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| **Module** | **Role** | **Accessible Components** | **Description** | **Scope** | **Role Parameters** |
|  |  | **ACQUISITIONS**:   * Create Purchase Request |  |  |  |
| Acquisitions | Acquisitions Administrator | **ACQUISITIONS**:   * Create Purchase Request * Manage Import Files * Exchange Rates Report * Acquisitions Configuration Menu   **ADMIN**:   * HealthCheck Dashboard * Run a Job * Monitor Jobs * Manage Sets * Manage Exports | Manages acquisitions configurations, such as PO review rules, reporting codes, and running acquisitions related jobs.  Select **Read Only** to enable the user to view but not edit acquisitions configurations. | Institution | * Read only – When selected, the user can view acquisitions configuration tables, but not change them or run any related acquisition jobs (including import profiles)   **Note**  There is a known issue causing edit options to be available when **Read Only** is selected for users with the Acquisitions Administrator role when clicking the back button after viewing an import profile. |
| Fiscal Period Manager | **ACQUISITIONS**:   * Create Purchase Request * Rollover Ledgers * Rollover PO Lines * Rollover Resource Sharing Requests | Manages copy ledger and editing of fiscal period tables when assigned in conjunction with the Acquisitions Administrator role. | Institution |  |
| Fund Manager | **ACQUISITIONS**: | Manages all fund-related actions, including allocations and transactions, | Institution / Library |  |

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| **Module** | **Role** | **Accessible Components** | **Description** | **Scope** | **Role Parameters** |
|  |  | * Create Purchase Request * Funds and Ledgers * Transfer Funds * Move Funds in Hierarchy | creating, updating, and closing funds. |  |  |
| Fund-Ledger Viewer | **ACQUISITIONS**:   * Create Purchase Request * Funds and Ledgers | Views funds and ledgers only. | Institution / Library |  |
| Invoice Manager | **ACQUISITIONS**:   * Create Purchase Request * Create Invoice * Receiving and Invoicing – Review * Receiving and Invoicing – Approve * Waiting for Payment * Vendors (View Only) | Manages invoice creation, review and approval activities, and assigning invoices to other operators.  **Note**  This role enables users to view the **Assigned to Others** tab. | Institution / Library |  |
| Invoice Operator | **ACQUISITIONS**:   * Create Purchase Request * Create Invoice * Receiving and Invoicing – Review * Waiting for Payment * Vendors (View Only) | Creates, edits, and reviews invoices. Reassigns invoices to other invoice operators. | Institution / Library |  |
| Invoice Operator Extended | **ACQUISITIONS**:   * Create Purchase Request * Create Invoice | Can delete invoices. | Institution / Library |  |

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| **Module** | **Role** | **Accessible Components** | **Description** | **Scope** | **Role Parameters** |
|  |  | * Receiving and Invoicing – Review (Edit and Delete) * Waiting for Payment * Vendors (View Only) |  |  |  |
| Ledger Manager | **ACQUISITIONS**:   * Create Purchase Request * Funds and Ledgers * Transfer Funds * Move Funds in Hierarchy | Enables creating and editing ledgers, adding funds and allocations, performing transactions, and updating ledgers and funds. | Institution / Library |  |
| License Manager | **ACQUISITIONS**:   * Create Purchase Request * Licenses * License Template   **ADMIN**:   * Manage Users (View Only) | Manages activities related to licenses and license amendments. | Institution |  |
| License Viewer | **ACQUISITIONS**:   * Create Purchase Request * Licenses (View Only) | Views licenses only. | Institution |  |
| Purchase Request Manager | **ACQUISITIONS**:   * Create Purchase Request * Manage Purchase Requests * Vendors (View Only) * Funds and Ledgers (View Only) | Manages purchase requests and assigns them to other operators and managers. If the role is defined in a library scope, the user may only see and assign requests in that library or those that do not belong to a specific library (the owning library field is empty). | Institution / Library |  |

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| **Module** | **Role** | **Accessible Components** | **Description** | **Scope** | **Role Parameters** |
|  |  | * Licenses (View Only) * Check Availability and Pricing   **ADMIN**:   * Manage Users (View Only) |  |  |  |
| Purchase Request Operator | **ACQUISITIONS**:   * Create Purchase Request * Manage Purchase Requests * Vendors (View Only) * Funds and Ledgers (View Only) * Licenses (View Only) * Check Availability and Pricing   **ADMIN**:   * Manage Users (View Only) | Manages purchase requests and edits the requester information. If the role is defined in a library scope, the user may only see requests in that library or those that do not belong to a specific library (the owning library field is empty). Reassigns purchase requests to other purchase request operators. | Institution / Library |  |
| Purchase Request Operator Extended | **ACQUISITIONS**:   * Create Purchase Request * Delete Purchase Requests | Can delete purchase requests. Must be combined with Purchase Request Operator or Purchase Request Manager. | Institution / Library |  |
| Purchasing Manager | **ACQUISITIONS**:   * All Purchase Order Lines, Purchase Order, and Advanced Tools options * Create Purchase Request * Import * Monitor and View Imports | Manages authoritative purchasing operations, such as reviewing and approving POs, activating electronic resources, assigning PO lines to purchasing operators, and linking licenses to PO lines. Can also view vendor data, ledgers and funds, and invoices. Can create and edit holdings by scope. When deleting the last item associated with a bibliographic record, can also delete that bibliographic record. | Institution / Library |  |

