User Permission Profiles
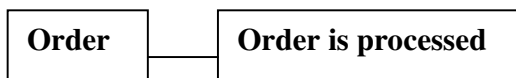
Goal

• A way to manage your orders and the expenses that go with its approval.

Order	Order is processed

Above you see the normal procedure for processing orders in our system.
By setting up an approval phase, the approver decides whether or not an order goes through. In figure 1 the order is approved, in figure 2 the order is cancelled by the approver.
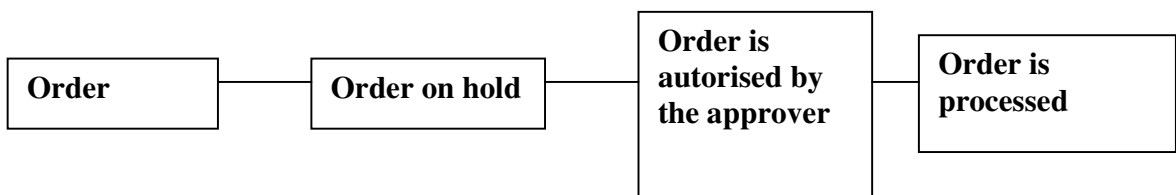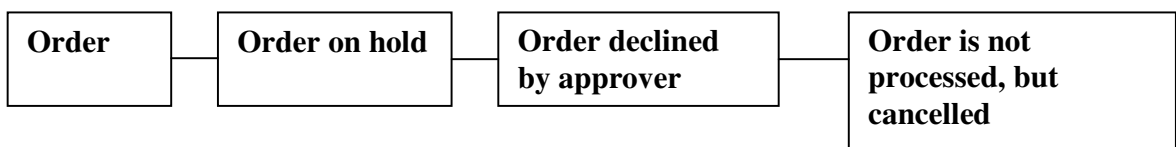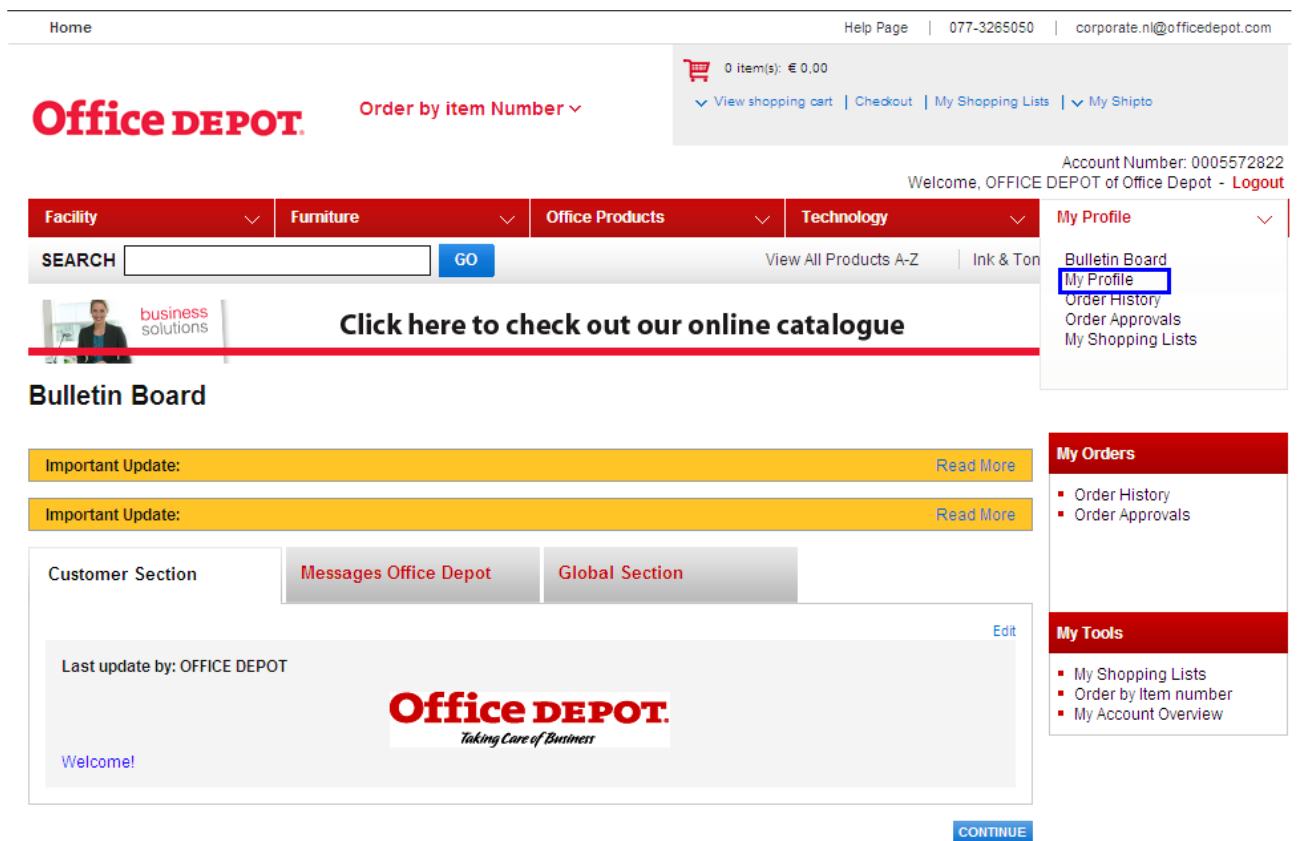
Figure 1

