The Roles Database

Navigating the Roles Database

Using the Roles Database to Manage SAP Authorizations

See also: http://web.mit.edu/rolesdb/www/intro.html

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Navigating the Roles Database

The Roles Database

The Roles Database contains authorizations—rules about people's privileges or roles—for MIT's financial and other business systems, such as SAP. Authorizations are maintained within the Roles Database by central and departmental people. Related data on people, departments, and financial objects are drawn from other databases such as the Data Warehouse.

The Roles Database does not enforce the authorizations that it stores. It only collects the information and distributes it to the appropriate applications, usually as a nightly data feed.

Applications with an interface to the Roles Database interpret the access rules from the Roles Database and enforce them.

Some users have the authority to create and modify authorizations, and for this they must use the Roles application. Other users only need to view authorization information, and they can use the Web interface for this.

Together, the database, the application, and the Web interface serve as a common tool for users in offices and labs to maintain authorizations for their departmental resources.

Authorizations

In the Roles Database, an authorization is a rule that lets you perform a specific business function within a computer-based application. It is the most important entity maintained in the Roles Database.

Authorizations have three parts: Person, Function, and Qualifier. (SAP authorizations are related but not the same as Roles Database authorizations.) When you connect these three components, an authorization is created.

For example:

Person	Function	Qualifier
jsmith	can view personnel data in the data warehouse	within org. unit within org unit 152000
jjones	can create a requisition	for fund center FC123456
ssimms	can approve a requisition for line items less than $2500	for spending group SG_ANTHRO

where:

Person is identified by her or his Kerberos user ID, e.g., jsmith, not by name, e.g, Jo Smith.

Function is what a person is permitted to do within a specific application, such as SAP, WRHS (MIT's Data Warehouse), GRAD (Graduate Admissions Application). For example, jsmith is allowed to view personnel data in the data warehouse.

Qualifier is an organizational unit, cost object, fund center, or some other item that limits the data on which a Person can perform the Function. For example, org. unit 152000

Some types of qualifiers in Roles must be prefixed with a letter that identifies the type of qualifier. For instance, 7654300 in Roles is preceded by a P that identifies it as a WBS element. Use the following prefixes before the appropriate cost element: F (Fund), FC (Fund center), C (Cost Center), I (Internal order), P (WBS element), PC (Profit center). For instance, to specify Fund Center number 123456 within the Roles Database, specify FC123456, not 123456.

Requirements

- A PC running Windows 95 or Windows NT 4 or higher or a Macintosh running MacOS7.5 or higher. See also *Recommended Hardware and Supported Software* in the web at http://web.mit.edu/desktop/.
- On a Macintosh, at least 16Mb of free disk space(6Mb for Roles and 10Mb for SQL*net)

  On an NT machine, at least, 32 Mb of free disk space (7Mb for Roles and 25Mb for SQL*net)
- A username registered in the Roles Database in order to run the application. Contact **rolesdb@mit.edu**
- An installed copy of the Roles Database application and SQL*net.

To download and install the necessary software, go to the web page Roles home page at **http://web.mit.edu/rolesdb/**

and click on the appropriate platform link. This link will take you to download and installation instructions for your computer.

More Roles URLs

http://webroles.mit.edu

Requirements for Roles on NT

- A PC running Windows NT 4 or higher. See also *Recommended Hardware and Supported Software* http://web.mit.edu/desktop/.
- At least 7Mb of free disk space for the Roles application and its PowerBuilder runtime library files.
- 25 MB of hard drive space for SQL*Net
- A username registered in the Roles Database in order to run the application. Contact rolesdb@mit.edu.
- An installed copy of the Roles Database application and SQL*Net.

Requirements for Roles on Macintosh

- A Power Macintosh computer running Mac OS 7.6.1or later. See also *Recommended Hardware and Supported Software* http://web.mit.edu/desktop/.
- At least 16 MB of RAM
- 6.5 MB of hard drive space for SQL*Net
- 10 MB for the Roles application and its PowerBuilder runtime library files
- A username registered in the Roles Database in order to run the application. Contact rolesdb@mit.edu.
- An installed copy of the Roles Database application and SQL*Net.

Download and Install the software

Windows NT: Download the Roles Database application for Windows NT from **http://web.mit.edu/rolesdb/www/ntroles.html**.

Macintosh: Download the Roles Database application for Macintoshes from **http://web.mit.edu/rolesdb/www/macroles.html**

The installers include Oracle SQL*Net, which will be installed if you have not previously installed it.

