User Roles for the USC Kuali Financial System

The processes and applications in the USC Kuali Financial System (KFS) and Kuali Enterprise Workflow (KEW) are governed by rules that pertain to the roles and access rights assigned to system users. In addition to being assigned roles individually, users may be added to "workgroups" defined within the system that have specific access rights, which are automatically granted to group members.

This document provides definitions and explanations for the most common roles and workgroups that control the access rights of individual users. This information can be used to aid you in requesting access to specific Kuali functions. To request access privileges, users should submit a KEW **User Access Request Document** eDoc, which can be initiated from the *Workflow Main Menu* page in Kuali.

General Information

Special Terms Used in This Document

"Departmental" and "Administrative." This document lists roles and workgroups in two categories: *Departmental* roles and work-groups are intended for those school or department users who will initiate or approve eDocs. *Administrative* roles and workgroups are for users in central processing departments (e.g., Comptroller or Payroll) responsible for final approvals and processing of requests.

"Default" versus "Derived" role types. In the context of Kuali user roles, the term *default* refers to access rights automatically granted to any individual who is assigned a particular user role or member-ship in a given workgroup. The term *derived* refers to access rights that a user inherits because of a determining factor, such as being assigned a different kind of role that is defined in various system maintenance tables. A user who has been assigned a derived role based on one of these tables will have access rights that are derived from a "role qualifier" specified in the table. This document is in-tended to help identify what permissions are derived for certain roles and where current access can be verified in the Kuali system.

What is a "Namespace"? The term *namespace* is an organizational concept used in computer data systems. It's like a labeled container that is used to group items together in a way that (1) identifies the context for those items, and (2) makes it possible to distinguish between separate items that might have identical or similar names, but different contents and purposes.

For example, all files on your computer reside in directories called folders, and each of those folders is a namespace. You cannot place two files named "readme" in the same folder, but you can have multiple files with that name on your computer if each of the iden-tically named files is in a separate folder, like the various folders for each program or "app" you have installed.

In the Kuali system, namespaces are used to associate items with a particular function or module. Although the roles for most modules share the same namespace, some modules use roles from a variety of namespaces. Namespaces are also used to maintain hierarchical groupings of related items: eDocs, workflow categories (Financial Processing, Course Scheduling, etc.), user roles, workgroups, etc.

Looking Up A User's Current Roles and Access Rights

You can view a lot of the roles and individual account access rights currently assigned to a user in the Kuali system by viewing his/her Person record, a Kuali Identity Management (KIM) profile. The KIM profile will list all default roles assigned to that user, but only some derived roles will appear there. This document is intended to clarify where in the Kuali system you can find a role, users who have that role, and any access rights associated with the role itself.

You can view a user's KIM profile by clicking his/her name when it is displayed as a hyperlink in Kuali (e.g., in the Route Log of an eDoc), or by using the *Person Lookup* form, which is available by clicking *System > Identity > Person* on the *Administration* menu in the Kuali window. Click the **show** button on the *Membership* tab in the user's Person record, and you will be able to see his/her role and work-group assignments, along with the accounts or organization codes used to "qualify" that role with further restrictions for security.

Look up roles and workgroups. To view roles, click *System > Identity > Role* on the *Administration* menu to access the *Role Lookup* form. Type the Role number in the *Role* field, click the ⟨ search ⟩ button, then click the Role Name in the search results. When details for that role are displayed, look for the *Assignees* tab to see the users who have been assigned that role. Likewise, to see users assigned to a workgroup, access the *Group Lookup* form, which is available by clicking *System > Identity > Group* on the *Administration* menu.

Account Level and Organization Code Access

Role Name	Description	Role Type
ETL Default Definition Role #15501 Namespace: KFS-SEC	This is the most basic Kuali user role, which enables a user to access account-specific data in the system. Access privileges for this role are determined by the full 10-digit account numbers (or 4- or 6-digit "masks") specified in the access request submitted for the user. Account-level access is used in conjunction with other roles in order to grant the user access to certain modules or processes within KFS.	**Default** ● Assigned to the user individually. ● Listed under Roles on *Membership* tab in the user's KIM profile.
KFS Org Code Access Role #265505 Namespace: KFS-SEC	This role authorizes a user to access system data for accounts that belong to specific organization codes. Access privileges for this role are determined by the full 10-digit organization codes (or 3-, 5-, or 7-digit "masks") specified in the access request submitted for the user. Organization code-level access is used in conjunction with other roles in order to grant the user access to certain modules or processes within KFS.	**Default** ● Assigned to the user individually. ● Listed under Roles on *Membership* tab in the user's KIM profile.
General Ledger Viewer Role #131186 Namespace: KFS-GL	This role authorizes a user to run the General Ledger inquiries available on the KFS Financial Main Menu, as well as Cognos reports available on the Business Intelligence Portal for KFS. The user must have this role or the **BI User** role (described next in this section) in order to access the portal by clicking the *Business Intelligence* button near the top of the Kuali window. When a user runs General Ledger inquiries, they will only contain data for those accounts to which he/she has been granted account-level or organization code-level access. If the user has been granted account-specific access for the Capital Assets Management System (CAMS), then he/she will be able to view information for those same accounts in inquiries and Cognos reports.	**Default** ● Assigned to the user individually. ● Listed under Roles on *Membership* tab in the user's KIM profile.

