

Select the Roles You Need	Role Definition	This Role Replaces eUMB's...	Choose this Security Context Value	Required Training
Procurement				
Procurement Preparer PLUS: -- Dept. Supplier Requester -- Accts. Payable Inquiry	Choose either Procurement Preparer OR Procurement Requester, not both. Initiate all types of requisitions and receive goods/services ordered by the Preparer or on behalf of others. This role requires: Department Supplier Requester and Accounts Payable Inquiry Role . Includes access to receive goods/services.	Requisitioner Receiver	PO (Purchase Req) UMB (Temporary Req)	Creating & Approving Requisitions/Receiving Orders
Procurement Requester PLUS: -- Dept. Supplier Requester -- Accts. Payable Inquiry	Choose either Procurement Preparer OR Procurement Requester, not both. Initiate requisitions and receive goods/services ordered by the Requester. This role requires: Department Supplier Requester and Accounts Payable Inquiry Role . Includes access to receive goods/services.	Requisitioner Receiver	PO (Purchase Req) UMB (Temporary Req)	Creating & Approving Requisitions/Receiving Orders
Procurement Receiver	Choose this role if you <u>do not</u> hold the Procurement Preparer or Procurement Requester role. You will be able to receive on ANY PO created by ANY Procurement Preparer or Requester.	Receiver	PO	Self-Paced - Receiving
Requisition Approver	Approve requisitions which cite any accounting string in departments the user has specified on form. Approvers will enter the Department IDs or range of Department IDs of all departments for which they will approve.	Department Requisition Approver	PO	Creating & Approving Requisitions/Receiving Orders
Department Supplier Requester	This role is required by: - Procurement Preparer/Requester for supplier & address lookup only - NONPO (Department) Invoice Initiator includes lookup and request for supplier registration	NEW	UMB	Included in training for related roles
PCard Reallocator	Access to view, reallocate & submit for approval moving cardholder transactions from default to appropriate accounting string.	PCard Reallocator	UMB	Reallocating Procurement Card Transactions
PCard Approver SELECT THIS ROLE: -- PCard Reallocator	Review and approve PCard reallocations. Role will be assigned automatically to current Authorized Reviewer. This role also requires PCard Reallocator role for full functionality.	Authorized Reviewer/ NEW	Contact SSAS to add, change or remove this role.	Reallocating Procurement Card Transactions
Debit Memos (Journal Entries)				
Debit Memo Initiator PLUS: -- Accts. Payable Inquiry	Create accounting transfer transactions on Debit Memo page & submit for approval. This role also requires Accounts Payable Inquiry role for full functionality.	Journal Entry Initiator	UMB (Debit Memos)	Using Debit Memos for Accounting Transfers
Accounts Payable Department Approver PLUS: -- Accts. Payable Inquiry	Approve Debit Memos and NONPO Invoices submitted by initiators in the departments for which Approver has requested this role. Approver will also see PO/requisition approvals & notifications. This role also requires Accounts Payable Inquiry role for full functionality.	NEW	NONPO (NONPO Invoices) UMB (Debit Memos)	Using Debit Memos for Accounting Transfers Using NONPO Invoices for Check Requests

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Debit Memos (Journal Entries) Cont'd.				
Accounts Payable Inquiry	View data related to NONPO Invoices, Debit Memos, Purchase Order invoices/vouchers. This role is required by the following roles for full functionality: - Debit Memo Initiator - NONPO Dept. Invoice Initiator - Procurement Preparer/Requester	NEW	NONPO (NONPO Invoices, Procurement Requester or Preparer roles) UMB (Debit Memos)	Included in training for related roles
NONPO Invoices (Check Requests)				
NONPO Invoice Initiator PLUS: -- Dept. Supplier Requester -- Accts. Payable Inquiry	Create transactions which result in check requests. (NONPO Invoices replace eUMB's PUR02, Working Fund and E-Z Pay check requests.) This role also requires Accounts Payable Inquiry and Department Supplier Requester roles for full functionality.	Requisitioner - PUR02 Working Fund, E-Z Pay forms	NONPO UMB	Using NONPO Invoices for Check Requests
Customer Billing				
Customer Billing Specialist PLUS: -- Accts. Receivable Inquiry	Create, save, print & mail non-sponsored customer bills. This role also requires Accounts Receivable Inquiry role for full functionality.	NEW - replaces CBS request form	NONSPON (CBS)	Creating & Managing Customer Billing
Accounts Receivable Inquiry	View Customer Billing data. Required by Customer Billing Specialist and Grants Viewer/Volume-Based Invoice Initiator roles for full functionality.	NEW	NONSPON (CBS) SPON (Grants Viewer)	Included in training for related roles
Customer Billing Collections Agent	The Collections Agent works only on non-sponsored Customer Billing issues. This role works in concert with the central office Collections Manager role. Collections Agents have access to: • view Customer Billing account balances online • create disputes (which stops dunning actions until issue is researched) • add collection-related notes to the customer record • enter adjustment requests (which are reviewed/approved/denied by the central office Collections Manager role)	NEW	NONSPON (CBS)	Creating & Managing Customer Billing
Fixed Assets				
Fixed Asset Inquiry	View fixed assets for any department and run Asset Inventory Report.	NEW	GAAP (Fixed Assets)	Self-Paced - Viewing Your Area's Fixed Assets
Grants				
Grants Viewer	View Grants-related information in Quantum Financials including Awards/Contracts and invoice details.	NEW	NONPO PO SPON UMB	Included in training for related role
Grants Viewer/Grants Volume-Based Invoice Initiator PLUS: -- Accts. Receivable Inquiry	Initiate billing requests for Volume-Based awards using Oracle Social Network events. This role also requires the Accounts Receivable Inquiry role for full functionality.	NEW -- replaces DIRRF from department to SPAC	NONPO PO SPON UMB	Viewing Grants & Using Oracle Social Network to Initiate Volume-Based Billing Events

Select the Roles You Need	Role Definition	This Role Replaces eUMB's...	Choose this Security Context Value	Required Training
Quantum Analytics				
Campus User	Data access is comparable to the RAVEN Financials Inquiry, COEUS Inquiry, and PCard Inquiry roles.	RAVEN Financials Inquiry RAVEN COEUS Inquiry RAVEN PCard Inquiry	No choice required	Using Quantum Analytics
Payroll Analyst	Payroll Analyst provides access to the Sponsored Management/Employee Detail and Download/HRMS Payroll.	SPC Inquiry	No choice required	Using Quantum Analytics