How to create a procurement agent in Oracle Fusion

This guide shows you how to create a procurement agent in Oracle Fusion. You start by creating an employee record, then set up the user account in the Security Console, assign roles, grant business unit data access, and configure the procurement agent in your implementation project.

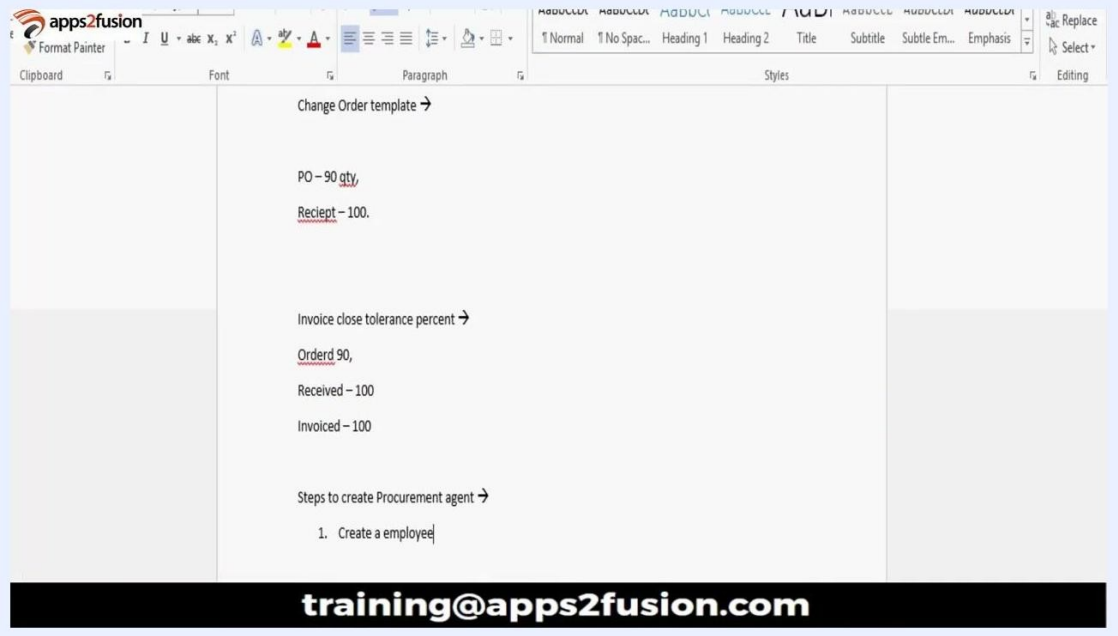
Prerequisites

Only users with an employee record in the system can become procurement agents. Users created solely from the Security Console are not recognized as employees.

Before you set up the procurement agent, make sure of the following:

- An employee record exists for the user who will become a procurement agent.
- You know which business units need procurement agent access. You repeat the procurement agent setup for each one.

When you create an employee, the system automatically generates a corresponding user account. Creating the employee is mandatory before you start the procurement agent setup.



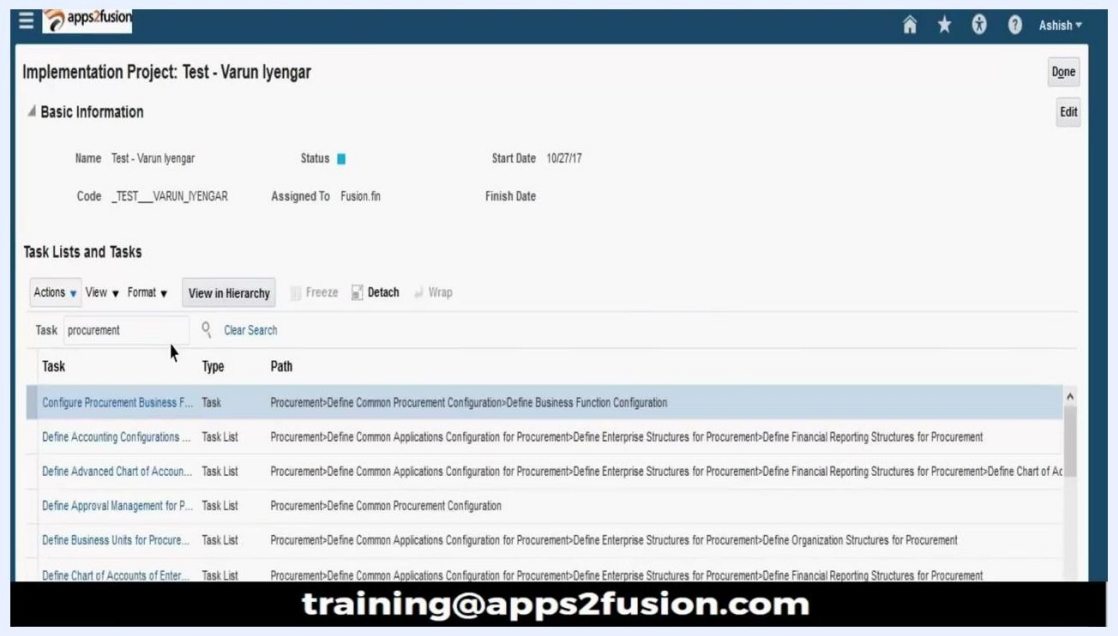
Document listing the steps to create a procurement agent, with step 1: create an employee

Part 1: Create the employee record

Step 1. Open your implementation project

1. Go to the **Implementation Project** screen for your project (for example, "Test - Varun Iyengar").

2. Review the **Task Lists and Tasks** section to confirm you are in the correct project workspace.



Implementation Project screen showing task lists and tasks for the project "Test - Varun Iyengar"

Step 2. Start a new user

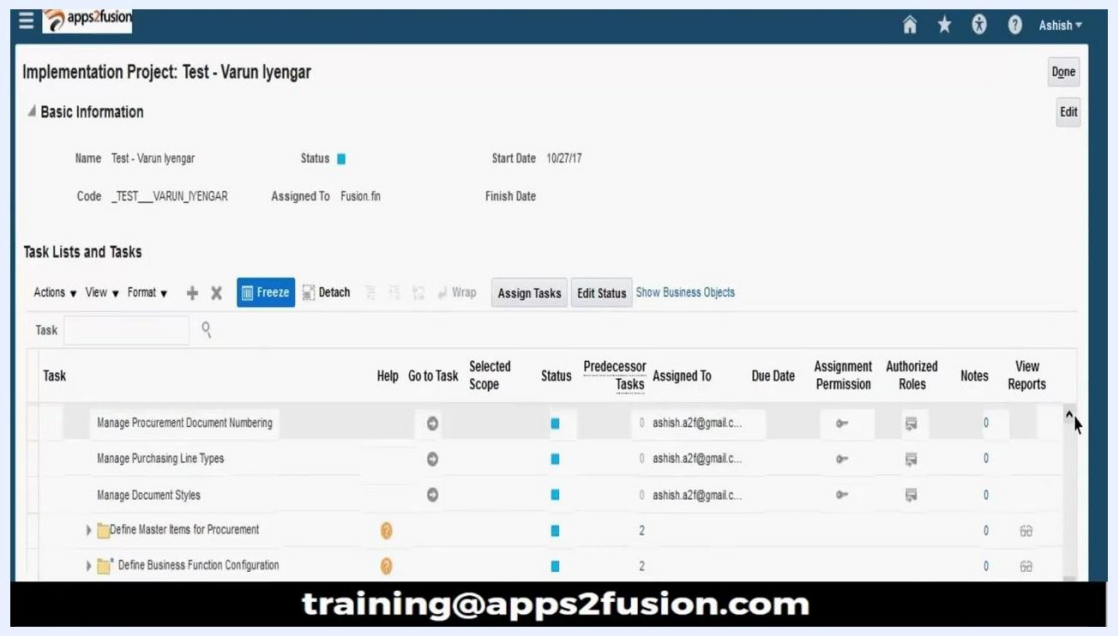
1. Find and click **Manage Users** in the available tasks or navigation menu.
2. Click the **+** (plus) button to create a new user.

Step 3. Enter personal details

In the **Create User** form, complete the following fields:

- **Last Name:** Enter "Varun".
- **First Name:** Enter "Employee".
- **Title:** Select the appropriate title from the dropdown (for example, "Mr.").

Make sure you complete all required fields, which are marked with an asterisk (*).

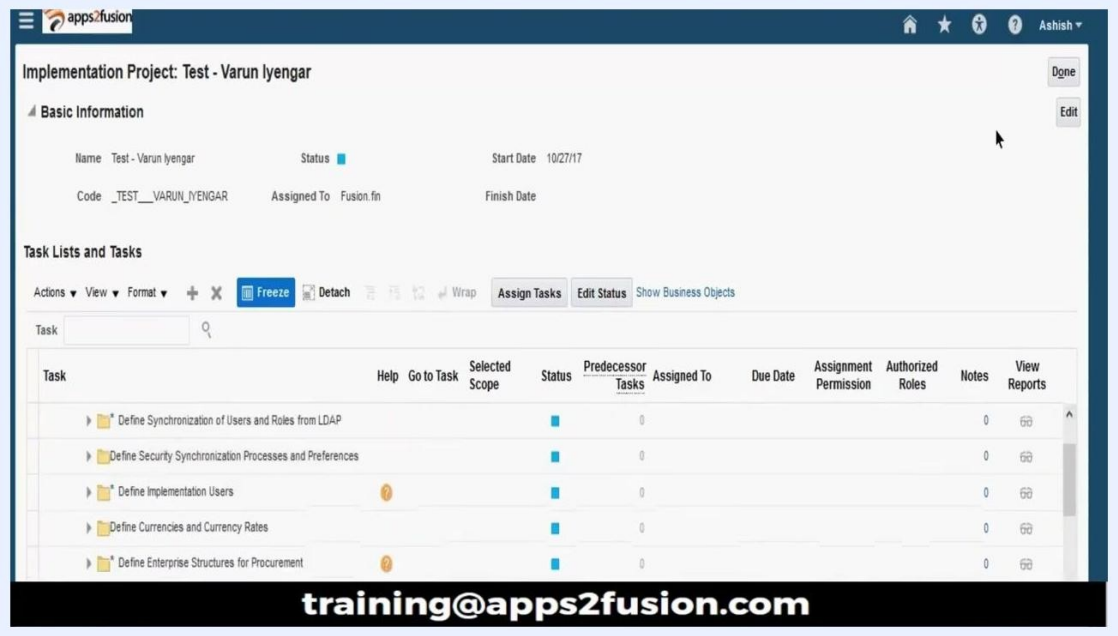


Create User form with Last Name, First Name, and Title fields being filled in

Step 4. Enter user details

1. In the **User Details** section, enter the username (for example, "Varun.Emp").

2. Select the **Send user name and password** check box so the login credentials are sent to the email address you provide.