Start the application

Once you have installed the Roles Database application, start the application.

1. Select the application icon in the **Start** menu.
2. At the prompts, enter your username and password. (Currently, you will need to use a special password given to you for the Roles Database. In the future, this application will be Kerberos so you will not need to use a special password. To request a password, send email to rolesdb@mit.edu .

Result: A "splash" screen displays the version number of the application and a subset of the documentation you are now reading.

3. Click **OK**. You can also choose to print the information on this screen, in which case choose **Print** and then **OK**.

Result: The "Authorization List" screen appears and you can begin your Roles session.

(At this point you can change your password, if you wish. See the instructions below.)

The four main screens of the Roles Database application

The Roles Database application has four main screens:

From these screens you can browse information from the database by Authorizations, Functions, Qualifiers, and Persons, respectively. You can access each of these main screens in three ways: from the View menu, from the keyboard using the key mappings shown above, and from the icon buttons in the icon bar.

Screen Name	Keyboard Combination	Icon button
Authorization List	Ctrl-shift-A	A
Function List	Ctrl -shift-F	F
Qualifier List	Ctrl -shift-Q	Q
Person List	Ctrl -shift-P	P

The first screen that appears is the Authorization List screen. The next section explains the various parts of the Roles Database application screens, using the Authorizations List screen as an illustration.

How to change your password in Roles

1. From the **Perform** menus select **Change Password…**

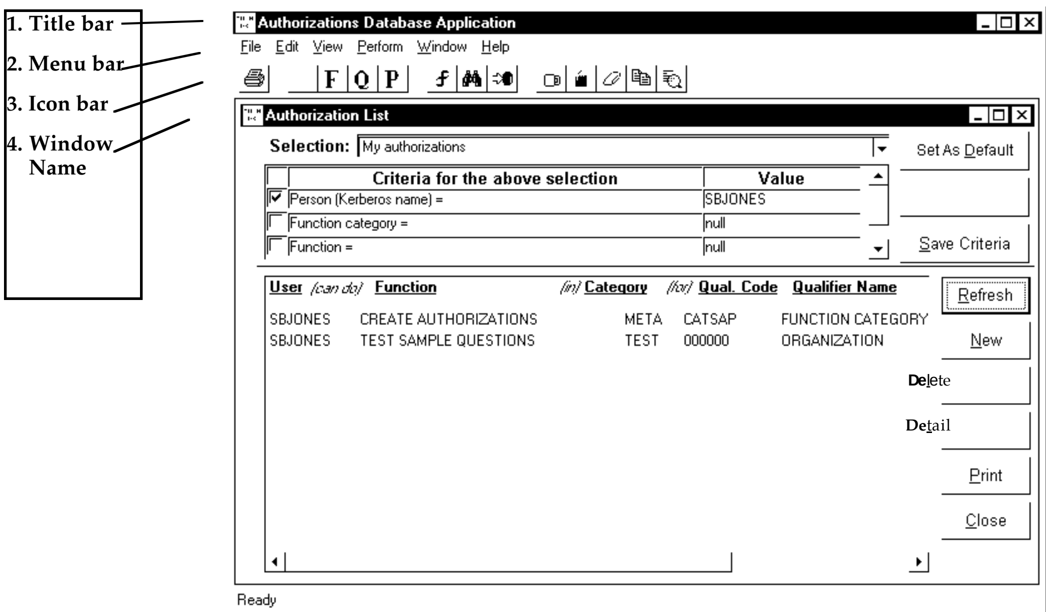
Result: The "Change Roles Password dialog box appears.

2. In the field **Current Password** enter your current password and press **Tab**.
3. In the field **Type New Password** enter your new password and press **Tab**.
4. In the field **Confirm New Password** enter your new password and click on the **Change** button.

A tour of the Roles Database screens

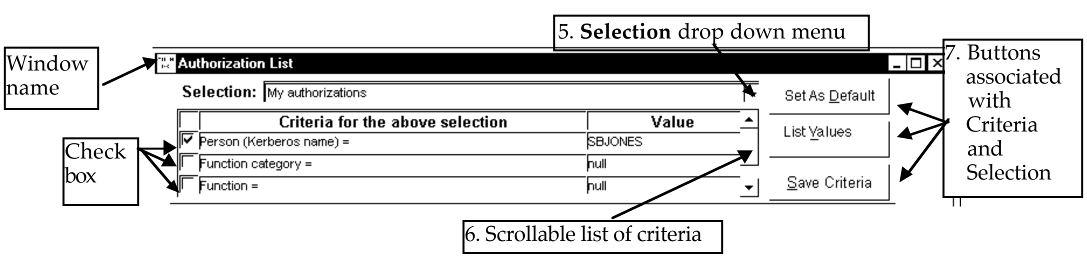
All of the main screens have the following nine areas.

1. At the top of the screen is the **Title bar** with the name of the application.
2. Below the Title bar is the **Menu bar**. Commands in the drop down menus let you view the various types of lists in the database and perform tasks such as duplicating and deleting. Most of the items listed in the menus have keyboard mappings, and many of them are duplicated in icons or buttons, giving you more than one way of doing the same thing.
3. Below the menu bar is the **Icon bar**. Pass your cursor over each icon to see an explanation of what each icon does.



Note: You can change the look of a window from the **View** menu. Particu-larly, you can either show or hide the Selection Criteria by toggling on and off **Show Selection Criteria (Ctrl+E)**. When off, all the criteria information (see 5, 6, and 7 below) is hidden and the lower box expands to fill the screen.

4. The **Window name** indicates whether you are looking at a list of Authorizations, Functions, Qualifiers, or Persons.



5. The **Selection** drop down menu shows a list of "Selection Sets" associated with the window. Each Selection Set is a set of criteria for defining the Authorizations, Functions, Qualifiers, or Persons you want to display in the lower half of the screen (8). To see the Selection Sets, click on the arrow at the right of the field.

> **Practice:** Choose "My Authorizations" from the Selection Set and click on the **Refresh** button.

6. The scrollable list of criteria is associated with the Selection Set. Each criterion is a filter for Authorizations, Functions, Qualifiers, or Persons.

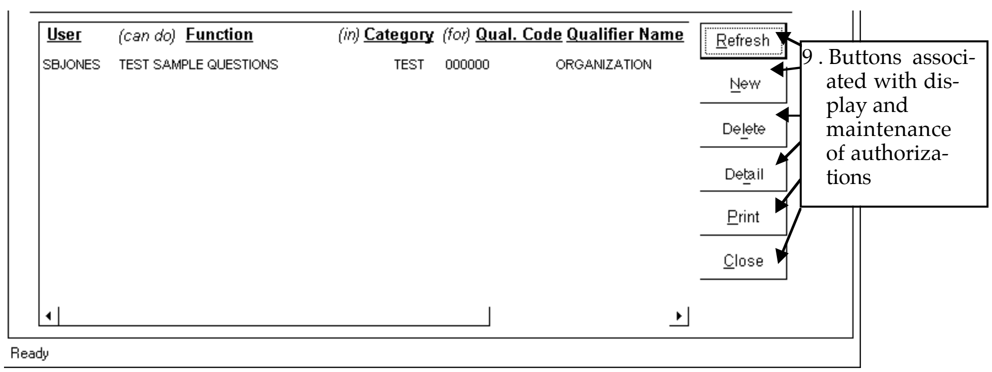
   Some criteria are "locked," that is, they cannot be disabled or changed. However, you can enable or disable most criteria by clicking the check box at the left. You can modify criteria by changing the **Value** field.

   When you change criteria or Selection Set, click the **Refresh** button to see the changed display

   Selection Sets and Criteria are powerful features of Roles. They let you display a subset of items you want to see.

Practice: Scroll through the list of values. What is the value for:
Person (Kerberos name)=
Function category=
Function=
Qualifier code=

7. The three buttons associated with Selection Sets and Criteria are:
   - The **Set As Default** button sets a default Selection Set to be used whenever you first enter one of the four main list screens. For more information on setting defaults, see in the Web "Using Selection Sets and Criteria" at http://web.mit.edu/rolesdb/www/start.html#five.
   - The **List Values** button becomes active when you click in one of the "null" Value fields. Clicking on the activated button takes you to a new screen where you can pick a value for the null value field.
   - The **Save Criteria** button lets you save a copy of your modified criteria for a given Selection Set. You can save your own sets of criteria.
8. The bottom half of the screen is where the selected Authorizations are displayed.



9. On the right of the screen are up to seven buttons. Some buttons may be "grayed out," that is, inactive. To activate these buttons, select (click on) one of the lines in the displayed authorizations.

Button	Description
Refresh	Refreshes the screen after you have changed Selection Set or Criteria, or after you have added, deleted, or modified objects displayed in the main window.
New	(Authorization List and Function List only) Allows authorized users to create new authorizations or functions.

Delete (Authorization List and Function List only) Allows authorized users to delete selected authorizations or functions.

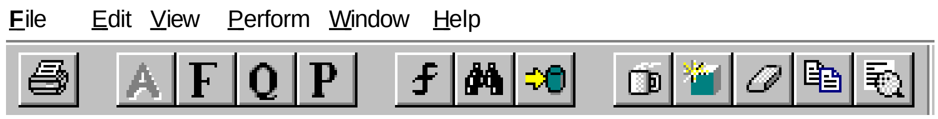
Detail Allows you to see more details for selected items.

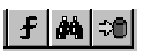
Pick (Function List, Qualifier List and Person List screens, not on Authorization List screen) Under some circumstances, you can use this button to pick a Function, Qualifier, or Person to be used in a new or updated authorization or in a selection criterion.

Print Prints the list of authorizations.

Close Closes the current screen.

Menu items





File	Close	Ctrl+W	Closes active window
	Export		Export to spreadsheet
	Print		Prints what is in the
	Printer Setup…		
	Exit	Ctrl+Q	Quits the Roles
Edit	Undo	Ctrl+Z	
	Cut	Ctrl+X	
	Copy	Ctrl+C	
	Paste	Ctrl+V	
	Clear	Del	
View	Authorization List	Ctrl+Shift+A	Opens Authorization
	Function List	Ctrl+Shift+F	Opens Functions List
	Qualifier List	Ctrl+Shift+Q	Opens Qualifier List
	Person List	Ctrl+Shift+P	Opens Person List screen
	Show Toolbar	Ctrl+T	Toggle to hide or show
	Show Selection Criteria	Ctrl+S	Toggle to hide or show
	Show EasyButtons	Ctrl+E	Toggle to hide or
Perform	Set As Default		
	List Values		
	Save Criteria		
	Refresh	Ctrl+R	
	New	Ctrl+N	
	Duplicate		
	Detail	Ctrl+I	
	Change Dates		
	Change Password…		Lets you create a new
Windows	Vertical		
	Horizontal		
	Layer		
	Cascade		
	(names of open windows)		
Help	About…	F1	Shows version number.

Using the Roles Database to Manage SAP Authorizations

This document is about using the Roles Database to create and manage SAP Authorizations. The types of SAP-related authorizations that you can grant through the Roles Database are:

- Can use SAP
- Spending or committing funds
- Requisition
- Journal Vouchers
- Manual Reservations
- Approval of spending
- Reporting
- Entry of budget information on a cost object in a departmental “plan version”

Although this document discusses all the types of authorizations in the section below, the instructions in the latter portions walk through creating and working with spending authorizations only.

Every Authorization has three parts: a person (who), a function (what), and a qualifier (where). A person is a Kerberos ID. A function is what a person may do. A qualifier defines the area in which a person may perform that function, for instance, a fund center or profit center in SAP. The following tables describe the various functions that apply to SAP authorizations.

Qualifiers of various types (such as Funds/Fund Centers or Cost Objects/Profit Centers) can be picked from any level of the hierarchy. For example, choosing a node at the top of a group of fund centers permits a user to perform the function “can spend or commit funds” on all funds connected to every fund center within the node.

For instance, a piece of the Information Systems Custom Fund hierarchy looks like this:

```
..
+--FC_VPIS VICE PRESIDENT FOR INFORMATION SYSTEMS
   +--FC100033 VP FOR INFORMATION SYSTEMS P404400
      +--FC100242 OFFICE OF THE VP INFO SYSTEMS P404400
      |  +--FC101012 GO-INFORMATION SYSTEMS P404400
      |  |  +--FC101014 GO-ACAD COMPUTING PCT INFO SYS P404400
      |  |  |  +--F1565100 Projects: Academic Computing
      |  |  |  +--F1565200 Service Sla
      |  |  |  +--F1565300 Support Sla
```

Granting a user a spending and committing authorization on node FC_VPIS would allow that user to spend and commit funds from any fund under that branch of the tree.

The general SAP Function

Function Name	Description
Can Use SAP	The basic SAP function in Roles is "Can Use SAP." Anyone who plans to use SAP for anything must have this authorization. The qualifier is "null" (no qualifier needed).

