



Infor LN Common User Guide for Authorization and Security

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About this document

This guide describes the process to set up authorizations and assign permissions to an employee or employee group for various business processes (project, requisition and procurement). The Authorization and Security process helps businesses authorize data access based on a role across locations, products, or market combinations.

Objectives

The objectives of this book are to describe the purpose of providing authorizations and permissions to employees or employee groups, across locations.

Intended Audience

This book is intended for those who are required to assign authorizations and permissions to an employee or an employee group, based on a role, to access the data for a specific business process.

Assumed Knowledge

Familiarity with the business processes involved in assigning authorities and permissions that can be used to authorize the data access based on a role across locations, products, or market combinations, and general knowledge of the Infor LN functionality will help you understand this book. In addition, Common related training courses are also available.

Document summary

This table shows the chapters of this guide:

Chapter 1	Introduction	Describes the purpose and the general characteristics of Authorization and Security.
Chapter 2	Data Authorization Framework	An overview of the Authorization and Security framework.
Chapter 3	Using Parameters	Describes the parameters that must be defined to enable the Authorization and Security functionality.

Chapter 4	Permissions	Describes the process to set up authorizations and assign permissions to the employees.
Chapter 5	Authorization for business processes and entities	Describes the various business processes and the assigned secondary attributes that are required for the related business documents.

How to read this document

This document was assembled from online Help topics. Consequently, references to other sections in the manual are presented as shown in this example:

Refer to the Table of Contents to locate the referred section.

Underlined terms indicate a link to a glossary definition. If you view this document online and you click on underlined text, you jump to the glossary definition at the end of this document. Non-underlined references do not represent a link to glossary definitions or other elements.

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Chapter 1

Introduction

1

As customers operate across the globe and work in different product and market combinations, the Authorization and Security functionality allows customers to streamline their logistic processes across different locations, and product and market combinations.

In most organizations, employees are grouped based on the role they execute within the company. A role is different from a function that an employee performs. It is common to have one function but multiple roles, because an employee might contribute to the organization in many ways that must be reflected in the employee's roles. Roles such as Buyer or Project Manager determine the activities the employee is authorized to perform. The roles of an employee change over time and therefore, customers rely on the role-concept and can use this functionality to:

- Assign authorizations to a new employee, based on the job description.
- Check if the authorization setup is correct.

The Authorization and Security functionality allows the customer to set up authorizations and assign permissions to an employee or employee group for various business processes such as project, requisition and procurement.

Chapter 2

Data Authorization Framework

2

This section provides an overview of the Authorization and Security framework.

Overview

The Authorization and Security functionality enables you to define the permissions (no permission, view, use, and modify) for the employees or employee groups to access data for a specific business process. The Authorization and Security process helps businesses authorize data access based on a role, rule, or company policy across locations, products, or market combinations. For example, management must be allowed to analyze all the data but employees can be authorized only to work on a subset of data.

Note

If the Authorization and Security functionality is implemented for a business process such as **Project Management** or **Procurement**, the usage of various fields are determined based on the specified permissions.

Example

Project Manager or Cost Engineer is only allowed to:

- See certain Projects.
- Use certain Projects

Example

All employees who are authorized to create requisitions are only allowed to:

- View own Requisitions.
- Modify own Requisitions.

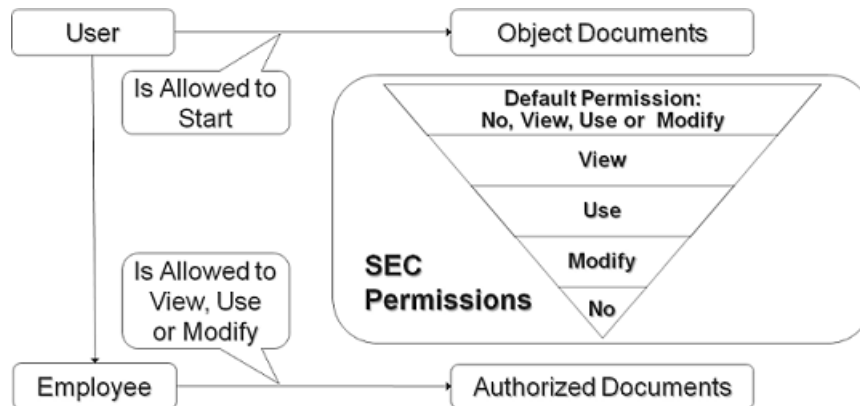
Example

While employee X is on holiday, employee Y is allowed to:

- View Requisitions of employee X
- Modify Requisitions of employee X

You could use the AMS and DEM functionality to assign permissions to employees, which was used to control session access. Using the Authorization and Security functionality, you can now provide authorizations to specific business objects (Projects, Purchase Orders, RFQs, and so on) considering the related attributes. For example, register project hours for a project that is part of a specific program.

The flowchart explains the authorization levels.



Benefits:

- Allows the company's management to analyze all activities and results.
- Sharing related (master) data across locations or product/ market combinations.
- Supports centralized processes such as, planning or procurement across entities.
- Reduces overhead by maintaining a single set of master data.

Permissions

Data authorizations (Permissions) can be based on Authorization policy, Authorization role, and Assigned rules. You can use these permission types individually or in a combination, to set up the security. The permissions and the related lines are created and maintained for each authorization business process (Project management, Requisition, and Procurement) with these authorization levels:

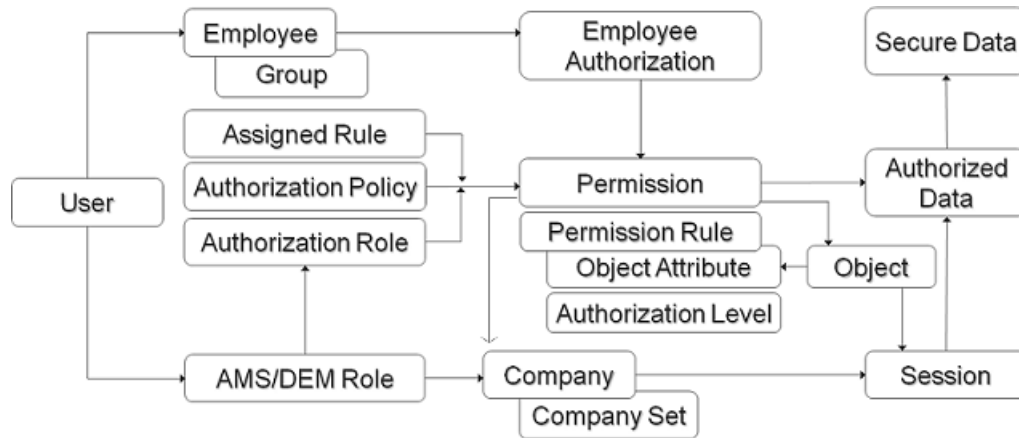
- View: The employee can view the data related to the specified business process.
- Use: The employee can use the data related to the specified business process. For example, the employee can use the project data in Hours Accounting.
- Modify: The employee can modify the data and execute the related processes.
- No Permission: The data related to the specified business process is not displayed.

The permissions are version controlled and limited to specific companies. You can assign the permissions to employees or employee groups. You can also copy the permissions of an employee or employee group to multiple employees or employee groups.

Note

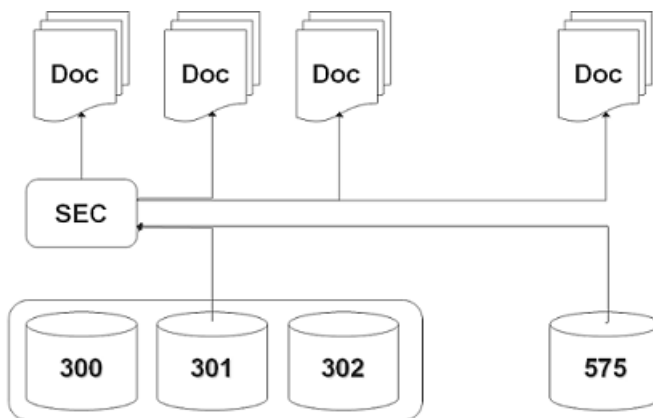
Data authorizations can be set up, only for employees currently working with the organization, by default, the authorization can be set to No Access, or View, or Use, or Modify.

This flowchart explains the permissions setup.



Authorization Definition company

You can set up authorizations for a specific company and the data can be used by other companies. For example, companies 301, 302, and 575 can use the setup in company 300.



After the authorizations and permissions are set up, you can activate the permissions for the users in the required company.

Limitations

- This functionality is only applicable for certain processes such as Project management, Requisitions, and Procurement.
- In Project, you can only access the functionality for projects (not contracts). Also, not all Project sessions are considered for the authorization setup. See *Supported Project sessions for authorization* (p. 27).

This section describes the parameters that must be defined to enable the Authorization and Security functionality.

Authorization and Security parameters

You can use the Authorization and Security Parameters (tcsec0100m000) session to set the authorizations and permissions that can be assigned to an employee or employee groups. These authorization and permissions are business process (contract management, project management, requisition, procurement, sales, and warehousing) specific.

Note

- To enable this functionality, you must select the **Authorization and Security** check box in the Implemented Software Components (tccom0100s000) session.
- When a user accesses an authorization and security session, in a company wherein the setup for the same is not applicable, a “Setup of security not allowed, Authorization Definition in Company” message is displayed. However, this is not applicable for the Authorization and Security Parameters (tcsec0100m000) session.

To set up the authorizations for a business process, in the Authorization and Security Parameters (tcsec0100m000) session you must:

- Select the **Authorization and Security Enabled** check box.
- Select the company in which authorizations must be specified.
- In the **Authorization Enabled for group** box:
 - Select the business process.
 - Use the **Default Authorization** field to select the required **Authorization Level** for the business process.

After defining the permissions and rules, select the **Enforce Active Permissions for Current Company** to enforce the policies for all the users of the active company.

This section describes the process to set up authorizations and assign permissions to the employees.

Defining the types of permissions

Using the Authorization and Security functionality, you can define authorizations for an employee or employee group enabling access to specific data in a business process such as contract management, project management, requisition, procurement, sales, and warehousing.

The applicable permission types:

- Authorization Role
- Authorization Policy
- Assigned Rule

These roles, policies, and rules can be used individually or in a combination.

You can also specify the data for:

- Company Sets (tcsec0530m000)
- Employee Groups (tcsec0110m000)
- System Administration (tcsec0140m000)
- Project Management Offices (tppdm0110m000)

Permissions:

Authorization Roles

Authorization Role is a type of permission assigned to a set of employees with the same role.

Note

In the Authorization Roles (tcsec0120m000) session, you can also link a defined authorization role to an AMS or DEM role (LN user authorizations (OP-CE)).

Example

To allow employees with the Project Manager role to modify their own projects, you must set the Authorization Level to Project Manager role and link the same to all the Project Managers.

To link an authorization role to AMS or DEM Role:

- From the Specific menu, select AMS Roles > Import in the Authorization Roles (tcsec0120m000) session, to create authorization roles with the same code and description as the AMS roles and link these roles to the appropriate AMS roles.
- Select Import DEM roles in the Authorization Roles (tcsec0120m000) session, to create authorization roles with the same code and description as the DEM roles and link these roles to the appropriate DEM roles.

You can use the AMS or DEM roles to set up session permissions with the required authorization levels. See, *Example of session and data authorization (p. 19)*.

Authorization Policies

Authorization Policies are used to define corporate policies for data authorization for a group of employees, irrespective of the employee role.

Example

A project is created to register an internal task in Hours Accounting (holidays or internal meetings) and all the employees are allowed to use this project. An authorization policy is linked to all the employees.

See, Authorization Policies (tcsec0150m000).

Assigned Rules

Assigned Rules are new, additional, or exceptional permission, specific to an employee and can be assigned without changing an existing authorization role or policy. Use the Assigned Rules (tcsec0160m000) session to view and maintain rules defined for an employee.

Example

Employee A goes on a holiday. You can assign a rule to another employee to provide access to the projects or purchase orders of employee A.

To set an assigned rule to Expired:

- Select the **Expired** check box.
- If the assigned rule is set to Expired, you cannot modify the value of the **Description** field and the permissions cannot be applied.

Example of session and data authorization

This table uses the Purchase Order session as an example to explain the two authorization systems:

- AMS or DEM: Authorization is applied at the session level.
- Authorization and Security: Authorization is applied at the business object level (for example, Project and RFQ).

Note

The application uses the most secure authorization system.

Session Authorization (AMS or Data Authorization (SEC DEM)		Result
No Permission	All Authorization Levels	User cannot access the session.
Display	No Permission	User can access the session but data is not displayed.
	View / Use / Modify	User can access the session and can only view the data.
Print/Display	No Permission	User can access the session but data is not displayed or printed.
	View / Use / Modify	User can access the session and authorized data can only be viewed and printed.
Modify/Print/Display	No Permission	User can access the session, but no data is displayed.
	View / Use	User can access the session and all authorized data can only be viewed, printed, or both.
	Modify	User can access the session and authorized data can be viewed, printed, or modified.
Insert/Modify/Print/Display	No Permission	User can access the session but no data is displayed
	View / Use	User can access the session and all authorized data can only be viewed, printed, or both.
	Modify	User can access the session and action can be executed, except delete, to the authorized data.
Full Authorization	No Permission	User can access the session, but no data is displayed
	View / Use	User can access the session, and all authorized data can only be viewed and printed.

Modify

User can access the session, any action can be executed, except delete, to the authorized data.

In case modifications or higher permissions in AMS or DEM (for a session that uses the data object) are required, for example, Projects in Hours Accounting, the following is applicable:

Session Authorization (AMS or Data Authorization (SEC DEM))		Result
Modify/Print/Display	No Permission	User can view and modify all the registered hours, but cannot use the project or zoom to the related project data.
	View	User can view and modify the related registered hours but cannot use the project, but can zoom to the related project data.
	Use / Modify	User can view and modify the related registered hours and can use project.
Insert/Modify/Print/Display	No Permission	User can create, view and modify all the registered hours, but cannot use the project or zoom to the related project data.
	View	User can create, view and modify the related registered hours but cannot use the project, but can zoom to the related project data.
	Use / Modify	User can create, view and modify the related registered hours and can use project.
Full Authorization	No Permission	User can delete, create, view and modify all the registered hours, but cannot use the project or zoom to the related project data.

View	User can delete, create, view and modify the related registered hours but cannot use the project, but can zoom to the related project data.
Use / Modify	User can delete, create, view and modify the related registered hours and can use project.

Creating permissions

You can use the Permissions (tcsec3100m000) session to set up the data for permissions. The types of permissions are Authorization Policy, Authorization Role, and Assigned Rule.

To create permissions for a business process or data object (Contract, Project, Requisition, Procurement, Sales, Warehousing, Item, or Business Partner):

- In the Permissions (tcsec3100m000) session, click New.
- Select the business process for which permissions must be created.
- Select the Permission **Type**.
- Specify the ID for the required permission. This value is defaulted based on the type of permission specified.
- Specify a **Version** number and the description.
- On the **Documents** tab, select the required business document (processes).
- Click the required line. In the related permissions session, specify this information:

Version tab

- In the Version Control group box, specify the version related data.

Company Permission tab

In the **Company Selection** group box, you can assign:

- Specific Company
- Range of companies.
- Set of companies.

Permission Rules tab

- Click New Permission Rule.
- In the **Permission for** field, select the attribute.
- Specify the related permission rule data. **Note** If you must select data in the From and To field in the Permission Rule lines from another company, from the Specific menu, click Browse

Company, to select the appropriate company from which to select the attribute data. You can only select companies that are set up in the **Company Permission** group box .

Note

- On the **Permission** tab in Procurement Permissions (tcsec3615m000) session, you can select the procurement documents (Requisition, Request for Quotation, Purchase Order, Purchase Contract and Purchase Price Book) from the **Documents** group box, for which the permission are applicable.
- On the **Permission** tab in Sales Permissions (tcsec3630m000) session, you can select the sales documents (Opportunity, Sales Quote, Sales Order, Sales Contract and Sales Price Book, Sales Catalog) from the Documents group box, for which the permission are applicable.

The attributes applicable for each business process:

Permission for	Attributes	Sessions
Contract	■ Enterprise Unit ■ Sales Office ■ Program Manager ■ Program ■ Line of Business ■ Business Sector ■ Area ■ Category ■ Group ■ Contract Manager ■ Internal Sales Representative ■ External Sales Representative ■ Contract	Contract Permissions (tc-sec3620m000) session includes the Permissions Rules tab to define the attributes.
Project	■ Enterprise Unit ■ Project Management Office ■ Program Manager ■ Program ■ Business Sector ■ Area ■ Category ■ Group ■ Project Manager ■ Main Project ■ Project	Permissions for Project (tc-sec3105m000) session includes the Permissions Rules tab to define the attributes.