Role Name	Description	Role Type
Account Level and Organization Code Access *(continued)*		
BI User Role #131183 Namespace: KFS-BI	This role enables the user to access the Business Intelligence Portal for KFS by clicking the *Business Intelligence* button near the top of the Kuali window. This role also provides additional permissions needed by users who have been granted access to run ad hoc or restricted Cognos reports on that portal. When a user runs Cognos reports, they will only contain data for those accounts to which he/she has been granted account-level or organization code-level access. If the user has been granted account-specific access for the Capital Assets Management System (CAMS), then he/she will be able to view information for those same accounts in inquiries and Cognos reports.	**Default** ● Assigned to the user individually. ● Listed under Roles on *Membership* tab in the user's KIM profile.

BI Budget Planning and Projections

Role Name	Description	Role Type
Income & Expense Projection Department User Role #131852 Namespace: KFS-BI	This role will allow the applicant to access the Income and Expense (I&E) Department projection model.	**Default** ● Assigned to the user individually. ● Listed under Roles on *Membership* tab in the user's KIM profile.
Gifts and Endowments Projection User Role #131858 Namespace: KFS-BI	This role will allow the applicant to access the Gifts and Endowments (G&E) projection model.	**Default** ● Assigned to the user individually. ● Listed under Roles on *Membership* tab in the user's KIM profile.

Capital Assets Management (CAMS)

Role Name	Description	Role Type
Add Account Level Access ● Access to Accounts or Account Masks Actual Role Name: **ETL Default Definition** Role #15501 Namespace: KFS-SEC ● Access to Organization Codes or Organization Code Masks Actual Role Name: **CAMS Facility Manager by Org** Role #131511 Namespace: KFS-SEC	The CAMS section of the KEW User Access Request eDoc enables you to request the addition or removal of access to CAMS data based on specific accounts and organization codes. You can enter any combination of full 10-digit account numbers, 1- to 9-digit account "masks," 10-digit organization codes, and 5-, 7-, or 9-digit organization code masks, in order to specify all accounts for which the applicant should have access. **Access to Accounts.** If you request that the applicant be given access to specific accounts or account masks, the applicant will be granted that account access via the **ETL Default Definition** role (described under *Account Level and Organization Code Access* roles; see page 3 of this guide). Note that any account level access added here will give the applicant access to full accounting data (balance inquiries, account link information, etc.) for those same accounts in other parts of KFS, depending on which other user roles he or she has been given. **Access to Organization Codes.** If you request that the applicant be given account access based on specific organization codes or organization code masks, he/she will be granted capital asset access via the **CAMS Facility Manager by Org** role. With this role, the user is able to view only CAMS asset data for all of the account numbers that belong to the organization codes you specified.	**Default** ● Assigned to the user individually. ● Listed under Roles on *Membership* tab in the user's KIM profile.

Cashiering

Role Name	Description	Role Type
Cashiering Cash Receipt/Deposit (CR Initiator Only) Role #1322 Namespace: KFS-FP	This role allows the user to initiate a Cash Receipt eDoc for the deposit of cash and checks. Users may be assigned to either the UPC or HSC Campus Code, but not to both.	**Default** • Assigned to the user individually. • Listed under Roles on *Membership* tab in the user's KIM profile.
Cashiering Credit Card Receipt/Deposit (CCR Initiator Only) Role #1326 Namespace: KFS-FP	This role allows the user to initiate a Credit Card Receipt eDoc for the deposit of credit card transaction receipts. Users may be assigned to either the UPC or HSC Campus Code, but not to both.	**Default** • Assigned to the user individually. • Listed under Roles on *Membership* tab in the user's KIM profile.
Cashiering Advance Deposit (AD Initiator Only) Role #1309 Namespace: KFS-FP	This role allows the user to initiate an Advance Deposit eDoc for deposits that go directly to the bank without processing assistance from the Cashier's office, including deposits made via ACH, wire transfer, and Lock Box. Departments that use direct pickup from armored couriers use Advance Deposit also. Users may be assigned to either the UPC or HSC Campus Code, but not to both.	**Default** • Assigned to the user individually. • Listed under Roles on *Membership* tab in the user's KIM profile.

