



## UC Flex Financials and Human Resources Decentral Roles

### Introduction:

Access to UC Flex is based on the business role(s) performed by an individual. Roles are assigned by business administrators or their designee by submitting a role request form to [ucflex@uc.edu](mailto:ucflex@uc.edu) for approval and processing. Most roles require the individual to attend a training class before access is granted.

The following information will aid administrators in determining what roles an individual should be assigned. First is a list of roles by business area and second is a description of each Financials and Human Resources role. Questions can be directed to [ucflex@uc.edu](mailto:ucflex@uc.edu).

### Decentral Roles Listed by Business Area

Business Area	Role
Accounts Payable	
	<a href="#">P-Card Processor</a>
	<a href="#">Small Dollar Direct Invoice Processor</a>
Accounts Receivable	
	<a href="#">Decentral Financial Processor - AR</a>
	<a href="#">Decentral Financial Processor - Non AR (Deposits)</a>
Asset Accounting	
	<a href="#">Inventory Tracker</a>
Budget	
	<a href="#">BEX Reporting –BW</a>
	<a href="#">BPS End User – BW</a>
	<a href="#">Decentral Financial Processor - FM</a>
	<a href="#">Decentral Financial Reviewer - FM</a>
	<a href="#">Decentral Funds Reservation Processor - FM</a>
	<a href="#">Decentral Travel Authorization Processor - FM</a>
Cash Management	
	None
Endowments	
	None
General Ledger	
	<a href="#">Decentral Financial Processor (Cost Transfers) - GL</a>
	<a href="#">Decentral Financial Processor (Internal Billing) - GL</a>
	<a href="#">Decentral Financial Processor (Journal Entries) - GL</a>
	<a href="#">Decentral Internal Order Custodian</a>
Grants	
	<a href="#">Decentral Financial Processor – Grants</a>
Human Resources	
	<a href="#">Kronos Timekeeper</a>
	<a href="#">Salary Leave Administrator</a>
	<a href="#">Salary Leave Supervisor</a>
	<a href="#">PCR Initiator</a>
	<a href="#">PCR Approver</a>
Project Systems	
	None
Purchasing	
	<a href="#">Requisitioner</a>
	<a href="#">Term Contract Releaser</a>
Decentral Viewer / BW Reporting	
	<a href="#">FI Viewer</a>
	<a href="#">HR Viewer</a>

## Decentral Role Descriptions

<b>Financials</b>
<b>Decentral Financial Processor – AR</b>
This role creates invoices in UC Flex to bill outside organizations.
<b>Decentral Financial Processor (Cost Transfers, Doc Type GT) – GL</b>
This role parks journal entries which are reviewed and posted by SPA. Users with this role park grant cost transfers. This role may also add or change descriptions on posted UC Flex accounting documents.
<b>Decentral Financial Processor (Internal Billing, Doc. Type BL) – GL</b>
This role parks journal entries which are reviewed and posted by Financial Services. Users with this role park journal entries for internal billings to other UC departments and print invoices for their internal sales. This role may also add or change descriptions on posted UC Flex accounting documents.
<b>Decentral Financial Processor (Journal Entries, Doc. Type JE) – GL</b>
This role parks journal entries which are reviewed and posted by Financial Services. Users with this role perform activities similar to posting documents to the SUSF in the old CUFS system. This role may also add or change descriptions on posted UC Flex accounting documents.
<b>Decentral Financial Processor – Grants</b>
This role is responsible for processing one grant budget transaction. The budget document is reviewed and released by Sponsored Program Accounting.
<b>Decentral Financial Processor – Non AR (Deposits)</b>
This role enters A151 and A152 forms in UC Flex to park all payments that come into the University that are not related to a customer invoice.
<b>Decentral Funds Reservation Processor – FM</b>
This role establishes new funds reservations and manually liquidates funds reservations when applicable. Funds reservations are created when a department identifies a need to encumber funds outside of the purchase order and travel authorization (TA) process.
<b>Decentral Travel Authorization Processor – FM</b>
This role establishes travel funds authorizations and manually liquidates this encumbrance when applicable. Travel authorization funds reservations are created when a department identifies a need to encumber funds for a travel activity, an activity that must be performed when a pre-payment is required.
<b>Decentral Internal Order Custodian</b>
This role creates Internal orders when a department identifies a unique reporting requirement that is not being captured within the UC Flex cost center structure. The Internal Order Custodian establishes an order number in the range pre-established for that department/unit and maintains the orders.
<b>Inventory Tracker</b>
This role creates and changes Asset Master Records. Asset Master Records must be maintained for all capital assets in UC's inventory. Each department may also elect to track items considered to be critical equipment.
<b>P-Card Processor</b>
This role allocates and/or posts P-Card expenses directly in UC Flex and is responsible for inventory tracking functions relating to P-Card purchasing transactions.
<b>Requisitioner</b>
This role creates requisitions which will be processed into purchase orders by the Purchasing Department.
<b>Small Dollar Direct Invoice Processor</b>
This role runs the direct invoice process allowing users to procure services or goods from companies for up to \$300.00. The use of this process is intended to be the rare exception and is highly discouraged. Procuring services or goods from companies should be done by P-Card, Term Contract Release and/or Purchase Orders (for repetitive purchases).
<b>Term Contract Releaser</b>
This role creates, changes and prints Term Contract Release Purchase Orders.

<b>Financial Viewer / BW Reporting</b>
This role runs financial reports, views and tracks financial data, tracks Requisitions (RXs) and Purchase Orders (POs) and reviews grant ledgers including budget, encumbrances and expenses. All authorized users are assigned the Decentral Financial Viewer role.
<b>Human Resources</b>
<b>Kronos Timekeeper</b>
This role records and maintains hourly employee time in Kronos for interfacing with UC Flex.
<b>Salary Leave Administrator</b>
This role records and maintains salaried employee leave usage (i.e., vacation and sick time).
<b>Salary Leave Supervisor</b>
This role records and maintains salaried employee leave usage (i.e. vacation and sick time) and validates data entered by a Salary Leave Administrator.
<b>PCR Initiator</b>
This role processes personnel actions initiated as a PCR (Personnel Change Request) including Salary Adjustment, Separation, Special Payments, Leave of Absence (with pay, without pay, extension, request for return from LOA), FMLA, Retirement, Kronos Account Line Changes, Cost Distribution and Change Recurring Payment.
<b>PCR Approver</b>
This role approves or denies personnel actions (PCRs) initiated by PCR Initiators (see above).
<b>HR Viewer / Reporting</b>
This role runs HR reports. All authorized users are assigned the HR Decentral Viewer role.
<b>Restricted</b>
<b>BPS End User – BW</b>
Reserved by the Office of Budget Management for those that participate in the annual budget Formulation Process within the BW-BPS module. Activities include accessing planning folders and formulating budgets for the upcoming fiscal year for General Fund expense budgets and non-general fund revenue and expense budgets. This information is summarized and included in the Budget Plan as well as being retracted to Funds Management for budget execution.
<b>BEX Reporting – BW</b>
Reserved by the Office of Budget Management for those with the BPS End User role to run reports that show Budget Formulation activity. BEX reports are used to assist in budget formulation as well as to reconcile and verify results of budget formulation.
<b>Financial Processor – FM</b>
Reserved by the Office of Budget Management, this role will park budget change documents. Financial Processors with this role process budget changes for non-general funds expense and revenue adjustments. General Funds budget changes can also be processed under certain conditions for current year entries. Budgetary Services will review and post budget changes.
<b>Financial Reviewer – FM</b>
Reserved by the Office of Budget Management, this role reviews transactions parked by a Decentral Financial Processor. Financial Reviewers include central offices such as Vice Presidential Offices. VP areas review budget changes parked by Decentral Processors.
<b>BW Super User</b>
Reserved for designated users who have been assigned the added responsibility of creating and sharing reports with Deans and others who have less access and detail knowledge of UC Flex data.
<b>Labor History</b>
Reserved by HR for those with the need and authority to access payroll history data.