Requisition	■ Enterprise Unit ■ Requester Department ■ Requester ■ Approver Department ■ Approver ■ Purchase Office ■ Buyer ■ Requisition	Permissions for Requisition (tc-sec3110m000) session includes the Permissions Rules tab to define the attributes.
Procurement	■ Enterprise Unit ■ Purchase Office ■ Buyer ■ Requisition ■ Request for Quotation ■ Purchase Order ■ Order Type ■ Purchase Contract ■ Purchase Price Book	Permissions for Procurement (tc-sec3115m000) session includes the Permissions Rules tab to define the attributes.
Sales	■ Enterprise Unit ■ Sales Office ■ Line of Business ■ Area ■ Internal Sales Representative ■ External Sales Representative ■ Opportunity ■ Sales Quote ■ Sales Order ■ Order Type ■ Sales Contract ■ Price book ■ Sales Catalog	Sales Permissions (tc-sec3630m000) session includes the Permissions Rules tab to define the attributes.
Warehousing	■ Enterprise Unit ■ Distribution cluster ■ Warehouse ■ Address	Warehousing Permissions (tc-sec3625m000) session includes the Permissions Rules tab to define the attributes.
Item	■ Product Type ■ Item	Item Permissions (tc-sec3635m000) session includes

the Permissions Rules tab to define the attributes.

Business Partner	■ Line of Business ■ Area ■ Business Partner	Business Partner Permissions (tcsec3640m000) session includes the Permissions Rules tab to define the attributes.
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Assigning permissions

You can assign permissions to an employee or an employee group in the Employee Authorization (tcsec1600m000) session.

In the Employee Authorizations (tcsec1500m000) session, select the user to whom the permissions must be assigned. Create a new record to access the Employee Authorization (tcsec1600m000) session

In the Employee Authorization (tcsec1600m000) session:

- You can assign authorization to an employee or an employee group
- Specify the ID of the **Employee** or Employee Group.
- Specify the **Version** name.
- On the Employee Permissions tab, specify the required data.
- From the Specific menu, select Assign New Rule (tcsec0260m000) to assign the permissions.

Copy employee permissions

You can also assign permissions to an employee or employee groups using the Copy Employee Permissions (tcsec1200m000).

From the Specific menu of the Employee Authorization (tcsec1600m000) session, click **Copy Authorizations**. The Copy Employee Permissions (tcsec1200m000) session is started.

- On the **Permissions** tab:
 - Select the Employee or Employee Group from which permissions must be copied.
 - Set the **Effective Period** and **Version Status Note**: You can set the Version Status to Active.
 - Select the Apply the Permissions check box ensure the copied permissions are immediately applied.
 - Select the type of permissions that must be copied such as Project, Procurement, and Requisitions.
 - Select the required options in the **Options** group box.
- You can copy the permissions to a range, or select individual employees or employee groups.

- For a Ranges On the **Permissions** tab, select the **Copy Permissions to** option and specify the applicable range.
- For Individual Employees: On the **Employees** tab, select the **Copy to Individual Employees** option and specify the applicable employees.
- For Individual Employee Groups: On the **Employees** tab, select the **Copy to Individual Groups** option and specify the applicable employee groups.
- If the Apply the Permission check box is not selected when you copy the permissions, you can use the **Apply Permissions** option in the Employee Authorization (tcsec1600m000) session, to apply the latest permissions later.

Apply and enforce authorization

After assigning permissions to employees, you must apply and enforce the authorization levels using the Apply Latest Permissions (tcsec3200m000) session, for the application to consider the assigned permissions.

Due to performance related factors, the newly created business objects (such as orders, projects, or contracts) are not immediately available for users when the Authorization and Security sessions are accessed. It is recommended that you apply the authorization process, using a job, several times a day. This process ensures that the authorization of the users for the required business objects is generated, and the active permissions are assigned to users in the Employee Document Permissions (tcsec2600m000) and Authorized Projects (tcsec2500m000) sessions.

Example

When a buyer creates a purchase order, all the buyers linked to the same purchase office are authorized to access the purchase order, based on the authorization setup. This is because when a buyer creates an order, another user approves the order. Effectively, this process ensures that other employees do not wait until the Apply Latest Permissions (tcsec3200m000) session is run, to send the order for approval.

Note

- You can run the session from the Authorized Projects (tcsec2500m000) session to help the application evaluate the permissions, when projects are created daily.
- You can also run the session from the Authorized Procurement Documents (tcsec2505m000) session to help the application evaluate the permissions, when procurement documents are created daily.

Viewing permissions data

You can use the auditing sessions to view the permissions assigned to the employees. The modified permissions can be viewed in the history sessions.

Auditing sessions

You can view permissions assigned to the employees or employee groups on a specified date and also check the authorized business objects for a specific employee using these sessions:

- **Employee Permissions on Date (tcsec4400m100):** You can print the list of employees and also the active permissions assigned to the employee or employee group, on the specified date.
- **Authorized Employees for Data Objects (tcsec4400m200):** You can view the Authorization levels, of the employee, for a business process and the employee's permissions for the same.

You can also view the history of the modifications made to the permissions and employee roles, using these sessions:

- **Employee Group History (tcsec0513m000):** You can view the history data that is added, modified, or deleted for a group of employees as specified in the Employee Groups (tcsec0110m000) session
- **System Administration History (tcsec0541m000):** You can view the history of the modifications to the authorization data in the System Administration (tcsec0140m000) session.

Supported Project sessions for authorization

This topic lists the sessions and the related data, in Project, that are enabled or disabled for an employee or employee group, based on the authorizations and permissions defined in the Authorization and Security module in Common.

Session	Name
tcmcs0152s000	General Projects
tcmcs0452m000	Print General Projects
tcmcs0552m000	General Projects
tpest0187m000	User Defined Statuses by Estimate Version
tpest0505m000	Message Log
tpest1100m000	Estimate Versions
tpest1110m000	Estimate Structures
tpest1200m000	Delete Versions
tpest1201m000	Copy Estimate Version
tpest1202m000	Swap Structures in Version
tpest1205m000	Copy Estimate Lines
tpest1205m100	Copy Budget to Estimates
tpest1210m000	Delete Structures
tpest1220m000	Generate Structural Elements
tpest1400m000	Print Estimate Versions
tpest1410m000	Print Estimate Structures
tpest1420m000	Print Structural Elements
tpest2200m000	Launch Estimate to Budget
tpest2200m100	Calculate Estimate Surcharges
tpest3100m000	Bids

tpest3110m000	Bid Lines
tpest3200m000	Convert Bid to Contract
tpest3210m000	Prepare Bid
tpest3400m000	Print Bids
tpest3410m000	Print Bid Lines
tppdm2200m000	Calculate Overhead
tppdm3600m000	Costing Breaks
tppdm3700m000	Costing Break Setup Review
tppdm3710m000	Costing Breaks - History
tppdm6100m000	Projects
tppdm6102m000	Project - Cost Control Levels
tppdm6103m000	Project Interim Results
tppdm6107s000	Project Status
tppdm6111s000	Project Labor
tppdm6112s000	Project Equipment
tppdm6113s000	Project Subcontracting
tppdm6114s000	Project Sundry Cost
tppdm6115s000	Project Revenues
tppdm6120m000	Project - Item Contracts
tppdm6121m000	Project - Price Group Contracts
tppdm6130m000	Project - Third Parties

tppdm6132m000	Project - Appointments
tppdm6134m000	Project - Documents
tppdm6136m000	Project - Locations
tppdm6150m000	Project-PCS Relationships
tppdm6170m000	Project Cost Object Mapping with Service
tppdm6201m000	Update Project Prices and Rates
tppdm6202m000	Update of Project Status
tppdm6204m000	Delete Project Labor
tppdm6205m000	Delete Project Equipment
tppdm6206m000	Delete Project Subcontracting
tppdm6207m000	Delete Project Sundry Costs
tppdm6208m000	Delete Project Revenues
tppdm6210m000	Convert Project and Budget Currency
tppdm6270m000	Check Cost Object Mapping
tppdm6400m000	Print Projects
tppdm6402m000	Print Cost Control Levels by Project
tppdm6403m000	Print General Project Data
tppdm6411m000	Print Project Labor
tppdm6412m000	Print Project Equipment
tppdm6413m000	Print Project Subcontracting
tppdm6414m000	Print Project Sundry Costs

tppdm6415m000	Print Project Revenues
tppdm6420m000	Print Project Contracts
tppdm6430m000	Print Third Parties by Project
tppdm6432m000	Print Appointments by Project
tppdm6434m000	Print Documents by Project
tppdm6436m000	Print Locations by Project
tppdm6449m000	Print Employees Responsible by Contract/Project
tppdm6450m000	Print Project-PCS Relationships
tppdm6470m000	Print Project Cost Object mapping with Service
tppdm6482m000	Print Project Procedures
tppdm6500m100	Project 360
tppdm6511m000	Project Labor
tppdm6512m000	Project Equipment
tppdm6513m000	Project Subcontracting
tppdm6514m000	Project Sundry Costs
tppdm6515m000	Project - Revenues
tppdm6584m000	Procedure Status
tppdm6600m400	Project
tppdm6800m000	Project Selection
tppdm7100m000	Project Deliverables
tppdm7100m100	Contract Deliverables

tppdm7100m200	Contract Deliverables Schedule
tppdm7190s000	Archived Projects
tppdm7200m000	Ship Non Hardware Deliverables
tppdm7200m100	Create Return Deliverables
tppdm7200m200	Update Planned Delivery Dates
tppdm7200m300	Update Status After Delivery
tppdm7290m000	Update Archived Projects
tppdm7400m000	Print Project Deliverables
tppdm7590m000	Archived Projects
tppdm7800m000	Project Deliverables
tppdm7810m000	Delete Projects
tppdm7820m000	Archive Projects
tppdm7840m000	Copy Project
tppdm8401m000	Print Employee Project Data
tppin0160m000	Project Shipments
tppin0170m000	Progress Payment Requests
tppin0180m000	Fees and Penalties
tppin0270m000	Create Progress Payment Requests
tppin0411m000	Print Settled Advance Payment lines
tppin0450m000	Print Transferred Unit Rate Invoiced Lines
tppin0460m000	Print Project Shipments

tpin0471m000	Print Settled Progress Payment Requests
tpin0511m000	Settled Advance Payments
tpin0550m000	Transferred Unit Rate Invoiced Lines
tpin1100m000	Contract Billable Cost Lines
tpin1200m000	Create Aggregated Billable Cost
tpin1210m000	Create Progress Invoice Installments
tpin1400m000	Print Billable Cost
tpin1410m000	Print Progress Invoice Specifications
tpin1510m000	Progress Invoice Specifications
tpin2100m000	Cost-Plus Transactions to be Invoiced
tpin2100m100	Material Transactions to be Invoiced
tpin2100m200	Labor Transactions to be Invoiced
tpin2100m300	Equipment Transactions to be Invoiced
tpin2100m400	Subcontracting Transactions to be Invoiced
tpin2100m500	Sundry Cost Transactions to be Invoiced
tpin2100m600	Overhead Transactions to be Invoiced
tpin4110m000	Advance Payments
tpin4112m000	Advance - Installment Settlement Mapping
tpin4140m000	Holdback
tpin4151m000	Installments
tpin4200m000	Transfer Transactions to Invoicing

tppin4251m000	Generate Installments
tppin4252m000	Update Planned Invoice Dates
tppin4257m000	Approve Transactions for Invoicing
tppin4410m000	Print Advance Payments
tppin4440m000	Print Holdback
tppin4451m000	Print Installments
tppin4457m000	Print Cost-Plus Transactions
tpppc2100m000	Cost Transactions
tpppc2100m100	Financial Transactions
tpppc2110s000	Commitments (Material)
tpppc2111m000	Material Costs
tpppc2116s000	Material Cost Forecast
tpppc2126m000	Cost Forecast by Activity/Cost Type
tpppc2131m000	Labor Costs
tpppc2132m000	Subcontracting Hours
tpppc2136s000	Labor Cost Forecast
tpppc2150s000	Commitments (Equipment)
tpppc2151m000	Equipment Cost
tpppc2156s000	Equipment Cost Forecast
tpppc2170s000	Commitments (Subcontracting)
tpppc2171m000	Subcontracting Costs

tpppc2176s000	Subcontracting Cost Forecast
tpppc2190s000	Commitments (Sundry Cost)
tpppc2191m000	Sundry Costs
tpppc2196s000	Sundry Cost Forecast
tpppc2216m000	Generate Cost Forecast by Cost Object
tpppc2226m000	Generate Cost Forecast by Activity/Cost Type
tpppc2410m000	Print Commitments
tpppc2411m000	Print Costs
tpppc2414m000	Print Cost Transactions
tpppc2416m000	Print Cost Forecast by Cost Object
tpppc2426m000	Print Cost Forecast by Activity / Cost Type
tpppc2431m000	Print Labor Costs
tpppc2432m000	Print Subcontracting Hours Accounting
tpppc2510m000	Commitment Entry (Material)
tpppc2511m000	Material Cost Entry
tpppc2516m000	Material Cost Forecast
tpppc2531m000	Labor Cost Entry
tpppc2532m000	Subcontracting Hours
tpppc2536m000	Labor Cost Forecast
tpppc2550m000	Commitment Entry (Equipment)
tpppc2551m000	Equipment Cost Entry

tpppc2556m000	Equipment Cost Forecast
tpppc2570m000	Commitment Entry (Subcontracting)
tpppc2571m000	Subcontracting Cost Entry
tpppc2576m000	Subcontracting Cost Forecast
tpppc2590m000	Commitment Entry (Sundry Cost)
tpppc2591m000	Sundry Cost Entry
tpppc2596m000	Sundry Cost Forecast
tpppc2605m000	Cost Entry
tpppc2810m000	Commitment Entry
tpppc3106s000	Forecast Extra Revenues
tpppc3406m000	Print Forecast Extra Revenues
tpppc3450m000	Print Interim Results
tpppc3506m000	Revenue Forecast
tpppc4200m000	Global Approving
tpppc4202m000	Post Transactions
tpppc4203m000	Build Cost Control
tpppc4402m000	Print Posting Report
tpppc4411m000	Print Cost Control
tpppc4412m000	Print Principal's Project-Control Report
tpppc4415m000	Print Hours by Period
tpppc4416m000	Print Costs by Period

tpppc4420m000	Print Project Control
tpppc4421m000	Print Management Report
tpppc4422m000	Expected Profit/Loss on Current Projects
tpppc4510m000	Control by Project
tpppc4580m000	Approve Commitments (Material)
tpppc4581m000	Approve Material Costs
tpppc4582m000	Approve Labor Costs
tpppc4583m000	Approve Subcontracting Hours Accounting
tpppc4584m000	Approve Commitments (Equipment)
tpppc4585m000	Approve Equipment Costs
tpppc4586m000	Approve Commitments (Subcontracting)
tpppc4587m000	Approve Subcontracting Costs
tpppc4588m000	Approve Commitments (Sundry Costs)
tpppc4589m000	Approve Sundry Costs
tpppc4802m000	Process Transactions
tpsss0110m000	Plans
tpsss2100m000	Activities
tpsss2101m000	Milestones
tpsss2120m000	Activity Baseline
tpsss2121m000	Milestone Baseline
tpsss2130m000	External Schedule Links

tppss2140m000	Project Selection
tppss2200m000	Delete Activities
tppss2201m000	Copy Activities
tppss2202m000	Copy from Standard Activities
tppss2203m000	Check Customized Item Completed
tppss2204m000	Delete Milestones
tppss2205m000	Update Work Authorization Status
tppss2221m000	Delete Baselines
tppss2231m000	External Scheduling Interface
tppss2400m000	Print Activities
tppss2402m000	Print Milestones
tppss2410m000	Print Activity Relationships
tppss2420m000	Print Activity Baseline
tppss2421m000	Print Milestone Baseline
tppss2430m000	Print External Schedule Links
tppss2500m100	Activities-Overview
tppss2510m000	Activity Relationships
tppss2531m000	ESP Project Overview
tppss6105s000	Rescheduling Messages for Material
tppss6106s000	Rescheduling Messages for Equipment
tppss6107s000	Rescheduling Messages for Subcontracting

tpsss6110m000	Planned PRP Purchase Order (Material)
tpsss6111m000	Planned PRP Purchase Order (Equipment)
tpsss6112m000	Planned PRP Purchase Order (Subcontracting)
tpsss6115m000	Planned PRP Warehouse Order
tpsss6116m000	Warehouse Order - Phantom Item Link
tpsss6120m000	Service Orders Links to Project
tpsss6200m000	Generate Planned PRP Orders
tpsss6210m000	Transfer Purchase Order to Planned PRP Warehouse Order
tpsss6215m000	Transfer Warehouse Order to Planned PRP Purchase Order
tpsss6220m000	Approve Planned PRP Purchase Orders
tpsss6225m000	Approve Planned PRP Warehouse Orders
tpsss6230m000	Transfer Planned PRP Purchase Orders
tpsss6235m000	Transfer Planned PRP Warehouse Orders
tpsss6250m000	Generate Service Orders
tpsss6400m000	Print Planned Transactions by Cost Object
tpsss6405m000	Print Rescheduling Messages
tpsss6410m000	Print Planned PRP Purchase Orders
tpsss6415m000	Print Planned PRP Warehouse Orders
tpsss6416m000	Print Warehouse Order-Phantom Item Link
tpsss6420m000	Print Service Order Links by Project

