage Invoices to Selected Locations (3505)	This restrictive permission is used to give users access to only certain invoices in the system based on selected locations. This permission can be assigned by locations or location group groups.
Can Copy Invoice (3507)	This permission allows users to copy existing invoices. This is only for non-PO invoices.
Manage Recurring Invoice (3508)	This permission allows users to manage invoices that recur. This is for non-PO invoices only.
Can Manage Invoice Masks (3501)	This permission enables users to edit invoice masks for purchase orders, work orders, or non-PO invoice entry.
Manage GL Templates (3509)	This permission allows users to create, edit, and manage the accounts coding templates that are used for invoicing.
Manage Invoice Types (3510)	This permission allows users to add, edit, and manage invoice types.

Manage Invoice Exceptions (3512)	This permission enables users/groups to manage invoice exceptions, a pre-determined list of reasons why an invoice cannot be processed. The user can add, edit, view, delete, enable, or disable the exceptions.
Manage Invoice Rejections (3513)	This permission enables users/groups to manage invoice rejections, a pre-determined list of reasons why an invoice is rejected during invoice approval. The user can add, edit, view, delete, enable, or disable the rejections.
Can Assign Batched Invoices (3514)	This permission allows users/groups to assign batched invoices to users to process. Once assigned, the invoices display in the Inbound section of the Invoice Task Center for that user.
Manage e-Invoices (3515)	<p>This permission controls access to all e-invoicing manager functions, which include process, upload, download, validate, process, process-pending invoices, and generate e-invoice templates.</p> <ul style="list-style-type: none"> • Users who have this permission have the ability to generate e-invoice templates • Users who have this permission have the ability to process e-invoices that are not yet processed • Users who have this permission have the ability to upload e-invoices manually, as sent by the suppliers via email or by other means, which are not yet posted by URL or FTP. • Users who have this permission receive notifications when credential validation fails for an ie-invoice document
Can Monitor Invoices (3516)	This permission allows users to monitor invoices for the assigned locations.
Can Assign Invoice to Different User (3517)	This permission allows a user to assign invoices to different users.
Can Assign Invoice to Different Work Queue (3518)	This permission allows users to assign invoices to different work queues.
Can Import Account Code Templates from External Sources (3519)	This permission allows users to import account code templates from an external source.
Bypass Receiving Tolerances for Receiving Discrepancy Approval (3520)	This permission allows users to bypass the receiving tolerance set for receiving discrepancy approval.

**Manage Invoice
Mask Setup (3521)**

This permission allows users/groups to configure and manage invoice masks. Invoice masks determine the behavior of the entry and approval process for invoices, as well as the layout of the entry page.

6 Expense Manager Permissions

6.1 Expense

Restrict to Own Expenses (2011)	This permission restricts the user only to see his/her own expenses on the Manage Expense Reports page. Users are able to view pending reconciliation and reconciled expenses created for themselves or for user reports they have created on-behalf-of another user.
Can Charge Expenses to Selected Locations (2002)	A check indicates that a Travel and Expense location is available for selected user/group. An expense location must be selected to make this permission effective. This permission is used for reconciliation of expense orders.
Can Add Expense Items to Item Assemblies (2008) [Hidden Permission]	This permission provides a [Special Functions] link that can be accessed from the Expense Bin page. This functions like item assemblies used in Purchasing.
Can Associate Expense with Selected Projects (2009)	This permission gives the user the ability to have projects accessible, to be able to link expense requests to specific projects. Projects need to be selected using the Select Projects link for this permission to be effective.
Can Submit Expense for Pre-Approval (2010)	<p>This permission provides the user the ability to submit an expense report for pre-approval before the charges occur.</p> <p>With this permission, users are able to see an additional field For Expense Advance or Pre-Approval on the Expense Request Header page.</p>
Can Import Expense Data from External Sources (2004)	<p>This permission defines whether the selected user/group can import expense data from an external source.</p> <p>Users/groups that have this permission are able to access the Import Wizard link in Travel and Expense.</p>
Can Release Expense Requests (Reconcile) (2003)	<p>This permission defines whether the selected user/group can execute reconciliation for expense orders.</p> <p>This permission is typically assigned to users in the Accounts Payable group.</p> <p>It allows users access to Current Expense Orders and Released Expense Orders in the Travel and Expense module.</p>



Users need to have permission 2002 – Can Charge Expenses to Selected Locations to be able to Reconcile Expenses for the locations selected.

