

SECURITY ROLES

1

Navigation:

PeopleTools > Security > User Profile > Distributed User Profile > Add a New Value > User Roles Tab

Dynamic Role Rule	User Roles	Personalize	Find	View All	First	1-4 of 4	Last
Execute on Server	Role Name	Description	Dynamic	View Definition			
Test Rule(s)	BOR PeopleSoft User	FN Base PeopleSoft User	<input type="checkbox"/>	Route Control	View Definition	+	-
Execute Rule(s)	BOR_EX_CASH_ADV	Exp Cash Advance	<input type="checkbox"/>	Route Control	View Definition	+	-
Process Monitor	BOR_FN_ADMIN_REP	Report Mgr-Admin/Archive	<input type="checkbox"/>	Route Control	View Definition	+	-
Service Monitor	ReportSuperUser	Report Super User	<input type="checkbox"/>	Route Control	View Definition	+	-

Expense Traveler users enter, modify, view, submit and print expense transactions for themselves and their delegates. They also review expense transactions after submittal and payment.

ROLES:

- BOR PeopleSoft User
- BOR_EX_CASH_ADV (optional)
- BOR_FN_ADMIN_REPORTING
- ReportSuperUser

USER AUTHORIZATIONS

2

Self Service Navigation: (For employee to delegate their own authority)
Employee Self Service > Employee T&E Center > Profiles & Preferences > Delegate Entry Authority

*Authorized User ID	Name
EX_TRAVELER	Scott, Nicole M
JSMITH	

Core Navigation:

Travel and Expenses > Manage Expenses Security > Authorize Expense Users (For expense admin to delegate authority for an employee)

*Authorized User ID	Name
EX_TRAVELER	Scott, Nicole M
JSMITH	

ORGANIZATIONAL DATA

3

Self Service Navigation: (Employee can view/update their own defaults)
Employee Self Service > Employee T&E Center > Profiles & Preferences > Review / Edit Profile > Organizational Data

Employee Data | **Organizational Data** | User Defaults | Bank Accounts

Nicole Scott

Expenses Processing Data Find | View All First 1 of 1 Last

Valid for Expenses Yes Default Profile
Reason for Status Passed All Validation Edits Ignore Authorized Amounts

Per Diem Amount Type Active Amounts

HR Information

Employee Status Active
Hire Date 09/24/2012
GL Unit 71000 Georgia Perimeter College
Department 5009304 College Admissions
Hours Per Period Use Business Unit Default

Supervisor Information

Name
ID
Telephone
Designated Approver

Default ChartField Values Personalize | Find | First 1 of 1 Last

GL Unit	Fund	Dept	Program	Class	Bud Ref	Project
71000		7209100			2015	

Cash Advance Level

Business Unit 0.00 USD
 Specific Amount
 None

Expense Role

Expense Processing Role

Save Return to Search

Employee Data | Organizational Data | User Defaults | Bank Accounts

***At a minimum, fund and budget reference must be populated.**

Core Navigation:
Travel and Expenses > Manage Employee Information > Update Profile > Organizational Data (Expense admin can view/update defaults for an employee)

Employee Data | **Organizational Data** | User Defaults | Bank Accounts | Corporate Card Information | Bank Accounts BOR

Nicole Scott

Expenses Processing Data Find | View All First 1 of 1 Last

Valid for Expenses Yes Default Profile
Reason for Status Passed All Validation Edits Ignore Authorized Amounts

Per Diem Amount Type Active Amounts

HR Information

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*GL Unit 71000 Georgia Perimeter College
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*ID
Name
Designated Approver

Default ChartField Values Personalize | Find | First 1 of 1 Last

*GL Unit	Fund	Dept	Program	Class	Bud Ref	Project
71000	10000	7209100	11100		2015	

Cash Advance Level

Business Unit 0.00 USD
 Specific Amount
 None

Expense Role

If desired, an expenses role can be associated with this employee. Please note that only one role can be assigned, per employee, no matter how many jobs they hold within the company.