tpyss6450m000	Print Cost-Object Transactions History
tpyss6451m000	Print PCS Planning Data
tpyss6500m000	Order Line Balance (Material)
tpyss6501m000	Order Line Balance (Equipment)
tpyss6502m000	Order Line Balance (Subcontracting)
tpyss6505m000	Rescheduling Messages for Material
tpyss6506m000	Rescheduling Messages for Equipment
tpyss6507m000	Rescheduling Messages for Subcontracting
tpyss6520m000	Service Order Links by Project
tpyss6550m000	Delivered Order Lines (Material)
tpyss6551m000	Delivered Order Lines (Equipment)
tpyss6552m000	Delivered Order Lines (Subcontracting)
tpptc0410m000	Print Extensions
tpptc0415m000	Print Job Sheets
tpptc0420m000	Print Budget Cost Surcharges
tpptc0430m000	Print Budget Cost Surcharge History
tpptc0470m000	Print Budget Adjustment Codes
tpptc0471m000	Print Budget Adjustments
tpptc1100m000	Elements
tpptc1101m000	Layouts for Extra Elements
tpptc1105s000	Element Relationship

tpptc1110s000	Element Budget (Material)
tpptc1111s000	Element Budget (Labor)
tpptc1112s000	Element Budget (Equipment)
tpptc1113s000	Element Budget (Subcontracting)
tpptc1114s000	Element Budget (Sundry Costs)
tpptc1201s000	Update Budget Status in Actual Budget
tpptc1202s000	Activity Relationships by Element
tpptc1204m000	Maintain Parent Element
tpptc1205m000	Update Prices and Rates in Budget
tpptc1210m000	Delete Element Budget Structure
tpptc1230m000	Generate Control Data
tpptc1245m000	Copy Element Budget Data
tpptc1250m000	Update Budget Dates in Budget
tpptc1400m000	Print Elements
tpptc1405m000	Print Element Relationships
tpptc1409m000	Print Element Budget Structure
tpptc1410m000	Print Element Budgets
tpptc1425m000	Print Element Budget Structure History
tpptc1431m000	Print Control Data by Element
tpptc1432m000	Print Control Data by Activity
tpptc1435m000	Print Control Data for Budget Lines

tpptc1509m000	Element Budget Structure
tpptc1510m000	Element Budget (Material)
tpptc1511m000	Element Budget (Labor)
tpptc1512m000	Element Budget (Equipment)
tpptc1513m000	Element Budget (Subcontracting)
tpptc1514m000	Element Budget (Sundry Costs)
tpptc1525m000	Element Budget History (Material)
tpptc1526m000	Element Budget History (Labor)
tpptc1527m000	Element Budget History (Equipment)
tpptc1528m000	Element Budget History (Subcontracting)
tpptc1529m000	Element Budget History (Sundry Costs)
tpptc1530m000	Element Relationship History
tpptc1535m000	Control Data (Material Lines)
tpptc1536m000	Control Data (Labor Lines)
tpptc1537m000	Control Data (Equipment Lines)
tpptc1538m000	Control Data (Subcontracting Lines)
tpptc1539m000	Control Data (Sundry Cost Lines)
tpptc1545m000	Control Data for Physical Progress (Material Lines)
tpptc1546m000	Control Data for Physical Progress (Labor Lines)
tpptc1547m000	Control Data for Physical Progress (Equipment Lines)

tpptc1548m000	Control Data for Physical Progress (Subcontracting Lines)
tpptc1549m000	Control Data for Physical Progress (Sundry Cost Lines)
tpptc2110m000	Activity Budget (Material)
tpptc2111m000	Activity Budget (Labor)
tpptc2112m000	Activity Budget (Equipment)
tpptc2113m000	Activity Budget (Subcontracting)
tpptc2114m000	Activity Budget (Sundry Cost)
tpptc2201m000	Update Budget Status
tpptc2202m000	Global Update of Schedule Link
tpptc2203m000	Delete Budget
tpptc2211m000	Update Assignments in Hours Accounting
tpptc2245m000	Copy Activity Budget Lines
tpptc2250m000	Generate Budget from Reference Activity
tpptc2410m000	Print Activity Budgets
tpptc2425m000	Print Activity Budget History
tpptc2525m000	Activity Budget History (Material)
tpptc2526m000	Activity Budget History (Labor)
tpptc2527m000	Activity Budget History (Equipment)
tpptc2528m000	Activity Budget History (Subcontracting)
tpptc2529m000	Activity Budget History (Sundry Costs)

tpptc2600m000	Activity Budget
tpptc3100s000	Budget Cost Analysis Version
tpptc3200m000	Generate Budget Cost Analysis
tpptc3400m000	Print Budget Cost Analysis Codes by Project
tpptc3405m000	Print Budgeted Element Costs
tpptc3415m000	Print Budgeted Activity Costs
tpptc3420m000	Compare Budget Cost Analysis
tpptc3425m000	Print Budgeted Extension Costs
tpptc3426m000	Print Budget by Extension
tpptc3440m000	Print Budgeted Project Costs
tpptc3441m000	Print Budget by Element
tpptc3443m000	Print Budget by Activity
tpptc3500m000	Budget Cost Analysis Versions
tpptc3501m000	Budget Cost Analysis Versions by Budget Type
tpptc3505m000	Budgeted Element Costs
tpptc3506m000	Budgeted Element Costs (incl. Element Quantity)
tpptc3508m000	Budgeted Element Costs by Cost Component
tpptc3515m000	Budgeted Activity Costs
tpptc3516m000	Budgeted Activity Costs by Cost Component
tpptc3525m000	Budgeted Extension Costs
tpptc3526m000	Budgeted Extension Costs by Cost Component

tpptc3530m000	Budgeted Extension Costs (Material)
tpptc3531m000	Budgeted Extension Costs (Labor)
tpptc3532m000	Budgeted Extension Costs (Equipment)
tpptc3533m000	Budgeted Extension Costs (Subcontracting)
tpptc3534m000	Budgeted Extension Costs (Sundry Costs)
tpptc3535m000	Budgeted Extension Costs by Material Control Code
tpptc3536m000	Budgeted Extension Costs by Labor Control Code
tpptc3537m000	Budgeted Extension Costs by Equipment Control Code
tpptc3538m000	Budgeted Extension Costs by Subcnt. Control Code
tpptc3539m000	Budgeted Extension Costs by Sundry Cost Control Code
tpptc3540m000	Budgeted Project Costs
tpptc3541m000	Budgeted Cost Component Costs
tpptc3545m000	Budgeted Material Costs
tpptc3546m000	Budgeted Labor Costs
tpptc3547m000	Budgeted Equipment Costs
tpptc3548m000	Budgeted Subcontracting Costs
tpptc3549m000	Budgeted Sundry Costs
tpptc3550m000	Budgeted Costs by Material Control Code
tpptc3551m000	Budgeted Costs by Labor Control Code

tpptc3552m000	Budgeted Costs by Equipment Control Code
tpptc3553m000	Budgeted Costs by Subcontracting Control Code
tpptc3554m000	Budgeted Costs by Sundry Cost Control Code
tpptc3801m000	Budgeted Project Costs

Chapter 5

Authorization for business processes and entities

5

This section describes the various business processes and the assigned secondary attributes that are required for the related business documents.

Overview of data security

To reduce the risk of fraud and errors, data authorization is enabled for various business processes such as Project, Contract, Requisitions, Procurement, Sales, and Warehousing and entities such as Item and Business Partners. You can define roles for which the authorization level is set for a range of these entities using the associated attributes, which ensure data security.

Benefits of authorization:

- Improves compliancy by allowing only responsible employees to update the master data.
- Improves the efficiency of the application by avoiding incorrect data to be used for transaction purpose (such as creating new transactions).
- Reduces expenses on stock control and administrative costs because less corrections are made.

Business scenarios

- In order to achieve a profit margin, a global operating customer has assigned designated buyers for items and suppliers. Buyers must ensure that the master data of the assigned suppliers and items is correct. These authorized buyers must, after negotiating the prices and conditions for the assigned items with the suppliers (using Requests for Quotations) specify these in contracts and/or price books.
- An organisation divides the sales operations into separate sales offices. Each sales office is responsible for a particular line of business or sales area. Employees working for a sales office that is responsible for a particular line of business, are only allowed to sell the items of that line of business.

When authorization objects are authorized as a primary authorization object, only employees with the permission to modify that object can create and maintain the assigned objects. So only an employee who has modify permission for a certain Project can update the master data of that project.

When authorization objects are authorized as a secondary authorization object, only employees with the permission to modify that object can use these secondary authorization objects to create or maintain a primary object. So only an employee with the permission to modify a range of purchase orders and use or modify permission for an item can create purchase orders within the authorized range and use only assigned items on the order lines. However, if a purchase order within the assigned range contains lines with items for which the employee is not authorized, this employee can still view and maintain the order (primary object) but view the secondary object. Employee can only view and use permissions for the assigned items while changing the order line.

Example

An employee is authorized to modify all the purchase orders linked to the assigned purchase office. This employee is also authorized to only use business partner A and B. This employee can:

- Create purchase orders only for business partners A and B.
- Approve or release to Warehousing, all the purchase orders of this purchase office, also the purchase orders from business partners other than A and B.
- View all the purchase orders (main authorization object) of the linked purchase office, also the purchase orders from business partners (secondary authorization object) other than A and B.
- Modify all the purchase orders of the linked purchase office, also the purchase orders from business partners other than A and B.
- However when the employee tries to change the business partner of the order:
 - The employee can only view the master data of business partner A and B.
 - The employee can only change the business partner to business partner A and B.

Exceptions to attributes for business partners permissions

Some attributes such as Business Partner Type, Area and Line of Business can be defined for multiple roles. However, these attributes can include a different value for each role for the same business partner (primary object). The business partner is provided authorization if:

- The business partner authorization is set up for an attribute (such as Area) and the authorized value is available in one of the roles, the business partner is authorized.
- Permission is set up for a different value of the same attribute and another role of the same business partner has that value for which the business partner is authorized.

Example

A Business partner ABC has two defined set of roles. One is set as the buy-from role which is the 'Preferred Supplier' type and for the ship-from role, the 'Supplier' type.

- If an employee is authorized to use all the business partners of the type 'Preferred Supplier', the employee is allowed to use business partner ABC.
- If the employee is authorized to use all the business partners of the type 'Preferred Supplier', but is not authorized for the type 'Suppliers', the employee is not allowed to use business partner ABC.

Enterprise Unit

Employees who are authorized for the enterprise unit attribute of any authorization entity, can be defined as a controller, auditor, and a high level manager. The selected employee can analyze the data and is able to view business partners in the authorized departments.

If business partners are authorized based on enterprise unit, LN authorizes all the business partners with the enterprise unit(s) of all the departments setup specified in this data for the business partner:

- sales office
- purchase office
- accounting office(s)

Exceptions to attributes for item permissions

In some cases, employees who are authorized for the enterprise unit attribute of any authorization entity, can be defined as a controller, auditor, or high level manager. The selected employee can analyze the data and is able to view items used in the departments linked to the enterprise unit.

If items are authorized based on enterprise unit, LN authorizes all the items with the enterprise unit(s) of the purchase office setup specified for the authorized item.

Authorization for buyer on requisition line level

You can assign permissions to a buyer on the requisition line level in the Employee Authorization (tcsec1600m000) session.

Assigning authorization to a buyer

- You must select the **Buyer on Requisition Line** in the Purchase Requisition Parameters (tdpur0100m200) session.

Start the Purchase Requisitions (tdpur2501m000) session, select a requisition line to assign the appropriate buyer.

- In the Employee Authorization (tcsec1600m000) session, this data setup for the appropriate employees is required:
 - In the **Employee** group box, select the appropriate **Employee** or the **Employee Group**.
 - In the **Version Control** group box, the correct date range for which the authorization must be valid as part of the setup must be specified.
 - On the Employee Permissions tab, a Procurement Permission line must be defined. In the Procurement Permissions (tcsec3615m000) session, a Procurement Permission line must be specified with the Buyer option selected in the **Permission for** field. The appropriate authorization level must be specified for this line and the **Active Rule** check box must be selected. In the Procurement Permissions (tcsec3615m000) session, on the **Permission** tab, the **Requisition** check box must be selected. The **Status** of this permission must be Active.
 - The procurement permission must be applied.
 - In the Purchase Requisition Lines (tdpur2502m000), and Purchase Requisition (tdpur2600m000) sessions, the assigned buyer can process the assigned requisition lines on the permission level specified in the Procurement Permissions (tcsec3615m000) session.

Procurement specific authorization roles and levels

The table lists the various roles that can be defined for the Procurement process. The authorization levels defined for the associated attributes of all the procurement-related tasks are also listed.

Note

- Only the other (secondary) attributes are listed in this table.

Authorized Roles	Tasks	Associated Attributes	Authorization Level
Buyer (pre-purchase activities)	■ Maintains Item-Purchase Data	Other Attributes ■ Item ■ Business Partner	■ Modify, use, view only assigned items ■ Use only assigned suppliers
	■ Maintains supplier data (Buy-from and Ship-from role)	Other Attribute ■ Business Partner	■ Modify only assigned business partners

	■ Master data set-up of suppliers and criteria (objective ratings) ■ Process Vendor Rating Questionnaires ■ Monitor Vendor Rating	Other Attribute ■ Business Partner	■ Only for assigned suppliers ■ Only for allowed periods
	■ Creates purchase contracts ■ Monitors purchase contracts	Other Attributes ■ Business Partner ■ Item	■ Modify, use, view only assigned contracts ■ Use only assigned business partners ■ Use only assigned items
	■ Creates purchase price books ■ Monitors purchase price books ■ Create and Maintain Price Matrix	Other Attributes ■ Business Partner ■ Item	■ Modify, use or view only assigned purchase price books ■ Use or view assigned items in price books ■ Use or view assigned suppliers in price books and matrixes ■ Price book type = Purchase
Purchase Manager	■ Monitors Purchase Item Data	Other Attribute ■ Item	■ View only assigned items
	■ Monitors supplier data (Buy-from and Ship-from role)	Other Attribute ■ Business Partner	■ View only assigned business partners
	■ View vendor Rating	Other Attribute ■ Business Partner	■ View only assigned suppliers
	■ Monitors purchase contracts	NA	■ View only assigned contracts
	■ Monitors purchase price	Other Attributes ■ Business Partner	■ View only assigned purchase price books

books and matrix-
es

■ Item

- View assigned items in price books
- View assigned suppliers in price books and matrixes
- Price book type = Purchase

Data authorization requirements of items for Contract

This table lists the item data authorization for the tasks that are considered as a part of the **Contract** processes.

Authorized Roles	Tasks	Secondary Attribute/ Other Attribute	Permissions
Contract Manager	■ Create and maintain contract deliverables	Other Attribute ■ Contract	■ An employee can view or modify the contract deliverables of all assigned contracts ■ However, employee can only view or modify an assigned item of the deliverable.
	■ Maintain customer furnished material	Other Attribute ■ Contract	■ An employee can view or modify the furnished materials of all assigned contracts ■ However, an employee can only view or modify an assigned item on the customer furnished material list.

Data authorization requirements of items for Warehouse processes

This topic lists the item data authorization for the tasks that are considered as a part of the **Warehousing** processes.

Note

For the complete attributes' list, see *Exceptions to attributes for business partners permissions (p. 48)*.

Authorized Roles	Tasks	Secondary Attribute/ Other Attribute	Permissions
Warehouse Administrator	■ Maintains item – warehousing data ■ Maintains item data by warehouse ■ Maintains packaging items ■ Maintains item – package definitions ■ Maintains item – warehousing defaults	Other Attribute ■ Warehouse	■ An employee can only view, and maintain assigned items ■ The employee can only view and assign items in the authorized warehouses. ■ The employee can only assign package definitions to the authorized item.
	■ Creates and maintains Inventory transfer (manual) and Warehouse order (manual)	Other Attributes ■ Warehouse ■ Project	■ An employee can view and modify all inventory transfer or warehouse orders for authorized warehouses. ■ However, an employee can only view, update or create authorized items for an inventory transfer or warehouse order.

