

PeopleSoft Version 8.4
Role Descriptions

Workflow Related (Central Purchasing)

Module	Role	Description
Purchasing	PO_Student	A central role associated with a buying authority of \$0, but coupled with other security settings having the ability to create procurement transactions as "Pending Approval". Page access will be granted with the Central_Buyer role.
	PO_Buyer	A central role associated with a buying authority of up to \$25K.
	PO_Manager	A central role associated with a buying authority of up to \$100K. Page access will be granted with the Central_Buyer role.
	PO_Purchasing Assistant Director	A central role associated with a buying authority of up to \$250K. Mainly a workflow role with the ability to add categories.
	PO_Purchasing Director	A central role associated with a buying authority of \$250K and up. Mainly a workflow role with the ability to add categories.
	Special Category Approver	A limited number of categories (i.e. RAD, POLIE, OFFIC, etc.) presently require Central Purchasing approval in addition to departmental approval, regardless of dollar amount. These categories may require additional processing, be sensitive in nature, or may be linked to university contracts. The buyer marked for workflow will receive these transactions in their worklist.

Overview: Requisitions after being approved by a department are selected by Central Buyers based upon their commodity or category and generated into purchase orders. Requests for purchases that exceed certain dollar thresholds for goods and services may require bids from multiple vendors before being dispatched as purchase orders.

GL Workflow Related (Central Unit)

Module	Role	Description
GL/BUD	Bricker	Allows central budget users final review and approval of transfers.
	RPIA	Allows central budget users final review and approval of GFSA and Earnings Prep.

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Purchasing Functional Roles (Central Unit)

Role	Description
Vendor Maintenance	This role used to add and update information in the vendor file.
Central_Buyer	A copy of the PO_Student role plus additional page access.
PO_Minority Maintenance	This role will have limited access to simply configure the minority reporting component.
PO_Contract Facilitator	Users with this role can enter contract information into the system.
PO_Contract Facilitator C	This role has limited correction access with regard to contract information.
PO_Dev	This role is primarily designed for read only access in Production, however it will contain the ability to run processes and some update capacity.
PO_OSUMC Purchasing	Placeholder for Health System purchasing staff.
PO_Central PCARD	This central role provides access to assign specific credit card account numbers to authorized designated departmental users.
PO_Expeditor	This central role provides access to purchase orders and vouchers. It's unique since it crosses modules.
PO_Contract_Read	View Only Contracts
PO_Administrator	Maintains Category Maintenance
PO_Central_Pcard	Central P-Card Maintains
PO_Contract_Facilitator	Enter and Maintains Contracts
PO_Contract_Facilitator_C	Enter and Maintains Contracts with correction access
PO_EPRO_MAINT	UNSPFC code-Global mapping how to numerically translate Category codes to universally numbering system
PO_EPRO_VENDOR_MAINT	Enter and maintain ePro vendors that map to Ketera
PO_EPRO_MAINT_VW	View Only ePro vendors
PO_Minority_Maintenance	Ability to configure Minority Reporting Ability to set exclusion
PO_PCard_Approver_Maint	Allows a user to sent the 2nd level approvers
PO_Requisitioner_MP	Allows access to Market Place
MP_User_GENERIC	Allows access to Market Place Catalogs
PTS_LOAD	Allows scanners to load information into PeopleSoft

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Expediter_Manager	"Allows a user to do match exceptions and over rides"
Expediter	Allows a user to do match exceptions for purchase orders and vouchers. It's unique because it crosses modules.
ERPT_QA	E-Report Testing
CM_SPEEDTYPE	Allows the ability to populate Chartfield
Central_Requisitioner	Allows users to go through Workflow and update code access

Inventory Functional Roles

Role	Description
INV_Administration	Super user for Inventory. This administrative role allows a user to complete monitor a variety of Inventory business processes.
INV_Adjustments	A user with this role can make adjustments to inventory prices.
INV_Demurrage	This role enables a user to enter and track demurrage (gas cylinders) transactions.
INV_Demurrage_C	This role enables the user to make corrections concerning demurrage transactions.
INV_Replenishment	This role enables a user to monitor inventory supply levels as well as to initiate replenishment orders.
INV_Warehouse_User	This role enables the performance of routine inventory operations.
INV_Price_Override	The end user with this role can adjust inventory pricing to accommodate customer discounts.
INV_Express_Issue	This role allows users to issue items from inventory to customers.
INV_Pharmacy_User	This role may be used to perform inventory item functions.
INV_Pharmacy_Manager	This role will contain some of the access of the INV_Administration and will be designed to monitor this segment of the Item File.
INV_Counts	This role will allow the preparation and execution of a system wide inventory count of items.
INV_Dev	The developer role primarily will have read only access in Production with the exception of some batch processes.
INV_Tree_Maintenance	This role will enable the user to maintain and update the item file tree.
Phys_Fac	The role will allow basic item file maintenance for Physical Facilities.

