Vroozi Roles Directory

Table of Contents:

Admin Interface Roles

PURCHASE ADMINISTRATOR (MASTER DATA)

Vroozi Module: Purchase

Permissions:
- Set up and maintain the company's Master Data. Including:
  - Content Access Mapping (restricts the catalog content users can view)
  - Data Mapping (material groups, unit of measure, currencies)
  - External Web Service Integration
  - Order Approval Workflow Rules
  - Organizational and Accounting data
  - BuyRoute Configuration
- View all catalog content within the company, without any restrictions.
- Administer user accounts and setup content access rules.

Additional Details:
- A company can have multiple users which have the Administrator role assigned to them
- Admins have access to every area of the Vroozi SpendTech Procure to Pay + Marketplace platform and the ability to configure company-wide settings.

MASTER ADMINISTRATOR

Vroozi Module: Catalog

Permissions:
- Access to every area of the smartOCI and have the ability to configure company-wide settings.
- Perform any actions on catalog content within their company.
- View all catalog content within the company, without any restrictions.
- Administer user accounts and setup content access rules.
- Set up and maintain the company's Master Data. Including:
  - Content Access Mapping (restricts the catalog content that users can view and access)
  - Data Mapping (material groups, unit of measure, vendor ids, currencies)
  - External ERP Integration
  - Content Approval Workflow Rules

Additional Details:

- A company can have multiple users which have the Master Admin role assigned to them
- A Master Administrator automatically inherits all other Catalog user roles; except the Power Shopper role.

CATALOG ADMINISTRATOR

Vroozi Module: Catalog

Permissions:
- Administer catalog content in their company, *if* given the appropriate Content View assignments.
  - Can only access content within their assigned Content View(s)
- Administer user accounts which have Content Approver, Buyer, Supplier, Shopper or Shopper Only Access roles assigned to them.
  - Content Admin users will only be able to view/administer user accounts with the same Content View assignments on their profile
- View and manage Supplier records in Vroozi Catalog (smartOCI)

Additional Details:
- Can only be assigned by a Master Administrator.

Unable to:
- Configure a company's Master Data or change company wide settings.

Purchasing and Receiving Roles

BUYER

Vroozi Module: Purchase

Permissions:
- Can access both Vroozi Catalog (smartOCI) and Vroozi Purchase
- May only access catalog content in Catalog based on their assigned *Content Views*
- Manually create purchase orders (PO) in Vroozi Purchase
- Add non-catalog line items to manually created POs in Vroozi Purchase
- Compile POs, using line items from approved PRs
  - Buyers can only see items from approved PRs, if those items are automatically assigned by the system, to the Buyer's relevant Buyer Group

○ Modify an existing PO
- Finalize and submit POs, sending them to the relevant suppliers

Additional Details:
- A company can have many users with the Buyer role assigned to them
- Buyers can only be associated to a Buyer Group by Administrators

Unable to:
- Administer, create, update or delete any catalogs in the Content Manager

CENTRAL RECEIVER

Vroozi Module: Purchase

Permissions:
- Receive against all Company Purchase Orders.
- Complete returns against received Purchase Orders.

Additional Details:
- Can be assigned as a single role or in combination with the Requester role. (next category)

Shopper Interface Roles

EMPLOYEE (REQUESTER)

Vroozi Module: Purchase

Permissions:
- Create purchase requests
- Create catalog and non-catalog free text line items in a purchase request
- Bulk upload line items against a purchase request.
- Add attachment(s) against a purchase request.
- Access the request status page to track the status of their purchase requests.
- Access the purchase order status page to track the status of the company's purchase orders.
- Access the receipt status page to track the goods receipts against purchase orders and once received can perform a goods receipt against items from their purchase order.

Additional Details:

- Spending threshold and specific approver can be set for each individual Requester. Otherwise approval will default to global setting.

SHOPPER EXPRESS

Vroozi Module: Express

Permissions:
- Create unique list/carts that they can be shared with their perspective power shoppers.
- Track their orders from their 'List Status Page'.

Additional Details:
- A hybrid role with specific access to Catalog Content only.
- No accounting data is required to submit an order.