■ Cycle counting ■ Creates and maintains adjustment orders	Other Attributes ■ Warehouse ■ Project	■ An employee can view and modify all adjustment or cycle counting orders for authorized warehouses. ■ However, an employee can update or create an adjustment or cycle counting order for assigned items only.
■ Creates inventory movements	Other Attribute ■ Warehouse	■ An employee can only move inventory within assigned warehouses (no item authorization).
■ Blocks/unblocks inventory	Other Attribute ■ Warehouse	■ An employee can view the blocking of only authorized warehouses. ■ However, an employee can only view, block or unblock assigned items.
■ Blocks/unblocks lots	NA	■ An employee can only view, block, unblock lots of assigned items.
■ Blocks lots by transaction	Other Attribute ■ Warehouse	■ An employee can view the lots of authorized warehouses. ■ An employee can only view or block, unblock lots of assigned items.

■ Creates and maintains project cost peg transfers ■ Handles borrow/loan transfers	Other Attributes ■ Warehouse ■ Project	■ An employee can view the project cost peg (and borrow/loan) transfers for the authorized warehouses. ■ An employee can create or maintains a project cost peg transfer for assigned items.
■ Reports on inventory	Other Attribute ■ Warehouse	■ An employee can only view the warehouse – item inventory, lots, stock points, inventory by specification, inventory overview, item warehouse negative inventory (=warehouse based reports) of assigned warehouses (no item authorization).
■ Inventory planning	Other Attributes ■ Warehouse ■ Business Partner	■ An employee can view all planned inventory transactions of assigned warehouses; item authorization does not play a role. ■ An employee can view all inventory commitments of assigned warehouses. ■ However, item authorizations are applied when manually creating or modifying commitments. ■ An employee can generate order ad-

			vices for only assigned warehouses. ■ An employee can view, modify and create all purchase and production order advices of assigned warehouses. ■ However, item authorizations are applied when manually creating or modifying purchase and production order advices.
■	Inventory costing	Other Attributes ■ Warehouse ■ Project	■ An employee can only process inventory variances and perform inventory valuation or actual costs correction for assigned warehouses (no item authorization). ■ Actual cost correction takes care of item authorization. ■ An employee is allowed to enter market price or perform a MAUC correction by item only for assigned warehouses and items. ■ An employee is allowed to change valuation methods only for assigned warehouses and items. ■ An employee is allowed to view market price, revaluation and integration

			- transactions, inventory variances, negative inventory consumptions only for assigned warehouses. - An employee can only view MAUC or MAUC transactions by warehouse valuation group of assigned warehouses (no item authorization).
	Create and process inventory change orders	Other Attribute Warehouse	- An employee can view all inventory change orders of assigned warehouses. - However, an employee can modify or create a change order for assigned items.
Receiving Clerk	Receive and put away material based on warehouse orders (handling units)	Other Attribute Warehouse	No item authorization
	Cross-dock Material	Other Attribute Warehouse	No item authorization
		Other Attribute Warehouse	No item authorization
Shipping Clerk	Prepare, pick, pack and ship material based on warehouse orders (handling units)	Other Attribute Warehouse	No item authorization

	■ Inspect outbound material	Other Attribute ■ Warehouse	■ No item authorization
Quality Inspector	■ Inspect received material (QM)	Other Attribute ■ Warehouse	■ An employee is allowed to view inspection orders of all assigned warehouses. ■ However, an employee can only process inspections of assigned items.
	■ Process material in quarantine (disposition)	Other Attribute ■ Warehouse	■ An employee is allowed to view all the quarantine lines of assigned warehouses. ■ However, an employee can only process the lines for authorized items.
	■ Storage inspections (QM)	Other Attribute ■ Warehouse	■ An employee can only inspect and process assigned items. ■ However, an employee can create or modifies storage inspection inventory in assigned warehouses.
Buyer / Sales / Production Planner	■ Views Stock Level	Other Attributes ■ Warehouse ■ Project	■ An employee can only view the item inventory, item – companies and warehouses inventory (= item based reports) of assigned items.

Accountant	Views inventory transactions	Other Attributes - Warehouse - Project	An employee can only view inventory transaction of assigned warehouses (no item authorization).
	Views inventory value	Other Attributes - Warehouse - Project	- An employee is allowed to view market price, revaluation and integration transactions, inventory variances, negative inventory consumptions only for assigned warehouses. - An employee can only view MAUC or MAUC transactions by warehouse valuation group of assigned warehouses.

Data authorization requirements of items for Sales processes

This topic lists the item data authorization for the tasks that are considered as a part of the **Sales** processes.

Note

For the complete attributes' list, see *Exceptions to attributes for business partners permissions (p. 48)*.

Authorized Roles	Tasks	Secondary Attribute/ Other Attribute	Permissions
Sales Support Administrator	Maintains item-sales data	Other Attribute Business Partner	An employee is allowed to view, use, modify all assigned items

■ Maintains items – sales business partner data		■ However, an employee can view and use assigned business partners for which the BP data for the item is updated or created.
■ Creates and maintains catalogs	Other Attributes ■ Catalog ■ Business Partner	■ An employee is allowed to view, use, modify all assigned catalogs ■ However, an employee can only view or use assigned items and business partners for which a catalog is updated /created. Catalog type = Sales
■ Creates and maintains sales contracts ■ Evaluates sales contracts ■ (De-)activates sales contracts ■ Terminates and/or delete sales contracts	Other Attributes ■ Sales Contract ■ Business Partner	■ An employee is allowed to view, use, modify all assigned sales contracts ■ However, an employee can only view or use assigned items and business partners for which a contract is updated /created.
■ Creates sales price books ■ Monitors sales price books ■ Creates and maintains price matrix	Other Attributes ■ Sales Price Book ■ Business Partner	■ An employee is allowed to view, use, modify all assigned sales price books ■ However, an employee can only view or use assigned items and business partners for which a sales

			- price book is updated /created. ■ Price book type = Sales
■ Creates and maintains sales quotes for goods or services ■ Monitors sales quotes ■ Processes sales quotes ■ Registers confirm/lost quotes ■ Cancels quotes ■ Deletes quotes	Other Attributes ■ Sales Quote ■ Project ■ Business Partner		■ An employee is allowed to view, use, modify all assigned sales quotes ■ However, an employee can only view and use assigned items, projects and business partners for which a quote is updated /created.
■ Copies BOM components to sales quotations	Other Attribute ■ Sales Quote		■ An employee is allowed to modify all assigned sales quotes ■ The employee can only copy assigned main items to sales quotations ■ The employee authorized for the main item, can copy all the BOM components.
■ Copies sales quotes to sales orders	Other Attributes ■ Sales Quote ■ Sales Order		■ An employee is allowed to copy all the quote lines of authorized quotes to authorized purchase orders ■ However, an employee can only view/use assigned items on the copied order.

■ Creates and maintains sales orders for goods or services ■ Monitors sales orders (e.g. timely delivery) ■ Changes prices after delivery ■ Changes prices of invoice Lines ■ Generates retro-billed price change advice ■ Generates retro-billed sales orders	Other Attributes ■ Sales Order ■ Project ■ Business Partner	■ An employee is allowed to view, use, modify all assigned sales orders ■ An employee can generate retrobilled price change advice and sales orders for all assigned sales orders ■ However, an employee can only view to or use assigned items, projects and business partners for which an (retro-billed) order is updated /created.
■ Maintains item material content ■ Maintains agreements for sales ■ Maintains material base prices ■ Maintains material actual prices	Other Attribute ■ Business Partner	■ The employee can only view to or use assigned items and business partners for which material item data, agreements for sales, material base prices and material actual prices are updated /created.
■ Creates and maintains terms and conditions line (if search attribute is item)	Other Attribute ■ Business Partner	■ The employee can view or use assigned items and business partners for which the terms and conditions line are updated /created.
■ Creates monitors and processes sales releases and schedules	NA	■ An employee is allowed to view and create sales schedules and releases

			but can only view or use authorized items
Account Manager / Sales Manager	■ Monitors items – sales data	Other Attribute	■ An employee is allowed to view assigned items ■ An employee is allowed to view the list of all business partners setup for the items ■ The employee can view the item – sales business partner data for the item.
	■ Monitor items – sales business partner data	■ Business Partner	

Data authorization requirements of items for Project processes

This topic lists the item data authorization for the tasks that are considered as a part of the **Project** processes.

Note

For the complete attributes' list, see *Exceptions to attributes for business partners permissions (p. 48)*.

Authorized Roles	Tasks	Secondary Attribute/ Other Attribute	Permissions
Product Engineer	■ Maintain item-project data	Other Attribute ■ Project	■ An employee is allowed to see, use, modify assigned items
	■ Maintains equipment ■ Maintains subcontracting	Other Attribute ■ Business Partner	■ An employee is allowed to see, use, modify all assigned

			■ items (equipment or subcontracting) ■ An employee is only allowed to view or use assigned business partners
	■ Maintains project equipment ■ Maintains project subcontracting	Other Attribute ■ Business Partner	■ An employee is allowed to see, use, modify all assigned projects ■ An employee can only view or use assigned items (equipment/subcontracting)
	■ Map equipment, subcontracting and sundry costs to items	Other Attribute ■ Project	■ Employee can only view or use assigned items for which the mapping of equipment is updated or created.
	■ Buy-from business partner files	Other Attributes ■ Project ■ Business Partner	■ An employee can see all the data of assigned business partners ■ However, an employee can only view or use assigned items.
Project Cost Engineer	■ Create and maintain project budgets ■ Customize items in budget ■ Create and maintain project estimates and bids	Other Objects ■ Project ■ Business Partner	■ An employee can only see and modify the budgets and estimates of assigned projects ■ However, an employee can only view and use assigned items and business partners

			for which a line is modified or created.
Project Planner	■ View, monitor and maintain planning data of assigned items	Other Attribute ■ Project	■ An employee is allowed to see all assigned items ■ An employee is allowed to create and modify authorized items.
	■ Create and maintain purchase budgets	Other Objects ■ Project ■ Business Partner	■ An employee can see all the data of assigned projects ■ However, an employee can only view or use assigned items and business partners.
	■ Evaluate, maintain and process planned purchase orders ■ Evaluate, maintain and process planned warehouse orders	Other Attributes ■ Project ■ Business Partner ■ Warehouse	■ An employee can see all the planned purchase orders ■ However, an employee can only view or use assigned items, projects, warehouses and business partners.
Project Manager	■ Create and maintain project deliverables	Other Attributes ■ Project ■ Business Partner	■ The employee can only see contract deliverables of assigned projects. ■ The employee can only maintain deliverables of authorized contracts. ■ And the employee can only view or use assigned items and business partners

	■ Track cost transactions	Other Attribute ■ Project	■ The employee can see all the cost transactions of assigned projects
	■ Compare budget vs. actual cost	Other Attribute ■ Project	■ The employee can see all the budget and cost transactions of assigned projects
Project Administrator	■ Registers and maintains project costs and commitments ■ Creates and maintains cost plus transactions	Other Attribute ■ Project	■ The employee can only register and see project costs, cost plus and commitments for assigned projects ■ However, an employee can only create or modify costs, cost plus and commitments for assigned items.

Data authorization requirements of items for Procurement processes

This topic lists the item data authorization for the tasks that are considered as a part of the **Procurement** processes.

Note

For the complete attributes' list, see *Exceptions to attributes for business partners permissions (p. 48)*.

Authorized Roles	Tasks	Secondary Attribute/Other Attribute	Permissions
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Buyer (pre purchase activities)	■ Maintains item-purchase data ■ Maintains approved supplier list ■ Maintains item manufacturer and manufacturer part number	Other Attribute ■ Business Partner	■ An employee is allowed to view, use, modify all assigned items ■ However, an employee can view and use assigned business partners for which the BP data for the item is updated or created.
	■ Maintains purchase catalogs	Other Attribute ■ Business Partner	■ An employee is allowed to view, use, modify all assigned catalogs * ■ However, an employee can view and use assigned items and business partners for which a catalog is updated /created. ■ Catalog type = Purchase
	■ Creates request for quotations ■ Monitors request for quotations ■ Processes request for quotations	Other Attributes ■ Request for Quotation ■ Business Partner	■ An employee is allowed to view, use (convert), modify all assigned request for quotations ■ However, an employee can view and use assigned items and business partners for which a request for quotation is updated or created.
	■ Creates purchase contracts ■ Activates purchase contracts ■ Monitors purchase contracts ■ Terminates purchase contracts	Other Attributes ■ Purchase Contracts ■ Business Partner	■ An employee is allowed to view, use, modify all assigned purchase contracts ■ However, an employee can view and use assigned items and business partners for which a contract is updated or created.
	■ Creates purchase price books ■ Monitors purchase price books	Other Attributes ■ Purchase Price Books	■ An employee is allowed to view, use, modify all assigned price books

	Creates and maintains price matrix	Business Partner	However, an employee can only view and use assigned items and business partners. Price book type = Purchase
	Creates and maintains scenarios by landed cost sets	- Other Attribute - Business Partner	An employee can only view and use assigned items and business partners for which the scenarios by landed cost set is updated or created.
	- Maintains item material content - Maintains agreements for procurement - Maintains material base prices - Maintains material actual prices	- Other Attribute - Business Partner	An employee can only view and use assigned items and business partners for which material item data, agreements for procurement, material base prices and material actual prices are updated or created.
	Creates and maintains terms and conditions line (if search attribute is item)	- Other Attribute - Business Partner	
Purchase Requester (employee outside the purchase organization requesting goods or services but does not have the authority to place the order)	- Creates requisition for goods or services to be bought - Submits requisition - Monitors requisitions that are submitted for approval and/or fulfillment	- Other Attributes - Requisition - Project	- An employee is allowed to view, use (submit), modify all assigned requisitions - However, an employee can only view and use assigned items, projects and business partners for which a requisition is updated or created.
Buyer (purchase fulfillment)	- Validate and check requisitions - Prepare requisitions for processing	- Other Attributes - Requisition - Business Partner	- An employee is allowed to view, use (convert), modify all assigned requisitions - However, an employee can only view and use as-

	■ Process requisitions to orders or requests for quotations	■ Project	signed items, projects and business partners for which the requisition updated or created.
	■ Creates purchase orders for goods or services to be bought ■ Processes signals from Enterprise planning ■ Monitors purchase orders (e.g. timely receipt) ■ Receives cost items (not via warehousing) ■ Changes prices after receipt	Other Attributes ■ Purchase Order ■ Business Partner ■ Project	■ An employee is allowed to view, use (e.g. release to warehousing), modify all assigned purchase orders ■ However, an employee can only view and use assigned items, projects and business partners for which the purchase order is updated or created.
	■ Purchase schedules	NA	■ An employee can create purchase schedules, but can only zoom to or use authorized items
	■ Monitor procurement data per project peg ■ Monitor aggregated project data by document	Other Attribute ■ Project	■ An employee is allowed to view all pegged information for authorized projects ■ So no item authorization
	■ Vendor Rating	Other Attribute ■ Business Partner	■ An employee is allowed to view and process vendor rating for all assigned business partners ■ Items are not used in this area so no item authorization
Purchase Manager	■ Monitors Purchase Item Data		■ An employee can only view assigned items.

Business partners specific authorization roles and levels in Warehousing processes

The table explains the various roles that can be defined for the Warehousing processes for a **Business Partner**. The authorization levels defined for the associated attributes of all the Business Partners-related tasks are also listed.

Note

- Employee can only execute tasks for the assigned warehouses.
- However, an employee can create a purchase order while modifying the business partner on a generated purchase order advice which can be transferred to **Procurement**. Therefore, business partner authorization must be considered while modifying business partner.
- Only the other (secondary) attributes are listed in this table.
- For the complete attributes' list, see *Exceptions to attributes for business partners permissions* (p. 48).

Authorized Roles	Tasks	Associated Attributes	Permissions
Warehouse Administrator / Buyer	■ Modify generated purchase order advices	Other Attributes: ■ Contract ■ Project	■ Use, view only assigned business partners (based on business partner, enterprise unit, purchase office, buyer, business partner type, area, line of business, price list, financial supplier group)
	■ Generate orders (KANBAN)	NA	■ Use, view only assigned business partners (based on business partner, enterprise unit, purchase office, buyer, business partner type, area, line of business, price list, financial supplier group)
	■ Modify inventory ownership change order lines	NA	■ Use, view only assigned business partners (based on business partner, enterprise unit, sales office, business partner type, area, sales territory, line of business, internal sales representative, external sales representa-

		tive, price lists, financial customer group)
■ Allocation change NA order lines	■ Use, view only assigned business partners (based on business partner, enterprise unit, sales office, business partner type, area, sales territory, line of business, internal sales representative, external sales representative, price lists, financial customer group)	

Business partners specific authorization roles and levels in the Sales processes

The table explains the various roles that can be defined for the sales activities for **Business Partner**. The authorization levels defined for the associated attributes of all the Business Partners-related tasks are also listed.

Note

- Only the other (secondary) attributes are listed in this table.
- For the complete attributes' list, see *Exceptions to attributes for business partners permissions* (p. 48).

Customer Management

Authorized Roles	Tasks	Associated Attributes	Permissions
Sales Support Administrator	■ Create and follow up on opportunities	Other Attributes: ■ Opportunity ■ Contact ■ Item ■ Sales Quotation ■ Sales Contract ■ Sales Order ■ Project ■ Project Contract ■ Purchase Order	■ Use, view only assigned business partners (based on business partner, enterprise unit, sales office, business partner type, area, sales territory, line of business, internal sales representative, external sales representative, price lists, financial customer group) ■ Modify, use, view only assigned opportunities

	■ Request for Quotations	■ Use only assigned business partners ■ Use only assigned contacts ■ Use only assigned items ■ Use only assigned sales quotations ■ Use only assigned sales contracts ■ Use only assigned sales orders ■ Use only assigned projects ■ Use only assigned project contracts ■ Use only assigned purchase orders ■ Use only assigned request for quotations
■ Maintains customer data (Header, Sold-to and Ship-to role)	NA	■ Modify, use, view only assigned business partners (based on business partner, enterprise unit, sales office, business partner type, area, sales territory, line of business, internal sales representative, external sales representative, price lists, and financial customer group)
■ Maintain Item-Sales Data per business partner	Other Attribute: ■ Item	■ Use, view only assigned business partners (based on business partner, enterprise unit, sales office, business partner type, area, sales territory, line of business, internal sales representative, external sales representative, price lists, financial customer group) ■ Modify, use, view only assigned items
■ Maintain or use sales catalogs	Other Attributes: ■ Catalog ■ Item	■ Use, view only assigned business partners (based on business partner, enterprise unit, sales office, business partner type, area, sales territory, line of business, internal sales representative, external sales representative, price lists, financial customer group) ■ Modify, use, view only assigned catalogs (type = sales) ■ Use only assigned items

	■ Create and maintain terms and conditions	NA		■ Use, view only assigned business partners (based on business partner, enterprise unit, sales office, business partner type, area, sales territory, line of business, internal sales representative, external sales representative, price lists, financial customer group)
	■ Create and maintain material pricing	NA		■ Use, view only assigned business partners (based on business partner, enterprise unit, sales office, business partner type, area, sales territory, line of business, internal sales representative, external sales representative, price lists, financial customer group)
Sales Manager / Account Manager	■ Follow up on opportunities	Other Objects: ■ Opportunity ■ Contact ■ Item ■ Sales Quotation ■ Sales Contract ■ Sales Order ■ Project ■ Project Contract ■ Purchase Order ■ Request for Quotations	■	Use, view only assigned business partners (based on business partner, enterprise unit, sales office, business partner type, area, sales territory, line of business, internal sales representative, external sales representative, price lists, financial customer group) ■ Modify, use, view only assigned opportunities ■ Use only assigned contacts ■ Use only assigned items ■ Use only assigned sales quotations ■ Use only assigned sales contracts ■ Use only assigned sales orders ■ Use only assigned projects ■ Use only assigned project contracts ■ Use only assigned purchase orders ■ Use only assigned request for quotations
	■ Monitors customer data (Header, Sold-to and Ship-to role)	NA		■ View only assigned business partners (based on business partner, enterprise unit, sales office, business partner type, area, sales territory, line of business, internal sales representative, external sales representative, price lists, financial customer group)

			sentative, external sales representative, price lists, financial customer group)
■	Monitors Item-Sales Data per business partner	Other Attribute: ■ Item	■ View only assigned business partners (based on business partner, enterprise unit, sales office, business partner type, area, sales territory, line of business, internal sales representative, external sales representative, price lists, financial customer group) ■ View only assigned items
■	Monitor catalogs	Other Attributes: ■ Catalog ■ Item	■ View only assigned business partners (based on business partner, enterprise unit, sales office, business partner type, area, sales territory, line of business, internal sales representative, external sales representative, price lists, financial customer group) ■ View only assigned catalogs ■ View only assigned items
■	Monitor terms and conditions	NA	■ View only assigned business partners (based on business partner, enterprise unit, sales office, business partner type, area, sales territory, line of business, internal sales representative, external sales representative, price lists, financial customer group)
■	Monitor material pricing	NA	■ View only assigned business partners (based on business partner, enterprise unit, sales office, business partner type, area, sales territory, line of business, internal sales representative, external sales representative, price lists, financial customer group)

Sales Activities

Sales Support Administrator	- Creates sales contracts - Monitors sales contracts	Other Attributes: - Sales Contract - Item	- Use, view only assigned business partners (based on business partner, enterprise unit, sales office, business partner type, area, sales territory, line of business, internal sales representative, external sales representative, price lists, financial customer group) - Modify, use, view only assigned contracts - Use only assigned items
	- Creates sales price books - Monitors sales price books - Create and Maintain Price Matrix	Other Attributes: - Price Book - Item	- Use, view only assigned business partners (based on business partner, enterprise unit, sales office, business partner type, area, sales territory, line of business, internal sales representative, external sales representative, price lists, financial customer group) - Modify, use, view only assigned price books (type = sales) - Use only assigned items
	- Creates sales quotes for goods or services - Monitors sales quotes - Process sales quotes - Register confirm/lost quotes	Other Attributes: - Sales Quote - Project - Item	- Use, view only assigned business partners (based on business partner, enterprise unit, sales office, business partner type, area, sales territory, line of business, internal sales representative, external sales representative, price lists, financial customer group) - Modify, use, view only assigned sales quotes - Use only assigned projects - Use only assigned items
	- Creates sales orders for goods or services - Monitors sales orders	Other Attributes: - Sales Order - Project - Item	Use, view only assigned business partners (based on business partner, enterprise unit, sales office, business partner type, area, sales territory, line of business, internal sales representative, external sales representative, price lists, financial customer group)

	■ (e.g. timely delivery) ■ Change prices after delivery ■ Changes prices of invoice Lines		■ tive, price lists, financial customer group) ■ Modify, use, view only assigned sales orders Use only assigned projects ■ Use only assigned items
	■ Create and monitor retro-billed advice	NA	■ Use, view only assigned business partners (based on business partner, enterprise unit, sales office, business partner type, area, sales territory, line of business, internal sales representative, external sales representative, price lists, financial customer group)
	■ Monitor and maintain sales schedules and releases	NA	■ Use, view only assigned business partners (based on business partner, enterprise unit, sales office, business partner type, area, sales territory, line of business, internal sales representative, external sales representative, price lists, financial customer group)
Account Manager	■ Monitors sales contracts	Other Attributes: ■ Sales Contract ■ Item	■ View only assigned business partners (based on business partner, enterprise unit, sales office, business partner type, area, sales territory, line of business, internal sales representative, external sales representative, price lists, financial customer group) ■ View only assigned contracts ■ View only assigned items
	■ Monitors sales price books and matrixes	Other Attributes: ■ Price Book ■ Item	■ View only assigned business partners (based on business partner, enterprise unit, sales office, business partner type, area, sales territory, line of business, internal sales representative, external sales representative,

			■ View only assigned price books (type = sales) ■ View only assigned items
	■ Monitor sales quotes ■ Monitor sales quotes below/above allowed margins	Other Attributes: ■ Sales Quote ■ Project ■ Item	■ View only assigned business partners (based on business partner, enterprise unit, sales office, business partner type, area, sales territory, line of business, internal sales representative, external sales representative, price lists, financial customer group) ■ View only assigned sales quotes ■ View only assigned projects ■ View only assigned items
	■ Monitor sales orders ■ Monitor retro-billed price change advice ■ Monitor sales schedules and releases ■ Monitor sales orders below/above allowed margins	Other Attributes: ■ Sales Order ■ Project ■ Item	■ View only assigned business partners (based on business partner, enterprise unit, sales office, business partner type, area, sales territory, line of business, internal sales representative, external sales representative, price lists, financial customer group) ■ View only assigned sales orders ■ View only assigned projects ■ View only assigned items
Receivables Administrator	■ Invoice sales orders ■ View sales orders ■ View sales schedules	Other Attributes: ■ Sales Order ■ Project ■ Item	■ Use, view only assigned business partners (based on business partner, enterprise unit, sales office, business partner type, area, sales territory, line of business, internal sales representative, external sales representative, credit analyst, financial customer group) ■ Use, view only assigned sales orders ■ Use only assigned projects ■ Use only assigned items

Business partners specific authorization roles and levels in Purchase activities

The table explains the various roles that can be defined for the Purchase activities for a **Business Partner**. The authorization levels defined for the associated attributes of all the Business Partners-related tasks are also listed.

Note

- Only the other (secondary) attributes are listed in this table.
- For the complete attributes' list, see *Exceptions to attributes for business partners permissions* (p. 48).

Pre Purchase Activities

Authorized Roles	Tasks	Associated Attributes	Permissions
Buyer	■ Maintain Item-Purchase Data	NA	■ Use, view only assigned business partners (based on business partner, enterprise unit, purchase office, buyer, business partner type, area, line of business, price lists) ■ Only use business partners for which the user is responsible.
	■ Maintain supplier data (Header, Buy-from and Ship-from role) ■ Master data setup of suppliers and criteria (objective ratings) ■ Process Vendor Rating Questionnaires	NA	■ Modify, use, view, only assigned business partners for which the user is assigned to. ■ Use, view only assigned buyers ■ Use, view only assigned business partner types ■ Use, view only assigned areas

- | | |
|---|---|
| <ul style="list-style-type: none"> ■ Monitor Vendor Rating | <ul style="list-style-type: none"> ■ Use, view only assigned line of businesses ■ Use, view only assigned Price Lists ■ Use, view only assigned business partners (based on business partner, purchase office, enterprise unit, buyer, business partner type, area, line of business, price lists, financial supplier group) ■ Buyers are assigned to business partners and these buyers are responsible for the vendor rating of their assigned business partners. |
|---|---|

- | | | |
|---|---|--|
| <ul style="list-style-type: none"> ■ Creates purchase contracts ■ Monitors purchase contracts | <p>Other Attributes:</p> <ul style="list-style-type: none"> ■ Purchase Contracts ■ Item | <ul style="list-style-type: none"> ■ Use, view only assigned business partners (based on business partner, enterprise unit, purchase office, buyer, business partner type, area, line of business, price lists, financial supplier group) ■ Only assigned contracts ■ Only assigned items |
|---|---|--|

- | | | |
|---|---|---|
| <ul style="list-style-type: none"> ■ Creates purchase price books ■ Monitors purchase price books | <p>Other Attributes:</p> <ul style="list-style-type: none"> ■ Price Book ■ Item | <ul style="list-style-type: none"> ■ Use, view only assigned business partners (based on business partner, |
|---|---|---|

- Create and Maintain Price Matrix
 - enterprise unit, purchase office, buyer, business partner type, area, line of business, price lists, financial supplier group)
 - Only assigned price books
 - Only assigned items
 - Use only business partners assigned to a certain price list.
-

- Create and maintain NA landed costs
 - Use, view only assigned business partners (based on business partner, enterprise unit, purchase office, buyer, business partner type, area, line of business, price lists, financial supplier group)
-

- Create and maintain NA material pricing
 - Use, view only assigned business partners (based on business partner, enterprise unit, purchase office, buyer, business partner type, area, line of business, price lists, financial supplier group)
-

- Create and maintain NA terms and conditions
 - Use, view only assigned business partners (based on business partner, enterprise unit, purchase office, buyer,

			business partner type, area, line of business, price lists, financial supplier group)
	■ Creates request for quotations ■ Monitors request for quotations ■ Processes request for quotations ■ Converts request for quotation to purchase order	Other Attributes: ■ Request for Quotation ■ Item	■ Use, view only assigned business partners (based on business partner, enterprise unit, purchase office, buyer, business partner type, area, line of business, price lists, financial supplier group) ■ Only assigned request for quotations ■ Only assigned items
	■ Create and maintain purchase catalogs	Other Attributes: ■ Catalog ■ Item	■ Use, view only assigned business partners (based on business partner, enterprise unit, purchase office, buyer, business partner type, area, line of business, price lists, financial supplier group) ■ Modify, use, view only assigned catalogs (type = purchase) ■ Only assigned items
Purchase Manager	■ Monitors supplier data (Header, Buy-from and Ship-from role)	NA	■ View, only assigned business partners (based on business partner, enterprise unit, purchase office, buyer, business partner type,

			area, line of business, price lists)
■	View vendor Rating	NA	■ View only assigned business partners (based on business partner, enterprise unit, purchase office, buyer, business partner type, area, line of business, price lists, financial supplier group)
■	Monitor landed costs	NA	■ Use, view only assigned business partners (based on business partner, enterprise unit, purchase office, buyer, business partner type, area, line of business, price lists, financial supplier group)
■	Monitor material pricing	NA	■ Use, view only assigned business partners (based on business partner, enterprise unit, purchase office, buyer, business partner type, area, line of business, price lists, financial supplier group)
■	Monitor terms and conditions	NA	■ Use, view only assigned business partners (based on business partner, enterprise unit, purchase office, buyer,

business partner
type, area, line of
business, price lists,
financial supplier
group)

Purchase Fulfillment Activities

Purchase Requester (employee outside the purchase organization requesting goods or ser- vices to be provided but has no authority to place the order)	■ Creates requisition for goods or ser- vices to be bought ■ Submits requisition ■ Monitors requisitions that are submit- ted for approval and/or fulfillment	Other Attributes: ■ Requisitions ■ Project ■ Items ■ Catalogs	■ Use, view only as- signed business partners (based on business partner, enterprise unit, pur- chase office, buyer, business partner type, area, line of business, price lists, financial supplier group) ■ Use only business partners that are assigned to a cer- tain Price List ■ Modify, use, view only assigned requi- sitions ■ Use only assigned projects ■ Use, only assigned items ■ Use, only assigned catalogs
Buyer	■ Validate and check requisitions ■ Prepare requisitions for processing ■ Process requisitions to orders or re- quests for quota- tions	Other Attributes: ■ Requisitions ■ Project ■ Item	■ Use, view only as- signed business partners (based on business partner, enterprise unit, pur- chase office, buyer, business partner type, area, line of business, price lists, financial supplier group)

			■ Use only assigned requisitions ■ Use only assigned projects ■ Use only assigned items
	■ Creates purchase orders for goods or services to be bought ■ Processes signals from Enterprise planning ■ Monitors purchase orders (e.g. timely receipt) ■ Receives cost items (not via warehousing) ■ Changes prices after receipt	Other Attributes: ■ Purchase Order ■ Project ■ Item	■ Use, view only assigned business partners (based on business partner, enterprise unit, purchase office, buyer, business partner type, area, line of business, price lists, financial supplier group) ■ Modify, use, view only assigned purchase orders ■ Use only assigned projects ■ Use only assigned items
	■ Monitor and maintain purchase schedules and releases	NA	■ Use, view only assigned business partners (based on business partner, enterprise unit, purchase office, buyer, business partner type, area, line of business, price lists, financial supplier group)
Payables Administrator	■ View unmatched purchase orders ■ View unmatched purchase schedules ■ Use purchase order data for matching	Other Attributes: ■ Purchase Orders ■ Project ■ Finance Company	■ View only assigned business partners (based on business partner, enterprise unit, purchase office, buyer, business partner type,

	- with purchase invoices ■ Use purchase schedules data for matching with purchase invoices		- area, line of business, price lists, financial supplier group) ■ Use only assigned purchase orders ■ Use only assigned projects ■ Only data from assigned finance company (via AMS)
■ Monitor stage payments	Other Attributes: ■ Project ■ Finance Company		■ View only assigned business partners (based on business partner, enterprise unit, purchase office, buyer, business partner type, area, line of business, price lists, financial supplier group) ■ View only assigned projects ■ Only data from assigned finance company (via AMS)

Business partners specific authorization roles and levels in Purchase fulfillment activities

The table explains the various roles that can be defined for the purchase fulfillment activities for **Business Partner**. The authorization levels defined for the associated attributes of all the Business Partners-related tasks are also listed.

Note

- Only the other (secondary) attributes are listed in this table.

- For the complete attributes' list, see *Exceptions to attributes for business partners permissions* (p. 48).