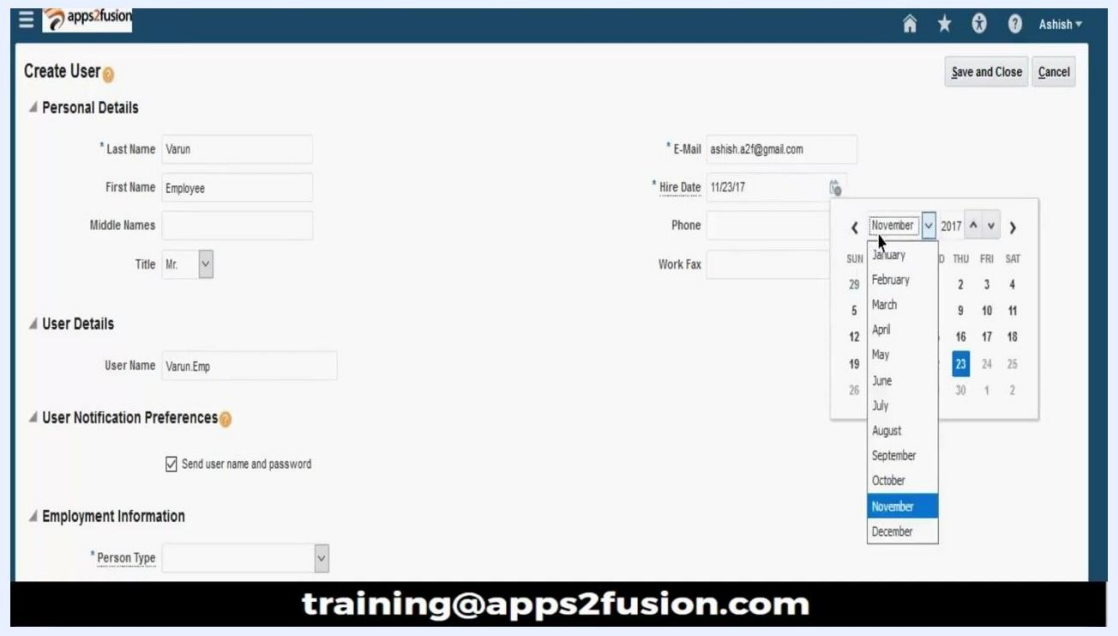
Create User form showing the username entry and the notification check box

Step 5. Provide contact and employment information

Complete the following fields:

- **E-Mail:** Enter the user's email address (for example, "ashish.a2f@gmail.com").
- **Hire Date:** Select the date with the calendar picker (for example, "11/23/17").

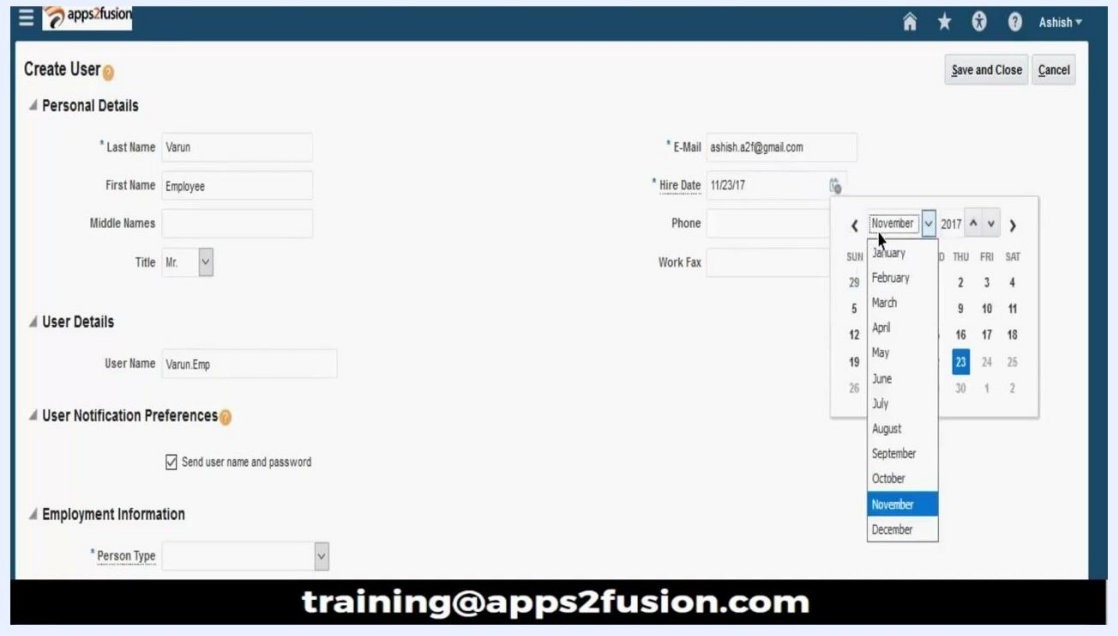
- **Person Type:** Select "Employee" from the dropdown.



Create User form with email, hire date, and person type filled in

Step 6. Select the legal employer

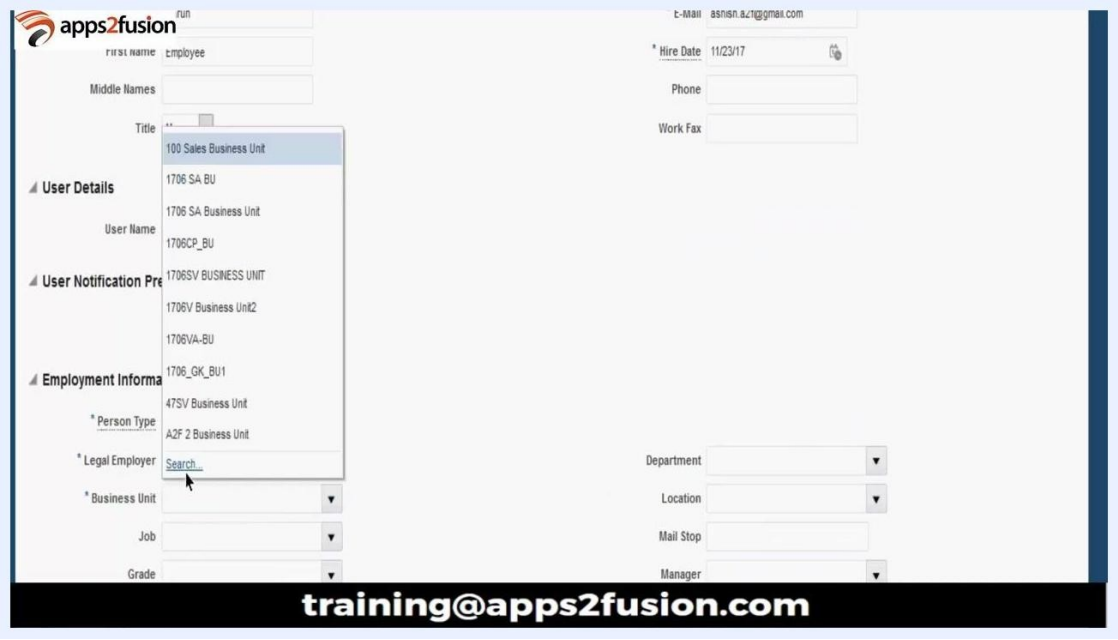
In the **Legal Employer** dropdown, select the appropriate legal entity for the employee (for example, "AppsPro").



Legal Employer dropdown expanded to show the available legal entities

Step 7. Select the business unit

In the **Business Unit** dropdown, choose the relevant business unit for the employee (for example, "100 Sales Business Unit").



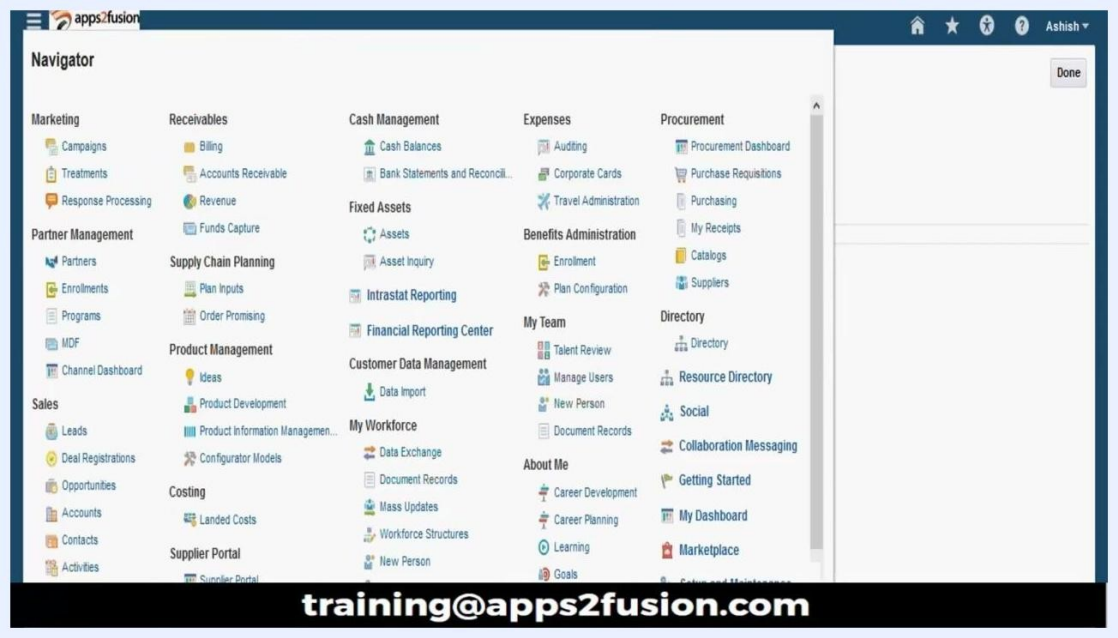
Business Unit dropdown expanded to show the available business units

Step 8. Complete the remaining employment details

Fill in other required employment fields as applicable, such as Job, Grade, Department, Location, Mail Stop, and Manager. You can skip optional fields you don't need.

Step 9. Save the employee record

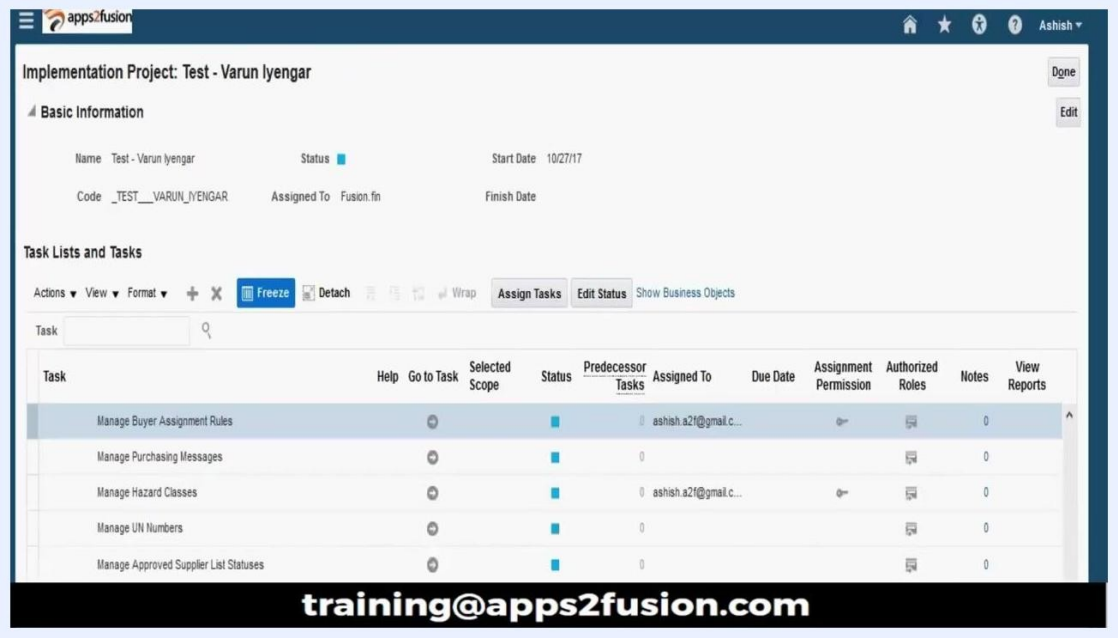
Click **Save and Close** to create the employee and the user account. The system automatically creates a corresponding user in the Security Console.



