PeopleSoft 9.2

Expenses TRAVELER
9.2 SECURITY ROLES & USER PREFERENCES

SECURITY ROLES

1

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

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 for access to Cash Advances)
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

Core Navigation: (For expense administrator to delegate authority for an employee)

Travel and Expenses > Manage Expenses Security > Authorize Expense Users

ORGANIZATIONAL DATA

3

Self Service Navigation:
Employee Self Service > Employee T&E Center > Profiles & Preferences > Review / Edit Profile > Organizational Data

(Employee can only view their Default ChartField Values)

Core Navigation:
Travel and Expenses > Manage Employee Information > Update Profile > Organizational Data

(Expense administrator can view/update Default ChartField Values for an employee)

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

USER DEFAULTS

4

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

Core Navigation:
Travel and Expenses > Manage Employee Information > Update Profile > User Defaults

BANK ACCOUNTS

5

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

(Employee has view only access to Bank Account Info and Payment Method)

Core Navigation:
Travel and Expenses > Manage Employee Information > Update Profile > Bank Accounts

(Expense Administrator has view only access to Bank Account Info but can update Payment Method)