

## Roles and Required Training in eUMB Financials

*\* All eUMB Financials and RAVEN Financials Inquiry courses require participation in Introduction to eUMB Financials including Chart of Accounts prior to attending any other course.*

<b>eUMB Roles in Financials:</b>	<b>Required Training for eUMB Financials Access*:</b>
<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 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 remain responsible for card transactions in the system.</li> </ul>	Introduction to eUMB Financials including Chart of Accounts 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 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 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> </ul>	Introduction to eUMB Financials including Chart of Accounts 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> </ul>	Introduction to eUMB Financials including Chart of Accounts Working With Requisitions
<b>Dept Grant Viewer</b> <ul style="list-style-type: none"> <li>Provides access to Grant Project View page, AR Aging Report and RF Payments Report - all useful to those who manage sponsored projects.</li> </ul>	Introduction to eUMB Financials including Chart of Accounts

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<b>eUMB Roles in RAVEN:</b>	<b>Recommended Training for Access to RAVEN Financials Inquiry:</b>
<b>RAVEN Financials Inquiry Role:</b> Access to All Activities page (summarized financial transactions), Grants pages: Summary, Standard, Deliverable; Transaction Details page; Plant Fund page	Introduction to eUMB Financials including Chart of Accounts RAVEN for eUMB Financials Users
<b>SPC Inquiry Role (Statement of Payroll Charges):</b> Access to SPC Inquiry page	Introduction to eUMB Financials including Chart of Accounts RAVEN for eUMB Financials Users
<b>PCard Inquiry Role</b> (Procurement Card transactions only): Access to PCard Inquiry page	Introduction to eUMB Financials including Chart of Accounts RAVEN for eUMB Financials Users