

University of Alberta
PeopleSoft HCM 9.2 Role Descriptions

TARGET AUDIENCE	ROLENAME	DESCR	DESCRLONG
Campus User	ZHBB_SELF_ENTRY	ESS-Benefits Entry	Automatically assigned and removed from employees. Provides employees with access to enter, modify and review their dependents and beneficiary information, update marital status and manage benefit enrollments. This role can't be requested by submitting an HCM security request form.
Campus User	ZHHR_ARCH_SECURITYFORM_VIEW	View archived security forms	Provides departmental access to view security smart forms that were entered in PeopleSoft 9.0. Users granted this role will have access to view form actions, related comments and history from initiator to final execution.
Campus User	ZHHR_ARCHIVED_EPAF_VIEW	View archived EPAF forms	Provides departmental access to view ePAF smart forms that were entered in PeopleSoft 9.0. Users granted this role will have access to view Hire, Job Change and Employee Status Change forms, with related attachments and history from initiator to final execution.
Campus User	ZHHR_ESS_COMMON_ACCESS	ESS-Company&Delegations	Automatically assigned and removed from current employees. Provides self-service access to view/maintain delegations. This role can't be requested by submitting an HCM security request form.
Campus User	ZHHR_ESS_DEFAULT_ACCESS	ESS-PayChk&Tax&DDeposit&Per	Automatically assigned and removed from current and former employees. Provides self-service access to view their pay cheques, tax slips, provide tax consent,view/maintain direct deposit information and to view/maintain personal information (phone,email,address). This role can't be requested by submitting an HCM security request form.
Campus User	ZHHR_GENERAL_BUCKETS_VIEW	View Bucket Hrs-Support Staff	Provides departmental access to view the employee type, union, grade, department, bucket type, bucket hours for all support staff on campus. This access is included in the ZZH_GENERAL_INQUIRY role.
Campus User	ZHHR_MANAGER_DASHBOARD	HR Manager Dashboard	Automatically assigned and removed from Supervisors using the Reports To position or Supervisor ID in JOB_DATA and to Department Managers in the Department Table. Provides access to the HR dashboard which is a collection of information used by Managers/Supervisors to manage their direct reports. This role can't be requested by submitting an HCM security request form.
Campus User	ZHPY_CHARTFIELD_INQUIRY	View Chartfields	Provides departmental access to view the chartfields associated with a speedtype (speed code). This is used to translate a speed code to a combination code (combo code). This role is not required if the user also has the ZZH_GENERAL_INQUIRY role.
Campus User	ZHPY_SALBEN_ADJUSTMENT_VIEW	Salary&Benefit Adjustment View	Provides access to view salary and benefit adjustments.
Campus User	ZHPY_SALBEN_DIST_ADJUSTMT	Employee Sal/Ben Adjustment	Provides departmental access to the pages used to adjust/transfer historical salary and benefits expenses from one combination code to another. Users granted this role will be appointed by the Senior Financial Officer of the Faculty.
Campus User	ZHPY_SUSPENSE_VIEW	Review Suspense Bal&Details	Provides departmental access to review suspense distribution balances and details. Users granted this role will also receive the email notification when a payroll transaction is sent to suspense.
Campus User	ZHTL_DELEGATED_TIME_APPROVER	Delegated Time&Leave Approver	Automatically assigned to users who have accepted a delegation request from a Manager/Supervisor to approve time. Access is also granted to run specific T&L queries via the T&L workcenter.
Campus User	ZHTL_SELF_ENTRY	ESS-Time&Leave Entry	Automatically assigned and removed from employees. Provides employees with access to enter, correct and review only their time and leave information. This role can't be requested by submitting an HCM security request form.
Campus User	ZHTL_TIME_APPROVER	Time&Leave Approver	Automatically assigned and removed from Supervisors using the Reports To position or Supervisor ID in JOB_DATA and to Department Managers in the Department Table. Provides access to approve, correct and review time for their direct reports. Access is also granted to run the T&L reports and specific queries via the T&L workcenter. This role can't be requested by submitting an HCM security request form.
