

OneRF Role Access Matrix

Last updated: May 4, 2026

The Research Foundation of the City University of New York (RFCUNY) has developed the matrix document that follows to identify the specific tasks and transactions field users can and should have access to. It is important to note that certain access considerations are influenced by formal or informal campus organizational structures, and we are committed to expanding GO access within applicable compliance requirements.

Please note: this document is regularly updated by RFCUNY. The most recent version of the Role Access Matrix is available at:

https://www.rfcuny.org/rfwebsite/media/xtulmh4a/ops_onerf_roles_access_matrix.pdf

The Role Access Matrix is organized as a spreadsheet with the following columns:

- **OneRF (Workday or Jaggaer) Task** – the discrete activity in OneRF’s platform (either Workday or Jaggaer)
- **Functional Area** – the type of activity. This can be Cross Functional, Procurement, Finance, or Human Resources
- **Initiating Role** – the roles (see glossary below) within OneRF who can start an activity.
- **Approving Role(s)** – the roles (see glossary below) within OneRF who can approve an activity.
- **Business Process Routing** – a brief overview of the approval path an activity takes within OneRF.
- **Validations, if Any** – other information required for approvals
- **Grant Assignment Required to Initiate?** – Does the Initiator need to be assigned to a specific grant in order to begin the activity?
- **Grant Assignment Required to Approve?** – Does the Approver need to be assigned to a specific grant in order to begin the activity?
- **Notes** – additional information on the activity.

Field Roles Referred to in the Field Roles Matrix

The OneRF Role Access Matrix references the following acronyms and roles on CUNY campuses:

- **AS - Authorized Signatory**
- **Employee**
- **PI – Principal Investigator**

- **GO – Grants Officer**
- **Timekeeper**

Additionally, the Matrix refers to the following roles which may be new to users since the launch of OneRF.

- **Animal Care Approver** – typically the Campus Animal Facility / Vivarium Director or Manager
- **Contingent Worker** – CUNY personnel with OneRF login (can be a PI or other role)
- **HR Partner / HR Absence** – RFCUNY central office Human Resources staff members
- **Payee** – any individual who has a OneRF login can be a payee
- **Property Manager** – Campus role responsible for property or capital equipment
- **Requestor of Requisition** – Initiator of a Requisition
- **Supervisory Org. Manager** – individuals designated as a manager within the OneRF supervisory organizational structure. This role does not map directly to functional manager roles.

In many cases users in OneRF can have multiple roles. To find out if you or a member of your team has one or more of the roles listed below, please contact your campus's Grant Officer. *Please note: there may be situations where an ad hoc approval by the RFCUNY Central Office is also required, depending on transaction specifics.*

Updates & Ownership:

Last Update: The provisions in this matrix were last updated: May 2026.

Ownership: RFCUNY Operations

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Chief Operating Officer

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OneRF (Workday or Jaggaer) Task	Functional Area	Initiating Role	Approving Field Role(s)	Business Process Routing	Validations, if Any	Grant Assignment Required to Initiate?	Grant Assignment Required to Approve?	Notes
Create a Case	Cross-Functional	All Users/Roles (with a OneRF Login)	N/A	N/A	N/A	N/A	N/A	
Delegation of Business Tasks	Cross-Functional	Contingent Worker (As Self)	Supervisory Org. Manager	Initiator -> Supervisory Organization Manager	N/A	No	No	
Expense Reimbursement	Finance	Payee (anyone with OneRF access)	PI (of the Grant)	PI submission -> RFCUNY Accounts Payable team Non PI Payee submission -> PI -> RFCUNY Accounts Payable team Delegate submission -> RFCUNY Accounts Payable team	A warning if the payee has no role on the grant that is being charged	No (OneRF will trigger a warning if the payee has no role the grant that is being charged)	Yes (routes to PI of grant for approval)	Grant validation - warning (can be overridden)
P-Card Reconciliation	Finance	PI (Cardholder) Delegate (Set by PI)	N/A	PI submission -> RFCUNY Accounts Payable team Delegate submission -> RFCUNY Accounts Payable team	No	No (Expense Report Reconciliation will only route directly to RFCUNY)	No (follows legacy routing)	Grant validation - warning (can be overridden)
Spend Authorization	Finance	Payee (anyone with OneRF access)	PI (of the Grant)	PI submission -> RFCUNY Accounts Payable team Non PI Payee submission -> PI -> RFCUNY Accounts Payable team Delegate submission -> RFCUNY Accounts Payable team	A warning if the payee has no role on the grant that is being charged	No (OneRF will trigger a warning if the payee has no role the grant that is being charged)	Yes (routes to PI of grant for approval)	Grant validation - warning (can be overridden)
Access an Employee's Leave of Absence Entitlement	Human Resources	PI Timekeeper (of the Grant) AS GO HR	N/A	N/A		Yes	Yes	
Access Employee Accrual Balances	Human Resources	PI Timekeeper (of the Grant) Authorized Signatory GO HR	N/A	N/A		Yes	Yes	