Expense Processing Role

Save Return to Search Notify Add

Employee Data | Organizational Data | User Defaults | Bank Accounts | Corporate Card Information | Bank Accounts BOR

USER DEFAULTS

4

Self Service Navigation:

Employee Self Service > Employee T&E Center > Profiles & Preferences > Review / Edit Profile > User Defaults

Employee Data | Organizational Data | **User Defaults** | Bank Accounts

Nicole Scott

Default Creation Method

*Expense Report Open a Blank Report
*Time Report Open a Blank Report
*Travel Authorization Open a Blank Authorization

Expense Defaults

Report Description _____ Per Diem Range _____
Business Purpose _____ Billing Type _____
Originating Location _____ Payment Type _____
Expense Location _____ Credit Card _____
Transportation ID _____ Number of Nights _____
Accounting Detail Default View Collapsed

Expense Type Defaults

Expense Type Merchant
*Expense Type Payment Type Billing Type

Country _____ State _____ Locality _____ Billing Type _____

Select Project ChartFields Display:
 Default: Codes
 Descriptions
 Codes

Save Return to Search

Employee Data | Organizational Data | User Defaults | Bank Accounts

Core Navigation:

Travel and Expenses > Manage Employee Information > Update Profile > User Defaults

Employee Data | Organizational Data | **User Defaults** | Bank Accounts | Corporate Card Information | Bank Accounts BOR

Nicole Scott

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Transportation ID _____ Number of Nights _____
Accounting Detail Default View Collapsed

Expense Type Defaults

Expense Type Merchant
*Expense Type Payment Type Billing Type

Project Defaults for Expenses

Enabled	PC Business Unit	Project	Activity	Category	Subcategory	Source Type	Description
<input type="checkbox"/>							

Time Defaults

Country _____ State _____ Locality _____ Billing Type _____

Select Project ChartFields Display:
 Default: Codes
 Descriptions
 Codes

Project Defaults for Time

Enabled	PC Business Unit	Project	Activity	Category	Subcategory	Source Type	Description
<input type="checkbox"/>							

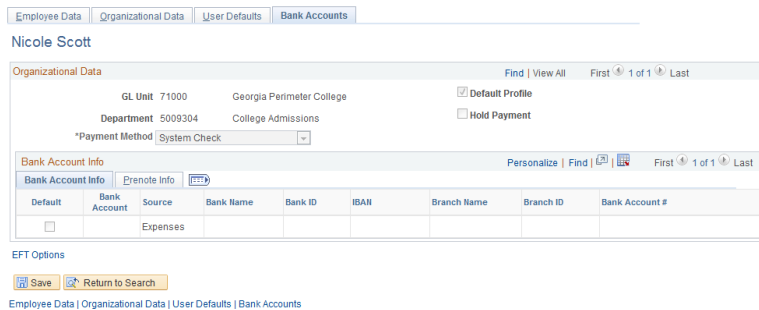
BANK ACCOUNTS

5

Self Service Navigation:

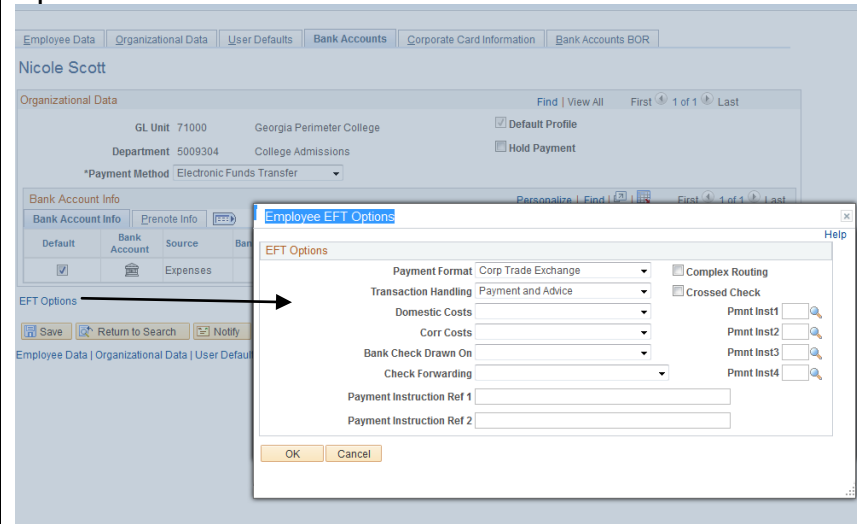
Employee Self Service > Employee T&E Center > Profiles & Preferences > Review / Edit Profile > Bank Accounts

(No update or drilldown capability)



Core Navigation:

Travel and Expenses > Manage Employee Information > Update Profile > Bank Accounts



Bank Detail/Drilldown:

