

User roles in Purchase Orders

There're 4 different user roles in Raley Purchase Orders

User role	Description
Team-member	Creates purchase requests and assigns approvers
Approver	Approves and Rejects PO where he/she is set as approver. Approvers can be Product , Budget , Department or Tier-related . Keeps tracking of budgets related to his/her departments
Finance	Can ultimately approve or reject any purchase request and modify any data in the PO later on. Manages budgets, suppliers and products
Company admin	Configures application with Jira, edits company metadata and Approvals. Configures departments, employees and permissions

Automatic assignment of roles

Raley will automatically assign the following roles:

Company admin: when a Jira user with permission ADMINISTER or SYSTEM_ADMIN navigates to Raley PO configuration console via link AppsRaley Purchase Orders or from UPM "Configure" button,

Raley will check if the current user (by Atlassian user ID) is already in the list of Raley PO users. In case he is not, Raley will add him with role **Company Admin**.

Team Member: a user would be added to this role automatically if he's not present in the Raley PO Employees (checking by Atlassian user ID) and one of the following happens:

- a Customer JSM user navigates to the portal, chooses the JSM Request Type as configured in Raley PO and creates a new JSM request
- a regular Jira user navigates to the ticket view where a Raley PO iframe is shown

In both cases outlined above, the newly created user would be able to choose any Active department, so he or she can submit a purchase request. The user will be associated with the department at the moment he chooses a department from the

combo-box in purchase request IFrame. If such a user who was added automatically creates another JSM request or a Jira ticket and he is associated with exactly one department, the department will be preselected for convenience.

This said, the automatically added user can still choose any other department as needed and he/she will be associated with it at the moment of department selection.