Authorized Roles	Tasks	Associated Attributes	Permissions
Purchase Re-quester (employee outside the purchase organization requesting goods or services to be provided but has no authority to place the order)	■ Creates requisition for goods or services to be bought ■ Submits requisition ■ Monitors requisitions that are submitted for approval and/or fulfillment	Other Attributes: ■ Requisitions ■ Project ■ Items ■ Catalogs	■ Use, view only assigned business partners (based on business partner, enterprise unit, purchase office, buyer, business partner type, area, line of business, price lists, financial supplier group) ■ Use only business partners that are assigned to a certain Price List ■ Modify, use, view only assigned requisitions ■ Use only assigned projects ■ Use, only assigned items ■ Use, only assigned catalogs
Buyer (fulfillment activities)	■ Validate and check requisitions ■ Prepare requisitions for processing ■ Process requisitions to orders or requests for quotations	Other Attributes: ■ Requisitions ■ Project ■ Item	■ Use, view only assigned business partners (based on business partner, enterprise unit, purchase office, buyer, business partner type, area, line of business, price lists, financial supplier group) ■ Use only assigned requisitions ■ Use only assigned projects ■ Use only assigned items
	■ Creates purchase orders for goods or services to be bought ■ Processes signals from Enterprise planning ■ Monitors purchase orders	Other Attributes: ■ Purchase Order ■ Project ■ Item	■ Use, view only assigned business partners (based on business partner, enterprise unit, purchase office, buyer, business partner type, area, line of business, price lists, financial supplier group) ■ Modify, use, view only assigned purchase orders ■ Use only assigned projects ■ Use only assigned items

	■ (e.g. timely receipt) ■ Receives cost items (not via warehousing) ■ Changes prices after receipt		
	■ Monitor and maintain purchase schedules and releases	NA	■ Use, view only assigned business partners (based on business partner, enterprise unit, purchase office, buyer, business partner type, area, line of business, price lists, financial supplier group)
Payables Administrator	■ View unmatched purchase orders ■ View unmatched purchase schedules ■ Use purchase order data for matching with purchase invoices ■ Use purchase schedules data for matching with purchase invoices	Other Attributes: ■ Purchase Orders ■ Project ■ Finance Company	■ View only assigned business partners (based on business partner, enterprise unit, purchase office, buyer, business partner type, area, line of business, price lists, financial supplier group) ■ Use only assigned purchase orders ■ Use only assigned projects ■ Only data from assigned finance company (via AMS)
	■ Monitor stage payments	Other Attributes: ■ Project ■ Finance Company	■ View only assigned business partners (based on business partner, enterprise unit, purchase office, buyer, business partner type, area, line of business, price lists, financial supplier group) ■ View only assigned projects ■ Only data from assigned finance company (via AMS)

Business partners authorization roles and levels in Project management processes

The table explains the various roles that can be defined for the project management processes for **Business Partner**. The authorization levels defined for the associated attributes of all the Business Partners-related tasks are also listed.

Note

- Only the other (secondary) attributes are listed in this table.
- For the complete attributes' list, see *Exceptions to attributes for business partners permissions* (p. 48).

Authorized Roles	Tasks	Associated Attributes	Permissions
Project Manager	■ Create and maintain project deliverables	Other Attributes: ■ Sales Order ■ Project ■ Item	■ Use, view only assigned business partners (based on business partner, enterprise unit, sales office, business partner type, area, sales territory, line of business, internal sales representative, external sales representative, price lists, financial customer group) ■ Use, view only assigned sales orders ■ Use only assigned projects ■ Use only assigned items
Project Cost Engineer	■ Create and maintain project estimates and bids	Other Attributes: ■ Project ■ Item	■ Use, view only assigned business partners (based on business partner, enterprise unit, purchase office, buyer, business partner type, area, line of business, financial supplier group) ■ Use, view only assigned items ■ Only for assigned projects
Project Planner	■ Create and maintain purchase budgets	Other Attribute: ■ Project	■ Use, view only assigned business partners (based on business partner, enterprise unit, purchase office, buyer, business partner type, area,

			- line of business, financial supplier group) ■ Use, view only assigned projects
	■ Evaluate, maintain and process planned purchase orders	Other Attribute: ■ Project	■ Use, view only assigned business partners (based on business partner, enterprise unit, purchase office, buyer, business partner type, area, line of business, financial supplier group) ■ Use, view only assigned projects
Product Engineer	■ Maintain equipment (prio2)	Other Attributes: ■ Project ■ Item	■ Use, view only assigned business partners (based on business partner, enterprise unit, purchase office, buyer, business partner type, area, line of business, financial supplier group) ■ Use, view only assigned projects ■ Modify, use, view only assigned items
	■ Maintain subcontracting (prio2)	Other Attributes: ■ Project ■ Item	■ Use, view only assigned business partners (based on business partner, enterprise unit, purchase office, buyer, business partner type, area, line of business, financial supplier group) ■ Use, view only assigned projects ■ Modify, use, view only assigned items
	■ Buy-from business partner files (prio3)	Other Attributes: ■ Project ■ Item	■ Use, view only assigned business partners (based on business partner, enterprise unit, purchase office, buyer, business partner type, area, line of business, financial supplier group) ■ Use, view only assigned projects ■ Modify, use, view only assigned items

Project Administrator	■ Registering project cost	Other Attribute: ■ Project	■ Use, view only assigned business partners (based on business partner, enterprise unit, purchase office, buyer, business partner type, area, line of business, financial supplier group) ■ Use, view only assigned projects
	■ Registering project revenues	Other Attributes: ■ Sales Order ■ Project ■ Item	■ Use, view only assigned business partners (based on business partner, enterprise unit, sales office, business partner type, area, sales territory, line of business, internal sales representative, external sales representative, price lists, financial customer group) ■ Use, view only assigned sales orders ■ Use only assigned projects ■ Use only assigned items

Business partners specific authorization roles and levels in Project contract processes

The table explains the various roles that can be defined for the Project Contract processes for **Business Partner** process. The authorization levels defined for the associated attributes of all the Business Partners-related tasks are also listed.

Note

- Only the other (secondary) attributes are listed in this table.
- For the complete attributes' list, see *Exceptions to attributes for business partners permissions* (p. 48).

Authorized Roles	Tasks	Associated Attributes	Permissions
Contract Manager	■ Create and maintain project contracts	Other Attributes: ■ Contract ■ Project	■ Use, view only assigned business partners (based on business partner, enterprise unit, sales office, business partner type, area, sales territory,

			line of business, internal sales representative, external sales representative, price lists, financial customer group) ■ Use, view only assigned contracts ■ Use only assigned projects
■	Maintain customer furnished material	NA	■ Use, view only assigned business partners (based on business partner, enterprise unit, sales office, business partner type, area, sales territory, line of business, internal sales representative, external sales representative, price lists, financial customer group)
■	Evaluate and use bids	NA	■ Use, view only assigned business partners (based on business partner, enterprise unit, sales office, business partner type, area, sales territory, line of business, internal sales representative, external sales representative, price lists, financial customer group)

Overview of data security for Production

You can define roles for which the authorization level is set for range **Production** related processes using the associated attributes, which ensure data security.

Benefits of authorization:

- Improves the process because employees only focus on a subset of data (only authorized) while defining production activities using the product design, costing, planning and preparation setup.
- Improves production process because users work with data that is authorized to view/use/modify when executing these tasks:
 - Work Distribution
 - Receive materials from inventory
 - Hours accounting
 - Monitoring

- Quality Control
- Performance analysis
- Also in the close Production processes employees can only work with the authorized data. These processes are:
 - Report item status is set to complete.
 - The completed item is issued to the inventory.
 - The production order status is set to closed.
- This enhances the effectivity of the employees and reduces the risk on fraud and mistakes.

Examples of business scenarios

An organization has production departments in the various locations. Each production department, has a resource planner and production planner to plan production activities:

- A resource planner is responsible of resource planning for the assigned production departments.
- The production planner is responsible for the production planning, printing the production order documents, assigning work to work centers, monitor production orders and report productions orders complete for the assigned production department.

Data authorization requirements for Work Distribution

This table lists the production authorization for the work distribution tasks that are considered as a part of the **Production** processes.

Note

- Only the other (secondary) attributes are listed in this table.

Authorized Roles	Tasks	Secondary Attribute/ Other Attribute	Permissions
Production Planner	■ Releases production orders ■ Registers material to issue for production orders ■ Initiates inventory issue	Work Center ■ Enterprise Unit ■ Parent Work Center ■ Production Department ■ Manager	■ An employee can view all material issue and production orders of assigned work centers (=calculation office). ■ An employee can only release production orders, modify material for issue to production and initi-

			ate inventory issue for work centers (=calculation office) for which the employee has at least use permission.
■ Releases production schedule lines ■ Initiates schedule line material issue	■ Work Cell ■ Enterprise Unit ■ Production Department	■ An employee can view all production schedules and schedule lines of assigned work cells. ■ An employee can view all schedule line materials of assigned work cells. ■ An employee can only release production schedule lines and initiate schedule line material issue for work cells for which the employee has at least use permission.	
■ Subcontracts operations ■ Monitors subcontracted operations ■ Monitors subcontracted operations by end item	■ Work Center ■ Enterprise Unit ■ Parent Work Center ■ Production Department ■ Manager	■ An employee can only create subcontract operations for production orders of work centers (=calculation office) for which the employee is assigned the use-permission. ■ The employee can only use assigned work centers for subcontracting. ■ An employee can only view subcontracted operations (by end item) of production orders of all assigned work	

			centers (=calculation office).
Buyer	Generates subcontracting purchase documents	- PCS Project - Enterprise Unit - Calculation Office - Project Employee - Other object: - Business Partner - Purchase Order	- An employee can generate purchase documents for subcontractors (=business partners) and PCS projects for which the employee has at least use permission. - The employee can view assigned business partners, PCS projects and production orders of assigned work centers (=calculation office). - The employee can only generate purchase documents for which the employee has modify permission.
	Subcontracts production orders	- Work Center - Enterprise Unit - Parent Work Center - Production Department - Manager - PCS Project - Enterprise Unit - Calculation Office - Project Employee - Other object: - Business Partner - Item - Purchase Orders	- An employee can only subcontract production orders of assigned work centers (=calculation office) with use permission. - An employee can view assigned PCS projects and items. - An employee can only use assigned business partners. - The employee can only generate purchase documents for which the employee has modify permission (= error

message when generating purchase documents outside the permission range).

Additional data authorization requirements for Warehousing

This table lists the additional production authorization for the tasks that are considered as a part of the **Warehousing** processes.

Note

- Only the other (secondary) attributes are listed in this table.

Authorized Roles	Tasks	Secondary Attribute/ Other Attribute	Permissions
Warehouse Administrator	■ Maintains item-warehousing master data	Other Attribute ■ PCS Project	■ The employee can only zoom to and use assigned PCS projects in item segment.
	■ Create and maintain Inventory transfer	Other Attribute ■ PCS Project	■ The employee can only zoom to and use assigned

(manual) and Warehouse order (manual) ■ Performs cycle counting ■ Creates inventory adjustments ■ Registers inventory movements ■ Blocks/unblocks inventory ■ Maintains project peg transfers ■ Reports inventory ■ Plans inventory ■ Performs inventory costing ■ Create and process inventory change orders		PCS projects in item segment.
■ Inspects received material ■ Processes material in quarantine (disposition) ■ Performs storage inspections (qm)	Other Attribute ■ PCS Project	■ The employee can only zoom to and use assigned PCS projects in item segment.

Additional data authorization requirements for Sales

This table lists the additional production authorization for the tasks that are considered as a part of the **Sales** processes.

Note

- Only the other (secondary) attributes are listed in this table.

Authorized Roles	Tasks	Secondary Attribute/ Other Attribute	Permissions
Sales Representative	■ Maintains item-sales data	Other Attribute ■ PCS Project	■ An employee can maintain all assigned items. ■ The employee can view and use assigned PCS projects in item segment
	■ Maintains sales orders ■ Handles quotations ■ Maintains sales contracts ■ Maintains sales price books ■ Maintains sales catalog	Other Attribute ■ PCS Project	■ An employee can maintain all assigned purchase orders, requisitions, requests for quotations, purchase contracts and price books. ■ The employee can view and use assigned PCS projects in item segment.

Additional data authorization requirements for Procurement

This table lists the additional production authorization for the tasks that are considered as a part of the **Procurement** processes.

Note

- Only the other (secondary) attributes are listed in this table.

Authorized Roles	Tasks	Secondary Attribute/ Other Attribute	Permissions
Purchase Requester (anybody outside the purchase organi-	■ Creates requisition for goods or	Other Attribute ■ PCS Project	■ An employee can modify only own requisitions or can

zation requesting goods or services to be provided but does not have the authority to place the order himself)	■ Submits requisition ■ Monitors requisitions that are submitted for approval and/or fulfillment	view requisitions of own department.	■ An employee can only requests items from an assigned 'Catalog'. ■ The employee can view and use assigned PCS projects in the item segment .
Buyer	■ Maintains item-procurement data ■ Maintains purchase orders ■ Handles requisitions ■ Handles requests for quotations ■ Maintains purchase contracts ■ Maintains purchase price books	Other Attribute ■ PCS Project Other Attribute ■ PCS Project	■ An employee can maintain all assigned items. ■ The employee can view and use assigned PCS projects in the item segment. ■ An employee can maintain all assigned purchase orders, requisitions, requests for quotations, purchase contracts and price books. ■ The employee can view and use assigned PCS projects in the item segment and project field.

Data authorization requirements for Costing

This table lists the production authorization for the tasks that are considered as a part of the costing process.

Note

- Only the other (secondary) attributes are listed in this table.

Authorized Roles	Tasks	Secondary Attribute/ Other Attribute	Permissions
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Item Cost Engineer	■	Creates and maintains item – costing data	■	PCS Project	■	An employee is allowed to view all assigned items.
			■	Enterprise Unit	■	An employee is allowed to create and modify items for which the employee is assigned the modify permission.
			■	Calculation Office	■	An employee can view and use assigned (PCS) projects.
			■	Project Employee		
			Other Attribute			
			■	Item		
			■	Project		
	■	Creates and maintains simulated purchase prices	■	PCS Project	■	An employee is allowed to view all assigned items.
			■	Enterprise Unit	■	An employee can only modify simulated purchase prices for items for which the employee has modify permission.
			■	Calculation Office	■	An employee can view and use assigned PCS projects.
			■	Project Employee		
			Other Attribute			
			■	Item		
	■	Calculates and actualize standard costs	Other Attribute		■	An employee can only calculate standard cost for items for which the employee has use permission.
	■	View item – standard costing data	■	Item	■	An employee can view item – standard costing data of all assigned items.
	■	Calculates sales prices	Other Attribute		■	An employee can only calculate sales prices for items for which the employee is assigned the use permission.
			■	Item		

	■ Calculates estimated cost by project	■ PCS Project ■ Enterprise Unit ■ Calculation Office ■ Project Employee	■ An employee can only calculate estimated cost by project for projects for which the employee has use permission.
	■ Prints cost comparison ■ Prints cost comparison by budget ■ Print cost calculation	■ PCS Project ■ Enterprise Unit ■ Calculation Office ■ Project Employee ■ Other Attribute ■ Item	■ An employee can print cost comparisons and calculations for all assigned items. ■ An employee can view assigned PCS projects
	■ Prints sales price calculation	■ Other Attribute ■ Item	■ An employee can print sales price calculations for all assigned items.
Application Administrator	■ Deletes costing data ■ Archives/deletes cost history		■ Application administrator must be able to clean up all the data that needs to be removed. The employee is therefore not subjected to data authorization.

Data authorization requirements for Monitoring

This table lists the data authorization requirements for monitoring that are considered as a part of the **Production** processes.

Note

- Only the other (secondary) attributes are listed in this table.

Authorized Roles	Tasks	Secondary Attribute/ Other Attribute	Permissions
Engineer	■ Monitors production item 360	PCS Project ■ Enterprise Unit ■ Calculation Office ■ Project Employee Other Attribute ■ Item	■ An employee can monitor all assigned items. ■ The employee can only view items of assigned PCS projects.
Production Supervisor	■ Monitors work center 360 ■ Monitors work station progress	Work Center ■ Enterprise Unit ■ Parent Work Center ■ Production Department ■ Manager Work Center ■ Enterprise Unit ■ Production Department	■ An employee can monitor all assigned work centers. ■ An employee can view work station progress for assigned work cells.

Data authorization requirements for Performance Analysis

This table lists the production authorization for the performance analysis tasks that are considered as a part of the **Production** processes.

Note

- Only the other (secondary) attributes are listed in this table.