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INV_Item File Pharm	The role will allow basic item file maintenance for Pharmacy.
INV_Item File Stores	The role will allow basic item file maintenance for Stores.
INV_Price Sync	This role will have the ability to sync up inventory prices after discounts/adjustments are made.

Accounts Payable Functional Roles (Central Unit)

Role	Description
AP_Inquiry	The role allows users to inquire about vouchers, payments and general vendor information in the system
AP_Data Entry	Users with this role can entry invoices into the system as vouchers, inquire about payments and vendor information.
AP_Close	This role will be involved with the closing processes for vouchers and payments.
AP_1099 Facilitator	This role has access to maintain 1099 vendors with the system.
AP_Match Exception Manager	A user with this role will be responsible for resolving problems associated with vouchers that fail matching.
AP_Vendor Maintenance	The role will allow AP users to maintain the vendor file.
AP_Vendor Reviewer	An operator with this role will be able to view vendor information, comments, contacts etc.
AP_Dev	The developer role will primarily have read only access with the exception of running processes.
AP_Banking Administrator	A user with this role will have access to bank reconciliation pages.
AP_Payment Facilitator	A user with this role will have access to void checks.
AP_Pay Cycle Manager	A user with this role will have the ability to run pay cycles.
AP_Super User	This administrative role that will have the ability to monitor and run basic AP processes as well as perform any AP process.
AP_Recurring Vouchers	A user with this role can create contracts to facilitate standard recurring payments to a particular vendor.
AP_Refund User	This access is for Health System Refund Processors only. This role allows users to create refund vendors, enter and process Refund invoices, and access Refund reports.
AP_Reports	Users with this role will have access to all AP reports except for 1099 and Refund reports.

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Asset Management Functional Roles (Central Unit)

Role	Description
AM_Dev	This developer role will have primarily read access in production with a few exceptions.
AM_Basic	This role will allow users to enter, update, retire, etc. assets online.
AM_Advanced (need to check w/John to see if this is still accurate 7/12/10)	This role is for Health System users only. This role will incorporate the basic role and give access to additional pages, processes and online AM reports.
AM_Advanced	This role allows a user to record/take a physical inventory for University assets. Also, a user can perform a mass change (update a range of assets at one time)
AM_Supervisor	This role will incorporate the basic role and give access to additional pages for Physical Inventory and online AM reports.
AM_Student	This role will give limited Asset Basic and inquiry access.
AM_HS Config	This role will allow a Health System user limited access to the AM configuration pages.
AM_Expert	A role that allows the user to review interface asset information going to other modules. Also, the user can run a variety of processes (Transfers, Retirements etc.). The role provides review of receipt information to determine if a receipt were entered for a capitalized asset.

General Ledger/Budgets Functional Roles (Central Unit)

Role	Description
GL_Controller	This role is essentially the super user for GL. This role incorporates most of the page access for General ledger.
GL_Senior_Accountant	A limited amount of central users will have this role. By virtue of having this role a user can perform accounting without having to workflow, perform year-end adjustments, have access to query and nVision reporting, and run allocations.
GL_Accountant	By virtue of having this role, a user can perform accounting without having to workflow, have access to query and nVision reporting.
GL_Dev	This role allows primarily read access to Production with the exception of Tree Updates and running

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	specific processes.
GL_OSURF	This role is similar to the Controller's role. A user with this role can update project chartfields, run central reports, correct suspense entries, close ledgers, mark journals for posting or unposting etc.
GL_Deposit_Summary	This role will allow users to create the deposit summary report.
GL_Open_Item_Accounting	This role will allow users to use the open item accounting process.
BUD_Central	This role is essentially the super user for Budgets. This role incorporates most of the page access for Budgets.

Global Functional Role (Department – Central Users)

Role	Description
FIN_Inquiry	This role potentially could be given to all financial users. Essentially it is a roll up of inquiry permissions from several different modules (?)

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Workflow Related (Department)

Module	Role	Description
Purchasing	PO Approver 0K	This role allows users to create purchase orders; must be a delegated buyer.
	PO Approver 1K	This role allows users to approve purchase orders up to \$1,000. May receive purchase orders over \$1,000, depending on the organization setup.
	PO Approver 5K	This role allows users to approve purchase orders up to \$5,000.
	Req Approver 0K	A role coupled with page access and departmental security provides a user with the ability to enter requisitions and save them as "Pending Approval".
	Req Approver 5K	This role when flagged for workflow allows a user to approve transactions not to exceed 5K.
	Req Approver 25K	This role when flagged for workflow allows a user to approve transactions not to exceed 25K.
	Req Approver All	This role when flagged for workflow allows a user to approve transactions above 25K.
	Dept Gatekeeper	Final departmental authority for requisitions. May be used in conjunction with other roles to allow certain users the ability to approve requisitions up to a given dollar amount. For example, a user with 0K, 5K & Gatekeeper can save requisitions up to 5K as approved.
	OSURF Approver 1	A user with this role will be able to bypass Research Foundation approval when generating a requisition that references a project starting with 7xxxx.