POWER SHOPPER

Vroozi Module: Express

Permissions:
- View and process user defined shopping lists that have been shared with them by a Shopper Express user.
- Add a list to the Shopping cart, and checkout the contents to an external ERP system. The ERP system is used for further processing of the order.
- Dismiss a shared list by selecting 'Remove'

Additional Details:
- A company can have multiple users with the Power Shopper role assigned to them
- Can only view shared lists from Shopper Express users, as long as they have the same Content Groups assigned.
- Role can only be administered by Master Admins

MARKETPLACE SHOPPER

Vroozi Module: Marketplace

Permissions:
- Shop from pre-approved catalogs.
- Create free text requests.
- Create unique lists which can be shared with other shoppers.

Additional Details:

- Launch of Marketplace is generated from an ERP system.
- Checkout of a Shopping Cart is completed in an ERP system.

Vroozi Expense

Vroozi Module: Expense

Permissions:
- Create expense reports for personal spending and submit to the company's financial approver to be reimbursed.
- Take pictures of receipts and add to expense 'Wallet' to be used for future use.
- Track mileage - if used by buying organization.
- Access the expense status section to keep track of submitted expenses.

Additional Details:
- Employees submitting personal expenses for reimbursement.

Approver Roles

Content Approver

Vroozi Module: Catalog

Permissions:
- Approve or reject catalog content that is assigned to their Content Views.

Unable to:
- Administer other user accounts
- Administer Supplier records
- Administer any catalog content, other than Approving or Rejecting the content
- View any catalog content outside of their assigned Content Views

Additional Details:
- A company can have multiple users which have the Content Approver role assigned to them.
- Content Approvers can only be administered by Master Admins and Content Admins
- Can be associated directly to catalogs or to a Supplier record.

- When assigned to a Supplier, they are automatically associated to all catalogs belonging to that Supplier.

Approver (Financial)

Vroozi Module: Purchase

Permissions:
- View any Requisition assigned to them and approve, or reject them

Unable to:
- Create new Requisitions.
- Make any changes or modifications to the company's Master Data, or companywide configurations.
- Administer any other user or supplier records.

Additional Details:
- Buying organizations may have multiple approvers assigned to a single requisition through the use of Approval Limits & the enablement of the Staircase Approval Workflow.

Sourcing Approver

Vroozi Module: Sourcing

Permissions:
- Filter and edit Purchase Requests (PRs) prior to financial approval.
- Approve or Reject PRs.

Additional Details:
- A company can have multiple users with the Sourcing Approver role assigned to them

Accounts Payable Roles

Vroozi Module for all Roles: Vroozi Invoice

AP Processor

Permissions:
- Create and submit Invoices including:
  - Submit Invoices for approval
  - Submit Invoices for coding
  - Submit Invoices for Exception Handling
- Assign Invoices to other AP Processors or Managers
- Park Invoices

- Track Invoices submitted for approval and coding.
- If 'Coding' permission is assigned to AP Processors, they can enter or modify Invoice accounting information when it is submitted to them for coding.

AP Approver

Permissions:
- Review Invoices submitted for approval, and 'approve' or 'reject' them.
- If 'coding' permission is assigned to AP Approvers, they can enter or modify Invoice accounting information.
- If 'editing' permission is assigned, Approvers can modify the information on an Invoice when it is submitted to them for approval.

AP Auditor

Permissions:
- May only view invoices from the specific business units or locations assigned to them.
- Retrieve, view and run reports on specific invoices in the following statuses
  - Posted
  - Paid
  - Partially Paid

Additional Details:
- May not be combined with AP Manager or Processor roles.

AP Manager

Permissions:
- Able to perform all the tasks that an AP Processor and Approver can do.
- Intercept and approve an Invoice that is pending approval from any AP Approver. Once an AP Manager intercepts and approves an Invoice the status become 'Approved' and does not require approvals from subsequent approvers, if any.

Additional Details:
- Only AP Managers are able to post Invoices to external system.

Supplier Portal Roles - Supplier Users

Vroozi Module for all Roles: Supplier Portal

ADMINISTRATOR

Permissions:
- Create new Portal users
- Edit Company Profile
- Add comments to POs and Invoices
- Create all transactional documents

ORDER PROCESSOR

Permissions:
- Reject & Confirm POs
- Create Invoices and ASNs
- Add comments to POs and Invoices

CONTENT MANAGER

Permissions:
- Manage Vroozi Catalog content with a single sign on via the Portal.
- Create Catalogs

Unable to:
- Approve, publish or delete catalogs.
- Make changes to the parent supplier record

Additional Details:
- Before going 'Live' any changes to Catalogs made will be subject to approval by buying organization users