SAP Functions for Spending or Committing funds

Can Spend or Commit Funds	The "can spend or commit funds" function works in conjunction with the "requisitioner" and "credit card verifier" functions. The qualifier for a "can spend or commit funds" authorization must be a fund, fund center, or a node in the fund center hierarchy that relates to a group of fund centers. Giving a user a "can spend or commit funds" authorization is the first step in making him or her able to carry out specific tasks in SAP. However, once you have authorized the person to spend funds from a given set of fund centers, you must then define how they can spend or commit funds. SAP has two types of spending or committing, and an individual may be authorized for one or both of them: • requisitioning • credit card verification Note that a person authorized as a "requisitioner" can requisition on all funds and fund centers specified in his/her "can spend or commit funds" authorizations. Similarly, a "credit card verifier" authorization applies to same set of funds and fund centers. You cannot authorize a person to be a requisitioner and a credit card verifier for two different sets of fund centers.
Requisitioner	What you can do with requisitioner authorization This authorization lets a requisitioner create or change a requisition in SAPweb or SAP. The qualifier is "null," but the authorization is related to "can spend or commit funds" authorizations.
Credit Card Verifier	What you can do with credit card verifier authorization This authorization lets a credit card verifier move MIT credit card expenditures billed to MIT to the specific cost object and cost element appropriate for that expenditure before the charge is actually posted. The qualifier is "null," but the authorization is related to "can spend or commit funds" authorizations. To setup a credit card verifier authorization or to become a credit card holder, contact the VIP Card office at x3-8366 or send e-mail to Stephanie Bromander at romander@mit.edu.

SAP Functions for Journal Vouchers and Manual Reservations

JV(FY) **JV(IP)** **JV(Standard)**	The journal voucher function is similar to the M or Y voucher in MIT's $SumMIT system. MIT users of this transaction create journal documents that are posted upon completion unless the business rules require otherwise. If approval is required, the completed journal document is routed to the SAP inbox of the appropriate CAO staff person, who reviews it to ensure that it meets MIT criteria before it is posted. The qualifier is "null" since none needs to be specified - users author-

ized to create journal vouchers in SAP can create debit or credit transactions on any cost object at MIT.

Manual Reservations

A person with manual reservation authorization can reserve funds on a cost object for anticipated expenditures. The reserved funds are displayed in the “committed” column of the Summary Statement.

The qualifier is “null” since none needs to be specified.

SAP Approving Functions

Approver Mod 2 Lev 1 and 2
Approver Mod 3 Lev 1 and 2
Approver Mod 4 Lev 1 and 2
Bates Approver Lev 1, 2, 3, and 4
Sloan Lev 1 Approver
Sloan Lev 2 Approver

The Approval functions in this group relate to approving a requisition after it has been created. Approval authorizations relate to the various Release Strategies (see http://rolesweb.mit.edu/doc_fragment.html#APPROVER) defined in SAP, i.e., the various “models” of steps ("levels") involved in approving a requisition. Approval authorizations apply to both paper and electronic requisitions. The qualifier must be a spending group from the Spending Group hierarchy.

Travel Documents Approval

This authorization applies to travel documents approval. It is this authorization that must be checked when paper travel documents or, eventually, electronic trip report documents require approval. The qualifier must be a fund, fund center, or fund center group. No dollar limit is associated with this authority and it is independent of Requisitioning Approval or Can Spend or Commit Funds. This is not an SAP authorization, but it is a financial authorization closely related to SAP functions. (CAN USE SAP authorization is not required.)

Invoice Approval Unlimited

This authorization applies to invoice and RFP(Request for Payment) approval. It is this authorization that must be checked when paper invoices or, eventually, electronic invoices require approval. No dollar limit is associated with this authority and it is independent of Requisitioning Approval or Can Spend or Commit Funds. The qualifier must be a fund, fund center, or fund center group. This is not an SAP authorization, but it is a financial authorization closely related to SAP functions. (CAN USE SAP authorization is not required.)

SAP Reporting Functions

Report by CO/PC
Report by Fund/FC
See Salary Subtotal Reports

The reporting functions control the Funds or Cost Objects on which you are allowed to report.

In SAP, the reporting functions are related to in the “MIT Financial System” screen (/nzmit) for reporting on a specific cost object. In the Data Warehouse, they also control reporting on Funds or Cost Objects.

You can assign reporting authorizations either of two ways through the: (1) Fund Centers or the(2)Profit Centers.

1. To control reporting by Fund Centers, choose the “Report by Fund/FC” function and specify a Fund or Fund Center.
2. To control reporting by Profit Centers, choose the “Report by CO/PC” function and specify a Profit Center or group of Profit Centers.

