

## Roles and Required Training in eUMB Financials

\* All eUMB Financials courses require attendance at Introduction to eUMB Financials including Chart of Accounts Orientation prior to attending any other course.

| <i>eUMB Role – Financials:</i>   | <i>REQUIRED Training for eUMB Financials Access*:</i>   |
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| <b>Dept Journal Entry Initiator</b> <ul style="list-style-type: none"> <li>Enters Journal Entries that move amounts from one UMB account to another.</li> </ul>  | Introduction to eUMB Financials including Chart of Accounts<br>Working with Journal Entries   |
| <b>Pro Card Viewer</b> <ul style="list-style-type: none"> <li>Pro Card Holders are NOT REQUIRED to be Pro Card Viewers but they do remain responsible for card transactions in the system.</li> </ul>  | Introduction to eUMB Financials including Chart of Accounts<br>PROCUREMENT: Intro to Corporate Purchasing Card Program (includes ProCard reallocation in eUMB Financials) |
| <b>Pro Card Reallocator</b> <ul style="list-style-type: none"> <li>Automatically receives Pro Card Viewer role.</li> <li>Reallocates procurement card expenses from the default project to the project that should bear the expense.</li> </ul>  | Introduction to eUMB Financials including Chart of Accounts<br>PROCUREMENT: Intro to Corporate Purchasing Card Program (includes ProCard reallocation in eUMB Financials) |
| <b>Receiver</b> <ul style="list-style-type: none"> <li>Acknowledges in eUMB Financials the receipt of goods delivered or services rendered. Indicates payment should be made.</li> </ul>   | Introduction to eUMB Financials including Chart of Accounts<br>Receiving Goods and Services   |
| <b>Requester</b> <ul style="list-style-type: none"> <li>Role is used to identify a specific individual's Ship To address on a purchase requisition. Also places individual's name on Attention: line.</li> </ul>   | <i>No training required. The individual has no access to eUMB Financials.</i>   |
| <b>Requisitioner</b> <ul style="list-style-type: none"> <li>Can also hold Dept Requisition Approver role, but cannot act as BOTH Requisitioner and Approver on the same requisition.</li> <li>Can hold Dept Requisition Approver role also, but cannot act as BOTH Requisitioner and Approver on the same requisition</li> </ul> | Introduction to eUMB Financials including Chart of Accounts<br>Working With Requisitions  |
| <b>Dept Requisition Approver</b> <ul style="list-style-type: none"> <li>Can also hold Requisitioner role, but cannot act as BOTH Requisitioner and Approver on the same requisition.</li> <li>Can hold Requisitioner role also, but cannot act as BOTH Requisitioner and Approver on the same requisition</li> </ul>             | Introduction to eUMB Financials including Chart of Accounts<br>Working With Requisitions  |
| <b>Dept Grant Viewer</b> <ul style="list-style-type: none"> <li>This role provides access to UMB Grant Project View as well AR Aging, AR Item Activity and UMB Restricted Funds Payments reports.</li> </ul>   | Introduction to eUMB Financials including Chart of Accounts   |

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| <i>eUMB Role – RAVEN Financials Inquiry pages:</i>   | <i>RECOMMENDED Training for RAVEN Financials Inquiry Access:</i>                               |
|--|--|
| <b>RAVEN User with access to (some or all):</b><br>All Activities Page (summarized financial transactions)<br>Transaction Details Page (detail at transaction level)<br>Grants Pages: Summary, Standard, Deliverable<br>Plant Fund Page                      SPC Inquiry Page                      Pro Card Inquiry Page | Introduction to eUMB Financials including Chart of Accounts<br>RAVEN for eUMB Financials Users |
| <b>RAVEN User with access only to SPC Inquiry</b> (Statement of Payroll Charges)   | Introduction to eUMB Financials including Chart of Accounts<br>RAVEN for eUMB Financials Users |
| <b>RAVEN User with access only to PCard Inquiry</b> (Procurement Card transactions only)   | Introduction to eUMB Financials including Chart of Accounts<br>RAVEN for eUMB Financials Users |