Campus User	ZHTL_TIME_KEEPER	Dept Admin-Time&Leave Entry	Provides departmental access for time/leave entry on behalf of employees, access to review /modify /troubleshoot time and leave entry errors, and to run all T&L queries /reports.
Campus User	ZHTL_TIME_REPORTS	Time&Leave Queries and Reports	Provides departmental access to all T&L queries / reports for people who are not Time Keepers or Approvers. This role does not have access to enter, correct or approve time.
Campus User	ZZH_GENERAL_INQUIRY	Dept Admin-View Staff HR Info	Provides departmental access to view staff HR information such as job data, buckets, leave accruals, position summary, contact information, citizenship, paycheque earnings/ deductions/taxes, GL Funding, view POI relationship, person organization summary, relationships to institution, and chartfields. Users granted this role do not require the ZHPY_CHARTFIELD_INQUIRY role.
Campus User	ZZH_GENERAL_REPORTING	HR Operational&TL Queries&Rept	Provides departmental access to run all HR Operational reports and to run the T&L queries / reports. Users granted this role do not require the ZHTL_TIME_REPORTS role.

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Campus User	ZZZ_ADD_TO_AIS_MAILING_LIST	Receive Psoft Production Notices	This role is used to identify a person who wishes to receive the PeopleSoft production notifications. This role is intended for use where a person does not have PeopleSoft access and wishes to receive email notifications on system availability and updates (for example a LAN administrator)
Campus User	ZZZ_TAKE_OFF_AIS_MAILING_LIST	Remove from Psoft Production Notices	This role is used to identify a person who wants to be removed from receiving the PeopleSoft production notifications.
Campus User (eForms)	ePAF Personnel Contact	Originator – All eForms	Provides departmental access to initiate all eForms; Hire, Job Change, Status Change. Access is also granted to add comments and to add/delete/view attachments on an eForm.
Campus User (eForms)	ePAF Department	First Approver Academic eForms	Provides departmental access to perform the first level review and approval of ACADEMIC eForms. Access is granted to update information on the eForm. The fields that can be updated are determined by the type of eForm. Access is also granted to add comments and to add/delete/view attachments on an eForm.
Campus User (eForms)	ePAF Faculty	Second Approver Academic eForms	Provides departmental access to perform the final review and approval of ACADEMIC eForms. Access is granted to update information on the eForm. The fields that can be updated are determined by the type of eForm. Access is also granted to add comments and to add/delete/view attachments on an eForm. After this approval the eForm is routed to HRS for final approval.
Campus User (eForms)	ePAF Supervisor Manager	First Approver Support eForms	Provides departmental access to perform the first level review and approval of SUPPORT eForms. Access is granted to update information on the eForm. The fields that can be updated are determined by the type of eForm. Access is also granted to add comments and to add/delete/view attachments on an eForm
Campus User (eForms)	ePAF Department Faculty	Second Approver Support eForms	Provides departmental access to perform the final review and approval of SUPPORT eForms. Access is granted to update information on the eForm. The fields that can be updated are determined by the type of eForm. Access is also granted to add comments and to add/delete/view attachments on an eForm. After this approval the eForm is routed to HRS for final approval.
Campus User (eForms)	ePAF Student Approver 1	First Approver Student eForms	Provides departmental access to perform the first level review and approval of STUDENT eForms. Access is granted to update information on the eForm. The fields that can be updated are determined by the type of eForm. Access is also granted to add comments and to add/delete/view attachments on an eForm.
Campus User (eForms)	ePAF Student Approver 2	Second Approver Student eForms	Provides departmental access to perform the final review and approval of STUDENT eForms. Access is granted to update information on the eForm. The fields that can be updated are determined by the type of eForm. Access is also granted to add comments and to add/delete/view attachments on an eForm. After this approval the eForm is routed to HRS for final approval.