Chart of Accounts

Role Name	Description	Role Type
Chart of Accounts – Department Accountant Role #1005 Namespace: KR-COA	This role is given to all users who are authorized to initiate a request for the creation of a new account or a change to an existing account on USC's Chart of Accounts. Each user is associated with a department code that specifies the eDoc SBO approval routing for requests initiated by that user.	**Default** • Assigned to the user individually. • Listed under Roles on *Membership* tab in the user's KIM profile.

Course Scheduling (CS)

Workgroup Name	Description	Role Type
CS Classroom Scheduling Workgroup Group #1000033 Namespace: KR-CS	This workgroup is not part of the automated routing for KEW Course Scheduling eDocs. However, when a Course Scheduling eDoc needs a classroom assigned, the Office of the Registrar will route it to this workgroup on an ad hoc basis.	**Default** ● Listed under Groups on *Membership* tab in the user's KIM profile.
CS College Academic Programs Workgroup Group #1000034 Namespace: KR-CS	This workgroup is used by the Dean for the Academic Programs office in the USC Dana and David Dornsife College of Letters, Arts and Sciences. This workgroup reviews all KEW Course Scheduling eDocs that involve a Dornsife College course before those eDocs are routed to the Office of the Registrar.	**Default** ● Listed under Groups on *Membership* tab in the user's KIM profile.
CS Registrar Scheduling Workgroup Group #1000035 Namespace: KR-CS	This workgroup is the most important approval node in the KEW Course Scheduling module. This workgroup receives and reviews all Course Scheduling eDocs through automated routing. Depending on certain characteristics of the data in the eDoc, it may be the only step of approval that the eDoc needs before going to "Final" status. This workgroup is to be assigned to the main Course Scheduling team in the Office of the Registrar. Note that this workgroup is linked to the **CS Registrar Scheduling Workgroup2** (listed below in this section), and it is important to ensure that the same users are present in both workgroups. The two workgroups were designed for technical routing reasons.	**Default** ● Listed under Groups on *Membership* tab in the user's KIM profile.
CS Curriculum Workgroup Group #1000036 Namespace: KR-CS	This workgroup is dedicated to the Curriculum team in the Office of the Registrar. When a KEW Course Scheduling eDoc meets the condition of including an addition or change to a Special Topics course, the eDoc will automatically be routed to the Curriculum Workgroup for approval. (A Special Topics course is identified when either 499 or 599 is present in the *Course* field on the eDoc.)	**Default** ● Listed under Groups on *Membership* tab in the user's KIM profile.
CS Registrar Workgroup Group #1000037 Namespace: KR-CS	This workgroup is typically filled by the Office of the Registrar or their assigned approvers. If a KEW Course Scheduling eDoc includes an addition or change to a Special Topics course (499 or 599 present in the *Course* field on the eDoc), then after being routed to the **CS Curriculum Workgroup** described above, it will next be routed to the Registrar Workgroup.	**Default** ● Listed under Groups on *Membership* tab in the user's KIM profile.

Workgroup Name	Description	Role Type
Course Scheduling Workgroups *(continued)*		
CS Registrar Scheduling Workgroup2 Group #1000038 Namespace: KR-CS	Under certain scenarios, a KEW Course Scheduling eDoc will return to this approval node after all automated routing has occurred, and this would be the final automated approval node before the eDoc goes to "Final" status. Note that this workgroup is linked to the **CS Registrar Scheduling Workgroup** (described above in this section), and the same users must be present in both workgroups. The two workgroups were designed for technical routing reasons.	**Default** ● Listed under Groups on *Membership* tab in the user's KIM profile.

Disbursement Voucher (DV) and Expense (Concur)

Role Name	Description	Role Type
DV Initiator Role #131411 Namespace: KFS-FP	This role enables a user to initiate and submit a DV eDoc. Initiators can assign any account to an accounting line without requiring specific account-level or organization code-level permissions.	**Default** ● Assigned to the user individually. ● Listed under Roles on *Membership* tab in the user's KIM profile.
DV Primary Delegate – Account Role #71029 Namespace: KFS-SEC	This role is intended for users within a department or school who have financial authority to approve or disapprove DV eDocs and Concur Expense reports in lieu of the Fiscal Officer. The Primary Delegate receives action list notifications in place of the Fiscal Officer. Routing of DV eDocs and Concur Expense reports for this role is based on account. Only one Primary Delegate can be assigned per account, whether based on the account number or the organization code.	**Default** ● Assigned to the user individually. ● Listed under Roles on *Membership* tab in the user's KIM profile.
DV Primary Delegate – Organization Code Role #71030 Namespace: KFS-SEC	This role is intended for users within a department or school who have financial authority to approve or disapprove DV eDocs and Concur Expense reports in lieu of the Fiscal Officer. The Primary Delegate receives action list notifications in place of the Fiscal Officer. Routing of DV eDocs and Concur Expense reports for this role is based on account as derived from organization code. Only one Primary Delegate can be assigned per account, whether based on the organization code or the account number.	**Default** ● Assigned to the user individually. ● Listed under Roles on *Membership* tab in the user's KIM profile.