Authorized Roles	Tasks	Secondary Attribute/ Other Attribute	Permissions
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Production Supervisor	■ Monitors production costing	Work Center	■ An employee can view production costing and history of assigned work centers (=calculation office).
	■ Monitors production history	■ Enterprise Unit ■ Parent Work Center ■ Production Department ■ Manager	
	■ Monitors cost documents	- Work Center ■ Enterprise Unit ■ Production Department	■ An employee can view cost documents for assigned work cells.
Project Controller	■ Monitors project history	PCS Project	■ An employee can monitor project history, financial transactions, standard cost by project and project 360 for assigned PCS projects.
	■ Monitors financial transactions	■ Enterprise Unit ■ Calculation Office ■ Project Employee	
	■ Monitors standard cost by project		
	■ Monitors project 360		
	■ Calculates interim COGS & revenue	PCS Project	■ An employee can calculate, modify, confirm and post interim COGS and revenues for PCS projects with use permission. ■ The employee can only zoom to assigned PCS projects. ■ The employee can only zoom to assigned calculation offices (=work center). ■ An employee can view interim COGS and revenues for all assigned projects.
	■ Reviews and modifies interim COGS & revenue	■ Enterprise Unit ■ Calculation Office ■ Project Employee	
	■ Confirms and posts interim COGS & revenue		
Accountant	■ Monitors production costing	- Work Center ■ Enterprise Unit	■ An employee can view production

■ Monitors production history	■ Parent Work Center ■ Production Department ■ Manager	costing and history of assigned work centers (=calculation office).
■ Monitors cost documents	Work Center ■ Enterprise Unit ■ Production Department	■ An employee can view cost documents for assigned work cells.
■ Monitors project history ■ Monitors financial transactions ■ Monitors standard cost by project ■ Monitors project 360	PCS Project ■ Enterprise Unit ■ Calculation Office ■ Project Employee	■ An employee can monitor project history, financial transactions, standard cost by project and project 360 for assigned PCS projects

Data authorization requirements for Warehousing

This table lists the warehousing authorization for the tasks that are considered as a part of the **Production** processes.

Note

- Only the other (secondary) attributes are listed in this table.

Authorized Roles	Tasks	Secondary Attribute/ Other Attribute	Permissions
Receiving Clerk	■ Receive and put away material based on warehouse orders (handling units)	■ Warehouse ■ Enterprise Unit ■ Address Code ■ Distribution Cluster Other Attribute ■ Item	■ An employee is authorized only for assigned warehouse(s) (based on Warehouse, Enterprise Unit, Address Code, Warehouse Type, Distribution Cluster).

			■ An employee is only authorized to access the assigned items.
	■ Cross-dock Material	■ Warehouse ■ Enterprise Unit ■ Address Code ■ Distribution Cluster - Other Attribute ■ Item	■ An Employee is authorized only for assigned warehouse(s) (based on Warehouse, Enterprise Unit, Address Code, Warehouse Type, Distribution Cluster). ■ An employee is authorized only for assigned items.
	■ Inspect received material	■ Warehouse ■ Enterprise Unit ■ Address Code ■ Distribution Cluster - Other Attribute ■ Item	■ An employee is authorized only for assigned warehouse(s) (based on Warehouse, Enterprise Unit, Address Code, Warehouse Type, Distribution Cluster). ■ An employee is authorized only for assigned items.
Shipping Clerk	■ Prepare, pick, pack and ship material based on warehouse orders (handling units)	■ Warehouse ■ Enterprise Unit ■ Address Code ■ Distribution Cluster - Other Attribute ■ Item	■ An employee is authorized only for assigned warehouse(s) (based on Warehouse, Enterprise Unit, Address Code, Warehouse Type, Distribution Cluster). ■ An employee is authorized only for assigned items.

	■ Inspect outbound material	■ Warehouse ■ Enterprise Unit ■ Address Code ■ Distribution Cluster - Other Attribute ■ Item	■ An employee is authorized only for assigned warehouse(s) (based on Warehouse, Enterprise Unit, Address Code, Warehouse Type, Distribution Cluster). ■ An employee is authorized only for assigned items.
Warehouse Administrator	■ Maintain Warehousing Master Data	■ Warehouse ■ Enterprise Unit ■ Address Code ■ Distribution Cluster - Other Attribute ■ Item	■ An employee is authorized only for assigned warehouse(s) (based on Warehouse, Enterprise Unit, Address Code, Warehouse Type, Distribution Cluster). ■ An employee is authorized only for assigned items.
	■ Create and maintain Inventory transfer (manual) and Warehouse order (manual)	■ Warehouse ■ Enterprise Unit ■ Address Code ■ Distribution Cluster - Other Attribute ■ Item ■ Project	■ An employee is authorized only for assigned warehouse(s) (based on Warehouse, Enterprise Unit, Address Code, Warehouse Type, Distribution Cluster). ■ An employee is authorized only for assigned items. ■ An employee is authorized only for assigned projects.
	■ Cycle counting	■ Warehouse ■ Enterprise Unit ■ Address Code	■ An employee is authorized only for assigned warehouse(s) (based on

	■ Distribution Cluster Other Attribute ■ Item ■ Project	Warehouse, Enterprise Unit, Address Code, Warehouse Type, Distribution Cluster). ■ An employee is authorized only for assigned items. ■ An employee is authorized only for assigned projects.
■ Inventory adjustments	■ Warehouse ■ Enterprise Unit ■ Address Code ■ Distribution Cluster Other Attribute ■ Item ■ Project	■ An employee is authorized only for assigned warehouse(s) (based on Warehouse, Enterprise Unit, Address Code, Warehouse Type, Distribution Cluster). ■ An employee is authorized only for assigned items. ■ An employee is authorized only for assigned projects.
■ Inventory movements	■ Warehouse ■ Enterprise Unit ■ Address Code ■ Distribution Cluster Other Attribute ■ Item	■ An employee is authorized only for assigned warehouse(s) (based on Warehouse, Enterprise Unit, Address Code, Warehouse Type, Distribution Cluster). ■ An employee is authorized only for assigned items.
■ Inventory blocking/unblocking	■ Warehouse ■ Enterprise Unit ■ Address Code ■ Distribution Cluster	■ An employee is authorized only for assigned warehouse(s) (based on Warehouse, Enterprise Unit, Address Code, Warehouse Type, Distribution Cluster).

	- Other Attribute - Item - Project	- prise Unit, Address Code, Warehouse Type, Distribution Cluster). - An employee is authorized only for assigned items. - An employee is authorized only for assigned projects.
Project peg transfers	- Warehouse - Enterprise Unit - Address Code - Distribution Cluster - Other Attribute - Item - Project	- An employee is authorized only for assigned warehouse(s) (based on Warehouse, Enterprise Unit, Address Code, Warehouse Type, Distribution Cluster). - An employee is authorized only for assigned items. - An employee is authorized only for assigned projects.
Inventory reporting	- Warehouse - Enterprise Unit - Address Code - Distribution Cluster - Other Attribute - Item - Project	- An employee is authorized only for assigned warehouse(s) (based on Warehouse, Enterprise Unit, Address Code, Warehouse Type, Distribution Cluster). - An employee is authorized only for assigned items. - An employee is authorized only for assigned projects.
Inventory planning	- Warehouse - Enterprise Unit	An employee is authorized only for as-

		■ Address Code ■ Distribution Cluster Other Attribute ■ Item	signed ware- house(s) (based on Warehouse, Enter- prise Unit, Address Code, Warehouse Type, Distribution Cluster). ■ An employee is au- thorized only for as- signed items.
	■ Inventory costing	■ Warehouse ■ Enterprise Unit ■ Address Code ■ Distribution Cluster Other Attribute ■ Item	■ An employee is au- thorized only for as- signed ware- house(s) (based on Warehouse, Enter- prise Unit, Address Code, Warehouse Type, Distribution Cluster). ■ An employee is au- thorized only for as- signed items. ■ An employee is au- thorized only for as- signed projects.
	■ Create and process inventory change orders	■ Warehouse ■ Enterprise Unit ■ Address Code ■ Distribution Cluster Other Attribute ■ Item	■ An employee is au- thorized only for as- signed ware- house(s) (based on Warehouse, Enter- prise Unit, Address Code, Warehouse Type, Distribution Cluster). ■ An employee is au- thorized only for as- signed items.
Quality Inspector	■ Inspect received material	■ Warehouse ■ Enterprise Unit ■ Address Code ■ Distribution Cluster Other Attribute	■ An employee is au- thorized only for as- signed ware- house(s) (based on Warehouse, Enter-

		Item	- prise Unit, Address Code, Warehouse Type, Distribution Cluster). - An employee is authorized only for assigned items.
	Process material in quarantine (disposition)	- Warehouse - Enterprise Unit - Address Code - Distribution Cluster - Other Attribute - Item	- An employee is authorized only for assigned warehouse(s) (based on Warehouse, Enterprise Unit, Address Code, Warehouse Type, Distribution Cluster). - An employee is authorized only for assigned items.
	Storage inspections (qm)	- Warehouse - Enterprise Unit - Address Code - Distribution Cluster - Other Attribute - Item	- An employee is authorized only for assigned warehouse(s) (based on Warehouse, Enterprise Unit, Address Code, Warehouse Type, Distribution Cluster). - An employee is authorized only for assigned items.
Project Manager	View Inventory Transactions	- Other Attribute - Item	An employee is authorized only for assigned projects.
	View warehouse stock level	- Warehouse - Enterprise Unit - Address Code - Distribution Cluster - Other Attribute - Project	An employee is authorized only for assigned warehouse(s) (based on Warehouse, Enterprise Unit, Address Code, Warehouse

			■ Type, Distribution Cluster). ■ An employee is authorized only for assigned items. ■ Non-project pegged.
	■ View inventory value	■ Warehouse ■ Enterprise Unit ■ Address Code ■ Distribution Cluster - Other Attribute ■ Project	■ An employee is authorized only for assigned warehouse(s) (based on Warehouse, Enterprise Unit, Address Code, Warehouse Type, Distribution Cluster). ■ An employee is authorized only for assigned items. ■ Non-project pegged.
Buyer / Sales / Production Planner	■ Create, maintain and process orders (purchase, sales, production, service)	■ Warehouse ■ Enterprise Unit ■ Address Code ■ Distribution Cluster	■ Use only assigned warehouse(s) (based on Warehouse, Enterprise Unit, Address Code, Warehouse Type, Distribution Cluster).
	■ View inventory transactions	■ Warehouse ■ Enterprise Unit ■ Address Code ■ Distribution Cluster - Other Attribute ■ Item ■ Project	■ An employee is authorized only for assigned warehouse(s) (based on Warehouse, Enterprise Unit, Address Code, Warehouse Type, Distribution Cluster). ■ An employee is authorized only for assigned items.

			■ An employee is authorized only for assigned projects.
	■ View Stock Level	■ Warehouse ■ Enterprise Unit ■ Address Code ■ Distribution Cluster - Other Attribute ■ Item ■ Project	■ An employee is authorized only for assigned warehouse(s) (based on Warehouse, Enterprise Unit, Address Code, Warehouse Type, Distribution Cluster). ■ An employee is authorized only for assigned items. ■ An employee is authorized only for assigned projects.
Accountant	■ View inventory transactions	■ Warehouse ■ Enterprise Unit ■ Address Code ■ Distribution Cluster - Other Attribute ■ Item ■ Project	■ An employee is authorized only for assigned warehouse(s) (based on Warehouse, Enterprise Unit, Address Code, Warehouse Type, Distribution Cluster). ■ An employee is authorized only for assigned items. ■ An employee is authorized only for assigned projects.
	■ View Stock Level	■ Warehouse ■ Enterprise Unit ■ Address Code ■ Distribution Cluster - Other Attribute ■ Item ■ Project	■ An employee is authorized only for assigned warehouse(s) (based on Warehouse, Enterprise Unit, Address Code, Warehouse Type, Distribution Cluster).

- View inventory value
 - Warehouse
 - Enterprise Unit
 - Address Code
 - Distribution Cluster
 - Other Attribute
 - Item
 - Project
- An employee is authorized only for assigned items.
- An employee is authorized only for assigned projects.
- An employee is authorized only for assigned warehouse(s) (based on Warehouse, Enterprise Unit, Address Code, Warehouse Type, Distribution Cluster).
- An employee is authorized only for assigned items.
- An employee is authorized only for assigned projects.

Data authorization requirements for Product Design

This table lists the production authorization for the product design tasks that are considered as a part of the **Production** processes.

Note

- Only the other (secondary) attributes are listed in this table.

Authorized Roles	Tasks	Secondary Attribute/ Other Attribute	Permissions
Product Engineer	■ Create and maintain item header ■ Create and maintain item – production data ■ Create and maintain alternative items	Other Attribute ■ Item	■ An employee is allowed to view all assigned items. ■ An employee is allowed to create and modify items for which the employee

- | | |
|--|---|
| <ul style="list-style-type: none"> ■ Create and maintain item – tool data | <ul style="list-style-type: none"> has modify permission. |
| <ul style="list-style-type: none"> ■ Create and maintain bill of material (JSC) | <ul style="list-style-type: none"> ■ An employee can only assign alternative items for which the employee has modify permission. ■ PCS Project <ul style="list-style-type: none"> ■ Enterprise Unit ■ Calculation Office ■ Project Employee ■ An employee is allowed to view the bill of material for all assigned items. ■ An employee can only create a bill of material for items for which the employee is assigned modify permission. ■ When the employee creates lines for the BOM the employee can only use items on the lines for which the employee has use permission. ■ When the employee creates lines for the BOM the employee can only use warehouses on the lines for which the employee has use permission. ■ When the employee creates a bill of material for an item, the employee can view and use assigned PCS projects. |
| <ul style="list-style-type: none"> ■ Creates and maintains machines | <ul style="list-style-type: none"> No authorization |

■ Creates and maintains tasks and task relationships	No authorization	
■ Creates and maintains routings and routing operations (JSC)	■ Work Center ■ Enterprise Unit ■ Parent Work Center ■ Production Department ■ Manager ■ PCS Project ■ Enterprise Unit ■ Calculation Office ■ Project Employee - Other Attribute ■ Item	■ An employee is allowed to view the routings and routing operations of all assigned items. ■ An employee can only assign routings and routing operations to items for which the employee has use or modify permission. ■ When an employee creates/ modifies routing operations the employee can view or use assigned work centers. ■ The employee can view and use assigned PCS projects.
■ Maintains item material content (material pricing)	■ PCS Project ■ Enterprise Unit ■ Calculation Office ■ Project Employee - Other Attribute ■ Item ■ Project	■ An employee can view all assigned items. ■ However, an employee can only update/creates material item data for items for which the employee has use permission. ■ The employee can view and use assigned (PCS) projects.
■ Creates and maintains effectivity unit – process variables	Other Attribute ■ Item	■ An employee is allowed to view the effectivity unit –

for an item (JSC) (prio 3)	process variables of all assigned items.	■ An employee can only maintain this data for items for which the employee has use permission.
■ Creates and maintains default process variables by item (JSC)	■ PCS Project ■ Enterprise Unit ■ Calculation Office ■ Project Employee - Other Attribute ■ Item ■ Project	■ An employee is allowed to view the default process variables of all assigned items. ■ An employee can only maintain this data for items for which the employee has modify permission. ■ The employee can view and use assigned (PCS) projects.
■ Creates and maintains engineering BOMs ■ Copies shop floor PBOM to EBOM ■ Creates and maintains engineering items – item relationships	■ PCS Project ■ Enterprise Unit ■ Calculation Office ■ Project Employee - Other Attribute ■ Item ■ Project	■ An employee can view, use and modify all engineering items on all engineering BOMs (no item authorization). ■ An employee can only copy PBOMs from items for which the employee has view, use or modify permission. ■ An employee can assign engineering items to items for which the employee has view, use and modify permission. ■ The employee can view and use as-

■ Creates and maintains product features by configurable item (PCF) ■ Creates and maintains configurable item constraints and constraint IDs (PCF) ■ Compiles constraints by configurable item (PCF)	Other Attribute ■ Item	signed (PCS) projects.
■ Creates and maintains configurable item structure (PCF) ■ Creates and maintains generic BOMs (PCF)	Other Attribute ■ Item	■ An employee can only view or setup product features, constraints and constraint IDs for items for which he/she has modify permission An employee can only compile constraints for items for which he/she has modify permission ■ An employee can only view the structure/BOM of assigned items. ■ An employee can only modify a structure/BOM for items for which the employee has modify permission. ■ This employee can only use items in the structure/BOM for which the employee has use or modify permission.
■ Creates and maintains generic item – settings for data generation (PCF) ■ Creates and maintains generic routings (PCF) ■ Creates and maintains generic price lists (PCF)	Other Attribute ■ Item	■ An employee can only view settings, generic routings and price lists for items for which the employee has at least view permission. ■ An employee can only create settings, generic routings and price lists for

■ Generates product variants (PCF)	items for which the employee is assigned the modify-permission.
■ Creates and maintains production model (Repetitive)	■ Product variant configuration contains generated data. User can only view or generate data based on data that has already been pre-configured and has therefore no influence on the data. So no item authorization ■ An employee can view the production models of all assigned items. ■ An employee can create and modify production models of all items for which the employee has modify permission. ■ When the employee modifies or creates production models, the employee can view and use assigned work cells.
■ Creates and maintains project parts (PCS)	■ Work Cell ■ Enterprise Unit ■ Production Department ■ Other Attribute ■ Item ■ PCS Project ■ Enterprise Unit ■ Calculation Office ■ Project Employee ■ Other Attribute ■ Item ■ An employee can view items for which the employee has at least view permission. ■ However, when the employee creates or maintains project parts, the employee can only use items

			for which the employee has use or modify permission.
		■ The employee can view and use assigned PCS projects.	
■ Generates (PCS project) structure for product variant	■ PCS Project ■ Enterprise Unit ■ Calculation Office ■ Project Employee - Other Attribute ■ Item	■ An employee is only allowed to use items with use or modify permission as a base for generating the structure. ■ The employee can view and use assigned PCS projects.	
■ Copies standard or customized product structure to customized structure ■ Copies customized structure to standard product structure	■ PCS Project ■ Enterprise Unit ■ Calculation Office ■ Project Employee - Other Attribute ■ Item	■ An employee is only allowed to use items (source) with use or modify permission as a base for copying. ■ An employee is only allowed to copy to items (target) with modify permissions. ■ The employee can view and use assigned PCS projects	
■ Creates and maintains generic BOMs (Assembly) ■ Creates and maintains assembly BOM and operations (Assembly)	- Other Attribute ■ Item	■ An employee can only view the generic/assembly BOM of assigned items. ■ An employee can only modify a generic/assembly BOM for items for which the employee has modify permission.	