Manage Expense Types and Itemization Fields (2007)

This permission defines whether the selected user/group can create, edit, or delete expense types and expense itemizations.

As a minimum, one user/group must have this permission.

It allows users access to Expense Types and Expense Itemizations links in the Administration Tools.

Manage Expense Reports (2005)

This permission defines whether the selected user/group can Manage Expense reports.

Run Expense Reports (2006)

This permission defines whether the selected user/group can run Travel and Expense reports.

Restrict to view-only travel & expense reports (158)

This restrictive permission prevents users from editing expense reports.

Manage All Users Expense Requests (2012)

This permission defines whether the selected user/group can manage expense requests of all users in the system.

Allow Sending of Expense Receipts by e-mail (2013)

This permission allows users/groups to email expense receipts into the system to later attach to an expense report. Users must also have this permission to use the Receipt capture function of the Basware - Verian mobile app.

Manage Inbound Expense Data (2014)

This permission allows users to view and edit Level 3 credit card data imported into the system. Users must have this permission to edit imported record with exceptions or automatically add users to the system from imported expense data.

Can copy credit card transactions (2015)

With this permission, users can copy transactions from an expense report if the transaction was originally a credit card expense. The copied transaction becomes a manual transaction on the new report.

Manage Card Service Requests (2020)

This permission allows users to view the Manage Card Service Requests grid and approve or decline users' requests for replacement cards and spend limit increases.

Restrict user from creating expenses (2099)

This restrictive permission prevents a user from creating new expense reports, adding new items to existing reports, or copying items to new reports.

Intended to ensure users only interact with their imported credit card transactions.

7 Spend Manager Permissions

7.1 KPIs

Can Access Purchasing KPIs (4003)	This permission gives a user/group access to the Spend Manager Purchasing KPIs.
Can Access Purchasing Standard Reports (4014)	This permission gives the user/group access to the Purchase Manager standard reports for the selected locations and location groups.
Can Access Invoicing KPIs (4004)	This permission gives a user/group access to the Spend Manager Invoicing KPIs.
Can Access Invoicing Standard Reports (4015)	This permission gives the user/group access to the Invoicing standard reports for the selected locations and location groups.
Can Access Expense KPIs (4005)	This permission gives a user/group access to the Spend Manager Expense KPIs.
Can Access Expense Standard Reports	This permission gives the user/group access to the Expense standard reports for the selected locations and location groups.
Can Access See-Manage-Save KPIs (4006)	This permission gives a user/group access to the Spend Manager See-Manage-Save KPIs and Benchmarking KPIs.
Can Access Asset Standard Reports (4017)	This permission gives the user/group access to the Asset standard reports for the selected locations and location groups.
Can Access Asset KPIs (4007)	This permission gives a user/group access to the Spend Manager Asset KPIs.
Can Access Budgeting Standard Reports (4018)	This permission gives the user/group access to the Budgeting standard reports for the selected locations and location groups.
Can Access Budget KPIs (4008)	This permission gives a user/group access to the Spend Manager Budget KPIs.
Can Access Work Order Standard Reports	This permission gives the user/group access to the Work Order standard reports for the selected locations and location groups.
Can Access Inventory KPIs (4009)	This permission gives a user/group access to the Spend Manager Inventory KPIs.

**Can Access Inventory
Standard Reports**

This permission gives the user/group access to the Inventory standard reports for the selected locations and location groups.

**Manage Spend Manager
(4010)**

This permission gives a user/group the ability to manage the security for the Spend Manager KPIs.