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| **Module** | **Role** | **Accessible Components** | **Description** | **Scope** | **Role Parameters** |
|  |  | * Resolve Import Issues * Vendors * Funds and Ledgers * Licenses * Check Availability and Pricing   **RESOURCES**:   * Community Zone Updates Task List * Import * Monitor and View Imports * Resolve Import Issues * Overlap and Collection Analysis   **ADMIN**:   * Manage Users * Run a Job * Monitor Jobs * Manage Sets * Manage Exports | **Note**  The item described above is not the last physical item. It is describing the last inventory item (in general = the last inventory resource). |  |  |
| Purchasing Operator | **ACQUISITIONS**:   * All Purchase Order Lines and Import Processing options, except Delete PO, including Claims * Package * Purchase Order – Review * Vendors * Funds and Ledgers * Licenses * Exchange Rates Report * Patron Driven | Manages all purchasing operations, including creating, reviewing, and updating PO lines, managing electronic resources, and linking licenses to PO lines. (New for May) PO lines that are assigned to others can be viewed but not updated. Can also view vendor data, ledgers and funds, and invoices. Can create and edit holdings by scope. When deleting the last item associated with a bibliographic record, can also delete that bibliographic record.  **Note**  The item described above is not the last physical item. It is describing the last inventory item | Institution / Library |  |

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| **Module** | **Role** | **Accessible Components** | **Description** | **Scope** | **Role Parameters** |
|  |  | Acquisition (PDA)   * Check Availability and Pricing   **RESOURCES**:   * Community Zone Updates Task List * Start New Import * Monitor and View Imports * Resolve Import Issues * Withdraw items via PO lines   **ADMIN**:   * Run a Job * Monitor Jobs * Manage Exports | (in general = the last inventory resource).  If Rialto is enabled, this role receives additional Rialto privileges. For more information, see [Managing Rialto User](https://knowledge.exlibrisgroup.com/Rialto/Product_Documentation/040Rialto_Administrator_Guide/040Managing_Rialto_User_Roles) [Roles](https://knowledge.exlibrisgroup.com/Rialto/Product_Documentation/040Rialto_Administrator_Guide/040Managing_Rialto_User_Roles). |  |  |
| Purchasing Operator Extended | **ACQUISITIONS**:   * Delete PO * Create Purchase Request | Can delete PO lines.  Must be combined with Purchasing Operator. | Institution / Library |  |
| Receiving Operator | **ACQUISITIONS**:   * Create Purchase Request * Receiving and Invoicing – Receive * Receiving Department Items * Scan in Items   **RESOURCES**:   * Withdraw items via PO lines | Manages the arrival of both physical and electronic purchased items.  **Note**  The items described above are not the last physical items. They are describing the last inventory items (in general = the last inventory resource).  You must assign a service unit when configuring this role. | Institution / Library | * Service Unit – The department for which this role applies. |
| Receiving Operator Limited | **ACQUISITIONS**:   * Create Purchase Request * Receiving and Invoicing – | Has Receiving Operator privileges, but cannot delete orders. When deleting the last item associated with a bibliographic record, can also delete that bibliographic record. | Institution / Library | * Service Unit – The department for which this role applies. |

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| **Module** | **Role** | **Accessible Components** | **Description** | **Scope** | **Role Parameters** |
|  |  | Receive   * Receiving Department Items * Scan in Items | You must assign a service unit when configuring this role. |  |  |
| Selector | **ACQUISITIONS**:   * Create Purchase Request * Manage Purchase Requests * Vendors (View Only) * Funds and Ledgers (View Only) * Licenses (View Only)   **ADMIN**:   * Manage Users (View Only) | This role is for use by Rialto. The functionalities listed here are transferred to Purchase Request Operator/Manager. For more information, see [Managing Rialto User](https://knowledge.exlibrisgroup.com/Rialto/Product_Documentation/040Rialto_Administrator_Guide/040Managing_Rialto_User_Roles) [Roles](https://knowledge.exlibrisgroup.com/Rialto/Product_Documentation/040Rialto_Administrator_Guide/040Managing_Rialto_User_Roles). | Institution |  |
| Selector Extended | This role is no longer in use. | | | |
| Trial Manager | **ACQUISITIONS**:   * Manage Trials * Create Purchase Request   **ADMIN**:   * Manage Users (View Only) | Manages electronic resource trials and evaluations as part of preprocessing for acquisitions, and manages the Trial Operator. When deleting the last item associated with a bibliographic record, can also delete that bibliographic record.  **Note**  The item described above is not the last physical item. It is describing the last inventory item (in general = the last inventory resource). | Institution |  |
| Trial Operator | **ACQUISITIONS**:   * Manage Trials * Create Purchase Request | Manages electronic resource trials and evaluations as part of preprocessing for acquisitions. When deleting the last item associated with a bibliographic record, can also delete that bibliographic record. | Institution |  |

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| **Module** | **Role** | **Accessible Components** | **Description** | **Scope** | **Role Parameters** |
|  |  |  | **Note**  The item described above is not the last physical item. It is describing the last inventory item (in general = the last inventory resource). |  |  |
| Trial Participant | NONE | An individual invited to participate in an electronic resource trial. | Institution |  |
| Usage Data Operator | **ACQUISITIONS**:   * Manage COUNTER data | Manually upload or delete COUNTER data for any vendor, manage the uploaded data files, and view usage data. | Institution |  |
| Vendor Account Manager | **ACQUISITIONS**:   * Create Purchase Request * Vendors | Manages the vendor account elements of vendor records. | Institution / Library |  |
| Vendor Manager | **ACQUISITIONS**:   * Create Purchase Request * Vendors | Manages all aspects of vendor records. | Institution |  |