Create User form with all required fields filled in, ready to save and close

Step 10. Plan the procurement agent setup for each business unit

Perform the procurement agent setup for every business unit where you want to grant procurement agent access. You repeat the setup for each relevant business unit.



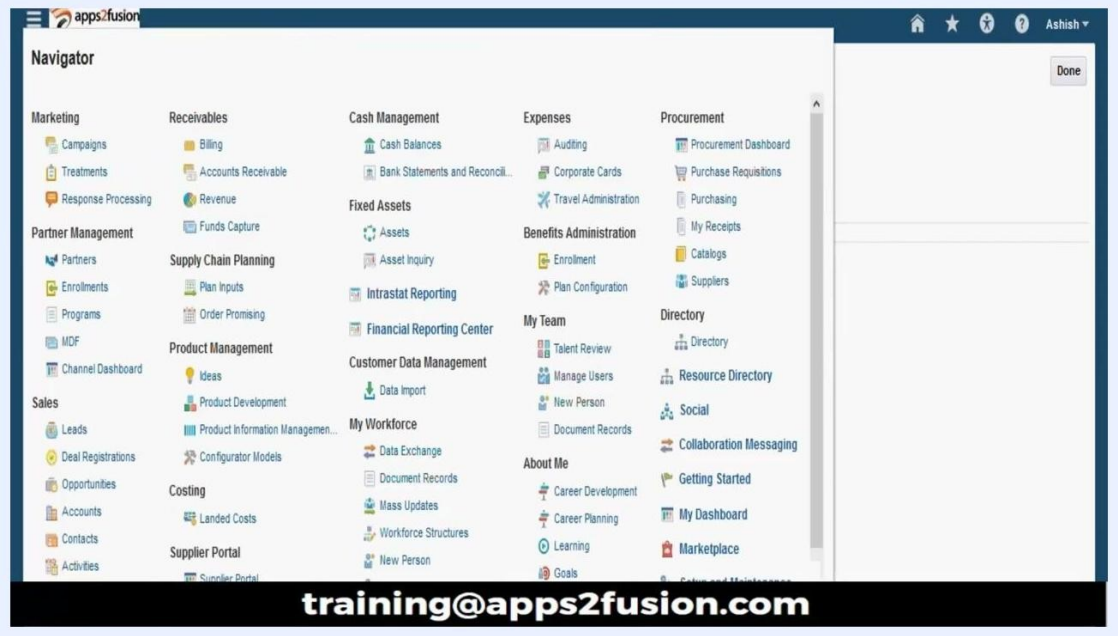
Document showing step 2: create the procurement agent setup for each business unit

Part 2: Prepare the user account in the Security Console

Step 11. Open the Security Console

1. Open the main application navigator.

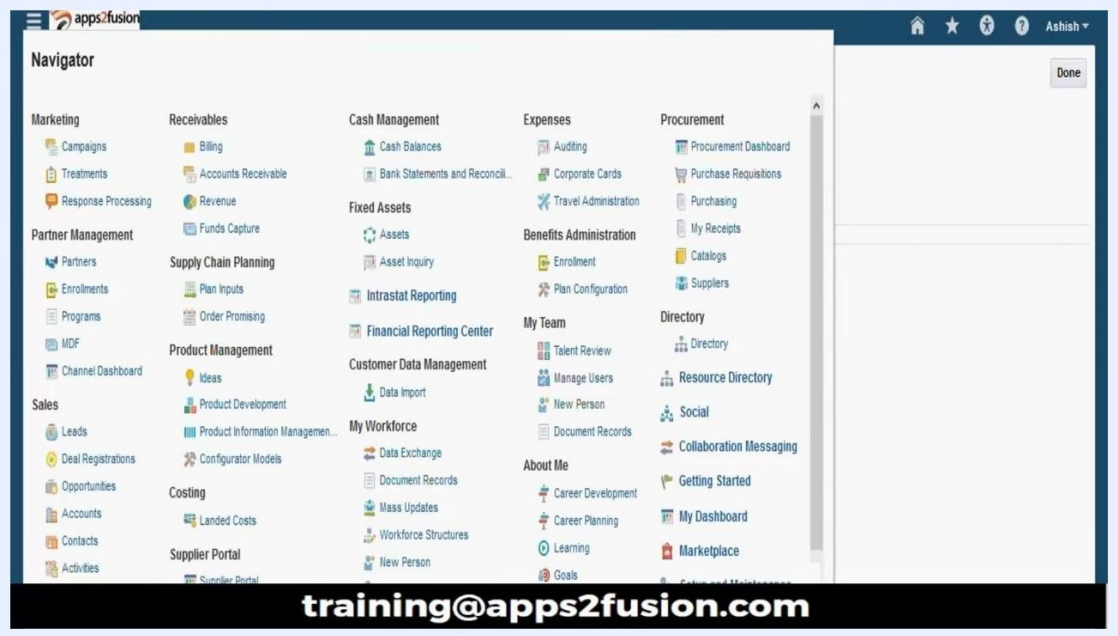
2. Click **Security Console** to access the user management features.



Main application navigator with the Security Console option visible among other modules

Step 12. Dismiss any warning

If a warning appears, such as one about the Import User and Role Application Security Data job, read the message. Click **OK** or the close (X) button to dismiss it and continue.

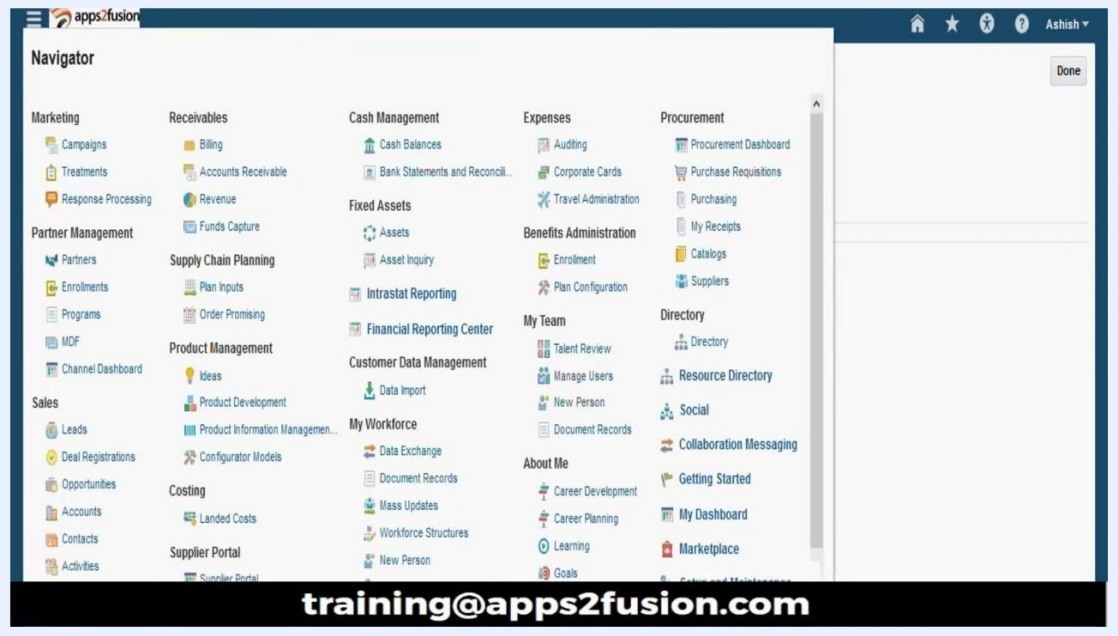


Security Console with a warning about the Import User and Role Application Security Data job

Step 13. Find the new user

1. In the **User Accounts** section, use the search bar to enter a search term (for example, "varun").
2. Confirm that the following user logins are listed: Varun, Varun.Emp, and varun@gmail.com (a login in the form varun@[domain].com).

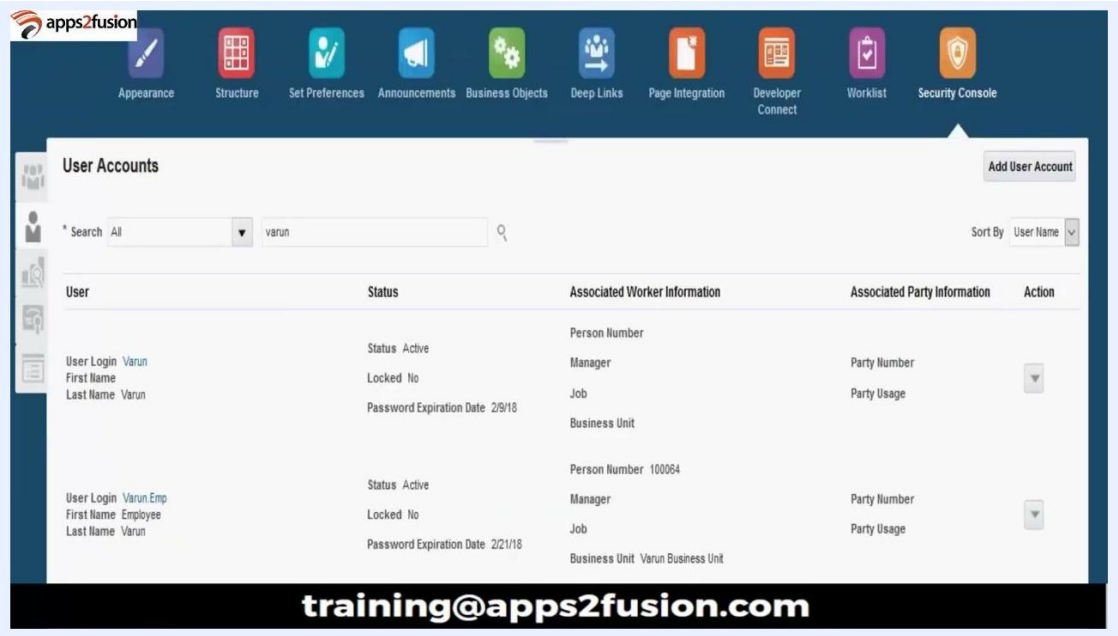
3. Verify that each account has a status of **Active** and is not locked.



User Accounts screen listing several user logins for "Varun" with their status

Step 14. Open the user account

Click the **User Login** (for example, "Varun.Emp") to open the user account details.



User Accounts screen with the "Varun.Emp" user login being selected

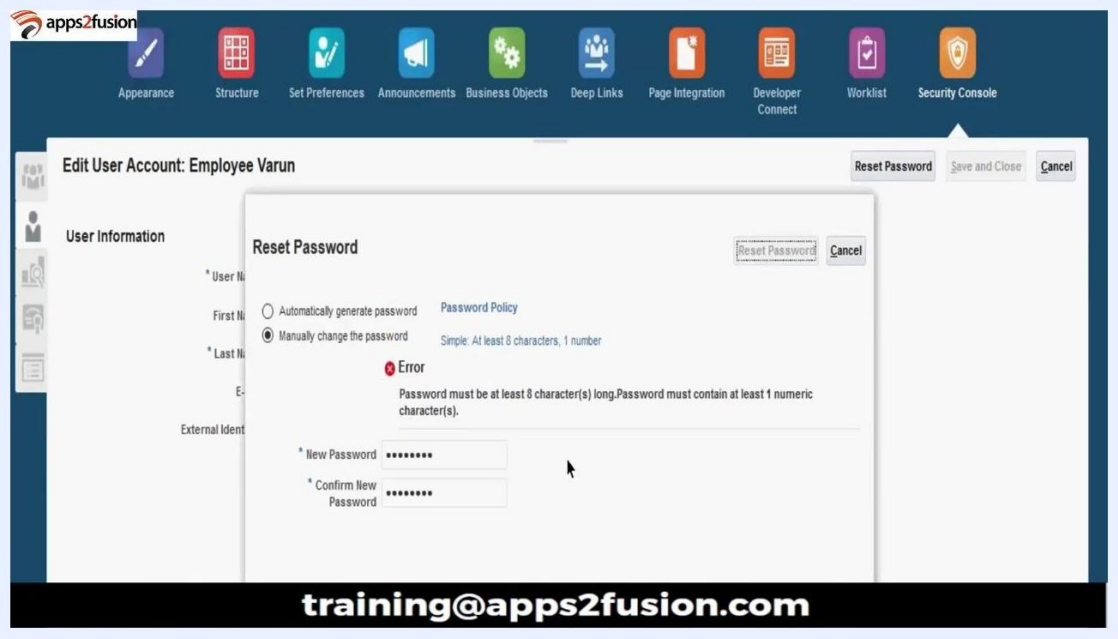
Step 15. Reset the password

1. On the **Edit User Account** screen, find the **Reset Password** section.
2. Select **Manually change the password**.
3. Enter a new password and confirm it.

The password must meet the policy:

- At least 8 characters long
- At least 1 numeric character

If an error appears, adjust the password to comply with these requirements.



Reset Password dialog showing a password policy error and the new password fields

Step 16. Review the account details

Verify the user information:

- User Name: Varun.Emp
- First Name: Employee
- Last Name: Varun
- E-Mail: ashish.a2f@gmail.com

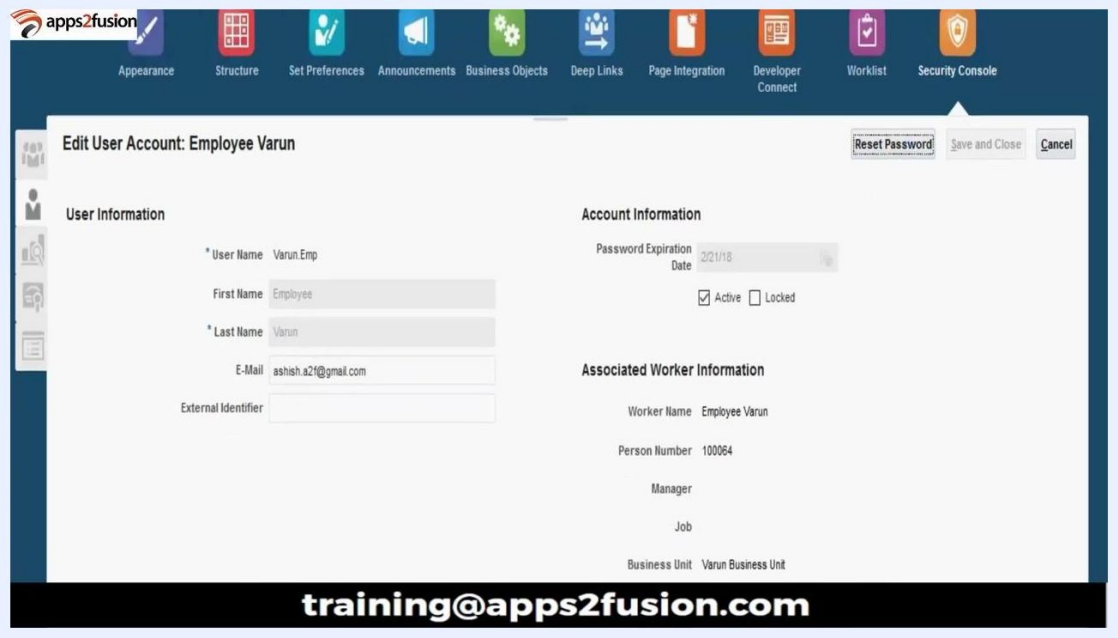
Check the account status:

- Password Expiration Date: 2/21/18
- Active: checked

- Locked: unchecked

Review the associated worker information:

- Worker Name: Employee Varun
- Person Number: 100064
- Business Unit: Varun Business Unit



Edit User Account screen showing user and account information for Employee Varun

Part 3: Assign roles to the user account

Step 17. Open the Add Role Membership dialog

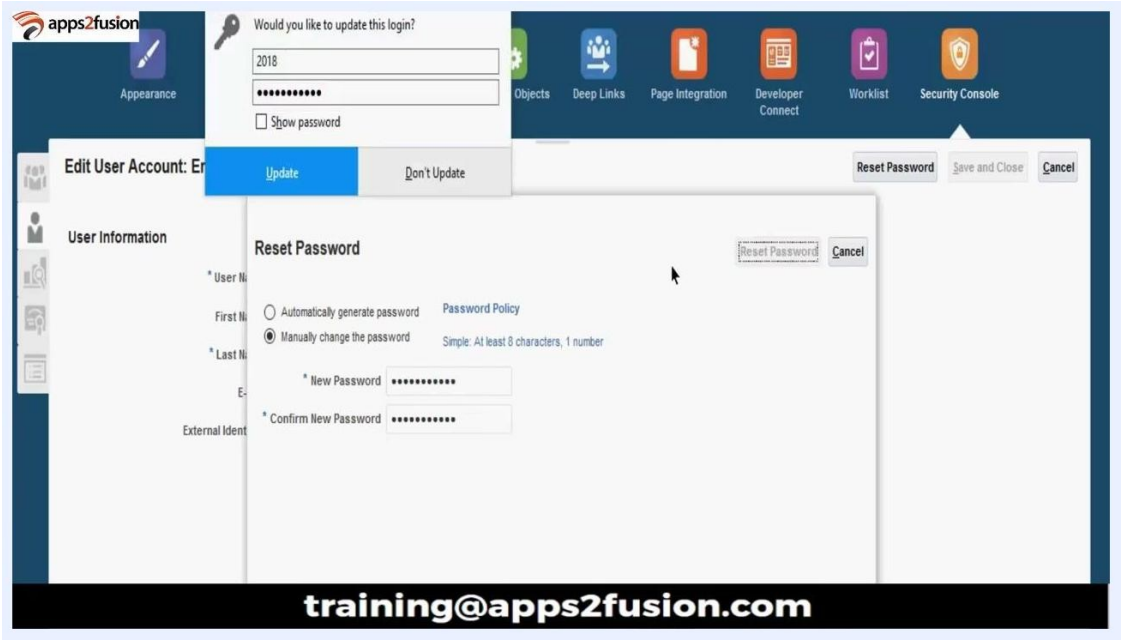
Click the option to add a new role membership for the user. In the **Add Role Membership** dialog, use the search box to find roles.

Step 18. Assign employee roles

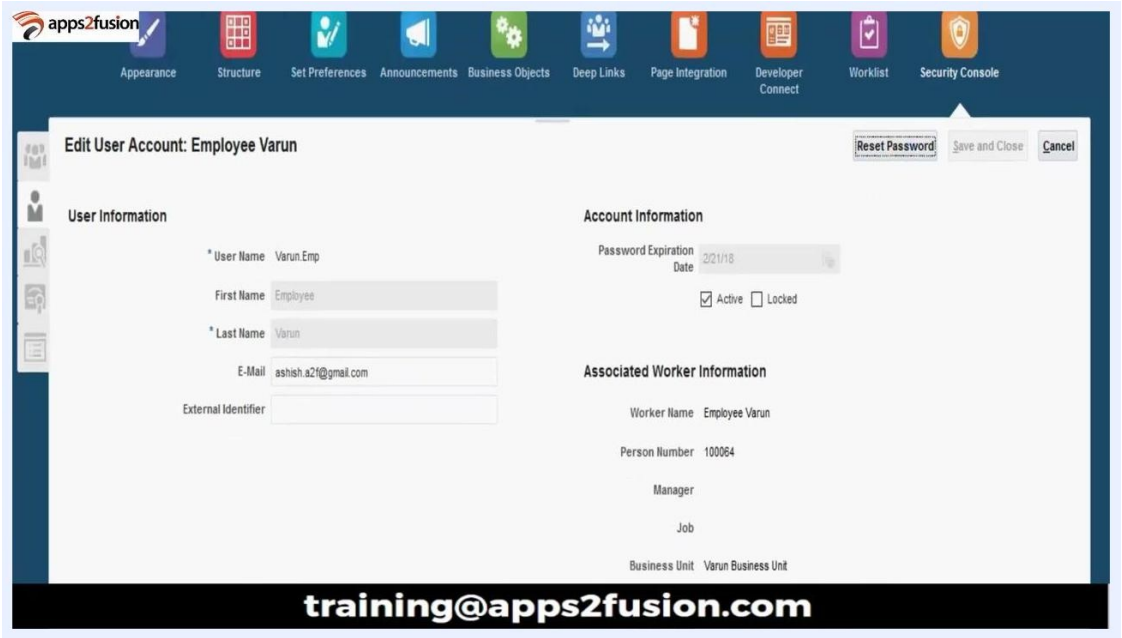
Type "employee" in the search box, then select from the available roles, such as:

- Employee (ORA_PER_EMPLOYEE_ABSTRACT)
- Employee (PER_EMPLOYEE_ABSTRACT)

- Employee Help Desk Analyst (ASE_EMPLOYEE_HELP_DESK_ANALYST_JOB)



Add Role Membership dialog with "employee" entered and a dropdown showing Employee and Employee Help Desk Analyst roles

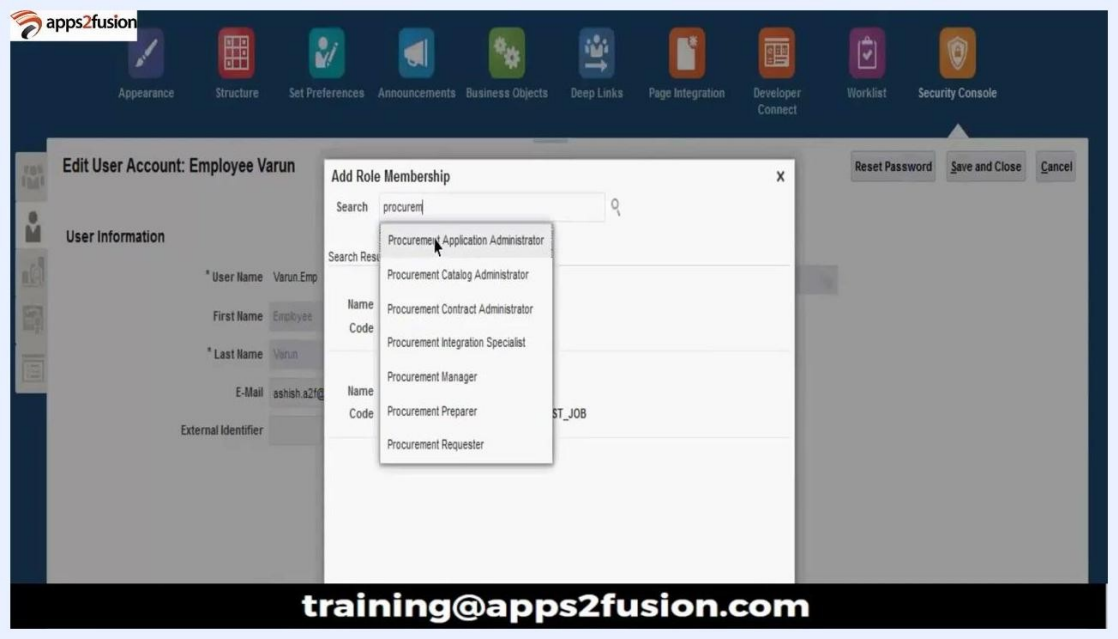


Add Role Membership dialog showing search results for "Employee" with the code for each role