Campus User (eForms)	ePAF HR View Forms	View all eForms	Provides departmental access to view all eForms in the department or faculty. Access is also granted to view comments and attachments. This role is intended for use by staff who are not eForm originators or approvers.
Campus User (eForms)	ePAF Project Manager Approver	ePAF Project Manager Approver	Automatically assigned and removed from project/grant managers to provide access to review and approve eForms for their project/grant. Access is granted to update information on the eForm. The fields that can be updated are determined by the type of eForm. Access is also granted to add comments and to add/delete/view attachments on an eForm. This role can't be requested by submitting an HCM security request form.

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Central Unit	ZHHR_JOB_DATA_VIEW	Central-View Job Data-All Empl	HR Callback - This role is intended for use in central units such as ONECard, Libraries and Supply Management Services (SMS) to view work location, job information, job labor and payroll information for all UofA employees. Ids granted this role require row security to all campus departments.
Central Unit	ZHHR_STAFF_TUITION_REMISSIONS	Fin Serv-View Hrs Bucket Serv	HR Callback - This role is intended for the staff in Financial Services who determines eligibility for tuition remissions for support staff. Access granted is to view the bucket hours with the calculate service button activated.
Central Unit	ZHHR_STATS_CANADA_VIEW	Central-Stats Canada View	HR Callback - This role is intended for use in Strategic Analysis. Access granted is to view the Full Time Teaching Survey Data
Central Unit	ZHPM_POSITION_VIEW	Budget&Stats - Position Mgmt	HR Callback - This role is intended for use in Budget & Statistics. Access granted is to view person profiles, position information, relationship to UofA, job family and job codes.
Central Unit	ZHPY_PARKING_SERVICES_MGMT	Parking Srv -Payroll Deduction	HR Callback - This role is intended for use in Parking Services. Access granted is to view payroll deductions and to run the Parking to HCM interface
Central Unit	ZHPY_PAY_CHK_ERN_VIEW	SMS-View PayCheque Earnings	HR Callback - This role is intended for use in Supply Management Services (SMS). Access granted is to view paycheque earnings. IDs granted this role require row security to all campus departments.
Central Unit	ZHZH_ENTER_JOB	PostDoctoralOfs-Enter Job Data	HR Callback - This role is intended for use in the PostDoctoral Fellows Office. Access granted is to do job data entry to register and track academic visitors. IDs granted this role require row security to all campus departments.
Central Unit	ZPT_APP_DES_READ_ONLY	PT App Designer View Only	IST Callback - Provides access to view the Application Designer in a Read-Only mode to see attributes behind Components/ Pages.
Central Unit	ZZH_AUTH_APPROVER_VIEW	View Dept Auth Approvers	IST Callback - This role is intended for use by ASP users who are processing security requests for access to PeopleSoft HCM. Access is provided to view the authorized approvers that have been assigned to a department.
Central Unit	ZZZ_ASP_HELPDESK_ANALYST	ASP Helpdesk Analyst	ISTS Callback - ASP Only - Allows Application Service Provider Helpdesk Support Analysts first level support access.
Central Unit	ZZZ_HLP_ACCT_UNLOCK_MARKER	Campus HLP Access-Marker Role	IST Callback - Marker Role that is used during HLP database refreshes to identify user ids to unlock.The user id will have the same access in HLP as the user id has in PRD.
Central Unit	ZZZ_ORACLE_MARKER	Oracle User Marker Role	IST Callback - Marker Role that identifies users with Oracle access to the HCM database.
Central Unit	ZZZ_PARKING_SERVICES_INQUIRY	Parking Srv - Locate Staff	IST Callback - This role is granted to staff in Parking Services to verify the status of UofA staff. Access is granted to search for a person, view job information, work location, job labor, payroll (paygroup and tax location) and relationship to institution. Ids granted this role require row security to all campus departments.