Order	Order on hold	Order is autorised by the approver	Order is processed

Figure 2

Order	Order on hold	Order declined by approver	Order is not processed, but cancelled

Set up in ODO

- Only super users can create permission profiles in ODO.
- Permission profiles created in ODO will automatically appear in SAP in the transaction ZBSDDATA – Maintain BSD

1. Log in as super user
2. Go to **My Profile → My Profile**

3. Go to **Manage User Permissions Profiles**

Facility ⌄	Furniture ⌄	Office Products ⌄	Technology ⌄	My Profile ⌄

SEARCH	[ ]	GO		View All Products A-Z	Ink & Toner	Paper	Bulletin Board

Home > My Profile

Manage Accounts

- Manage Contacts
- Manage Shipto #
- Manage Cost Center:
- Manage User Groups
- Manage User Permissions Profiles
- Select a Shopper

Manage Users

- Add New Users
- Edit Active Users
- Active/Inactive Users
- Workflows

Order Setting

- My Account Overview
- Select Shipto #
- Select Contacts
- Select Cost Center:
- Proxy Approver Info

Need Help?

- Email Assistance
- FAQs

My Profile

Create and store your information for easy access.

Order Tracking

Search By: Order Number ▼ [   ]

Order Date Range: From: [   ] 🗓 To: [   ] 🗓

RESET SEARCH ORDERS

My Shopping Lists

▸ How to create and use lists
▸ Set up reminders for yourself

Select an existing list
Bestellijst ▼
VIEW LIST

Create a new list
List Name: [   ]
Comment: [   ]
Type: ○ Company-Wide List
◉ Personal List
CREATE LIST

4

4. In the overview, click on **CREATE A NEW PERMISSION PROFILE**

5. Enter the amounts and choose the settings you want.
6. After doing this, click on **ADD** to save the profile.

Create Profile

Manage Accounts

- Manage Contacts
- Manage Shipto #
- Manage Purchase Order No.:
- Manage Cost Center:
- Manage User Permissions Profiles

Manage Users

- Add New Users
- Edit Active Users
- Active/Inactive Users
- Workflows

Order Setting

- My Account Overview
- Select Shipto #
- Select Contacts
- Select Purchase Order No.:
- Select Cost Center:
- Proxy Approver Info

Need Help?

- Email Assistance
- FAQs

* Profile Name

Order Limit

Add

* Required Information

* Per Order Limit

* Per Unit Price Limit

* Per Line Limit

* Per Period Limit

* Minimum Order Value

Place any order containing non-contracts ☐
items on hold for approval.