Step 19. Assign procurement roles

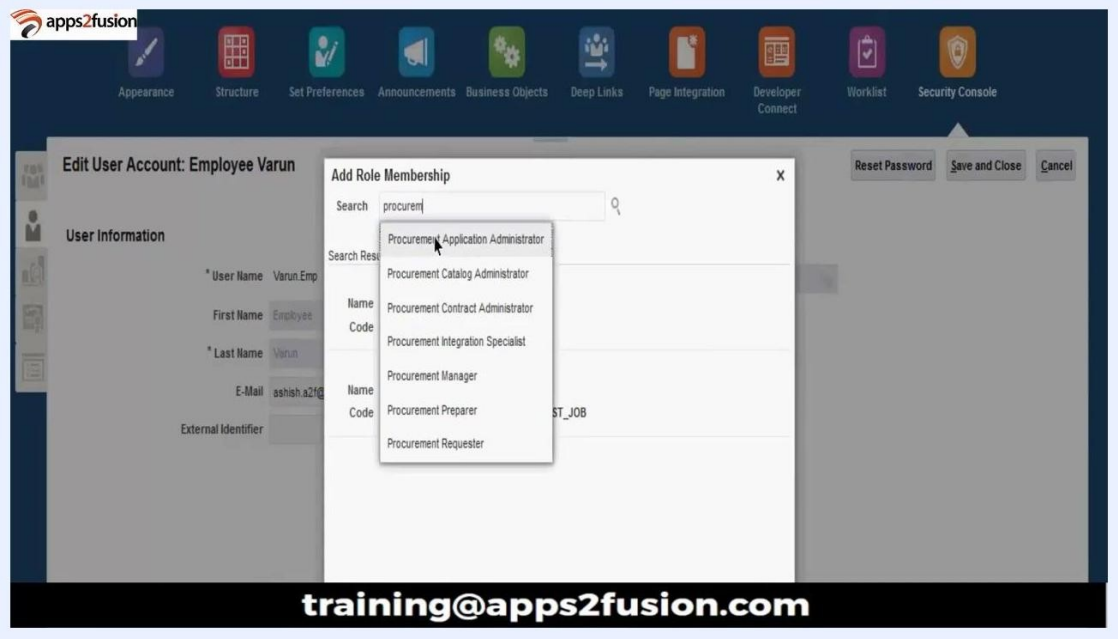
Type "procurement" in the search box, then select from the list of procurement roles, such as:

- Procurement Application Administrator
- Procurement Catalog Administrator
- Procurement Contract Administrator
- Procurement Integration Specialist
- Procurement Manager
- Procurement Preparer
- Procurement Requester



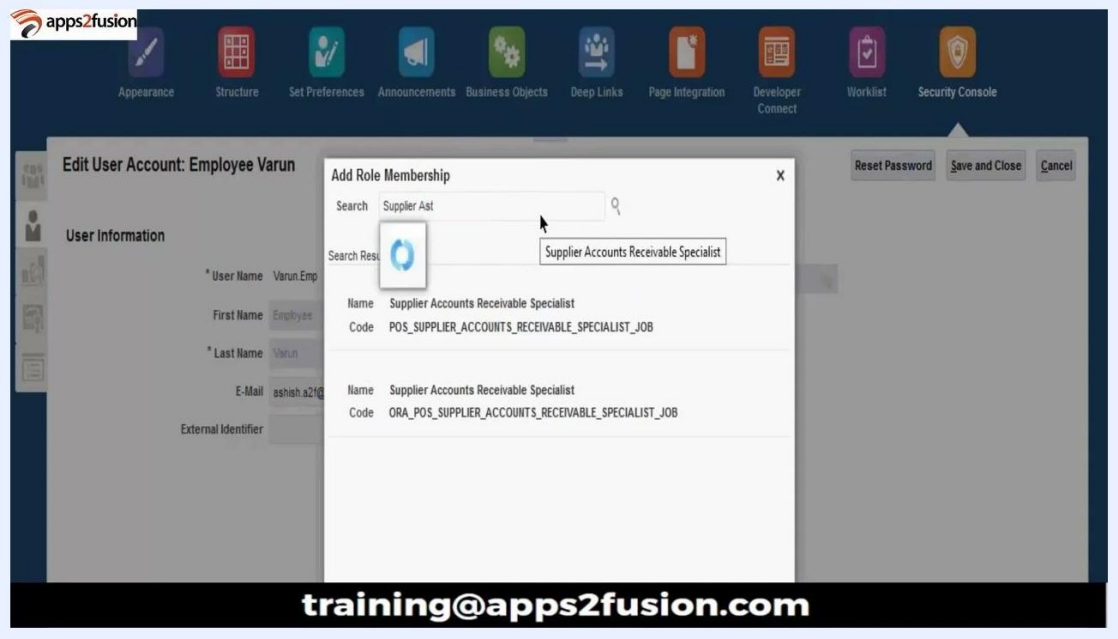
Add Role Membership dialog with "procurement" entered and a dropdown showing procurement roles

To assign the Procurement Preparer role, type "Procurement Preparer" in the search box. Select **Procurement Preparer** (ORA_POR_PROCUREMENT_PREPARER_ABSTRACT) from the results.



Add Role Membership dialog with "Procurement Preparer" entered and the role and code in the results

To assign the Procurement Requester role, type "Procurement Requester" in the search box. Select **Procurement Requester** (ORA_POR_PROCUREMENT_REQUESTER_ABSTRACT) from the results.



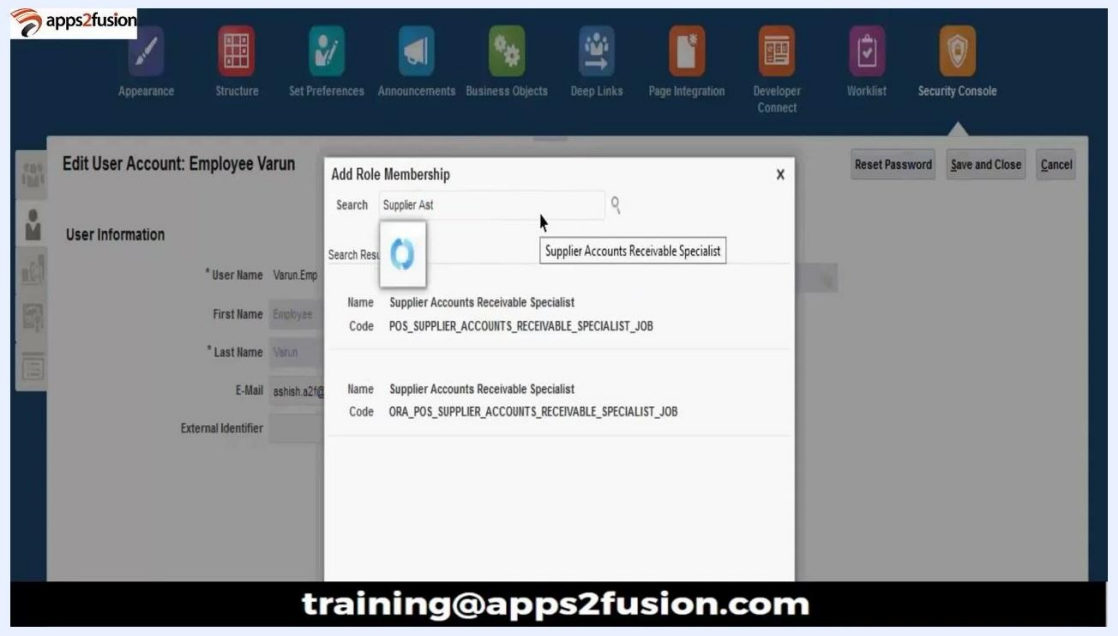
Add Role Membership dialog with "Procurement Requester" entered and the role and code in the results

Step 20. Assign supplier roles

Type "supplier" in the search box, then select from the list of supplier roles, such as:

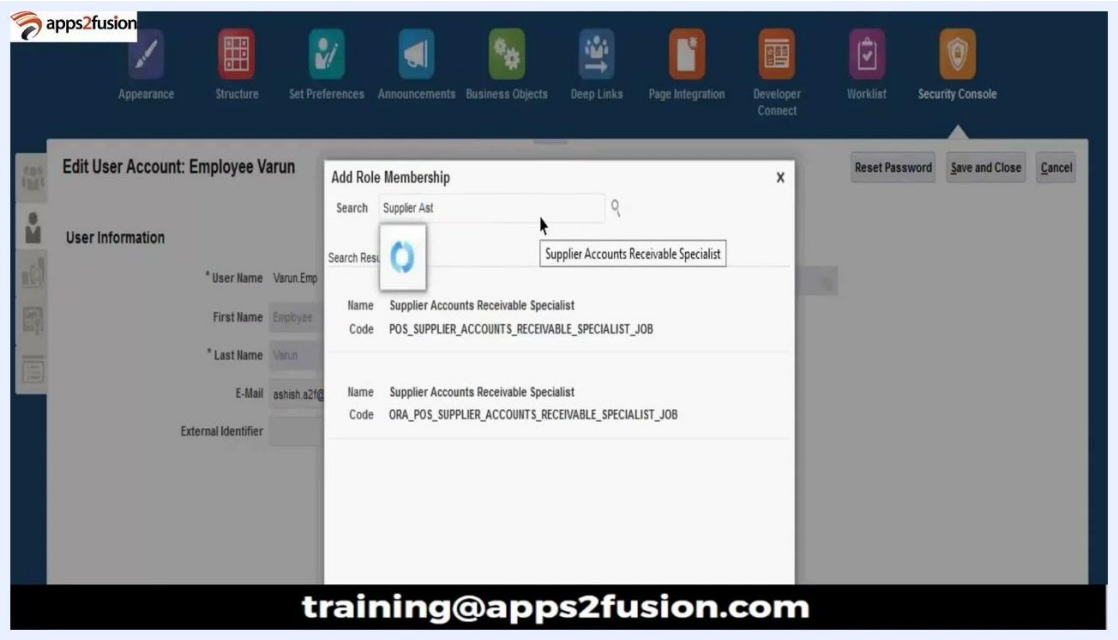
- Supplier Accounts Receivable Specialist
- Supplier Administrator
- Supplier Bidder
- Supplier Contract Administrator
- Supplier Contract Manager
- Supplier Contract Team Member
- Supplier Contract User
- Supplier Customer Service Representative

- Supplier Demand Planner



Add Role Membership dialog with "supplier" entered and a dropdown showing supplier roles

To assign the Supplier Accounts Receivable Specialist role, type "Supplier Ast" in the search box. Select **Supplier Accounts Receivable Specialist** (POS_SUPPLIER_ACCOUNTS_RECEIVABLE_SPECIALIST_JOB or ORA_POS_SUPPLIER_ACCOUNTS_RECEIVABLE_SPECIALIST_JOB) from the results.