Role Name	Description	Role Type
DV and Concur Roles *(continued)*		
DV Secondary Delegate – Account Role #71031 Namespace: KFS-SEC	This role is intended for users within a department or school who have financial authority for procurement and expenditures. The Secondary Delegate serves as a backup to the Fiscal Officer and the Primary Delegate, approving or disapproving DV eDocs on their behalf. Routing of DV eDocs for this role is based on account. Action list filters can be used to locate eDocs routed to the secondary delegate. One or more Secondary Delegates can be assigned per account. (Note: This role is not applicable to Concur Expense reports.)	**Default** ● Assigned to the user individually. ● Listed under Roles on *Membership* tab in the user's KIM profile.
DV Secondary Delegate – Organization Code Role #71032 Namespace: KFS-SEC	This role is intended for users within a department or school who have financial authority for procurement and expenditures. The Secondary Delegate serves as a backup to the Fiscal Officer and the Primary Delegate, approving or disapproving DV eDocs on their behalf. Routing of DV eDocs for this role is based on account as derived from organization code. Action list filters can be used to locate eDocs routed to the secondary delegate. One or more Secondary Delegates can be assigned per organization code. (Note: This role is not applicable to Concur Expense reports.)	**Default** ● Assigned to the user individually. ● Listed under Roles on *Membership* tab in the user's KIM profile.
Organization Reviewer DV (or Expense) – Accounting Reviewer Role #28 Namespace: KFS-SYS	This role is intended for users who manage departments or divisions and who need the ability to monitor high dollar transactions. Users with this role are able to review and approve or disapprove DV eDocs and Concur Expense reports. Routing of DV eDocs and Concur Expense reports for this role is based on organization code. The assignment of this role to a given user can be configured with a dollar threshold approval limit.	**Default** ● Assigned to the user individually. ● Listed under Roles on *Membership* tab in the user's KIM profile.

Role Name	Description	Role Type
DV and Concur Roles *(continued)*		
Special Account Approver DV – Account Role # 131249 Namespace: KFS-FP	This role is intended for users who manage departments or divisions and who need the ability to review and approve or disapprove DV transactions based on allowability and appropriateness. This role does not replace the regular Financial Approver. Routing of DV eDocs for this role is based on account as derived from the user's account-level or organization code-level permissions. (Note: This role is not applicable to Concur Expense reports.) It is recommended that only one Special Account Approver be assigned per account, whether based on the account number or organization code. This role access is shared with USC eMarket **eSpecial Account Approver** access (see page 20).	**Default** ● Assigned to the user individually. ● Listed under Roles on *Membership* tab in the user's KIM profile.
Special Account Approver DV – Organization Code Role # 131255 Namespace: KFS-FP	This role is intended for users who manage departments or divisions and who need the ability to review and approve or disapprove DV transactions based on allowability and appropriateness. This role does not replace the regular Financial Approver. Routing of DV eDocs for this role is based on account as derived from the specified organization code. It is recommended that only one Special Account Approver be assigned per account, whether based on the account number or organization code. This role access is shared with USC eMarket **eSpecial Account Approver** access. (Note: This role is not applicable to Concur Expense reports.)	**Default** ● Assigned to the user individually. ● Listed under Roles on *Membership* tab in the user's KIM profile.
Supervisor (DVQE) Role # 131510 Namespace: KFS-FP	This role is no longer in use. It pertained to the routing of KFS DVQE eDocs, which have been replaced by Concur Expense reports. Concur Expense reports will route to the employee's supervisor based on the current designation in Workday.	**Derived** ● Not listed in the user's KIM profile. ● Derived from an Employee/Supervisor table in the system, based on the USC ID of the employee.

eStatement

Role Name	Description	Role Type
Business Officer Reviewer Role #131147 Namespace: KFS-FP	Optional approver role for departments that want a Business Officer to review Procurement Card transactions after they are approved by the cardholder (or a designated proxy), a Senior Business Officer, and a supervisor.	**Derived** ● Listed under Roles on *Membership* tab in the user's KIM profile. ● Access privileges are determined by the full 10-digit organization codes (or 5- or 7-digit masks) specified in the request for assignment of this role to a given user.
EStatement Proxy Role #131146 Namespace: KFS-FP	Optional role to authorize a user to act as a proxy for a specific Procurement Card holder. The eStatements for the associated card will be routed to the proxy user so that he/she can attach receipts and enter the Business Purpose for each listed transaction on behalf of the cardholder.	**Derived** ● Not listed in the user's KIM profile. ● If assigned, the proxy role is derived from an Employee/Supervisor table in the system, based on the cardholder.
PSTMTSupervisor (eStatement Supervisor) Role #131104 Namespace: KFS-FP	This role designates the eStatement Supervisor for a specific Procurement Card holder. Used to route eStatements for mandatory Supervisor sign-off. The supervisor role is assigned automatically, based on the cardholder's supervisor designation in Workday; however, a different supervisor can be assigned this role directly by means of an access request.	**Derived** ● Not listed in the user's KIM profile. ● Derived from an Employee/Super-visor table in the system, based on the USC ID of the Procurement Card holder.

