



Department roles for Workday

Workday approver roles

Role	Description	Assignment level
Adaptive Planning budget	This role provides access to the Workday Adaptive Planning budget system worklet. Requestors must also submit the Adaptive Planning role request form .	Cost center or cost center hierarchy.
Cost center manager	<p>This role is responsible for:</p> <ul style="list-style-type: none"> • Accounting journals. • Adjustments. • Approving requisitions. • Budget amendments. • Changing orders. • Expense reports. • Spend authorization. <p>This role is also responsible for specific supplier invoices and contracts used by departments for programs, gifts and projects that are not classified as centrally managed. The role can also initiate form requests.</p>	Cost center or cost center hierarchy.
Cost center P-Card manager	This role is responsible for approving Purchasing Card transaction verifications initiated by the department data entry specialist.	Cost center or cost center hierarchy.
Customer manager	This role is responsible for viewing and approving customer transactions.	Cost center or cost center hierarchy.
Dean or vice president	This role is used to apply for dean- or vice president-level approval when required for accounting journals, budget amendments, expense reports and spend authorizations.	Cost center hierarchy.
Department technology security reviewer	This role is used to review technology purchases.	Cost center or cost center hierarchy.
Grant manager	This role is responsible for accounting journals, adjustments, approving requisitions, change orders,	Grant or grant hierarchy.



Department roles for Workday

	expense reports, spend authorizations and specific supplier invoices and contracts used by departments for grants. The role can also initiate form requests.	
Provost or executive vice president	This role is used to apply for provost- or executive vice president-level approval when required for requisitions, change orders and expense reports.	Cost center hierarchy.

Workday data entry and view roles

Role	Description	Assignment level
Customer specialist	This role is responsible for setting up customers and processing customer invoices.	Cost center or cost center hierarchy.
Department accountant	This role is responsible for initiating accounting journals, accounting adjustments from requests and budget amendments.	Cost center or cost center hierarchy.
Department data entry specialist — internal service provider	This role is responsible for processing internal service delivery documents.	Cost center or cost center hierarchy.
Department data entry specialist — P-Card	This role is responsible for processing Purchasing Card verification transactions.	Cost center or cost center hierarchy.
Department data entry specialist — property control	This role is responsible for viewing capital assets.	Cost center or cost center hierarchy.
Department data entry specialist — spend	This role is responsible for initiating change orders, expense reports and spend authorizations on behalf of others, receivers, return to suppliers and non-purchase order supplier invoices.	Cost center or cost center hierarchy.
Department data entry specialist — supplier contracts	This role is responsible for processing supplier contracts for purchases that do not require a purchase order.	Cost center or cost center hierarchy.



Department roles for Workday

	Supplier contracts initiated by departments are used on a limited basis.	
Department view-only	<p>This role is responsible for viewing financial information secured by the cost center.</p> <p>The department view-only role allows you to view gift worktag restriction descriptions. Type CCG in the organization field in the ServiceNow request and select your department from the list.</p>	Cost center, cost center hierarchy or CCG organizations assigned to gifts.

Other system roles

This role is requested for Workday for Use in other systems. It does not have Workday reporting or transaction view access.

Role	Description	Assignment level
AW cost center IT asset manager	This role is used for asset managers in AssetWorks.	Cost center or cost center hierarchy.
AW cost center IT asset user	This role is for AssetWorks users.	Cost center or cost center hierarchy.
AW cost center IT asset view only	This is the department view-only role for AssetWorks.	Cost center or cost center hierarchy.
Cost center P-Card allocator	This role is used to review and reallocate Purchasing Card transactions within PaymentNet for programs, gifts and projects.	Cost center or cost center hierarchy.
Grant P-Card allocator	This role is used to review and reallocate Purchasing Card transactions within PaymentNet for grants.	Grant or grant hierarchy — grant hierarchy is preferred.
PeopleSoft HR cost center manager	This role is used to approve personnel transaction requests and select position management transactions for projects, programs and gifts within the PeopleSoft HR system.	Cost center or cost center hierarchy.
Jaggaer procurement requestor	This role is used to request and review contracts and participate	Company level.



Department roles for Workday

	in sourcing activities like a request for proposal in SunRISE.	
PeopleSoft HR grant manager	This role approves personnel transaction requests and selects position management transactions for grants within the PeopleSoft HR system.	Grant or grant hierarchy.