Approval Limit

* User may approve orders up to

User may approve orders that exceed ☐
budget limits

User may approve orders containing ☐
custom-catalog restricted SKUs
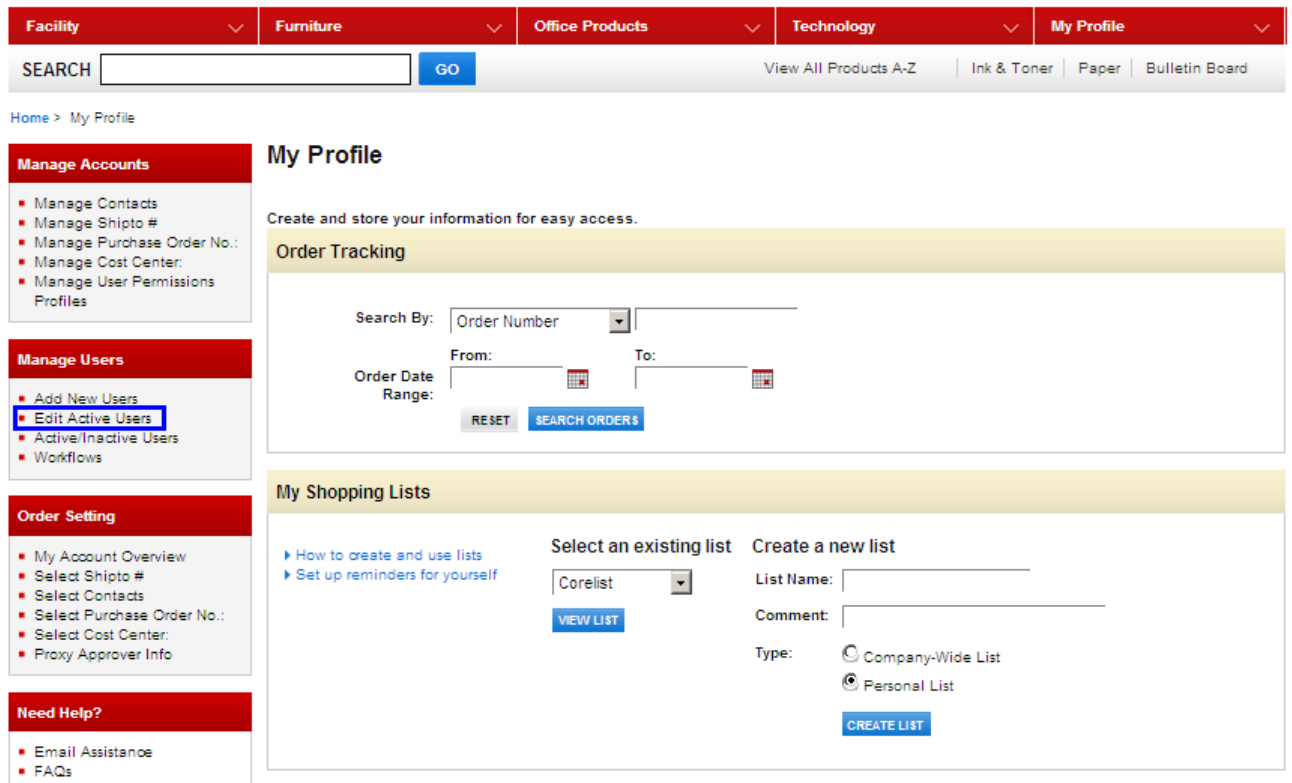
User may approve orders containing non- ☐
contract SKUs

ADD

Return to Account Center   Back to Manage Profile

Link Permission Profile To a User.

After creating a permission profile you can immediately link it to a user in ODO. This requires the following steps:

1. Go to **Edit Active Users**

2. Select the user you want to link the permission profile to.

Manage Accounts

- Manage Contacts
- Manage Shipto #
- Manage Purchase Order No.:
- Manage Cost Center:
- Manage User Permissions
  Profiles

Manage Users

- Add New Users
- Edit Active Users
- Active/Inactive Users
- Workflows

Order Setting

- My Account Overview
- Select Shipto #
- Select Contacts
- Select Purchase Order No.:
- Select Cost Center:
- Proxy Approver Info

Need Help?