Central Unit	ZZZ_PROTECTIVE_SERV_INQUIRY	ProtectSer - Locate Staff	IST Callback - This role is granted to staff in Protective Services and is used to verify the status and to contact/locate staff as part of their normal investigation process and in the event of an emergency. Access is granted to view job information, work location, relationship to institution, Bio/Demographic data, and contact information. Users granted this role will see the birth date unmasked. IDs granted this role require row security to all campus departments.
Central Unit	ZZZ_QUERY_PRIV	Create Private PS Queries	IST Callback - This role is intended for use in central units. It allow users to create private PeopleSoft queries and to schedule queries.
Central Unit	ZZZ_QUERY_PUB	Create Public PS Queries	IST Callback - This role is intended for use in central units. It allow users to create private and public PeopleSoft queries and to schedule queries.
Central Unit	ZZZ_SECURITY_VIEW	View HCM Security	IST Callback - Provides access to view the security setup information and the security granted to users in PeopleSoft HCM.
Central Unit	ZZZ_STAFF_STDNTS_INQUIRY	Central-Inquiry for Staff	IST Callback - This role is intended for use in IST, ONECard and Parking Services where access is required to verify the status of staff. Access is granted to search for a person and to view job information, relationship to institution.IDs granted this role require row security to all campus departments.
Central Unit	ZZZ_UAT_ACCT_UNLOCK_MARKER	UAT User Marker Role	IST Callback - Marker Role that is used during UAT database Refreshes to identify user ids to unlock.
Central Unit	ZZZ_UAT_HR_SUPERUSER_MARKER	HR-UAT Enhanced User Access	IST Callback - This role is intended for use in central HRS. This role is used as a marker to track users that require enhanced access to the UAT database. Access granted on UAT is to all HCM functionality that is currently implemented. The user profile will be unlocked.
Central Unit RSO (eForms)	ePAF Research Services Office	ePAF Research Services Office	HR Callback - This role provides the Research Services Office with the ability to review and approve eForms for VP Research project funded staff.

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Central HRS	ZHBB_PBEN_ADVISOR	Pen/Benefit Advisor	HR Only - View and update access required for staff in Pensions and Benefits whose primary focus is benefits. Update and correction access to benefits. Correction is required to change start/end dates for benefit coverage. Update to personal data (ie. DOB,DOD,SIN). View to job data, pensions, additional pay, pay cheques earnings and deductions, T4s. View to HCM setup tables.
Central HRS	ZHBB_PBEN_MANAGER	Pen/Benefit Manager	HR Only - View only access required for staff managing Pensions & Benefits. View to benefits, pensions, job data, leaves, personal data, additional pay, pay cheque earnings and deductions, Tax Slips and Time and Labour. View to HCM setup tables.
Central HRS	ZHBB_PBEN_SUPERVISOR	Pen/Benefit Supervisor	HR Only - View and update access required for staff supervising the daily operations in Pensions & Benefits. Update and correction access to benefits and pensions. Correction is required to change start/end dates for benefit coverage. Update to personal data (ie. DOB,DOD,SIN) and to pensions. View to job data, additional pay,leaves, pay cheque earnings and deductions, Tax Slips and Time and Labour. Access is also given to processing for pensions and benefits (ie. benefit and pension loads). View to HCM setup tables.
Central HRS	ZHHR_CLAIMS_ADMINISTRATOR	Claims Administrator	HR Only - View only access for staff in HRS HPaWs. View to personal data, emergency contacts, benefits, position data, job data, leaves,pay cheque earnings and deductions, and time & labour
Central HRS	ZHHR_EE_RELATIONS_VIEW	EE Relations Staff	HR Only - View only access required for staff in EE Relations and HRC. View to benefits, job data, position data, personal data, pensions, leaves, bucket hours,time and labour and emergency contacts. View to HCM setup tables
Central HRS	ZHHR_EMPLOYMENT_PAY_ADVISOR	Employment Advisor	HR Only - This role is intended for use by Employment Pay Advisors in HRS. This role grants correction access for primary job flag maintenance. Update access to payline, one-time deductions and one-time taxes. View, update and print access for ROE processing.