Financial Aid Account (FAA)

Role or Workgroup Name	Description	Role Type
FAA Departmental Roles		
FAA Reviewer Role #131370 Namespace: KR-FAA	Required role intended for the academic department senior fiscal officer responsible for approving Financial Aid transactions sourced from accounts that he/she oversees, which are associated with specified 10-digit organization codes. Before KEW-FAA eDocs can be submitted for any accounts associated with a given organization code, a request to assign someone as the FAA reviewer for that organization code must be submitted and processed. If no user is set up with this role to approve the organization code's account, an error message will be shown to the initiator attempting to submit the KEW-FAA eDoc.	**Derived** ● Listed under Roles on *Membership* tab in the user's KIM profile. ● Access rights are derived from the organization codes specified for this user in KIM role's list of assignees.
Optional FAA Reviewer Role #131371 Namespace: KR-FAA	Optional internal approver role for departments that want an additional approver to review financial aid transactions before they are approved by a senior fiscal officer. This provides for two levels of approval before a KEW-FAA eDoc goes to the Office of Financial Aid. Users with this role are assigned access for the 10-digit organization codes of financial aid accounts belonging to their departments.	**Derived** ● Listed under Roles on *Membership* tab in the user's KIM profile. ● Access rights are derived from the organization codes specified for this user in KIM role's list of assignees.
FAA Administrative Roles and Workgroups		
FAA View All Role #131541 Namespace: KR-FAA	This role is reserved for personnel in the Office of Financial Aid. Users assigned this role will have view-only access for any KEW-FAA eDoc, regardless of whether they were included in the document's workflow route path.	**Default** ● Assigned to the user individually. ● Listed under Roles on *Membership* tab in the user's KIM profile. ● Access rights based on accounts specified for **ETL Default Definition** role, and/or organization codes assigned to the user in addition to this role.

Role or Workgroup Name	Description	Role Type
FAA Administrative Roles and Workgroups *(continued)*		
Financial Aid Workgroup Group #1000084 Namespace: KR-FAA	This role is reserved for personnel in the Office of Financial Aid who are authorized to give final approval for Financial Aid transactions.	**Default** • User is assigned to the workgroup. • Listed as "FinancialAid" under Groups on *Membership* tab in the user's KIM profile.

General Budget Change

Role Name	Description	Role Type
GBC Departmental User Role #131241 Namespace: KFS-FP	This role enables a user to initiate a General Budget Change eDoc for BCCH and BCAM general budget changes.	**Default** • Assigned to the user individually. • Listed under Roles on *Membership* tab in the user's KIM profile.

General Purpose Workflow

Workgroup Name	Description	Role Type
SYS Access Group Group #1000048 Namespace: KR-GEN	This group is used by the Office of the Comptroller for KFS access requests. This workgroup is set up with automated routing as the final approval step for all KEW User Access Request eDocs.	**Default** ● Listed as "SysAccess" under Groups on *Membership* tab in the user's KIM profile.
Supplier Data Management Group Group #1000109 Namespace: KR-GEN	This workgroup was created at the request of the Purchasing department for their internal routing needs.	**Default** ● Listed as "SDMGroup" under Groups on *Membership* tab in the user's KIM profile.
Medical Finance Group Group #1000110 Namespace: KR-GEN	This workgroup was created at the request of the Keck School of Medicine for their internal routing needs.	**Default** ● Listed as "MedFinance" under Groups on *Membership* tab in the user's KIM profile.
Cognos Access Group Group #1000154 Namespace: KR-GEN	This workgroup was created at the request of the Business Intelligence team to provide group routing, when needed, of system access requests after they are reviewed by the SysAccess workgroup described earlier in this section.	**Default** ● Listed as "CognosAccess" under Groups on *Membership* tab in the user's KIM profile.

Internal Billing

Role Name	Description	Role Type
IBR Document Initiator Role #131517 Namespace: KFS-FP	This role enables a user to initiate and submit an Internal Billing Requisition eDoc in KFS.	**Default** ● Assigned to the user individually. ● Listed under Roles on *Membership* tab in the user's KIM profile.