8 Vendor Portal Permissions

8.1 Vendor Portal

Can Access PO Inquiry (3600)	This permission allows a vendor portal user/group to view purchase order information without editing anything, using the Purchase Order -- PO Inquiries menu item.
Can Access WO Inquiry (3613)	This permission allows a vendor portal user/group to access and view work order information without editing anything, using the Work Orders menu item.
Can Create PO Invoices (3601)	This permission allows a vendor portal user/group to create a purchase order invoice to send to the tenant through the Invoice -- Invoice Entry menu item.
Can Create Service/WO Invoices (3602)	This permission allows a vendor portal user/group to create a work order invoice to send to the tenant through the Invoice -- Invoice Entry menu item.
Can Create Non-PO Invoices (3603)	This permission allows a vendor portal user/group to create a non-purchase order invoice to send to the tenant through the Invoice -- Invoice Entry menu item.
Can Access invoice inquiry (3604)	This permission allows a vendor portal user/group to access and view invoice information without editing the invoice, using the Invoice -- Invoice Inquiries menu item.
Manage All Quotes (3605)	This permission allows a vendor portal user/group to perform management actions on all RFQs entered by the tenant, including downloading the RFQ in Excel/XML format, printing the RFQ, uploading RFQ information, or responding to the RFQ.
Can Import Invoice Data from External Sources (3606)	This permission allows a vendor portal user/group to import invoices from external sources, such as Excel files, into the system. Users can do this using the Invoice > Import Invoice menu item.
Manage Invoices (3608)	This permission allows a vendor portal user/group to manage invoices using the Invoice -- Manage Invoice menu item.
Manage POs (3609)	This permission allows a vendor portal user to view and take action on purchase orders sent in by the tenant. Possible actions include printing, marking the purchase order as confirmed, and creating an invoice for the purchase order (requires permission 3601 - Can Create Purchase Order Invoice).

Manage WOs (3610)	This permission allows a vendor portal user/group to view and take action on work orders sent in by the tenant. Possible actions include viewing a print preview, updating labor or parts, marking confirmed, or creating an invoice for the work order (requires permission 3602 - Can Create Service /WO Invoices)
Manage Users (3611)	This permission allows a vendor portal user/group to add or invite more users to the Vendor Portal. The number of users allowed is displayed at the bottom of the Manage Users admin list.
Manage Payment Terms (3612)	This permission allows a Vendor Portal user/group to manage payment discounts, add new discounts, and accept or reject requested discounts. Payment terms are accessed with the Administration > Payment Terms menu item.
Can upload Catalog Data from External Sources (3614)	This permission allows a vendor portal user/group to upload catalog data via a file (such as an Excel spreadsheet) into the system using the Catalogs -- Upload Catalog menu item.
Manage Vendor Registration (161)	This permission allows a vendor administrator user/group to manage registered vendors on the Vendor Registration List. The user with this permission has access to the Admin Tools > Vendor Registration > Registration Key menu item. The user can add, edit, delete, and perform other actions for each registered vendor.
Vendor Registration (162)	This permission allows a vendor administrator user/group to enter a new vendor registration. The user with this permission has access to the Admin Tools > Vendor Registration > New Registration menu item.

9 Budget Manager Permissions

9.1 Budget

**Manage
Budgets
(160)**

This permission allows users/groups to view and manage all budget information through the Budget Admin List. The user can add budgets or child budgets, edit, delete, disable, or manually enter budget information.

This permission allows all actions allowed by permission 165 - View Budgets. If the user has permission 160 but not permission 165, the user may still view budgets, audits, and graphs.

**View
Budgets
(165)**

This permission allows users/groups to view all budgets in the Budget Admin List. The user can also view an audit or graph displaying budget use over time.

10 AP Automation Permissions

10.1 AP Automation

Can access AP Automation Dashboard (4201)	<p>When enabled, the user can view and click the menu item Invoicing > Invoice Dashboard to access the P2P AP Automation Dashboard. Permission 4203 - Can access AP Automation and all relevant P2P AP Automation system settings must also be configured. Clicking the link takes the user to P2P AP Automation Professional Mode</p>
Can access AP Automation Approval (4202)	<p>When enabled, the user can view and click the menu item Invoicing > Invoice Approval to access the P2P AP Automation Approval page. Permission 4203 - Can access AP Automation and all relevant P2P AP Automation system settings must also be configured.</p>
Can access AP Automation (4203)	<p>When enabled, the user is also logged in to the P2P AP automation module when they log in to Purchase Manager. All relevant P2P AP Automation system settings must also be configured.</p>