Role Administration

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AORs have the ability to add AOR, DRA, DH, RD, CD, SUBC, and SUBD approvers through “Role Administration” from the main menu. An AOR can have access to more than one unit. Any users added to one of the listed roles must have a person profile.

Adding a person to a role

- Select Unit View (if AOR has access to more than one unit, select appropriate unit)
- Select Role (AOR,DRA,DH,RD,CD,SUBC,SUBD)
- Select Unit (department)
- Enter name or userid (red search icon will turn to a green checkmark when validated – if name does not appear, a request must be made to add a person)
- Press the green “Add” button

Once added, the person will appear in the appropriate role group below and any pending approvals are now required of the person in that role.

Deleting a person from a role

To delete a person from a role, press the red “Delete” (A) action button. Note that multiple people can be added to an AOR and DRA roles but all DH, RD, and RD roles can have only one person assigned. That person must first be deleted to add a new person to the role.

Pressing the green “Delegate” (B) action button will display the assigned delegates for that person.

The “Financial Account Creation Contact Email” is the department email addresses notified when an Internal Order (IO) is generated. Each department can have a separate email. Please contact simsadmin@psu.edu to make changes to this list.