Payroll Expense Transfer (PET)

Role or Workgroup Name	Description	Role Type
PET Departmental Roles		
Payroll Transfer and View Role #131576 Namespace: KFS-LD	This role enables a user to initiate a PET eDoc. Users are limited to requesting transfers from accounts to which they have access through account-level or organization code-level permissions.	**Default** ● Assigned to the user individually. ● Listed under Roles on *Membership* tab in the user's KIM profile. ● Access rights restricted to accounts specified for the user under **ETL Default Definition** role, and/or organization codes specified for the user under **KFS Org Code Access** role.
Payroll Expense Transfer Department PreApproval Role #131526 Namespace: KFS-LD	Optional approver role for departments that need two levels of departmental approval for their PET requests. Approvers are assigned approval authority for full 10-digit organization codes or for 5- or 7-digit masks.	**Derived** ● Not listed in the user's KIM profile. ● To see all users who have this and any other department-level PET approver role, view the *Payroll Expense Transfer Department Approver* maintenance table found in the *Labor Distribution* section of KFS *Financial Maintenance* menu.
Payroll Expense Transfer Department Approval Role #131527 Namespace: KFS-LD	Required role for all USC departments that submit PET eDocs. The user is granted PET approval authority for the department that owns the "From" account originally charged for the salary amount in question. A Senior Business Officer should be assigned both this role and the **Department To Line Approval** role (described next) to ensure that all PETs are approved properly. Approvers are assigned approval authority for full 10-digit organization codes or for 5- or 7-digit masks. Only one person should be assigned per organization code, but workgroups can be created and assigned this role in order to accommodate multiple approvers per organization code. All users assigned to a workgroup would then share this role for that organization code.	**Derived** ● Not listed in the user's KIM profile. ● To see all users who have this and any other department-level PET approver role, view the *Payroll Expense Transfer Department Approver* maintenance table found in the *Labor Distribution* section of KFS *Financial Maintenance* menu.

Role or Workgroup Name	Description	Role Type
PET Departmental Roles *(continued)*		
Payroll Expense Transfer Department To Line Approval Role #131539 Namespace: KFS-LD	Required role for all USC departments that submit PET eDocs. The user is granted PET approval authority for the department that owns the "To" account to which the payroll charge is being transferred. A Senior Business Officer should be assigned both this role and the **Department Approval** role (described above) to ensure that all PETs are approved properly. Approvers are assigned approval authority for full 10-digit organization codes or for 5- or 7-digit masks. Only one person should be assigned per organization code, but workgroups can be created and assigned this role in order to accommodate multiple approvers per organization code. All users assigned to a workgroup would then share this role for that organization code.	**Derived** • Not listed in the user's KIM profile. • To see all users who have this and any other department-level PET approver role, view the *Payroll Expense Transfer Department Approver* maintenance table found in the *Labor Distribution* section of KFS *Financial Maintenance* menu.
PET Administrative Workgroups		
Sponsored Projects Accounting Group #1000100 Namespace: KFS-LD	Used by the Office of Sponsored Project Accounting for approval of PET eDocs that involve sponsored accounts. If the PET trans-action involves a sponsored account, the eDoc will automatically be routed to the users in this workgroup.	**Default** • User is assigned to the workgroup. • Listed under Groups on *Membership* tab in the user's KIM profile.
Financial Aid Group #1000101 Namespace: KFS-LD	Used by the Office of Financial Aid for approval of PET eDocs that involve financial aid accounts. If the PET transaction involves a financial aid account, the eDoc will automatically be routed to the users in this workgroup.	**Default** • User is assigned to the workgroup. • Listed under Groups on *Membership* tab in the user's KIM profile.
PET Payroll Services Approval Workgroup Group #1000123 Namespace: KFS-LD	Users in this workgroup are the final approval level in the auto-mated routing of all PET eDocs. This workgroup should therefore be assigned for members of the Payroll Services Department who are responsible for reviewing every PET transaction before it goes to Final status.	**Default** • User is assigned to the workgroup. • Listed under Groups on *Membership* tab in the user's KIM profile.

Procurement Card Reallocation

Role Name	Description	Role Type
Reallocator Reviewer Role #131105 Namespace: KFS-FP	This role enables a user to review Procurement Card Realloca-tion eDocs and to change the object codes and accounts to be charged in the listed card transactions before submitting the eDoc for approval. The user can be authorized to approve reallocated transactions for all cards with default accounts that belong to a 10-digit organization code, or to a 5- or 7-digit "mask," thus enabling that user to reallocate transactions for all cards associated with any of those organization codes. The Reallocator Reviewer can edit Accounting Line entries, and as an additional option, can also add receipts, Missing Receipt Declarations (MRDs), and the stated Business Purpose for a transaction. Any eDocs approved by the Reallocator Reviewer are then routed to the **Reallocator Reviewer Approver** (described next in this section) for approval, if that optional role has been set up.	**Derived** ● Listed under Roles on *Membership* tab in the user's KIM profile. ● Access rights are derived from the organization codes specified when requesting assignment of this role to the user.
Reallocator Approver Reviewer Role #131106 Namespace: KFS-FP	This role is intended for optional approvers for accounts used in procurement card transactions. It is used in Procurement Card Reallocation eDoc routing when a school or department wants an additional level of approval for transactions already approved by the **Reallocator Reviewer** (described above). The user can be authorized to approve reallocated transactions for all cards with default accounts that belong to a 10-digit organization code, or to a 5- or 7-digit "mask," thus enabling that user to reallocate transactions for all cards associated with any of those organization codes. A user with this role is authorized to redistribute procurement card transaction amounts from the card's default account and object code to other accounts and object codes before approving the eDoc, or can return the eDoc to the Reallocator Reviewer for changes. Additionally, the Reallocator Approver Reviewer can edit Accounting Line entries, and can add receipts, Missing Receipt Declarations (MRDs), and the stated Business Purpose for a transaction.	**Derived** ● Listed under Roles on *Membership* tab in the user's KIM profile. ● Access rights are derived from the organization codes specified when requesting assignment of this role to the user.