- Email Assistance
- FAQs

Edit Active Users

Select a User

Type the first few characters of a user name or login and click "Search" for a list of Valid Users

Search By: User Id ▾ [_____] **SEARCH**

Result 111 - 115 of 115   First ◀ Prev | Page: 7 8 9 10 11 12

User Id	User	Active	Super User
Test-officedepot	TEST ACCOUNT	Yes	No
emailtest	A B	Yes	Yes
besteller-1	TEST BESTELLER	Yes	No
goedkeurder	TEST GOEDKEURDER	Yes	Yes
goedkeurder-1	TEST GOEDKEURDER	Yes	Yes

CANCEL

3. Open **Workflows/Approvals** and click **EDIT**.

4. Choose a permission profile and click **Search** to select an approver.

Update Workflows/Approvals information

User Permissions (optional)		
Permissions Profile:	No Spending Limit	
Enter a Workflow Template.		Search — What is a Workflow Template?
OR		
Single Approver:		Search — Assign a Single Approver

CANCEL   UPDATE

5. Select the approver you want to link from the list. In the column **super user** you can verify whether the approver is a super user. With respect to standard permission profiles, the approver has to be a super user.

Edit Active Users

Select a User

Type the first few characters of a user name or login and click "Search" for a list of Valid Users

Search By: User Id ▾ [   ] **SEARCH**

Result 111 - 115 of 115   First ◂ Prev | Page: 7 8 9 10 11 12

User Id	User	Active	Super User
Test-officedepot	TEST ACCOUNT	Yes	No
emailtest	A B	Yes	Yes
besteller-1	TEST BESTELLER	Yes	No
goedkeurder	TEST GOEDKEURDER	Yes	Yes
goedkeurder-1	TEST GOEDKEURDER	Yes	Yes

CANCEL

6. When the approver and the permission profile are chosen, click on the **UPDATE** button to save the change.

Update Workflows/Approvals information

User Permissions (optional)

Permissions Profile:	ALLES AUTORISEREN
Enter a Workflow Template.	[_____] Search
OR	
Single Approver:	goedkeurder Search

What is a Workflow Template?

Assign a Single Approver

CANCEL   UPDATE

7. The overview of the user will show the changes. You can see the approver and approval profile.

Account Administration

User Id: emailtest

Account Settings
Manage this user's contact information, subscriptions and logins

A B
000-0000000
EBUSINESS.NL@OFFICEDEPOT.COM

Subscriptions & Settings
▸ Email Preferences
▸ Subscriptions
▸ Login Settings

[EDIT CONTACT INFORMATION]

Accounting Fields   View ⊞

Permissions   View ⊞

Workflows/Approvals   View

Permissions Profile:
ALLES AUTORISEREN
Single Approver:
goedkeurder
Workflow Template:

[EDIT]

Proxy Approver Info
Proxy is currently Inactive

[EDIT]

Results in ODO

1. When the shopper enters an order and goes to the check-out page, a message will appear informing the user that the order has been presented for approval.

Checkout

> ⚠️ **Please Note**
> Your order will now be sent for approval for the following reasons:
> Autorisatieprofiel: all orders have to be approved by the Superuser

Click Edit to make changes to your existing information.

2. The button to finalize your order will automatically change to a button to forward it for approval.

Back to shopping cart

> SAVE FOR LATER   PUT ORDER ON HOLD   SEND FOR APPROVAL

3. An overview of the order shows the order number. The user will also be informed that the order has been forwarded for approval.

Thank you for your order!   Print This Page
Please print this page for your records.

> ⚠️ **Please Note**
> Your order will now be sent for approval for the following reasons:
> Autorisatieprofiel: all orders have to be approved by the Superuser

Your ordernumber: 3203274519

Estimated delivery date: 29/07/13 View Order Details

Workflow Status		Details:	
Submitted by:	REGULAR USER on 7/26/13		
Pending release by:	MEGA USER		
Comments for the order:			

Order number:	3203274519	Username:	REGULAR USER
Order date:	7/26/13	Customer number:	0005641652
		Purchase Order:	
		Contact:	REGULAR USER
Status:	Held for Approval:	Cost center:	
	Autorisatieprofiel: all orders have to be approved by the Superuser	Comments:	
Deliver to:			

Office Depot
Demo Account
E-commerce
Columbusweg 33
VENLO,5928 LA
Netherlands
0773238959