The default authorization does not include the ability to see salary subtotals in reports. You must specifically request the authorization to see salary subtotals cost element.

SAP Budgets Function

Enter Budgets

This function is not related to the Nimbus budget submission process.

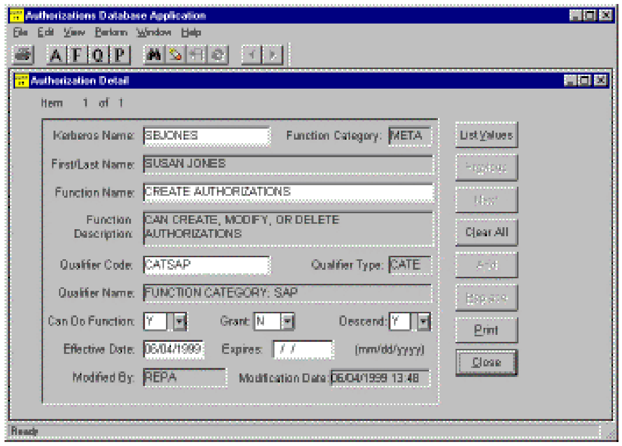
Budgets, or departmental plans, are authorized by plan version. There are nineteen versions, one for each school and VP area. These are separate from the official Institute budget (Version 0). The Summary Statement, Detail Transaction Report, and the Account Manager's Report can all be run with the Institute budget version (0) or with a different version that authorized individuals may enter.

Create an authorization for a new user to spend

The following is an example of creating an SAP authorization in Roles for a person to be able to spend or commit funds in SAP. Use this same process to create other authorizations.

1. In the "Authorization List" window of the Roles Application, click on the **New** button.

Result: The "Authorization Creation" window appears.



The "Authorization Creation" window

In this window, enter information defining the person for whom you are creating an authorization and what that person can do in SAP (Can Do Function) and in Roles (Grant/View). The following table describes each field and the proper entries. All fields are required unless noted otherwise.

Field	Value	Description
Kerberos Name		Kerberos ID of the person, e.g., sbjones, for whom this authorization is being created.
Function Name		Name of the function the user is authorized to do, e.g., can spend or commit funds
Qualifier Code		A cost object within the Qualifier Type that fits the selected Function Name
Qualifier Type		Name for the Qualifier appears when you select a Function Name.
Qualifier Name		The name that matches the Qualifier Code, e.g., Support is the name of the Fund Center associated with
FC100246		
Can Do Function	**Y** or **N**	This field refers to SAP authorizations. If **Y**, this person can actually do the Function in SAP within the given Qualifier. If **N**, the Person can only grant or view the authorizations.
Grant		This field refers to Roles authorization
	N	This is the default for all Roles users.
	Y	Grant this user the authority to create authorizations for this function
Descend	**Y** or N	For SAP, this should always be **Y**. If Y, the authorization applies not only to the specified Qualifier, but also to all descendants of the specified Qualifier in the tree. If N, the authorization applies only to the specified Qualifier and not to descendants.
Effective Date	**mm/dd/yyyy**	Defaults to today's date. The date on which the authorization becomes effective.
Expires		(Optional) The date after which the authorization expires (i.e., becomes inoperative).
Modified By		Kerberos name of the last person to modify this authorization.
Modified Date		The date on which the authorization was last modified.

Entering data in the "Authorization Creation" window

The general procedure for making these selections is to click on one of the fields and then on the **List Values...** button. When a list with selections for the field appears, make your selection and click on the **Pick** button.

When all the fields are complete, the **Add** button becomes active. Click on the **Add** button.

2. Select the user by typing the Kerberos name or searching as described above.
3. Select the function from the list of functions.
   - When the "Function Pick List" appears, choose "Functions by category" from the **Selection** field and click on **Refresh**.
   - From the list that appears, select the function you want to assign, for instance if you want this person to be able to buy things, select "CAN SPEND OR COMMIT FUNDS" and click on **Pick**.
4. Select a qualifier from the qualifier list.
   - When the "Qualifier Pick List" window appears, choose "Hierarchical list of Fund Centers" from the Selection field and click on **Refresh**.
   - When the "FCMIT ALL INSTITUTE BUDGET" hierarchy appears in the lower portion of the window, click on the ⊞ for "FC_CUSTOM Custom Fund Groups" to see the list of Custom Fund Groups. You can continue to expand this list as long as there is a ⊞ in front of the item in the hierarchy.
   - Select the custom hierarchy node or element you desire and click **Pick**.
5. Click the **Add** button to save.
6. Click the **Close** button to return to the "Authorization List" screen.