USC University of Southern California

Purchasing - Accounts Payable (PurAP)/USC eMarket

Role Name	Description	Role Type
eShopper Role #131250 Namespace: KFS-PURAP	A user with this USC eMarket role can initiate requisitions by selecting items or services for purchase (i.e., placing them in a shopping cart), but the cart must then be assigned to a user with the **eRequisitioner** role (described next), who will edit the accounting details and submit the requisition. This role gives a user all of the necessary permissions to enter information confirming receipt of a delivery for goods or services in an order originated by that same user, so it is usually redundant to assign the **eReceiver** role (described later in this section) to a user with this role.	**Default** ● Assigned to the user individually. ● Listed under Roles on *Membership* tab in the user's KIM profile.
eRequisitioner Role #131271 Namespace: KFS-PURAP	A user with this USC eMarket role can edit accounting information for an **eShopper** and can submit requisitions with a specified amount threshold. This role also gives a user all of the necessary permissions to enter information confirming receipt of a delivery for goods or services in an order originated by that same user. Therefore, it is redundant to assign either the **eReceiver** or **eShopper** role to a user with this role. This role can be assigned with no self-approval, meaning that all requisitions are routed to the appropriate financial approver. Alternatively, the role can be assigned with self-approval permissions, optionally with "qualifiers" for specific accounts and/or organization codes, and with specified dollar thresholds. Self-approval permission allows an **eRequisitioner** to approve his/her own requisition when it meets the specified self-approval qualifiers. For example, an eRequisitioner can have self-approval by organization code for $500 that works on all accounts associated with that organization code, **and** self-approval by account for $1000 for a specific account that is associated with a different organization code.	**Default** ● Assigned to the user individually. ● Listed under Roles on *Membership* tab in the user's KIM profile. NOTE: When viewing a user's Person record, you may notice more than one "Requisitioner" role. Although the generic **eRequisitioner** role described here has a Role Type of "Default," you may also see "PURAP Requisitioner" roles that have a Role Type listed as "Constraint, Operator, & Value." These roles identify whether that user has dollar threshold amounts specified for self-approval by account or by organization code.

Role Name	Description	Role Type
PurAP Roles *(continued)*		
eReceiver Role #131251 Namespace: KFS-PURAP	USC eMarket role that allows a user to enter Receiving information to confirm receipt of a delivery for goods or services purchased on a PO. It is redundant to assign this role to a user who has either the **eShopper** or **eRequisitioner** role (described earlier in this section), both of which are authorized to perform receiving duties.	**Default** ● Assigned to the user individually. ● Listed under Roles on *Membership* tab in the user's KIM profile.

eFinancial Approver (Sequential) OR (Shared)
Role #131391
Namespace: KFS-PURAP
	USC eMarket role that allows a user to approve requisitions at the Financial Approver step/node. Users can be assigned either the shared or sequential role, but not both. All eFinancial approvers for a given school or division should follow the same approval method, shared or sequential, to make the routing work correctly.
	Approval routing is determined by the accounts (or masks) or organization codes specified for the user.
	● **eFinancial Approver** <u>Sequential</u> role is intended for assignment to a group of users who will be required to provide up to three consecutive approvals for certain dollar amounts.
	● **eFinancial Approver** <u>Shared</u> role is intended for assignment to one or more users who are each authorized to provide approval of certain dollar amounts for which only one approval level is required. Do not apply dollar thresholds that overlap one another, as this will create redundant approvals.
		Default
		● Assigned to the user individually.
		● Listed under Roles on the *Membership* tab in the user's KIM profile.
		  - Format for sequential approver role names: *PURAP First Step by Account 0 to **; *PURAP Second Step by Org 5000 to **; etc.
		  - Format for shared approver role names: *PURAP Shared Folder by Account 0 to 5000*; *PURAP Shared Folder by Org 5000 to **; etc.

eInvoice Exception Approver Role #131272 Namespace: KFS-PURAP	USC eMarket role that allows a user to approve invoices that cannot be paid due to pricing, quantity, or receipt exceptions, such as invoice quantities or dollar amounts that exceed defined thresholds. Approval routing is determined by the accounts (or masks) or organization codes specified for the user.	**Default** ● Assigned to the user individually. ● Listed as "eInvoice Approver" under Roles on *Membership* tab in the user's KIM profile.

