Overview

The Buy@Duke Department Administrator Tool provides a means for administrative staff to manage personalization attributes for their users in the Buy@Duke system.

This document details the steps necessary to access the tool and use it to edit user personalizations at the organizational and individual levels.

**Note:** Access to the tool requires that a security role be placed on the administrator’s position in SAP. Requests for this role can be made by the SAP R/3 Department Administrator using the SAP R/3 User Admin website. Simply request that role Z&EPSR0080 be added to the user’s profile in the Notes section.

By default, the Department Administrator Tool will display the individuals assigned to positions in the same organizational unit as the Buy@Duke Department Administrator. To manage other organizational units, add the organization numbers of the units you need access to in the Notes field of the SAP R/3 User Admin request described above. Once added, the tool will require a manual refresh to get the new names to appear. To accomplish this, click the blue Refresh link in the far bottom right of the Buy@Duke Administrator Tool page.

Accessing the Department Administrator Tool in Buy@Duke

1. Open a web browser and login to Duke@Work (http://work.duke.edu) with your NetID and password.

2. Once logged in, click the **Buy@Duke** tab to access the system, followed by the **Buy@Duke Department Administrator** link.

   ![Duke@Work Login Screen](image)

   **Note:** Be sure to allow pop-up windows from this website (work.duke.edu) in your web browser. Check with your network administrator if you have questions.

Setting user attributes

The Buy@Duke Department Administrator Tool allows administrators to set and edit system personalizations for their users. This can be done on an individual user basis or for all users within a particular organizational unit. Both options can be utilized to efficiently establish personalizations for all users in your area.
**Note:** Setting certain attributes at the organization level will trump those set individually, and vice versa. For information concerning when these rules apply, please see the table in the Appendix.

Setting attributes at the organization level

This method is ideal if there are certain attributes that will be the same for all users in your unit (e.g., Non Valued GR Flag, G/L Codes, etc.). Attributes set at the organizational level are automatically inherited by new and existing users.

1. On the **Buy@Duke Department Administrator** landing page, your current employees are listed individually. Instructions for accessing and editing individual records are described in the next section.

2. To gain access to attributes that can be set at the organizational level, click the **Dept. Administrators – Edit Attributes** link in the left navigation bar.

3. Click on the drop-down arrow in **Department/User** field and choose your organization's name from the list.

4. Once the organizational unit is chosen, click on the drop-down arrow for the **Attributes** field and select the attribute to be set (refer to table below).
Buy@Duke Personalization Attributes Table

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Assignment Category</td>
<td>Please note: Attributes not included below do not pertain to Duke. Choose a value that indicates what type of cost object (i.e., fund code) will be used on the cart MOST OF THE TIME as follows:</td>
</tr>
<tr>
<td></td>
<td>• Asset: used only by central administrative areas</td>
</tr>
<tr>
<td></td>
<td>• Cost Center: indicates that the seven digit fund being used for the purchase is a Cost Center (pertains to seven digit funds beginning with 15x, 4xx, 6xx, 8xx, and others considered to be non-restricted)</td>
</tr>
<tr>
<td></td>
<td>• WBS: indicates that the seven digit fund being used for the purchase is a WBS Element/Project (pertains to all seven digit restricted funds beginning with the 20x – 39x, as well as 7xx non-restricted funds)</td>
</tr>
<tr>
<td>Company Code</td>
<td>DO NOT CHANGE THE PRESET VALUE. This value indicates the entity to which your department belongs at Duke:</td>
</tr>
<tr>
<td></td>
<td>• Duke University (including SOM, SON, and Provost areas) = 0010</td>
</tr>
<tr>
<td>Cost Center</td>
<td>Enter as many lines as needed to list the seven digit cost center value(s) that may be used on a cart (seven digit funds beginning with 15x, 4xx, 6xx, 8xx, and others considered to be non-restricted).</td>
</tr>
<tr>
<td>Delivery Address</td>
<td>Enter as many lines as needed to list the building numbers which correspond to the delivery address for a building to help suppliers know exact locations (use drop-down to search by building name if needed).</td>
</tr>
<tr>
<td>Delivery Days</td>
<td>DO NOT CHANGE THE PRESET VALUE. Please note, this value will not prevent deliveries from being made as soon as a vendor is able to process the order.</td>
</tr>
<tr>
<td>G/L Account</td>
<td>Enter as many lines as needed to list the six digit G/L Account value(s) that may be used on a cart (examples include 645000 for Laboratory Supplies &amp; Materials and 646000 for Office Supplies).</td>
</tr>
</tbody>
</table>
Buy@Duke Department Administrator Tool