Display the authorizations you have created

1. From the "Authorization List" window, in the **Selection** field, choose "Authorizations I created" and click the **Refresh** button.

Result: In the lower portion of the screen you should see your newly created authorization(s).

Display a person's authorizations

1. From the "Authorization List" window, in the **Selection** field, choose "Authorizations for a person."
2. In the **Person (Kerberos name)=** field, type the person's Kerberos name and click the **Refresh** button.

Result: In the lower portion of the screen you should see a list of that person's authorization(s).

Delete an authorization

1. From the "Authorization List" screen, click on an authorization to select it.
2. Click the **Delete** button (or select **Delete** from the **Perform** menu).

For more on deleting and editing authorizations, particularly working with multiple authorizations, see **http://web.mit.edu/rolesdb/www/start2.html#ten**.

Exercises:

1. Create an authorization giving requisitioning or credit card verification authorizations to your user.
2. Create an authorization giving reporting authorization.
3. Display the authorizations that you have created.

Copy authorizations from one user to another user

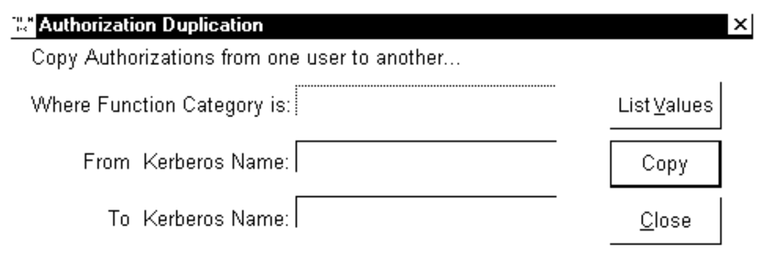
The Roles application lets you duplicate all of a user's authorizations within a category and the authorizations to another user. To do so, you must be authorized to create all of the authorizations you want to copy.

If you are unsure whether you have the appropriate authorizations, see "Determine Your Level of Authorization" at **http://web.mit.edu/rolesdb/www/auth-level.html**

Suppose you want to take all of the SAP-related authorizations for user XXXXX and duplicate them for user YYYYY. To do so,

1. Open the "Authorization List" screen.
2. From the **Perform** menu, select **Duplicate** or click on .

Result: The "Authorization Duplication" screen appears.



3. Complete the fields on this screen as follows:

Where Function Category is:	**SAP** (You can either type in the Category name or put your cursor on the field and click the **List Values…** button to choose it from a pick list.
From Kerberos Name:	Kerberos name of the person who has the existing authorization that you want to duplicate. (Or pick the Kerberos name from a list by clicking in the field and then clicking the **List Values…** button.)
To Kerberos Name:	Kerberos name of the person that you want to include in the duplicated authorization.

4. When you have entered all the necessary information, click the **Copy** button to do the duplication.

Result: For each existing authorization in the specified category for the specified **From Kerberos Name** for which you have create authority, the application will create a new authorization with the Kerberos name set to the **To Kerberos Name**.

The application tells you how many authorizations were duplicated.

Note: If an authorization already exists with the given Function and Qualifier for the "To" Person, the authorization will not be duplicated.

If you do not have the appropriate authorizations, you will receive an error message telling you that you are not authorized to copy some number of the authorizations you tried to copy. You might find it handy to use the Selection Set "Compare Authorizations for two people" from the "Authorization List” screen to see the results of the Duplicate facility.

To see the results of your duplication, in the “Authorization List” screen, from the **Selection** field, choose “Compare Authorizations for two people.”

How to find new fund or cost objects

A new fund center or cost object added to SAP is displayed in the standard SAP hierarchies within Roles with each new feed from SAP. In many cases, these are added to the custom hierarchy automatically.

Custom hierarchy

The custom fund center hierarchy in Roles joins Institute and Sponsored parts of the Fund center Hierarchy into Spending Groups. These spending groups can include fund centers outside a department if users are authorized to spend on them. At present, custom hierarchies have been created for ASO, RLE, and Sloan.