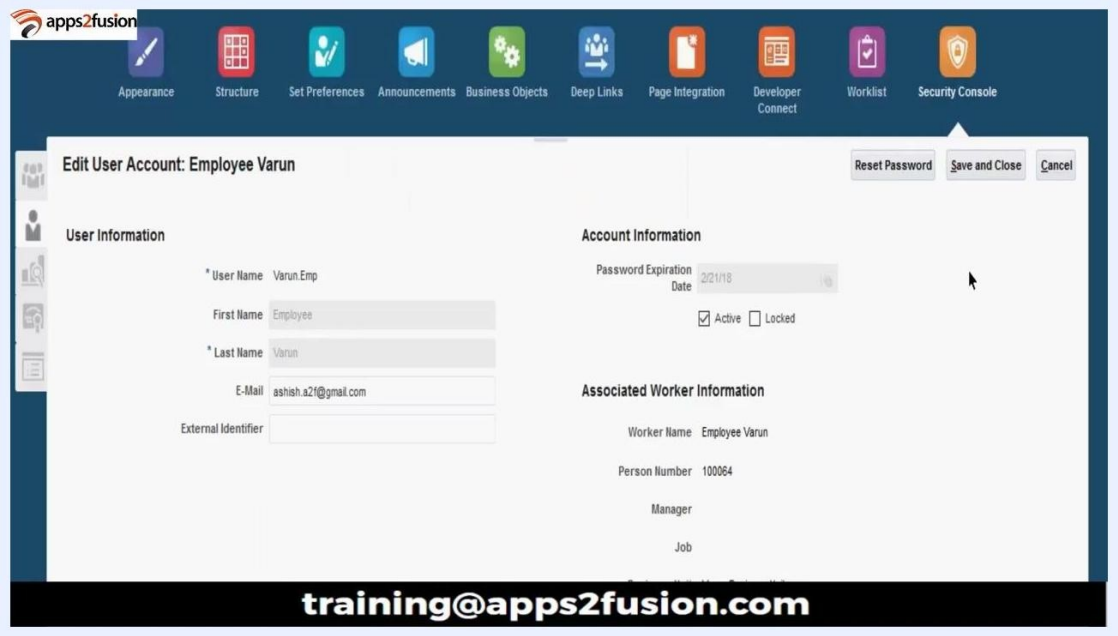
Add Role Membership dialog with "Supplier Ast" entered and the Supplier Accounts Receivable Specialist roles and codes in the results

Select the role codes exactly as shown in the search results.

Step 21. Assign the Supplier Qualification role

1. In the **Add Role Membership** dialog, make sure the search box contains "Supplier".
2. Review the dropdown list of supplier-related roles. It includes Supplier Accounts Receivable Specialist, Supplier Bidder, Supplier Contract Administrator, Supplier Contract Manager, Supplier Contract Team Member, Supplier Contract User, Supplier Customer Service Representative, Supplier Demand Planner, and Supplier Inventory Manager.

3. Scroll through the list and select the **Supplier Qualification** role, if it is available.



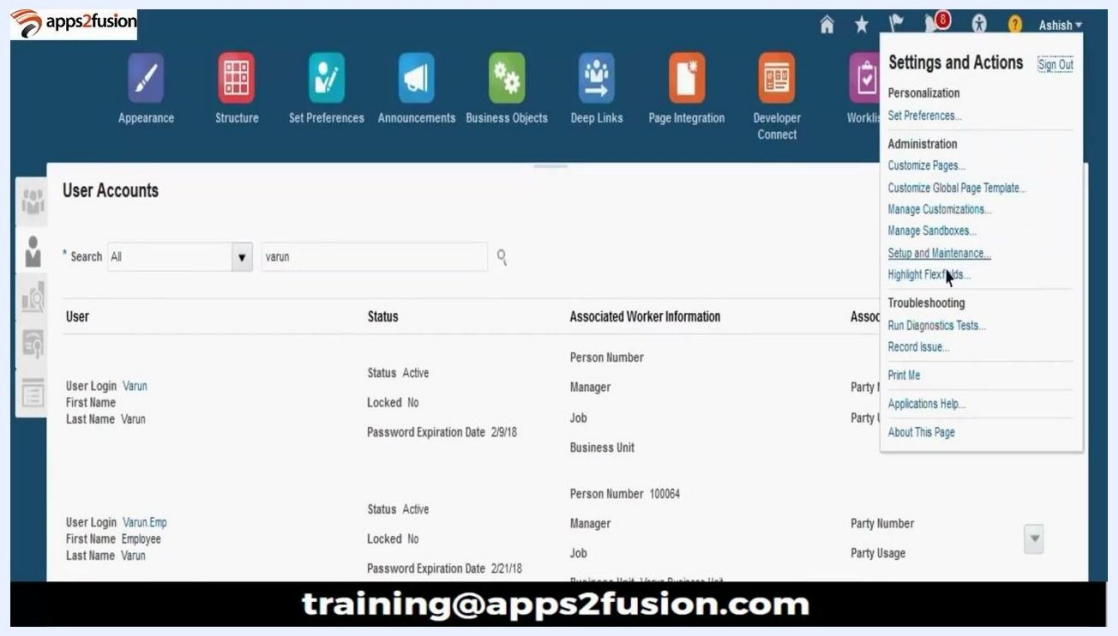
Add Role Membership dialog with the supplier roles dropdown open

Part 4: Grant business unit data access

Step 22. Open Setup and Maintenance

1. Click the user profile icon in the top right corner.

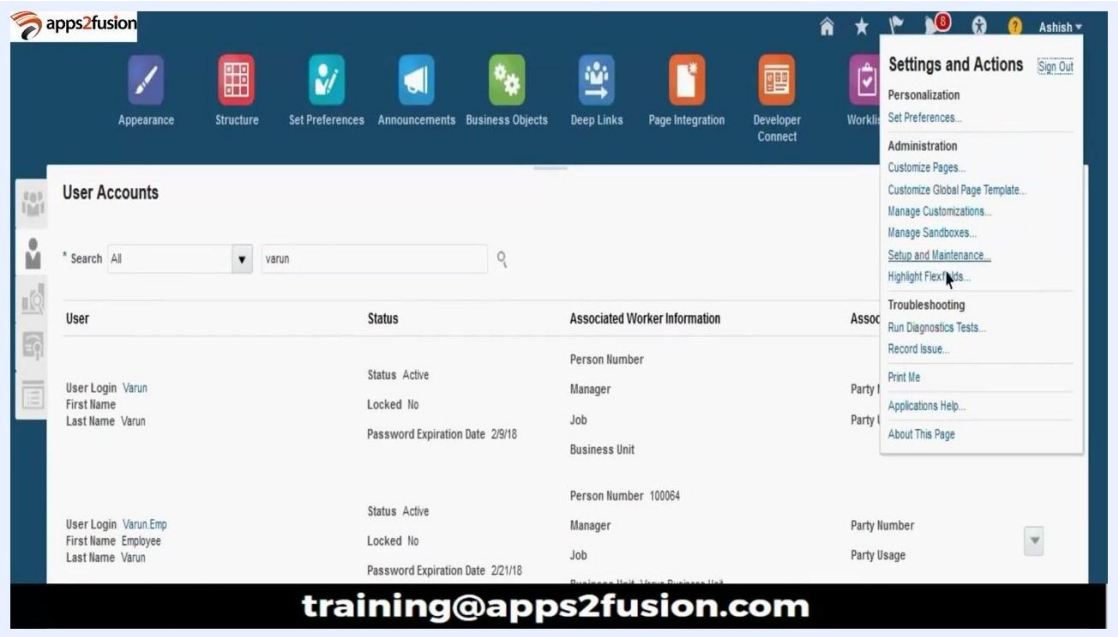
2. In the **Settings and Actions** dropdown, select **Setup and Maintenance**.



Settings and Actions dropdown with Setup and Maintenance highlighted

Step 23. Search for the data access task

On the **Setup and Maintenance** screen, type "manage data" in the search bar at the top to find the relevant task.



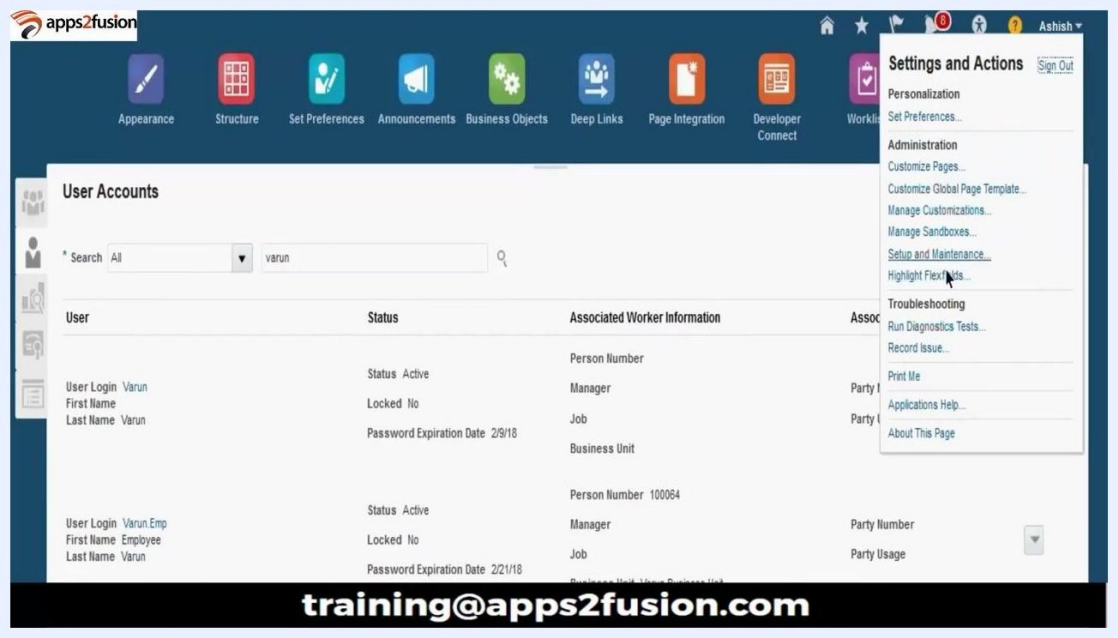
Setup and Maintenance screen with "manage data" entered in the search bar

Step 24. Open Manage Data Access for Users

1. Select **Manage Data Access for Users** from the search results.
2. Make sure **Users without Data Access** is selected.