Workflow Related (Department)

Module	Role	Description
Accounts Payable	Voucher Approver 5K	Any voucher that exceeds 5K must route to the worklist of a user with this role for approval.
	Voucher Amount Deny	Allows a departmental user to deny a voucher based on certain parameters.

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GL Workflow Related (Department)

Module	Role	Description
GL	Journal Initiator	This role in conjunction with security settings is required to create a journal entry. This role when flagged for workflow tells the system where to route transactions involving multiple organizations.
	Journal Approval 1	Allows a user to review and approve another user's work, but requires an additional level for posting purposes.
	Journal Approver 2	Final departmental approver for Journals.
	OSURF,GL,Approver 1	The central user assigned this role would receive workflow when OSURF projects are used in journals.

BUD Workflow Related (Department)

Module	Role	Description
BUD	Transfer Initiator	This role in conjunction with other security settings allows a user to transfer funds. This role when flagged for workflow tells the system where to route transactions involving multiple organizations.
	Transfer Approver 1	Allows a user to review and approve an initiator's work.
	Transfer Approver 2	Final departmental approver for transfers.
	EF_DEPT	This role enables a user to prepare an Earnings Fund budget
	EF_FO	A user with this role can freeze a budget after it has been created
	GF_DEPT	The role allows the generation of a General Funds budget
	GF_FO	This role provides a user the ability to lock or "freeze" a General Funds budget

Departmental Functional Roles

Module	Role	Description
BUD	BUD_Plan	Allows users to access Plan Budget pages.
	BUD_Earnings Maintenance	Allows users to access Earnings Maintenance pages.

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	BUD_Transfers	Allows users to access Budget/Fund Transfer pages.
	BUD_Earnings Prep	Allows users to access Earnings Prep pages.
	BUD_General Funds Prep	Allows users to access General Fund Prep pages.

Purchasing Functional Roles (Department)

Role	Description
PO_Receiver	This role allows a user to enter a receipt, generate a report, and to notate delivery information. It is university policy that all capitalized assets exceeding a certain dollar threshold must be entered into the system when received.
PO_Requisitioner	A user with this role can enter requisitions (request for purchase) for an assigned department into the system.
PO_Delegated Buyer	System access predicated upon completion of training and Central Purchasing approval to enter purchase orders not to exceed 5K in value.
PO_Req_PO Approver	Page access for amount approval for requisitions and purchase orders, generally used in conjunction with associated workflow roles.
PO_Department PCARD	This role allows designated users to reconcile assigned procurement card transactions.
PO_Home_Page	This role provides inquiry access for Procurement.

Accounts Payable Functional Role (Department)

Role	Description
AP_Invoice Approver	This role provides page access (voucher approval) to manually approve a voucher.

Asset Management Functional Role (Department)

Role	Description
AM_Equipment Coordinator	The operator with this role will be able to add non-capitalized assets, update departmental asset information (custodian, location, etc.), enter receipts, and have limited access to AM reports.

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General Ledger Functional Roles (Department)

Role	Description
GL_Journal	A user with this role can enter journals, run basic processes and inquire on journals.
GL_Deposit	This role allows a user to enter a deposit and generate the associated deposit slip.
GL_Inquiry	This role provides inquiry access for GL and Procurement.
GL_Report Expert	This role will allow users to schedule user requested reports.

Global Functional Role (Department – Central Users)

Role	Description
BRIO_Only	BRIO reporting access only.

Inventory Roles (Department-Central Users)

Role	Description
INV_Adjustments- RED FLAG for Aduitors	This role gives access to do adjustments on the Adjustments page
INV_Administration- RED FLAG for Auditors	This role rives superuser access (so to speak) and allows you to set up families, groups, and categories as well as view accounting line errors.
INV_Counts	This role gives access to do the Physical Inventories-set up, count sheets, etc
INV_Demurrage	This role gives access to perform all Demurrage tasks- tagging, etc
INV_Express Issue	This role gives access to enter Express Issues.
INV_Item_File_Stores- RED FLAG for auditors	This role gives access to the Item File for Stores
INV_MSR_Delivery	This role gives access to do MSR deliveries like the Receiving Delivery page
INV_Price_Override- RED FLAG for auditors	This role gives access to do price overrides
INV_Price_Ovr_View_Only	This role gives access to view price override information
INV_UNSPSC_INBOUND	This role gives access to page for maintaining inbound UNSPSC codes
INV_Warehouse_User	This roles gives access to pick, pack, and ship MSRs