- New fund centers that are children of parent fund centers already listed in the custom fund center groups are automatically added to the custom hierarchy in the feed from SAP.
- New cost objects linked to existing fund centers or to new fund centers that meet the criteria in (a) are automatically added to the custom hierarchy in the feed from SAP.
- New cost objects linked to new fund centers in (b), that are parents or children of parents not in the custom hierarchy, will be added when the fund centers are explicitly added to the custom fund center group.

However, there are instances when you must request maintenance on your custom hierarchies.

- New fund centers that are parents or children of parents not in the custom hierarchy must be explicitly added to the custom fund center groups if you want to assign them as qualifiers using the custom hierarchy.

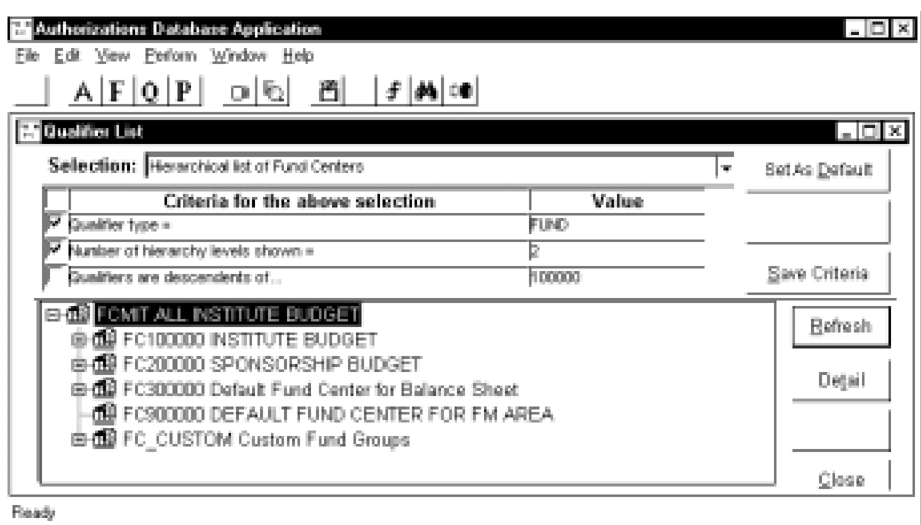
Display the Fund Centers Hierarchy

1. Click on the **Q** button in the menu bar.

Result: The “Qualifier List” screen is displayed.

2. From the Selection Set menu, choose “Hierarchical list of Fund Centers” and click on the **Refresh** button.

Result: The root of the Fund Centers Hierarchy is displayed at the bottom of the screen.



3. To see the branches of the hierarchy, click on

Who can do function x with qualifier y?

As you work with Roles, using it as a tool to look up authorizations, you will find the Selection item "Who can do function x with qualifier y" very useful.

This Selection Set lets you answer the question "Who is authorized to perform a given business function with a given qualifier?" This selection set does the following:

- It looks both for authorizations that have a specified qualifier, such as a cost center, and authorizations that have a qualifier that is a parent of the specified qualifier, such as a fund center.
- It only displays authorizations where the person can do the business function and does not display grant or view authorizations
- It takes into account the effective date and the expiration date for the authorization, ignoring authorizations that are not in effect today.

This selection set allows you to be very specific or quite loose. For instance, if you want to know who is permitted to requisition against a particular cost center, you would set the following values

✔Function category=	**SAP**
✔Function=	**REQUISITIONER**
✔Qualifier code (or is parent of)=	**f1644200** for example…
✔do_function flag=	**Y**
✔is authorization active today?	**Y**
Function name contains…	
Person can spend on fund or FC…	
Qual code is NULL or is a parent of…	

By selecting or not selecting criteria you can change the scope of the search. For instance, if you want to know all the people at MIT who are authorized to verify credit card purchases of any sort, you would select (✔)the following criteria and enter the following values:

✔Function category=	**SAP**
✔Function=	**CREDIT CARD VERIFIER**
Qualifier code (or is parent of)=	
✔do_function flag=	**Y**
✔is authorization active today?	**Y**
Function name contains…	
Person can spend on fund or FC…	
Qual code is NULL or is a parent of…	

However if you prefer a more contained list, you could limit the search by selecting a qualifier against which the credit card charges might be made

✔Function category=	**SAP**
✔Function=	**CREDIT CARD VERIFIER**
✔Qualifier code (or is parent of)=	**fxxxxxxx**
✔do_function flag=	**Y**
✔is authorization active today?	**Y**
Function name contains…	
Person can spend on fund or FC…	
Qual code is NULL or is a parent of…	