The search section includes these fields:

- Security Context: All
- User Name: a dropdown to select the user
- Role: a dropdown to select the role



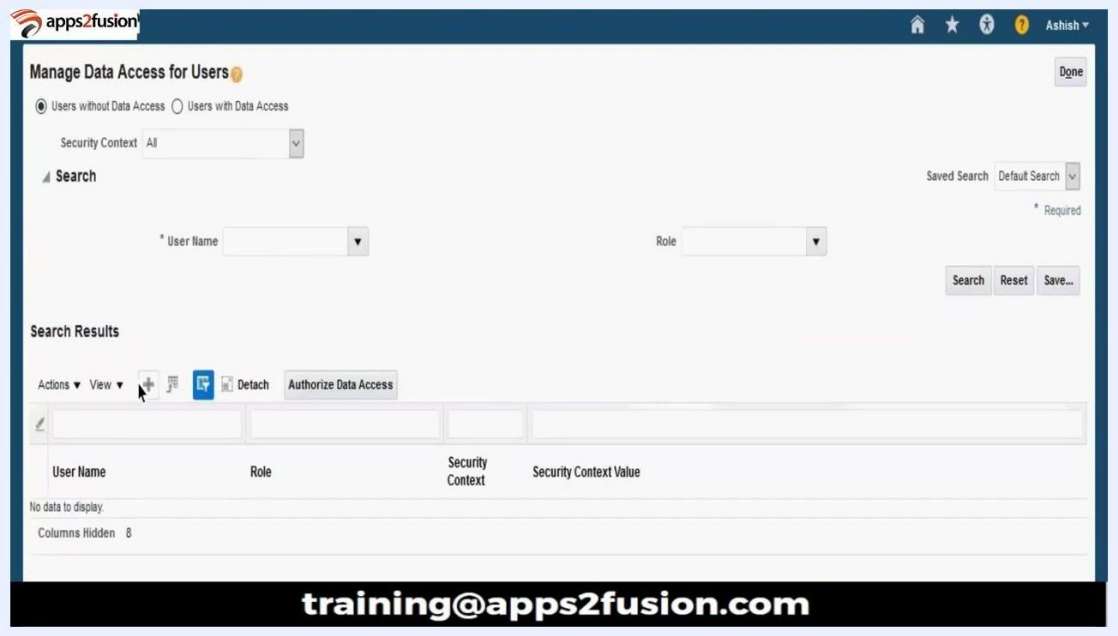
Manage Data Access for Users screen with search fields for user name and role

Step 25. Create data access for the user

Click the **+** (Add) button. In the **Create Data Access for Users** dialog, set the following values:

- **User Name:** Varun.Emp
- **Role:** Buyer
- **Security Context:** Business unit
- **Security Context Value:** Varun Business Unit

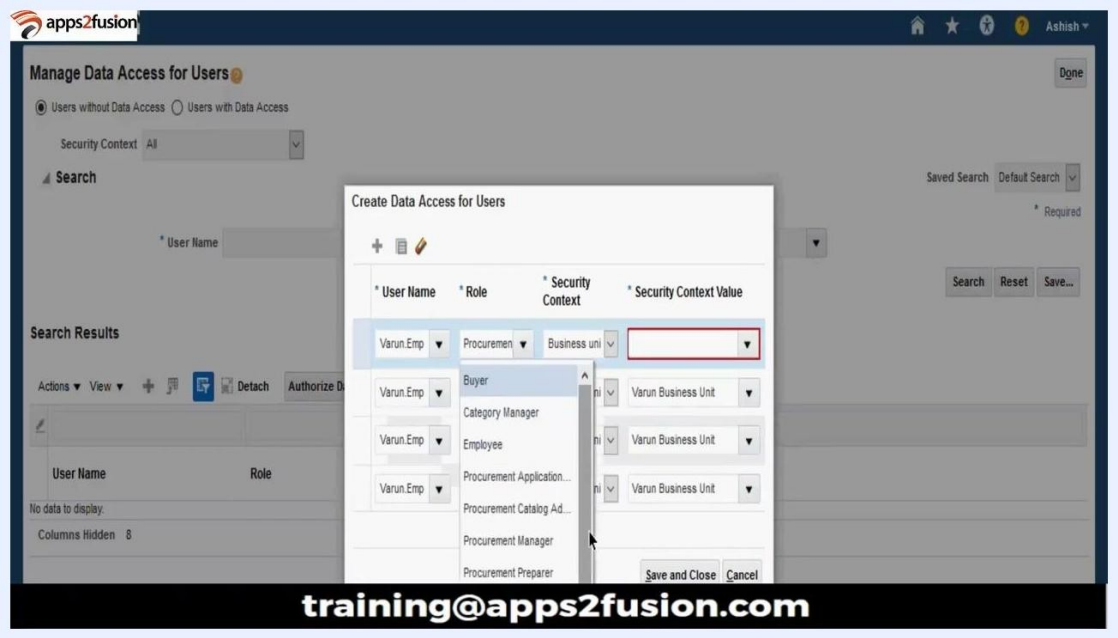
Repeat for other roles as needed, such as Category Manager, Employee, and the procurement roles.



Create Data Access for Users dialog with fields for user name, role, security context, and security context value

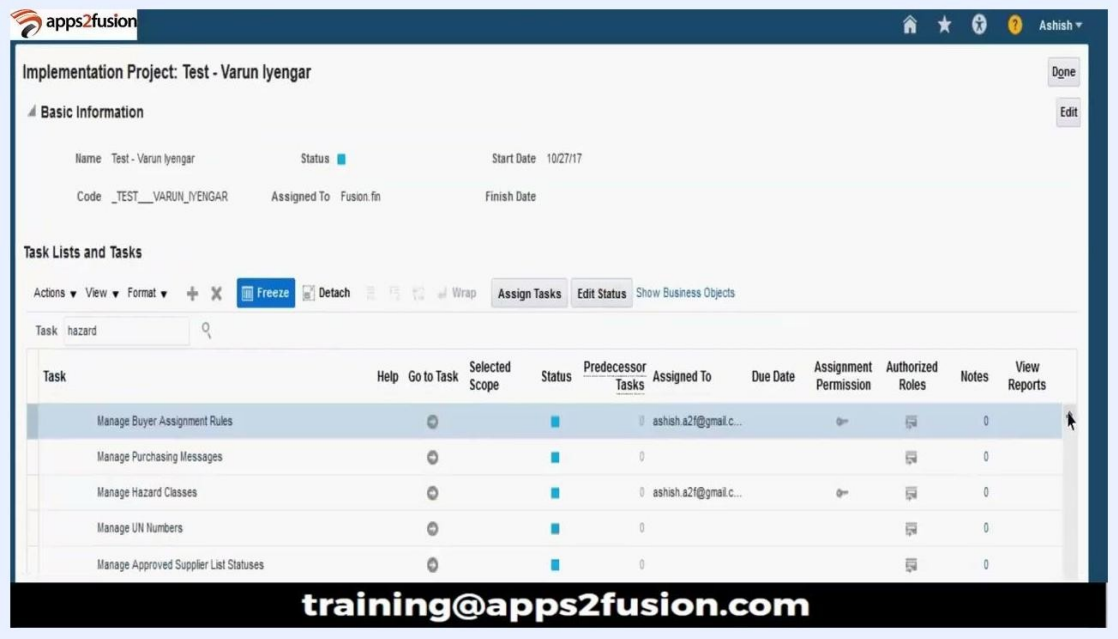
Step 26. Fix a missing Security Context Value

If a row has no **Security Context Value**, the dialog shows the error "A value is required. You must enter a value." In the source example, this happens for the Procurement role. Every row must have a Security Context Value.



Create Data Access for Users dialog showing the "A value is required" error for a missing Security Context Value, with the dropdown open for Varun Business Unit

To resolve the error, click the dropdown under **Security Context Value** for the Procurement role. Select **Varun Business Unit**. Repeat this for any other roles that require a business unit context.



Security Context Value dropdown open with Varun Business Unit shown as an option

Step 27. Add more roles and save

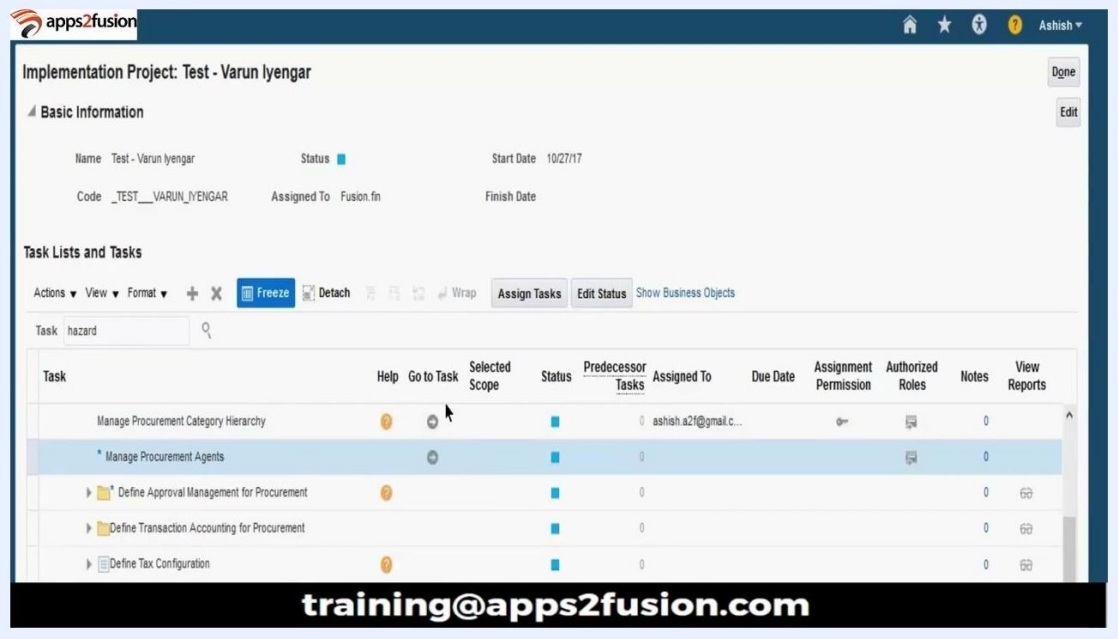
1. If needed, add more roles by selecting from the **Role** dropdown. Available roles include Buyer, Category Manager, Employee, Procurement Application Administrator, Procurement Catalog Administrator, Procurement Manager, Procurement Preparer, and Procurement Requester.
2. For each role, set **Security Context** to "Business unit" and **Security Context Value** to "Varun Business Unit".
3. Make sure every row is complete.
4. Click **Save and Close**.

Part 5: Create the procurement agent

Step 28. Go to the Manage Procurement Agents task

1. Return to the main implementation project screen. It shows the project name ("Test - Varun Iyengar"), status, start date, assigned user, and a list of tasks.

2. Use the search bar to filter tasks if needed (for example, by typing "hazard"), or scroll through the task list.
3. Find the **Manage Procurement Agents** row.

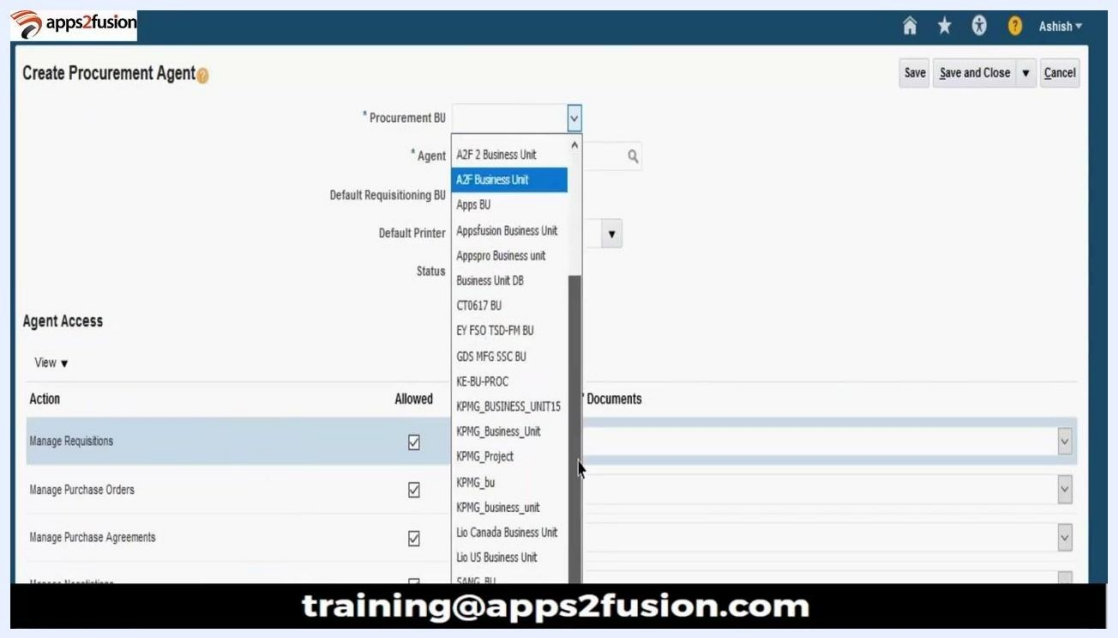


Implementation Project screen with the Manage Procurement Agents task highlighted in the task list

Nearby tasks include **Manage Procurement Category Hierarchy** and **Define Approval Management for Procurement**. Confirm you have the correct task, then click the **Go to Task** icon (a circle with an arrow) next to **Manage Procurement Agents**.