**Goods Recipient**
Enter one or more lines as needed to tell the supplier who should receive the ordered items (who to ask for when delivering the goods). If deliveries may be made to two different buildings, labs, or locations within a building, you may wish to list one goods recipient for each scenario. Please note, entries are truncated after 12 characters, so abbreviate the names as needed.

**Non-valued GR Flag**
If your organization has decided to perform electronic goods receipt in the system, enter an upper case X in the value field. This entry tells the system that a goods receipt is expected for every order produced by the user/organization.

**Room Number**
Enter one or more lines as needed to indicate which room number (e.g., 112 C) or location in a building where the goods should be delivered. This is a free text entry, and can include suite numbers and zone information.

**Team Shopping Cart**
If your business unit is using the team shopping concept, enter an upper case X in the value for this field.

**WBS Element**
Enter as many lines as needed to list the seven digit WBS Element value(s) that may be used on a cart (seven digit restricted funds beginning with the 20x – 39x, as well as 7xx non-restricted funds).

5. Enter the values for the attribute chosen (steps apply to most attributes), as follows:
   - Click on the Add Line button and enter a value for the attribute in the Value field.
   - Continue to click the Add Line button to add multiple values that may be used on a shopping cart for the users chosen, depending on the attribute.
   - Click on the Standard button to select the value that will default in the cart as the value used most uses most of the time (remember that you can go back and change individual users as needed).
   - Click on the Save button periodically or when done. Remember to click the Edit button again to continue editing attributes.

6. Repeat the steps above to enter values for the attributes for your organization.
7. Note that you may go back into each individual Personalization from the list of users (see next section of this guide) and verify that the attributes were set, if desired, or edit organizational unit attributes settings for specific individuals.

Setting attributes for individual users

The steps below cover how to enter or change Attribute and Procurement Substitute values for one employee. Setting certain attributes individually will trump those set at the organization level, and vice versa. For information concerning when these rules apply, please see the table in the Appendix.

Reviewing individual user personal data

1. Ensure the Buy@Duke tab and Buy@Duke Department Administrator page are selected.
2. In the resulting page, review the list of employees with positions that belong to your organizational unit and note the following:
   • The total number of employees is listed at the top.
   • The list of employees includes last name, first name, email address, name of the position, and department name.
   • The list of employees includes all employees in the organization, not just the ones with Buy@Duke roles.

3. Optional: To filter the list of users:
   • Click on the Show Quick Criteria Maintenance button.
   • Use the selection fields available to refine the list of users based on the criteria chosen, like Last Name or User ID (NetID).
   • Click on the Apply button to filter the list
   • Click on the Hide Quick Criteria Maintenance to close the section as needed.
   • Use the Clear and Apply button to remove the filter in the future as needed.
4. Click on the box to the left of the Employee’s Last Name to select the line item for that employee.

5. Click on the Display button.
6. On the **Maintain User Data** screen, click on the **Edit** button (top or bottom of screen) to switch to the edit mode.

![Edit button](image)

7. Review the **Personal Data** section and note the following:

   - The **red asterisks** next a fields indicate that information must be entered (see the steps below).
   - Other fields are optional and may be changed by the Department Administrator or the user, if needed.
   - Be sure to save the information you have entered when done.
   - After saving, click the **Edit** button (top or bottom of screen) to switch back to the edit mode.

![Personal Data section](image)

8. **Required**: To enter the **Form of Address**, click on the drop-down button and make the preferred selection from the list.

9. **Required**: Check the user’s name in the **First Name** and **Last Name** fields and make any adjustments as needed. Please note, these changes do not update HR/Payroll records.
10. Ensure that the **Position** tab is selected.

11. Notice the **Organizational Assignment** fields contain defaulted values. These fields are populated from SAP HR/Payroll records and may not be changed in Buy@Duke.

