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
Administration							
User Administration	X						
User Account Manager	X						
User Role Manager	X						
Disbursement Sources	X					X	
Email Administration	X						
Invoice Approval Setup	X	X					
Invoices							
Statement of Account	X	X	X	X	X	X	X
Pay							
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	
Export							
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
History							
Invoice History	X	X	X	X	X	X	X
Payment History	X	X	X	X	X	X	X
Approvals							
Invoice Approvals		X					
Payment Approvals				X	X	X	
Other System Functions							
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