

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	Route Control	View Definition		
Test Rule(s)	BOR PeopleSoft User	FN Base PeopleSoft User	<input type="checkbox"/>	<input type="checkbox"/>	View Definition	+	-
Execute Rule(s)	BOR_EX_CASH_ADV	Exp Cash Advance	<input type="checkbox"/>	<input type="checkbox"/>	View Definition	+	-
Process Monitor	BOR_FN_ADMIN_REP	Report Mgr-Admin/Archive	<input type="checkbox"/>	<input type="checkbox"/>	View Definition	+	-
Service Monitor	ReportSuperUser	Report Super User	<input type="checkbox"/>	<input type="checkbox"/>	View Definition	+	-

Save Add Update/Display

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

Authorize Users

Nicole Scott

Entering new UserIDs on this page will give those users the ability to enter expense transactions on behalf of the employee.

*Authorized User ID	Name
EX_TRAVELER	Scott,Nicole M

Save

Core Navigation:

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

Authorize Users

Nicole Scott

Entering new UserIDs on this page will give those users the ability to enter expense transactions on behalf of the employee.

*Authorized User ID	Name
EX_TRAVELER	Scott,Nicole M

Save

Return to Search Notify

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

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

*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 Business Purpose Originating Location Expense Location Transportation ID Accounting Detail Default View Expanded

Per Diem Range Billing Type Payment Type Credit Card Number of Nights

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

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 Business Purpose Originating Location Expense Location Transportation ID Accounting Detail Default View Collapsed

Per Diem Range Billing Type Payment Type Credit Card Number of Nights

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: