



User Role Quick Reference Tool provides a list of each available user roles and the function(s) that can be performed by users that have been assigned the role(s).

| User Role Quick Reference Tool    | Administrator | Invoice Approver | Payment Initiator | Payment Approver | Payment Releaser | Super-User | View Only/Guest |
|-----------------------------------|---------------|------------------|-------------------|------------------|------------------|------------|-----------------|
| <b>Administration</b>             |               |                  |                   |                  |                  |            |                 |
| User Administration               | X             |                  |                   |                  |                  |            |                 |
| User Account Manager              | X             |                  |                   |                  |                  |            |                 |
| User Role Manager                 | X             |                  |                   |                  |                  |            |                 |
| Disbursement Sources              | X             |                  |                   |                  |                  | X          |                 |
| Email Administration              | X             |                  |                   |                  |                  |            |                 |
| Invoice Approval Setup            | X             | X                |                   |                  |                  |            |                 |
| <b>Invoices</b>                   |               |                  |                   |                  |                  |            |                 |
| Statement of Account              | X             | X                | X                 | X                | X                | X          | X               |
| <b>Pay</b>                        |               |                  |                   |                  |                  |            |                 |
| Pay Invoices                      |               |                  | X                 | X                | X                | X          |                 |
| Pay Without Invoice               |               |                  | X                 | X                | X                | X          |                 |
| Initiate Payment                  |               |                  | X                 | X                | X                | X          |                 |
| Approve Payment                   |               |                  |                   | X                | X                | X          |                 |
| Release Payment                   |               |                  |                   |                  | X                | X          |                 |
| <b>Export</b>                     |               |                  |                   |                  |                  |            |                 |
| Export Invoice Summary            | X             | X                | X                 | X                | X                | X          | X               |
| Export Invoice Detail             | X             | X                | X                 | X                | X                | X          | X               |
| Export Payment History            | X             | X                | X                 | X                | X                | X          | X               |
| <b>History</b>                    |               |                  |                   |                  |                  |            |                 |
| Invoice History                   | X             | X                | X                 | X                | X                | X          | X               |
| Payment History                   | X             | X                | X                 | X                | X                | X          | X               |
| <b>Approvals</b>                  |               |                  |                   |                  |                  |            |                 |
| Invoice Approvals                 |               | X                |                   |                  |                  |            |                 |
| Payment Approvals                 |               |                  |                   | X                | X                | X          |                 |
| <b>Other System Functions</b>     |               |                  |                   |                  |                  |            |                 |
| InfoCentral                       | X             | X                | X                 | X                | X                | X          | X               |
| Preferences – Modify Own Password | X             | X                | X                 | X                | X                | X          | X               |
| Help – Online Help                | X             | X                | X                 | X                | X                | X          | X               |
| Help – Contact Us                 | X             | X                | X                 | X                | X                | X          | X               |
| Exit – Return to Login Page       | X             | X                | X                 | X                | X                | X          | X               |
| Exit – Exit Application           | X             | X                | X                 | X                | X                | X          | X               |

The descriptions below provide more details regarding the user functions indicated above:

**User Administration:** Users with this function will have the ability to add new users and/or modify existing user information including contact name, contact email, assigned user roles, workflow limits, account assignments etc.

**User Account Manager:** Users with this function will have the ability to select a customer account and assign or de-assign the account to a user’s access

**User Role Manager:** Users with this function will have the ability to select a user role and assign or de-assign the role to a user’s access

**Disbursement Sources:** Users with this function will have the ability to add a new or modify an existing disbursement source (bank account information)

**Email Administration:** Users with this function will have the ability to add and/or remove user email addresses used for email notifications.

**Invoice Approval Setup:** Users with this function will have the ability to enable or disable the Invoice Approval functionality

**Statement of Account:** Users with this function will have the ability to view all open invoices for assigned account(s) as well as the status of the invoice(s). Invoice Approvers will have the ability to update the Invoice Approval status from this menu option.

**Pay Invoices:** Users with this function will have the ability to initiate invoice(s) for payment

**Pay Without Invoice:** Users with this function will have the ability to initiate a payment without an invoice and reference remittance instructions. NOTE: Should ONLY be used by Chapter customers unless prior authorization has been received from the American Red Cross

**Initiate Payment:** Users with this function will have the ability to initiate invoice(s) for payment

**Approve Payment:** Users with this function will have the ability to approve a payment that was initiated by another user

**Release Payment:** Users with this function will have the ability to release a payment that was initiated and approved by another user(s)

**Export Invoice Summary:** Users with this function will have the ability to export high level invoice information

**Export Invoice Detail:** Users with this function will have the ability to export low level (line item) invoice information

**Export Payment History:** Users with this function will have the ability to export payment information for payments processed through the application. Payments made outside of this application can not be exported.

**Invoice History:** Users with this function will have the ability to view historical invoice information as well as corresponding online payment information

**Payment History:** Users with this function will have the ability to view historical payment information as well as the corresponding invoice(s) included in the payment

**Invoice Approvals:** Users with this function will have the ability to approve invoices or un-approve invoice(s)

**Payment Approvals:** Users with this function will have the ability to approve, release or cancel approval on a scheduled payment

**InfoCentral:** Users with this function will have access to online reference materials related to this application.

**Preferences – Modify Own Password:** Users with this function will have the ability to modify their own password

**Help – Online Help:** Users with this function will have the ability to view online help features

**Help – Contact Us:** Users with this function will have the ability to send a communication to the American Red Cross regarding questions or concerns.

**Exit – Return to Login Page:** Users with this function will have the ability to return to the login page

**Exit – Exit Application:** Users with this function will have the ability to exit the application and close browser windows