Role Name	Description	Role Type
PurAP Roles *(continued)*		
eSpecial Account Approver Role #131270 Namespace: KFS-PURAP	Optional USC eMarket approval role intended for users who manage departments or divisions and who need the ability to review and approve or disapprove requisitions based on allowability and appropriateness. This role can be used with, but does not replace, the **eFinancial Approver** node (described earlier in this section). It is recommended that only one Special Account Approver be assigned per account, whether based on the organization code or account number. This role access is shared with **DV Special Account Approver** access (see page 10). Alternatively, this role can be assigned to a user without speci-fied account, organization code, or dollar amount threshold access to allow selection of the user as an approver on an ad hoc or substitute routing basis.	**Default** ● Assigned to the user individually. ● Listed under Roles on *Membership* tab in the user's KIM profile.

SPA Budget Reallocation

Role Name	Description	Role Type
SPA Budget Reallocation Department User Role #131773 Namespace: KFS-FP	This role is intended for department and school users who need the ability to initiate a SPA Budget Reallocation (BR) eDoc. Users with this role cannot manually enter accounting lines for Fringe Benefits and Indirect Cost Recovery (formally known as Overhead and Facilities & Administrative Cost). Instead, they must utilize the **calculate** button at the bottom of the SPA BR eDoc to automatically insert those accounting lines with values calculated by the system.	**Default** ● Assigned to the user individually. ● Listed under Roles on *Membership* tab in the user's KIM profile.
SPA Budget Reallocation Fringe ICR Manual Calculation Role #131774 Namespace: KFS-FP	This enhanced user role for initiating SPA BR eDocs is intended for those department and school users who are authorized to enter accounting lines for Fringe Benefits and Indirect Cost Recovery manually, as well as automatically.	**Default** ● Assigned to the user individually. ● Listed under Roles on *Membership* tab in the user's KIM profile.
SPA Budget Reallocation Account Expired Override Role #131780 Namespace: KFS-FP	If a user is granted this role along with one of the two SPA BR eDoc initiator roles described above, he/she can override the warning message displayed when an expired account is specified in a budget reallocation accounting line.	**Default** ● Assigned to the user individually. ● Listed under Roles on *Membership* tab in the user's KIM profile.
SPA Budget Reallocation Sufficient Fund Check Override Role #131796 Namespace: KFS-FP	If a user is granted this role along with one of the two SPA BR eDoc initiator roles described above, he/she can override the warning message displayed when the specified budget reallocation amount exceeds the funds available for the specified account and SPA object class.	**Default** ● Assigned to the user individually. ● Listed under Roles on *Membership* tab in the user's KIM profile.

Role Name	Description	Role Type
SPA Budget Reallocation Roles *(continued)*		
SPA Budget Reallocation Department Approver I Role #131777 Namespace: KFS-FP	This role is intended for school and department approvers who will be responsible for level 1 department approval of SPA BR eDocs. Each organization has the option of having one, two, or no department approval nodes. Organizations with either one or two department approval nodes can request this role for one or more individuals. Note that each approver must approve the eDoc unless this approver role is assigned to a group rather than to an individual. If the role is assigned to a group, any one of the group members will be able to provide the approval needed. If a SPA BR eDoc involves budget reallocations between accounts from multiple organizations for the same award, an *Approve* action request can be sent to the "SPA Budget Reallocation Department Approver I" users for each of those organizations, according to its specified routing preferences.	**Derived** ● Listed under Roles on *Membership* tab in the user's KIM profile. ● Assigned to each user individually, based on the routing preferences specified by the school or department for its SPA BR eDocs. ● Requires an organization code qualifier.
SPA Budget Reallocation Department Approver II Role #131778 Namespace: KFS-FP	This role is intended for school and department approvers who will be responsible for level 2 department approval of SPA BR eDocs. Each organization has the option of having one, two, or no department approval nodes. Organizations with two department approval nodes can request this role for one or more individuals. Note that each approver must approve the eDoc unless this approver role is assigned to a group rather than to an individual. If the role is assigned to a group, any one of the group members will be able to provide the approval needed. If a SPA BR eDoc involves budget reallocations between accounts from multiple organizations for the same award, an *Approve* action request can be sent to the "SPA Budget Reallocation Department Approver II" users for each of those organizations, according to its specified routing preferences.	**Derived** ● Listed under Roles on *Membership* tab in the user's KIM profile. ● Assigned to each user individually, based on the routing preferences specified by the school or department for its SPA BR eDocs. ● Requires an organization code qualifier.