



eFinancePLUS User Roles

Revised June 2018

User Roles

User Roles for eFinancePLUS can be requested through LAMA. Refer to the table below for an alphabetical listing of the current roles available and a short description of each.

LAMA Access Name (eFinancePLUS Role ID)	Description
eFinancePLUS Accounting (ACCTG)	This role will give the user access to various options in eFinancePLUS, including Fund Accounting and Purchasing.
eFinancePLUS Accounts Payable (POSTPAYABLE)	This role will give users limited access to the options in eFinancePLUS related to accounts payable, including Posting Batch Payables and printing vendor checks.
eFinancePLUS Auditor/Read Only (AUDITOR)	This role will give the user read only access to several areas of eFinancePLUS, including Fund Accounting and Human Resources.
eFinancePLUS Batch Payable Entry (PAYABLE)	This role will give the user access to limited options in eFinancePLUS, including the ability to enter/change Batch Accounts Payable, see the Expenditure Ledger and Revenue Ledger, and see the Organization Chart and Vendor List.
eFinancePLUS Cognos	This role will give users access to run (resource 899) and create reports (resource 4093) in Cognos.
eFinancePLUS Employee Bank Account Information (EMPLBANK)	This role gives the user access to view, update, search, and run reports including bank account information for employees.
eFinancePLUS Employee SSN (SSN)	This role gives the user access to view, update, search, and run reports including employee social security numbers.
eFinancePLUS Human Resources Admin (HRADMIN)	This role gives the user access to various aspects of eFinancePLUS, including Human Resources, Personnel Budgeting, Benefits, and EMIS.
eFinancePLUS Optio Print Manager (OPTIO)	This role gives the user access to the Optio Print Manager in eFinancePLUS to maintain print formats and signatures for purchase orders, AP checks, and payroll checks (eFP Menu Path: e-Forms & Tools > All > Tools > Optio Print Manager).
eFinancePLUS Payroll (PAYROLL)	This role gives the user access to various options in eFinancePLUS, including Payroll/HR, EMIS, and Workflows.
eFinancePLUS Requisition Approver (REQAPPROVE)	This role gives the user access to approve requisitions, run budget reports, run expenditure reports, and run purchasing



	queries.
eFinancePLUS Requisition Entry (<i>REQENTRY</i>)	This role gives the user access to enter/update/print requisitions and run queries for vendors and purchasing.
eFinancePLUS Treasurer (<i>TREASURER</i>)	This role gives the user access to various aspects of eFinancePLUS, including Fund Accounting, Budgeting, Payroll/HR, and EMIS.
eFinancePLUS Vendor Bank Account Information (<i>VENDORBANK</i>)	This role gives the user access to view, update, search, and run reports including bank account information for vendors.
eFinancePLUS Vendor Tax ID (<i>VENDTAXID</i>)	This role gives the user access to view, update, search, and run reports including the federal tax ID for vendors.
eFinancePLUS – MCOECN Community Site	Allows access to an MCOECN hosted website on which Ohio users and ITC staff can post comments to a forum or share documentation for eFinancePLUS.
eFinancePLUS – PowerSchool Customer Forum	Allows access to PowerSchool forum of eFinancePLUS users and recordings of Regulatory calls.
eFinancePLUS – PowerSchool Learning Base	Allows access to self-paced online PowerSchool courses on eFinancePLUS topics.
eFinancePLUS – PowerSchool Support Portal	Allows access to manuals and knowledge base on the PowerSchool support portal website.

Job Functions

This section can be used as a reference when assigning user roles. The list below identifies some typical roles required by certain job functions. This will not cover all possibilities, but is to be used as a guideline.

Job Function	Possible/Recommended Roles
Treasurer	eFinancePLUS Treasurer eFinancePLUS Optio Print Manager eFinancePLUS Cognos
Assistant Treasurer	eFinancePLUS Treasurer eFinancePLUS Optio Print Manager eFinancePLUS Cognos
Accounts Payable	eFinancePLUS Accounting eFinancePLUS Vendor Bank Account Information eFinancePLUS Vendor Tax ID eFinancePLUS Cognos



Accounts Receivable	eFinancePLUS Accounting eFinancePLUS Cognos
Payroll	eFinancePLUS Payroll eFinancePLUS Employee Bank Account Information eFinancePLUS Employee SSN eFinancePLUS Cognos
Human Resources	eFinancePLUS Human Resources Admin eFinancePLUS Employee SSN eFinancePLUS Cognos
Department Head/Director	eFinancePLUS Requisition Approver
Superintendent	eFinancePLUS Requisition Approver
Principal	eFinancePLUS Requisition Approver
Secretary	eFinancePLUS Requisition Entry eFinancePLUS Batch Payable Entry
Auditor	eFinancePLUS Auditor/Read Only