12. **Required:** Verify and correct the email address for the user, if needed.

13. Once you have entered all the required fields in the **Personal Data** section for the selected user, click the **Save** button.

**To set attributes for the selected user**

1. Click on the **Edit** button to switch to the edit mode.

2. Ensure the **Position** tab is still selected on the **Maintain User Settings** screen.

3. Click the drop-down arrow in the **Attribute** field located at the bottom of the screen to display the list of available attributes. Detailed descriptions of each attribute can be found in the **Buy@Duke Personalization Attributes Table** above.
4. Select the attribute you wish to edit by clicking on its title in the list (use scroll bar as needed).

5. In the resulting screen showing the selected attribute data, click the Add Line button if applicable to add a new line with white, editable fields (please note, some attributes will not have the Add Line button if not applicable).

6. Click on the radio button in the Standard column.

7. In the Value field, enter the appropriate data. Use the search button to the right of the field to identify your preferred value or contact your business office or the Buy@Duke Help Desk.

8. Click the Check button to see if the data you entered are correct. If not, make corrections.

9. If the data do not contain errors, click the Save button (you may enter several attributes and then click on the Save button if preferred).

10. Repeat steps 4-9 above to select other attributes from the list, enter the desired values, and check and save data (make sure to click back on the Edit button after the Save button is used).

Establishing procurement substitutes for the selected user

1. Once the attributes are set, you can associate the selected user with other Buy@Duke users in their team by establishing procurement substitutes.

Note: Procurement substitutes are colleagues in your organization who may view the user’s shopping carts. Shoppers must always have at least one Submitter listed as a procurement substitute.
2. Click on the User Account tab.

3. Click the Edit button to switch to the edit mode.

4. In the My Procurement Substitutes box, click on the Add Line button.

5. On the new line, click in the Name of Substitute field and click on the drop-down arrow.

6. In the User Account Search box, enter the Last Name of the team member you wish to add, and click on Start Search.
7. In the resulting list, click on the selection button to the left of the line that contains the user ID and name of interest.

8. Once the team member is highlighted, click the OK button to display the User ID of the selected individual in the Name of Substitute field.

9. Required: Set a start and end date of the substitute’s access. Type the date (MM/DD/YYYY) or use the drop-down button to select the date for both the Start Substitution On and the End Substitution On fields.

   **Note:** If you expect the Team Member to be on the user’s team for an extended period of time, enter the date 12/31/9999. This will ensure that the team assignment will not end, eliminating the need to update the assignment again. If you wish to end the assignment in the future (e.g., if the substitute transfers to another organization at Duke), you will simply Remove the line at that time.

10. Click the Check button to verify the data (the NetID of the person will be displayed on the list).

11. To continue to add procurement substitutes, repeat steps 4-10 above.

12. Click the Save button once all of the desired procurement substitutes have been added.
**Appendix**

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Rule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account assignment category</td>
<td>User inherits org values</td>
</tr>
<tr>
<td>Company code</td>
<td>User inherits org values</td>
</tr>
<tr>
<td>Cost center</td>
<td>User inherits org values*</td>
</tr>
<tr>
<td>Delivery address</td>
<td>User values overwrite org values</td>
</tr>
<tr>
<td>Delivery days</td>
<td>User values overwrite org values</td>
</tr>
<tr>
<td>Flag: Forward work item</td>
<td>User values overwrite org values</td>
</tr>
<tr>
<td>G/L account</td>
<td>User inherits org values</td>
</tr>
<tr>
<td>Goods receipt flag</td>
<td>User values overwrite org values</td>
</tr>
<tr>
<td>Goods recipient</td>
<td>User values overwrite org values</td>
</tr>
<tr>
<td>Non valued GR flag</td>
<td>User values overwrite org values</td>
</tr>
<tr>
<td>Plant</td>
<td>User inherits org values</td>
</tr>
<tr>
<td>Room number</td>
<td>User values overwrite org values</td>
</tr>
<tr>
<td>Team shopping cart</td>
<td>User values overwrite org values</td>
</tr>
<tr>
<td>WBS element</td>
<td>User inherits org values*</td>
</tr>
</tbody>
</table>

*Org values are additive to user values added prior to org values by clicking the edit button, org values are displayed*