- **This form is to add, update or remove *ROLES (Shopper, Requestor, Approver, IPO Invoice Processor)* in Marketplace**

- **The form is also to *add, update or remove RULES* in Marketplace**

- **The form is submitted through the *Help Desk Intake Form* under Marketplace/Access/Questions**

- **The form *MUST be signed by someone listed in the dropdown or it will be returned***

Please fill out the following table for *new/updated* RU Marketplace Access.
For *Action*, *Employee Type*, *Unit Division,* and *Role* fields use drop-down menus.

In Order to have Inquirer role, you must be a Rutgers employee.
If requesting IPO Invoice Processor role, must provide the IPO number associated with it otherwise role will not be granted.

① Table:

Action	Employee Type	Net ID	Unit Division	First Name	Last Name	Role	IPO Number

For Approvals please add the following GL or Project information; provide Net ID(s) for approver(s):
Fund is optional; should be used if approver is for a specific fund type.

② Table:

Action	Unit	Division	Org	Fund	Primary Approver: All Dollar Amounts	Primary Approver: $0-5K	Primary Approver: $5-10 K	Primary Approver: over $10k	Secondary Approver: All Dollar Amounts	Secondary Approver: Over $50K

③ Table:

Action		Project	Primary Approver: All Dollar Amounts	Primary Approver: $0-5K	Primary Approver: $5-10 K	Primary Approver: over $10k	Secondary Approver: All Dollar Amounts	Secondary Approver: Over $50K

④ Please select the Business Manager: _____

Business Manager's Signature required in order for request to be processed: _____

Please attach completed form in *Help Desk Intake Form.*

Role	Definition
Shopper	Default role. Only able to create carts from punch-out suppliers.
Inquirer	The role assigned to individuals who need to view purchasing requisitions and invoices in Marketplace. Inquirer is authorized to access the system in a limited manner and cannot submit a requisition or approve an invoice. *Prior to obtaining this role, contact Manuel Pierre of Ethics and Compliance (pierrem1@uec.rutgers.edu) to complete HIPAA training.*
Requisitioner/ Preparer/ Requestor	The role assigned to individuals who have the responsibility for submitting purchasing requisitions into the RU Marketplace. Have access to, and knowledge of, the new Chart of Accounts that must be input as the fund source for the transaction.
Approver	The role assigned to individuals responsible for affirming a department is purchasing requisition based on budget and policy. Cannot approve their own requisition. Approval hierarchy driven by the UDO or the Project ID of the Chart of Accounts used to fund the transaction.
IPO Invoice	The role assigned to individuals responsible for approving a department's purchasing requisition, based on policy, which involves an IPO. Cannot approve their own requisition.

In Order to have Inquirer role, you must be a Rutgers employee.
If requesting IPO Invoice Processor role, must provide the IPO number associated with it otherwise role will not be granted.

①

Action	Employee Type	Net ID	Unit Division	First Name	Last Name	Role	IPO Number

Please select the Business Manager:

④ **Business Manager's Signature required in order for request to be processed:**

Please attach completed form in Help Desk Intake Form.

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① See the Marketplace definitions on the first page and complete this section accordingly.

- **All fields must be completed**
- ***When adding an IPO Invoice Processor role, include the IPO number(s)***

④ Choose a name in the dropdown and have only that person sign this form. ***MUST be signed by someone listed in the dropdown or it will be returned.*** **Do not add additional names.**

- **Submit the form through the Help Desk Intake Form**

For Approvals please add the following GL or Project information; provide Net ID(s) for approver(s):
Fund is optional; should be used if approver is for a specific fund type.

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Action	Unit	Division	Org	Fund	Primary Approver: All Dollar Amounts	Primary Approver: $0-5K	Primary Approver: $ 5-10 K	Primary Approver: over $10k	Secondary Approver: All Dollar Amounts	Secondary Approver: Over $50K

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Action		Project	Primary Approver: All Dollar Amounts	Primary Approver: $0-5K	Primary Approver: $ 5-10 K	Primary Approver: over $10k	Secondary Approver: All Dollar Amounts	Secondary Approver: Over $50K

HINT: Before submitting rule updates, use the _Help Desk Intake Form_ and request the current ADW rules.

- **All approvers must have the role first in Marketplace.** If they do not have the role, complete section 1. If they already have the role *DO NOT complete section 1.*

- **Approvers must be assigned to a dollar threshold.** The business manager can request as many or as few approvers as needed.

- **Must have at least one Approver for all dollar amounts or multiple approvers for each dollar threshold.**

Choices:

- Primary Approver ALL DOLLAR AMOUNTS or Primary Approver by a specific dollar group, $0-5k, $5-10k, over $10k. *DO NOT add the same Approver to all 3 of these fields,* use ALL dollar amounts.

Action:

- *Add New Rule* – Brand NEW project or GL (UDO) needs Approvers added to the accounting string. Multiple Primary Approvers are allowed for each dollar threshold. Secondary Approver is NOT the backup for the Primary Approver but an additional approval in the workflow process.

- *Add to Existing Rule* – the name(s) on this form is/are added to the existing approvers. *NO approvers are removed.*

- *Replace Existing Rules* – remove all current approvers and replace them with the names on this form

- *Remove from Existing Rules* – removes a person(s) from the rule but other names will remain