Central HRS	ZHHR_HUMAN_RIGHTS_OFFICER	Reports&Upd Workforce Survey	HR Only - Access to run reports related to the Office of Human Rights. Access to update Workforce Survey Results.
Central HRS	ZHHR_IMMIGRATION_OFFICER	Immigration Officer	HR Only - View access for Immigration Officers. View to personal data, citizenship, permits, visas, limited access to job. Access to view paycheck earnings for the following reasons: Both the foreign nationals and our university must comply with federal immigration legislation. Parts of this legislation dictate whether foreign nationals can receive any financial assistance; who can pay the financial assistance and; how much financial assistance can be paid. The U of A Immigration Specialists often need to verify this information to mitigate the university's liability and ensure that we are in compliance with federal law.
Central HRS	ZHHR_JOB_DESIGN_CONSULTANT	HR Job view only	HR Only - View only access required for consultants in Comp & Job Design. View to job data, position data, personal data, and bucket hours.
Central HRS	ZHHR_PERSONNEL_CONSULTANT	Personnel/Fin Consultant	HR Only - View only access required for consultants within Personnel & Finance. View to benefits, job data, pay cheque earnings, position data,Time & Labour banked time and launch pad. View to HCM setup tables
Central HRS	ZHHR_POI_MAINTENANCE	Add Upd employee- HR POI type	HR Only- Allows the user to add and maintain defined relationships to a person. This includes the effective date of relationship, termination of relationship as well as the text data required for the University calendar
Central HRS	ZHHR_RECONCILIATION_ANALYST	Personnel&Fin Reconciliation	HR Only - View only access required for staff performing benefit/deduction reconciliation activities within Personnel & Finance. View to benefits, job data, pay cheque earnings and deductions, position data, personal data, general deductions and additional pay. View to HCM setup tables.
Central HRS	ZHHR_RECONCILIATION_CONSULTANT	Reconciliation Consultant	HR Only - View and update access required for consultants in Reconciliation. Update and correction access to additional pay,payroll and primary job flag maintenance. Correction is required to change start/end dates. Update to personal data (ie. DOB,DOD,SIN)and correction to personal data to update contact information. View to Benefits, T4's, job data, and HCM setup tables. Access is also given to run all year-end processing and off cycle cheque processing.
Central HRS	ZHHR_RECONCILIATION_MANAGER	Reconciliation Manager	HR Only - View only access required for staff managing Reconciliation. View to benefits, pensions, job data, leaves, personal data, additional pay,pay cheque earnings and deductions, T4s,Time and Labour, payroll.
Central HRS	ZHHR_RECORDS_MANAGEMENT	View only for Records Mgmt	HR Only - View only access to job data and person data for staff managing Records & Reception.
Central HRS	ZHHR_RECRUITMENT_CONSULTANT	Recruitment services	HR Only - View only access required for consultants in Recruitment Services. View to job data and position data

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Central HRS	ZHHR_REHAB_CONSULTANT	View only for staff in HRS	HR Only - View only access for staff in HRS HPaWs to personal data(DOB,SIN,contact information), emergency contacts,job data(pay,deductions), position data, benefits.
Central HRS	ZHHR_SERVICE_RECOGNITION	HR Service Recognition	HR Only - Used by staff in HPaWs to enter service recongion date
Central HRS	ZHPA_PENSION_CONSULTANT	Pension Consultant	HR Only - View and update access required for staff in Pensions and Benefits whose primary focus is benefits. Update and correction access to pensions. Correction is required to change start/end dates. View to job data, personal data, additional pay cheque earnings and deductions,payline and one-time deductions, Tax Slips. View to HCM setup tables.