Step 29. Select the procurement business unit

On the **Create Procurement Agent** screen, click the dropdown next to **Procurement BU**. Choose the relevant business unit (for example, "A2F Business Unit" or "Varun Business Unit").



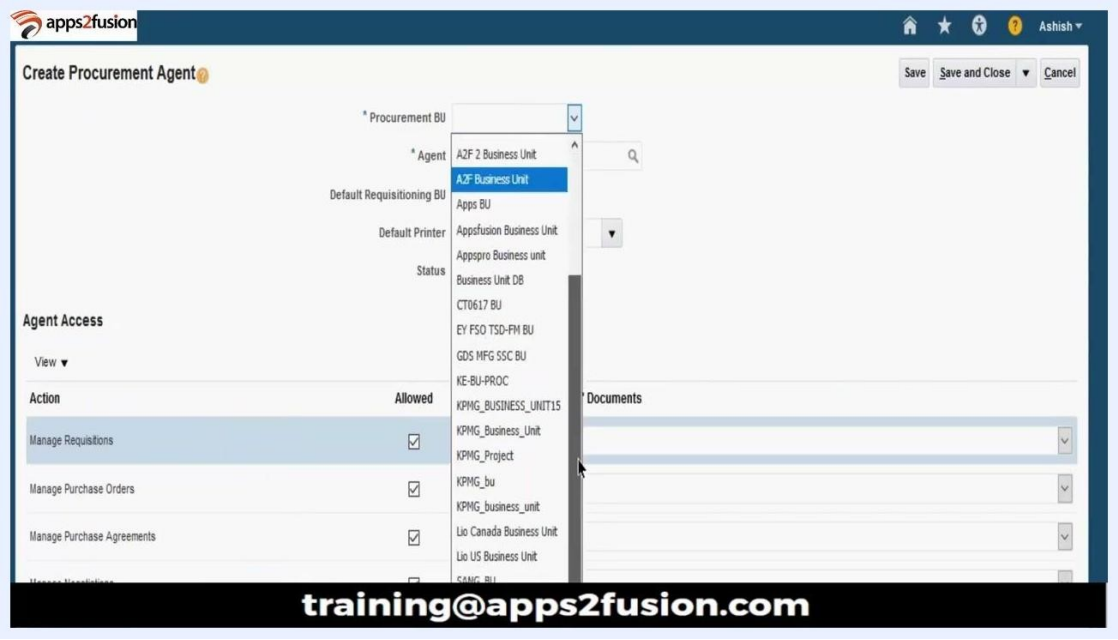
Procurement BU dropdown showing multiple business unit options

Step 30. Select the employee you created

In the **Agent** field, enter or search for the employee's name (for example, "Varun, Employee"). Use the search icon if you need help locating the user.

Step 31. Set the default requisitioning BU

Click the dropdown next to **Default Requisitioning BU** and select the appropriate business unit (for example, "Varun Business Unit").



Default Requisitioning BU dropdown with Varun Business Unit selected and the Agent field filled in

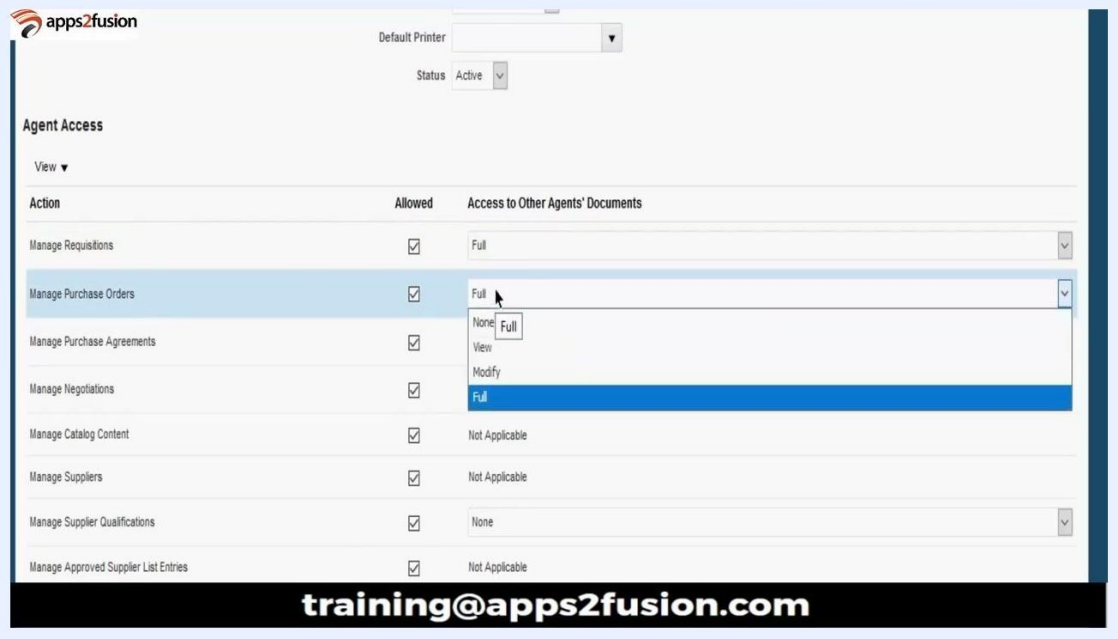
Step 32. Set the status

Make sure the **Status** field is set to **Active**.

Step 33. Configure agent access

1. Under **Agent Access**, review the list of actions and permissions.
2. For each action (such as Manage Requisitions, Manage Purchase Orders, and Manage Purchase Agreements), select the **Allowed** check box if the agent should have access.

3. For each action, set **Access to Other Agents' Documents** as needed. For example, set Manage Requisitions and Manage Purchase Orders to "Full".

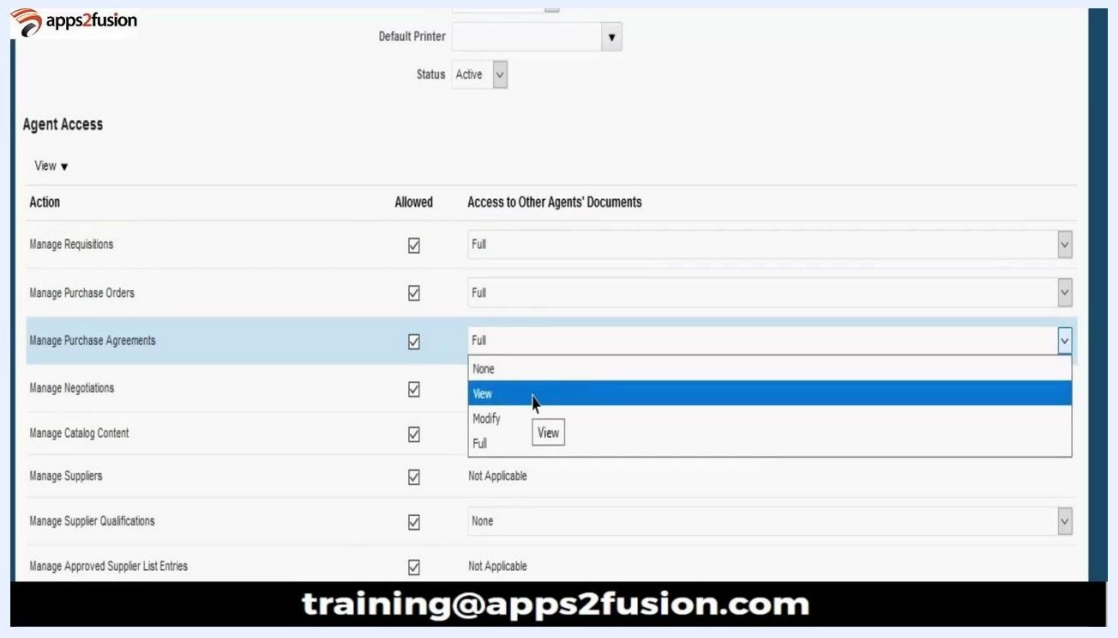


Agent Access section showing actions, Allowed check boxes, and access dropdowns

The access levels work as follows:

- **None:** The agent cannot access other agents' documents.
- **View:** The agent can only view other agents' documents.
- **Modify:** The agent can edit other agents' documents.
- **Full:** The agent can perform all actions, including approval and other management tasks.

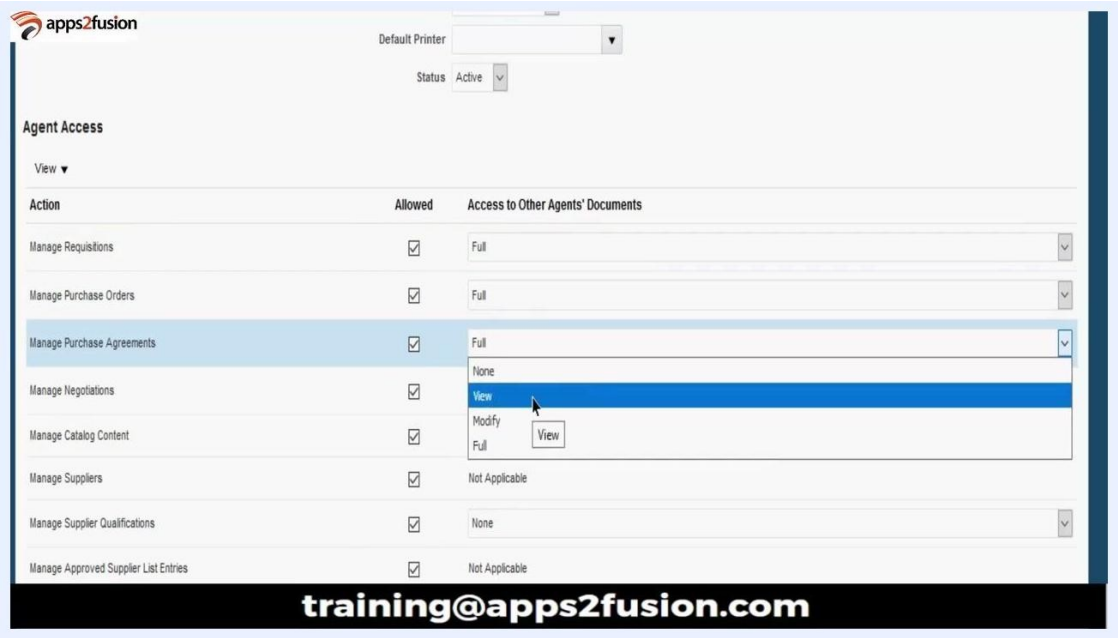
The dropdown also offers **Not Applicable**.



Access to Other Agents' Documents dropdown showing the options None, View, Modify, and Full

Step 34. Check the permissions

Confirm that all required permissions and access levels match your organization's policy.



Final Agent Access configuration with Full access set for key actions

Step 35. Save the procurement agent

Click **Save** or **Save and Close** to finalize the procurement agent setup.

Summary

You now know how to create a procurement agent in Oracle Fusion. You created an employee record, which generated the user account, then reset the password and assigned employee, procurement, and supplier roles in the Security Console. You granted business unit data access and configured the agent's business unit assignments and document access levels. Repeat the procurement agent setup for each business unit where the agent needs access.