	■ Creates and maintains configurable items – assembly line (Assembly)	■ Other Attribute ■ Item	■ This employee can only use items in the generic/assembly BOM with use-permission. ■ An employee can only view the configurable items – assembly lines of assigned items. ■ An employee can only modify configurable items – assembly lines BOM for items with use-permission
	■ Creates and maintains product variants (Assembly) ■ Creates and maintains product variants – inventory (Assembly) ■ Calculates assembly part requirements (Assembly)	■ Other Attribute ■ Item	■ An employee can only view the product variants, - inventory of assigned items. ■ An employee can only modify product variants, - inventory for items with use-permission. ■ An employee can only calculate assembly part requirements for items with use-permission.
Planner	■ Creates and maintains item – ordering data ■ Create and maintain item – planning data	■ PCS Project ■ Enterprise Unit ■ Calculation Office ■ Project Employee ■ Other Attribute ■ Item ■ Project	■ An employee is allowed to view all assigned items. ■ An employee is allowed to create and modify items for which he/she has modify permission. ■ The employee can view and use assigned projects.

Buyer	■ Maintains material prices in item - purchase	■ PCS Project ■ Enterprise Unit ■ Calculation Office ■ Project Employee Other Attribute ■ Item ■ Project	■ An employee is allowed to view all assigned items. ■ An employee is allowed to create and modify items for which the employee has modify permission. ■ The employee can view and use assigned projects.
	■ Determines subcontracting rates	■ PCS Project ■ Enterprise Unit ■ Calculation Office ■ Project Employee Other Attribute ■ Item ■ Business Partner ■ Project	■ An employee can view subcontracting rates of all assigned projects. ■ An employee can only create and modify subcontracting rates for PCS projects for which the employee is assigned the use-permission. ■ An employee can view and use assigned (PCS) projects. ■ An employee can view and use assigned items. ■ An employee can view and use assigned business partners.
Accountant	■ Maintains operation rates	■ PCS Project ■ Enterprise Unit ■ Calculation Office ■ Project Employee	■ An employee can view operation rates of all assigned PCS projects. ■ An employee can only modify operation rates of PCS

			projects with use permission.
		■	Note: Within PCS project authorization a blank field is also a code.
■	Creates and maintains item surcharges	■	PCS Project
		■	Enterprise Unit
		■	Calculation Office
		■	Project Employee
		Other Attribute	
		■	Item
		■	Project
		■	An employee can view all items surcharges of assigned items.
		■	An employee can only modify item surcharges of items for which the employee has use permission.
		■	An employee can view and use assigned (PCS) projects.
■	Creates and maintains project surcharges	■	PCS Project
		■	Enterprise Unit
		■	Calculation Office
		■	Project Employee
		■	An employee can view project surcharges for all assigned PCS projects.
		■	An employee can modify only project surcharges for PCS projects for which the employee has use permission.

Data authorization requirements for Production Preparation

This table lists the production authorization for the production preparation tasks that are considered as a part of the **Production** processes.

Note

- Only the other (secondary) attributes are listed in this table.

Authorized Roles	Tasks	Secondary Attribute/ Other Attribute	Permissions
Production Planner	■ Creates manual production orders	■ Work Center ■ Enterprise Unit ■ Parent Work Center ■ Production Department ■ Manager ■ PCS Project ■ Enterprise Unit ■ Calculation Office ■ Project Employee Other Attribute ■ Item ■ Warehouse	■ An employee can only create production orders that are assigned to work centers (=calculation office) for which the employee is assigned the Use permission. ■ The employee can view and use assigned items. ■ The employee can view and use assigned PCS projects. ■ The employee can view and use assigned warehouses.
	■ Prints production order documents	■ Work Center ■ Enterprise Unit ■ Parent Work Center ■ Production Department ■ Manager	■ An employee can only print production order documents for all production orders of assigned work centers (=calculation office) with use permission.
	■ Prints work lists	■ Work Center ■ Enterprise Unit ■ Production Department	■ An employee can only print work lists of assigned work cells with view permission.

Overview of data security for processes in Financials

You can define roles for which authorization level is set for range **Financials** related processes using the associated attributes, which ensure the data security.

Examples of business scenarios

Employees creating purchase orders for cost items are allowed to only use a selected set of ledger accounts or GL codes. This reduces the time to locate the proper code and avoid errors.

An employee who is responsible for creating open entries for accounts payable is only allowed to use assigned business partners, ledger accounts, and dimensions.

Data authorization requirements for register and approve Purchase Invoices

This table lists the financials authorization for the registered and approved purchase invoices tasks that are considered as a part of the **Financials** processes.

Note

- Only the other (secondary) attributes are listed in this table.

Authorized Roles	Tasks	Secondary Attribute/ Other Attribute	Permissions
Payables Administrator	■ Registers Invoices	Other Attribute	■ An employee can view and use assigned business partners.
		■ Business Partner	
	■ Creates, maintains and finalizes cost invoices	Other Attribute	■ An employee can only create and modify financial documents in transactions types for which the employee has use-permission.
	■ Creates, maintains and finalizes registered purchase invoices	■ Transaction Type	
		■ Ledger Accounts	
	■ Matches purchase invoices	■ Parent Account	
		■ Dimension (1-12)	
		■ Parent Dimension	
		■ Responsible Employee	■ An employee can view and use as-

- | | | |
|---|--|---|
| <ul style="list-style-type: none"> ■ Approves purchase invoices | <ul style="list-style-type: none"> ■ Business Partner ■ Purchase Order | <p>signed ledger accounts.</p> <ul style="list-style-type: none"> ■ An employee can view and use assigned dimensions. ■ An employee can view and use assigned business partners. ■ An employee can view and use assigned purchase orders. |
| <ul style="list-style-type: none"> ■ Creates, maintains, uses and reports subcontracting information | <p>Other Attribute</p> <ul style="list-style-type: none"> ■ Transaction Type ■ Business Partner ■ Project | <ul style="list-style-type: none"> ■ An employee can only view, use and/or modify subcontractors data for assigned business partners. ■ An employee can only view, use and/or modify remittance agreements for assigned business partners. ■ When creating or modifying remittance agreements, this employee can view or use assigned projects on the remittance agreements. ■ An employee can only view subcontracting invoices for business partners with view-permission. ■ An employee can only modify subcontracting invoices for business partners |

	Views open entries	Other Attribute Business Partner	with use-permission. An employee can only view the open entries of assigned business partners.
Department Manager / Project Manager	Views cost invoices and approved purchase invoices of own department or projects	Other Attribute - Dimension (1-12) - Parent Dimension - Responsible Employee	An employee can only view cost and approved purchase invoices of assigned dimensions. Note: The above scenario is valid only in case of segment accounting and to be implemented only in segmented reports.

Data authorization requirements for Supplier Cash Flow

This table lists the financials authorization for the supplier cash flow tasks that are considered as a part of the **Financials** processes.

Note

- Only the other (secondary) attributes are listed in this table.

Authorized Roles	Tasks	Secondary Attribute/ Other Attribute	Permissions
Payables Administrator	- Assigns purchase credit notes - Assigns advanced- and unallocated payments	Transaction Type Other Attribute Business Partner	- An employee can only use assigned transaction types to assign credit notes or advanced- and unallocated payments. - An employee can use all credit notes

		or advanced and unallocated payments of assigned business partners.
■ Changes anticipated payment status	■ Transaction Type - Other Attribute ■ Business Partner	■ An employee can only use assigned transaction types to change the anticipated payments status. ■ An employee can use all anticipated payments of assigned business partners.
■ Adjusts purchase invoices	■ Transaction Type ■ Ledger Accounts ■ Parent Account ■ Dimension (1-12) ■ Parent Dimension ■ Responsible Employee - Other Attribute ■ Business Partner	■ An employee can only adjust purchase invoices created in assigned transaction types. ■ The employee can view and use, view assigned ledger accounts. ■ The employee can view and use, view assigned dimensions. ■ When the employee changes the business partner, the employee can view or use assigned business partners.
■ Prints statements	- Other Attribute ■ Business Partner	■ The employee can only print statements for assigned business partners.
■ Prints reminders for missing statements (subcontracting)	- Other Attribute ■ Business Partner	■ The employee can only print reminders for missing state-

ments for assigned business partners.

Data authorization requirements for Purchase orders for cost items

This table lists the financials authorization for the tasks of creating and maintaining purchase orders for cost items.

Note

- Only the other (secondary) attributes are listed in this table.

Authorized Roles	Tasks	Secondary Attribute/ Other Attribute	Permissions
Buyer	■ Creates and maintains purchase orders for cost items	Note -Additional Authorization: ■ Ledger Accounts ■ Parent Account ■ Dimension (1-12) ■ Parent Dimension ■ Responsible Employee ■ GL-Code	■ An employee can view and use assigned ledger accounts. ■ An employee can view and use dimensions. ■ An employee can view and use assigned GL-codes.

Data authorization requirements for Invoicing

This table lists the **Invoicing**, **Financials**, **Business Partner**, and **Item** authorization for the tasks that are considered as a part of the **Invoicing** processes.

Note

- Only the other (secondary) attributes are listed in this table.

Authorized Roles	Tasks	Secondary Attribute/ Other Attribute	Permissions
Billing Analyst	■ Creates manual sales invoices	■ Manual Sales Invoice ■ Financial Company ■ Enterprise Unit ■ Department ■ Area ■ Internal Sales Representative Other Attribute: ■ Ledger Accounts ■ Parent Account ■ Dimension (1-12) ■ Parent Dimension ■ Responsible Employee ■ GL-Code ■ Business Partner ■ Item	■ An employee can view all assigned manual sales invoices. ■ An employee can only create or modify manual sales invoices for which the employee is assigned the modify-permission. ■ The employee can view and use assigned ledger accounts. ■ The employee can view and use assigned dimension. ■ The employee can view and use assigned GL-codes. ■ The employee can view and use assigned business partner. ■ The employee can view and use assigned items.
	■ Maintains billable lines	■ Billable Line ■ Financial Company ■ Enterprise Unit ■ Department ■ Contract ■ Project	■ An employee can view all assigned billable lines. ■ An employee can modify only billable lines with modify-permission.

	■ Line of Business ■ Area ■ Internal Sales Representative	
	Other Attribute:	
	■ Business Partner	
■ Confirms billable lines	■ Billable Line ■ Financial Company ■ Enterprise Unit ■ Department ■ Contract ■ Project ■ Line of Business ■ Area ■ Internal Sales Representative	■ An employee can view all assigned business partners. ■ An employee can view all assigned billable lines. ■ An employee can only confirm billable assigned billable lines. ■ An employee can confirm only billable lines with at least use-permission.
	Other Attribute:	
	■ Business Partner	
■ Creates invoicing batches	■ Billable Line ■ Financial Company ■ Enterprise Unit ■ Department ■ Contract ■ Project ■ Line of Business ■ Area ■ Internal Sales Representative	■ When creating invoicing batches, the employee can view and use and assigned billable lines. ■ The employee can view and use assigned business partners.
	Other Attribute:	
	■ Business Partner	
■ Composing and Printing	■ Billable Line ■ Financial Company	■ An employee can only compose and print billable lines

	■ Enterprise Unit ■ Department ■ Contract ■ Project ■ Line of Business ■ Area ■ Internal Sales Representative	■ with use-permission. ■ The employee can only compose and print billable lines for business partners with use-permission.
	Other Attribute:	
	■ Business Partner	
■ Posts invoices	■ Invoice ■ Financial Company ■ Enterprise Unit ■ Department ■ Contract ■ Project ■ Line of Business ■ Area ■ Internal Sales Representative	■ An employee can only post invoices with use-permission. ■ The employee can only post invoices for business partners with use-permission.
	Other Attribute:	
	■ Business Partner	
■ Reprints invoices	■ Invoice ■ Financial Company ■ Enterprise Unit ■ Department ■ Contract ■ Project ■ Line of Business ■ Area ■ Internal Sales Representative	■ An employee can only reprint invoices with view-permission. ■ The employee can view assigned business partners. ■ The employee can view assigned Sales Contracts.
	Other Attribute:	
	■ Business Partner ■ Sales Contract	

■ Views and analyzes sales invoices	■ Invoice ■ Financial Company ■ Enterprise Unit ■ Department ■ Contract ■ Project ■ Line of Business ■ Area ■ Internal Sales Representative	■ An employee can only view assigned invoices. ■ The employee can view assigned business partners.
Other Attribute:		
	■ Business Partner	
■ Credits and rebills invoices	■ Invoice ■ Financial Company ■ Enterprise Unit ■ Department ■ Contract ■ Project ■ Line of Business ■ Area ■ Internal Sales Representative ■ Transaction Type ■ Billable Line ■ Financial Company ■ Enterprise Unit ■ Department ■ Contract ■ Project ■ Line of Business ■ Area ■ Internal Sales Representative	■ An employee can view all assigned invoices. ■ An employee can only credit and rebill invoices for which the employee has use-permission. ■ The employee can only create a re-billed invoice for assigned billable lines with use-permission. ■ The employee can view and use assigned business partners.
Other Attribute:		

		■ Business Partner	
	■ Creates credit invoice line	■ Invoice ■ Financial Company ■ Enterprise Unit Department ■ Contract ■ Project ■ Line of Business ■ Area ■ Internal Sales Representative ■ Transaction Type Other Attribute: ■ Business Partner	■ An employee can view all assigned invoices. ■ An employee can only credit invoices for which the employee has use-permission. ■ The employee can view and use assigned business partners.
Contract Manager / Sales Support Administrator	■ Confirms billable lines	■ Billable Line ■ Financial Company ■ Enterprise Unit Department ■ Contract ■ Project ■ Line of Business ■ Area ■ Internal Sales Representative Other Attribute: ■ Business Partner	■ An employee can view all assigned business partners. ■ An employee can view all assigned billable lines. ■ An employee can only confirm billable assigned billable lines. ■ An employee can confirm only billable lines with at least use-permission.
	■ Composing and Printing	■ Billable Line ■ Financial Company ■ Enterprise Unit Department ■ Contract ■ Project	■ An employee can only compose and print billable lines with use-permission. ■ The employee can only compose and print billable lines

	■ Line of Business ■ Area ■ Internal Sales Representative	for business partners with use-permission.
	Other Attribute:	
	■ Business Partner	
■ Reprints invoices	■ Invoice ■ Financial Company ■ Enterprise Unit Department ■ Contract ■ Project ■ Line of Business ■ Area ■ Internal Sales Representative ■ Transaction Type	■ An employee can only reprint invoices with view-permission. ■ The employee can view assigned business partners. ■ The employee view assigned Sales Contracts.
	Other Attribute:	
	■ Business Partner ■ Sales Contract	
■ Views and analyzes sales invoices	■ Invoice ■ Financial Company	■ An employee can only view assigned invoices.

	■ Enterprise Unit Department ■ Contract ■ Project ■ Line of Business ■ Area ■ Internal Sales Representative ■ Transaction Type	■ The employee view assigned business partners.
	Other Attribute:	
	■ Business Partner	
Accountant	■ Posts invoices	■ An accountant must be able to post all invoices created for the financial companies assigned to the employee.

Data authorization requirements for Integration transactions

This table lists the financials transactions authorization for the tasks that are considered as a part of the Integration Transaction processes.

Note

- Only the other (secondary) attributes are listed in this table.

Authorized Roles	Tasks	Secondary Attribute/ Other Attribute	Permissions
Internal Accountant	■ Maps and posts integration transactions		■ In most companies, mapping and posting integration transactions is performed using a job. A 'trouble shoot'

- Analyzes integration transactions

employee is assigned the permission to map and post integration transactions for a specific (finance) company to ensure all transactions are posted after solving the problems that caused the mapping and posting errors in the job. This user is able to map and post all transactions related to the proper finance company. No data authorization

- If an employee is assigned the permission to view integration transactions for a specific (finance) company, the user can analyze all transactions related to the authorized finance companies. No data authorization.

