

**LSF002: LaGov Security – Purchasing, Contracts & Inventory
Request for Position Security – Form Instructions**

Revised 03/26

This form is currently designed for use by agencies to establish, revise, and remove security related to a position.

- Position Number:** Position number to be assigned LaGov purchasing, contracts & inventory security.
- Holder Personnel #:** Personnel number assigned by HR department.
- Position Holder Name:** Employee name.
- Start Date:** The beginning date for the permissions requested.
- End Date:** The ending date for the permissions requested. If security is to be temporary, then provide an appropriate end date, else a default end date of 12/31/9999 will be assigned.
- Action:** **Check appropriate action to be taken for position number listed on this form.**
- Add:** Add the selected security to the position. Any existing security on the position governed by this form will remain intact.
- Remove:** Remove the selected security from the position. If no job functions are selected, then all job functions related to the form will be removed.

Inventory Job Functions: *(Definitions of job functions not displayed below can be found in ZP290A report)*

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| Inventory Plant Access | If any Inventory Job Function is selected, then list plant numbers where access is needed. |
| MM-02 Goods/Services Receiver | Responsible for the receipt of goods and services associated with a purchase order and changing or canceling material documents associated with the good receipt. Items to be received can be from an external vendor or from another inventory site. |
| MM-03 Inventory Manager - Enhanced | Same responsibilities as MM-05; And is responsible for maintaining and updating plant master data; replenishment of inventory materials through planned orders (requisitions/orders); unblocking materials; transferring inventory materials; creating inventory counts and recounts; and verifies and clears differences from the inventory count. |
| MM-04 Inventory Requestor | Responsible for requesting an item from inventory that will be expensed at the time of issue. |
| MM-05 Inventory Manager - Basic | Responsible for creating, changing, or canceling goods movement transactions; creating and updating outbound delivery documents; transferring inventory materials; creating IM inventory count documents; changing IM inventory counts; creating an IM inventory recount; blocking, unblocking, changing, analyzing or posting a change notice for a material; monitoring delivery due dates; managing of batch inventories. |
| MM-06 Requisition Approver Group 1 | Responsible for approving stock replenishment requisitions when replenishment is from Plant to Plant transfers or through SRM processing. |
| MM-07 Requisition Approver Group 2 (Work Orders) | Responsible for approving PM and Fleet requisitions for external procurement. |
| MM-08 Requisition Approver Group 3 (Inventory) | Responsible for approving expense requisitions of inventory items. |
| WM-01 Warehouse Clerk/Operator | Responsible for picking, issuing, and returning inventory materials; receiving items; bin to bin movements of materials; conducting physical inventory counts via the handheld device or execution of the transaction codes on the desktop. |

WM-02 Warehouse Manager	Same responsibilities as WM-03 Warehouse Supervisor; Also verifies and clears differences from the WM inventory count; creates and changes bins. Note: The warehouse manager role should include the inventory manager role to perform the inventory transactions in conjunction with warehouse transactions.
WM-03 Warehouse Supervisor	Responsible for creating, changing, or canceling a transfer order (instructions to move an inventory material); creating and updating outbound delivery documents; transferring inventory materials; creating WM inventory count documents; changing WM inventory counts; creating a WM inventory recount; management of bin replenishment; blocking, unblocking, analyzing or posting a change notice for a material; monitoring delivery due dates; monitoring warehouse managed outbound and inbound deliveries; scrapping materials. Note: The warehouse supervisor role should include the inventory clerk/operator role to perform the inventory transactions in conjunction with warehouse transactions.

Inquiry Job Functions:

LO-01 Logistics Inquiry	Display of inventory management information, such as list of material documents; list of warehouse stocks on hand; display of individual and collective MRP list; display of reservations, listing of stock in transit; display of planned orders; display of purchase orders, display of inventory counts; display of material forecast. Display role for auditing maintenance work processes, property control and fleet operations. Legislative auditors currently operate in this display only mode in Protégé for reporting and auditing of all state agencies movable property. Display of warehouse information such as transfer requirements; inventory count documents; bins; storage units.
SRM-05 SRM Inquiry	Display and reporting on all SRM modules. Everyone who has this role have the responsibility for overseeing and monitoring SRM activities.

eProcurement (SRM) Job Functions:

SRM-01 Approver	Shopping cart approver (Cost Center, Fiscal (required for LaGov services and professional contracts, optional for materials and operating services), Signature Authority (required for professional contracts), Agency Approver (required when PO > \$10000 and not result of RFx (bid), contract, or catalog).
Ad Hoc Approver	By definition, an Ad Hoc approver can be manually added to a Shopping Cart or PO for a particular purpose or as necessary. An Ad Hoc approver is not a system generated approver, nor is it part of the designed workflow. If using Ad Hoc approval functionality, the procurement document creator must know at which step the Ad Hoc approver should be manually added. If the procurement document creator knows the PID of the person that needs to be manually added to the workflow, the PID can be entered; if PID is not known, search functionality is available. An Ad Hoc approver must have an Approval role to approve documents to which they have been added.
Agency Approver	<i>Optional</i> If you are not sure of how this approval functions, do not select. For additional information, please submit a help desk ticket to the SRM team for a detailed explanation.
Asset Accountant Approver	Required on a PO when the purchase is designated as a capitalized asset. It is recommended that this role is held by someone with financial knowledge.
Commodity Approver	<i>Optional</i> Shopping Cart approval that defines (by product category) types of commodities that will require approval; for example IT equipment, vehicles, etc. If selecting this optional approval you must provide the product category and the dollar value at which the approval will be required.
Cost Center Approver	Required for all procurement transactions. This person has the authority to approve use of funds from a specific cost center.
Fiscal Approver	Shopping Cart approval required for all LaGov services (consulting, professional services, social, etc.) LaGov services must start with a Shopping Cart. This should be a person who

would have knowledge that the funds are available for this purchase. Possibly someone from your budget office.

Signature Authority Approver

Shopping Cart approval required for all LaGov services (consulting, professional services, social, etc.) LaGov services **must** start with a Shopping Cart. This approval is usually at the Undersecretary level and is not applicable for commodities/operational services.

SRM-02 Buyer

Responsible for processing shopping cart requests for goods/services and professional contract services. Processing will include creating purchase orders from the shopping cart and creating RFx (bids/RFPs), evaluating and awarding responses; creating resulting purchase orders/contracts. Our design to meet the encumbrance requirement is that professional contracts (engineering, legal, consulting, etc.) are purchase orders. This excludes retainer contracts. Buyer can create POs, RFxs, and contracts without a shopping cart request.

SRM-03 Requisitioner

Responsible for requesting goods/services and professional contract services (engineering, legal, consulting, etc.). This person will be creating shopping carts.

SRM-04 SRM SUS Registration

Allows for registration on behalf of the vendor in SUS via single sign-on eProcurement tab. Note: Requires buyer security.

SRM-06 Buyer - Basic

Responsible for creating POs that will in most cases reference a statewide and/or agency contract. Also responsible for creating shopping cart requests for items not on a statewide and/or agency contract. The buyer basic role is not responsible for creating RFx, PO from RFx response, contract, and other advanced level procurement functions.

The agency Security Administrator or Alternate is responsible for retaining a copy of each form submitted for audit purposes.