Central HRS	ZHPY_GARNISHMENTS_MGMT	Manage Garnishments	HR Only- This role should be given to the users in Reconciliation Unit of S&SP only. They are the only users that Manage Garnishments
Central HRS	ZHPY_PAYROLL_SUPERVISOR	Payroll Supervisor	HR Only - Specific payroll processes that are only run by the payroll supervisor. Currenlty this includes: Close RP/TP Payable Time
Central HRS	ZHTL_TIME_ADMINISTRATOR	Central HR Time&Leave Admin	HR Only - Provides access for staff in HR to run the Mass Approval process, approval notification process (email all approvers with pending approvals),TL Approval Cleanup process and Refresh Dynamic Group(s).
Central HRS	ZHTL_WORKFLOW_ADMIN	Central HR T&L Workflow Admin	HR Only - Provides access for staff in HR to monitor and administer Time & Leave workflow transactions.
Central HRS	ZZH_ACADEMIC_CONSULTANT	Acad Agreement Consultant	HR Only - View and update access for staff in Academic Agreement Operations. View to additional pay, benefits, pay cheque,citizenship,permits and visas. Update to personal data, person profile (education), prior work experience and teaching member. Correction to job data, persons of interest and position data. Access is granted to the processes and reports used for academic salary settlements and adjustments.
Central HRS	ZZH_ACADEMIC_OFFICER	Acad Agreement Officer	HR Only - View only access for staff in Academic Agreement Operations to personal data(DOB,SIN,education), job data(pay,deductions),pay cheque earnings, additional pay, benefits, persons of interest, position data, citizenship, permits and visas
Central HRS	ZZH_ASP_BA_SUPPORT_VIEW	ASP Business Analyst View Only	IST Callback - Allows functional View Only access to implemented components to support investigation and troubleshooting.
Central HRS	ZZH_CENTRAL_REPORTING	Central HR Reporting	HR Callback - This role is intended for use by HR staff to run reports and queries in all HR modules.
Central HRS	ZZH_RECEPTION	Records Receptionist	HR Only -Limited access required for HR receptionists. View to personal data, limited access to job information (no salaries)and the ability to update Visa/Permit and Citizenship/Passport data.
Central HRS	ZZH_SYSTEMS_SUPPORT	HRS Systems Support	HR Only - Provides access required for staff in PeopleSoft Systems Support to all components. Update and limited correction access to HCM setup tables.
Central HRS (eForms)	ePAF Academic Staff Admin	ePAF Academic Services	HR Only – Provides HR staff in Academic Services with access to approve and to originate eForms. Access is also provided to view all eForms.
Central HRS (eForms)	ePAF HR Staff and Stdnt Pymnts	ePAF HR Staff and Stdnt Pymnts	HR Only – Provides HR staff in Staff and Student Payments with access to approve and to originate eForms. Access is also provided to view all eForms.
Central HRS (eForms)	ePAF HR Terms and Conditions	ePAF HR Terms and Conditions	HR Only – Provides HR staff in Terms and Conditions with access to approve and originate eForms. Access is also provided to view all eForms.
Central HRS (eForms)	GT eForms Setup UofA Inquiry	View eForms config&setup	IST Callback – Provides view-only access to the eForms configuration and ePAF setup tables such as employee groups, eForm Department Security override, action reasons, employee types, GT administration tool, eForms Parts Gallery, and to view items under Create/Update an eForm (ie. routings, notifications, attachment descriptions).
Central HRS (eForms)	GT eForms Setup UofA Mgmt	Maintain eForms config&setup	IST Callback – Provides access to view the eForms configuration and setup tables. Access is also provided to update attachment descriptions and to maintain the ePAF setup tables (employee groups, action reasons, employee types). Update access is provided to the main page of the GT administration tool which is used to action eForms.