Product number	Product description	Order- Quantity	Unit price	Unit of measure	Extended Price
5468481	PK6 LOWNOISETAPE BRUIN SCOTCH 50MMX66M	1	€	PAK	€

Legend:
Order quantity Original ordered quantity
UOM: Unit of Measure
Sales Unit: Price per individual unit
DeliveryDate: Expected delivery date
*****:Indicates multiple deliveries
TotalPrice: Ordered Quantity x Unit Price

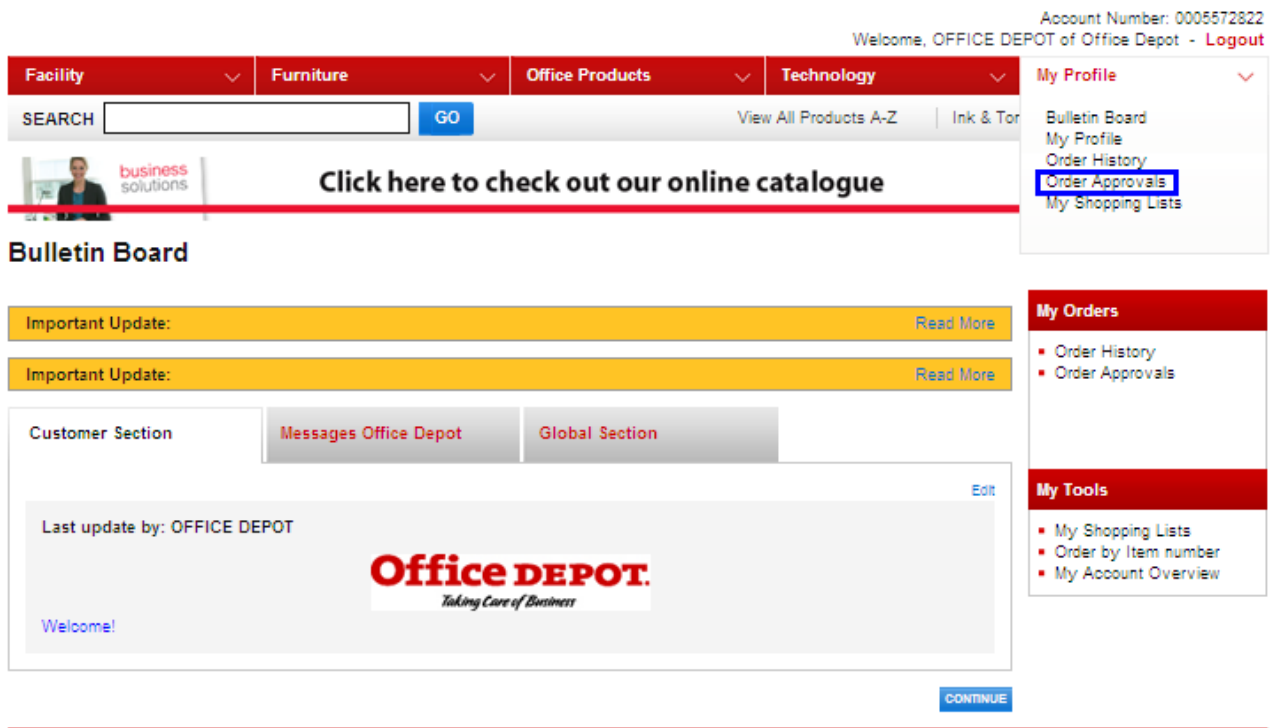|	
Subtotal:	
Additional charges:	
VAT:	
Total:	€

Payment type:Account Billing

Please click the "Release Order" button or the
"Disapprove/Modify" button
You will be asked to enter your user ID and password in
order to release the order.

RELEASE ORDER   Disapprove/Modify

4. If set, the shopper and approver will receive a confirmation e-mail concerning the
    order. The status of the order is pending approval. Together with this status it is
    explained why the order has been presented for approval. If the approver has saved his
    login data in his cookies, he can authorize by means of the approval e-mail.

5. If the authorizer did not save his login data, the possibility exists to login to ODO and approve the order by means of **Order Approvals**.

6. As soon as the order is approved or rejected, the shopper will receive another confirmation.