Quick Reference User Guide by Vroozi Service

Vroozi Service	Role	Additional Role Allowances	Description
Vroozi Catalog	Master Administrator	NA	All-encompassing role with access to all aspects of their company wide settings including setting up and maintaining the Company's master data. Including Content mapping, data mapping, external ERP mapping, reporting and approval workflows.
	Content Administrator	NA	With the appropriate content view assignments, can administer all catalog content and create new users.
	Content Approver	NA	Associated directly to catalogs or Supplier Records for approval or rejection of content. Unable to administer content.
Vroozi Marketplace	Employee	NA	Search and browse authorized goods and services in the Marketplace from hosted catalogs, internal inventory catalogs, level 2 punch-out catalogs and punch-out catalogs.
	Buyer	NA	Search and browse authorized goods and services in the Marketplace from hosted catalogs, internal inventory catalogs, level 2 punch-out catalogs and punch-out catalogs.
Vroozi Purchase	Administrator (Master)	All	All-encompassing role allowed to view manage all system configurations and all Master data.
	Content Administrator	NA	Manage content without having access to effect change to their company settings like a Master Administrator would.
	Purchase Approver	NA	Approve PRs based on organization defined approval limits. *Can only view PRs assigned to them.
	Central Receiver	Specify Access - Company Code &	Process Goods Receipts or Returns on behalf of any requester within an organization or within assigned business unit or location.

Vroozi Service	Role	Additional Role Allowances	Description
		Plant	
	Employee	● Restrict Coding of PR/PO ● Submit Request Forms ● Submit RFQs to Supplier	Submit PRs, process own Good Receipts or Returns and Resolve Invoices. *Ability to cancel or short close POs if setting activated by Admin.
Vroozi Sourcing	Buyer	● Manage Suppliers ● Restrict Coding of PR/PO	Have access to all both Vroozi Catalog and Vroozi Purchase. Allowed to create new users, Create POs and release POs.
	Sourcing Approver	NA	Filter and edit PRs prior to financial approval. Approve PRs.
Vroozi Service	**Role**	**Additional Role Allowances**	**Description**
Vroozi Purchase Express *Marketplace Users*	Power Shopper	NA	Act on shared carts from Shopper Express and submit back to ERP system for ordering.
	Shopper Express	NA	Catalog access to view and create a cart and share with their Power Shopper.
Vroozi Supplier Discovery	Supplier Discovery Admin	NA	Management of Supplier Discovery Master Data; Supplier & User Records, Production Records, Account Settings, Reports, Categories, Attributes
	Supplier Discovery Power User	● Allow EF Approvals	View assigned supplier record information within a specific area which they have been assigned to. Information includes Supplier Contract, Contact, details, Insurance, Products & Services *Acts as an approver for Exception Form (New Supplier Request) and Export Reports.
	Supplier Discovery Basic User	● Allow EF Approvals	View assigned supplier record information within a specific area which they have been assigned to. Information includes Supplier Contract, Contact, details, Insurance, Products & Services
Vroozi	Accounts	● Allow for	Approve or reject an invoice.

Invoice	Payable Approver	coding of invoice • Allow for editing an invoice during approval	*Role only applicable if admin requires buying organization to manually approve invoices.
	Accounts Payable Auditor	NA	Retrieve, view and run reports on specific invoices in the following statuses 1. Posted 2. Paid 3. Partially Paid *Can be restricted to view specific business units or locations based on company code allocations. *Cannot be designated as an exception handler.
	Accounts Payable Manager	NA	View all invoices in the system. They can intercept, code, approve and post invoices to financial system.
	Accounts Payable Processor	• Allow for coding of an invoice	Process and submit invoices for coding and approval, assign invoices to other AP processors or managers. park invoices Submit invoices for Exception Handling *Only have access to own invoices.
Vroozi Expense	Expense Requester	NA	Create and submit expense reports to Supervisor who is designated Approver.
	Expense Approver	NA	Approve Expense reports based on organization defined approval standards.
Vroozi Service	**Role**	**Additional Role Allowances**	**Description**
Vroozi Supplier Portal	Administrator	NA	The Administrator can create users, edit the company profile, add comments to and create all transactional documents.
	Order Processor	NA	The Order Processor can reject and confirm POs, create invoices and ASNs and add comments to transactional documents.
	Content Administrat	NA	The Content Manager Role now allows the supplier user to manage their Vroozi Catalog

	or		content with a single sign on via the Portal. Content Managers can create and update catalogs on the buying organization's behalf. Buying organization approval will still be required before changes go live.