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Add a Job	Human Resources	PI Supervisory Org. Manager HR Partner AS Preparer	GO (if GO driven school) Supervisory Org. Manager (to sign Wage Theft Notice) Employee (to sign Wage Theft Notice & change Benefits Elections if eligible)	PI Initiator (if not HR) -> GO (if GO driven school) -> HR Partner -> Grant Managers (GM or AGM) -> HR Partner (if need to switch primary job) -> Supervisory Org Manager to sign Wage Theft Notice -> Employee (Sign Wage Theft Notice & Change Benefits Elections if eligible)		No (Intitator must be on the grant in order to select it)	Yes	
Approve Employee Timesheet	Human Resources	PI Timekeeper (of the Grant) AS GO HR	HR, PI (Supervisory Org. Manager)	Initiator -> PI -> HR		Yes	Yes	An approver on a grant can review, submit, and approve employee's time depending on the initiator
Assign a Work Schedule (Standard/Custom)	Human Resources	PI Supervisory Org. Manager Timekeeper (Grants) AS GO HR Partner/HR Absence	N/A	N/A		Yes	Yes	
Cancel an Employee's Time Off Request	Human Resources	PI Timekeeper (of the Grant) GO AS HR	HR (If HR initiates, no second approval)	Initiator > HR If HR initiates, no second approval		Yes	Yes	Unscheduled Holiday routing currently unavailable
Change Job Details	Human Resources	PI Supervisory Org. Manager HR Partner AS GO Preparer	GO (if GO driven school) Supervisory Org. Manager (to sign Wage Theft Notice) Employee (to sign Wage Theft Notice & change Benefits Elections if eligible)	PI Initiator (if not HR) -> GO (if GO driven school) -> HR Partner -> Grant Managers (GM or AGM) -> HR Partner (change job detail) -> Supervisory Org Manager to sign Wage Theft Notice (if applicable) -> Employee (Sign Wage Theft Notice, if applicable & Change Benefits Elections if eligible)		No (Intitator must be on the grant in order to select it)	Yes	
Complete the Job Requisition Questionnaire	Human Resources	PI Supervisory Org. Manager AS GO HR Partner	N/A	N/A		No (Intitator must be on the grant in order to select it)	Yes	

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Create a Job Requisition	Human Resources	PI Supervisory Org. Manager AS GO HR Partner Preparer	GO (if GO driven school) PI (depends on project type e.g. OAA)	Initiator -> GO (GO driven schools) -> Recruiting Analyst -> PI (if Initiator is not PI, and depending on project type i.e., OAA) -> Grant Managers (GM/AGM) -> Recruiting Analyst (If needs to be posted)		No (Intitator must be on the grant in order to select it)	Yes	Initiator for Field must be PI, GO, Preparer, or AO of Grant
Create a Position	Human Resources	PI Supervisory Org. Manager AS GO HR Partner Preparer	HR	Initiator -> HR Partner		No (Intitator must be on the grant in order to select it)	Yes	
Create a Prospect	Human Resources	PI Supervisory Org. Manager AS GO HR Partner	N/A	N/A		No	Don't need approval	
Edit a Job Requisition	Human Resources	PI Supervisory Org. Manager AS GO HR Partner	GO (if GO driven school) PI (depends on project type e.g. OAA)	PI Initiator (If Preparer) -> GO (GO driven schools) -> Recruiting Analyst > PI (depending on project type i.e., OAA) -> Grant Managers (GM or AGM) -> Recruiting Analyst (If needs to be posted)		No (Intitator must be on the grant in order to select it)	Yes	
End a Job	Human Resources	PI Supervisory Org. Manager HR Partner Preparer	GO (if GO driven school)	PI Initiator -> GO (if Grants Officer driven campus) -> HR Partner -> Grant Managers -> Benefits Partner (if applicable)		Yes	Yes	Routing may vary by campus email your RFCUNY Personnel Coordinator if you have any questions
End Employment Date or Actual Compensation End Date	Human Resources	PI Supervisory Org. Manager HR Partner AS Timekeeper (grant)	PI (no other field approval)	PI Initiator (if not HR) -> HR Partner -> Grant Managers		Yes	Yes	Routing may vary by campus email your RFCUNY Personnel Coordinator if you have any questions
Enter Time on an Employee's Timesheet	Human Resources	PI Timekeeper (or Preparer) GO AS	N/A	N/A		Yes	Yes	

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Hire a Candidate When Recruitment Is Not Required	Human Resources	PI Supervisory Org. Manager Primary Recruiter	<i>Various</i>	See OneRF Tasks for Create a Position, Create a Job Req, Create a Prospect and Hiring When Using the Offer Process		No (<i>Intitator must be on the grant in order to select it</i>)	Yes	Aproving Field Roles found in the following Tasks: "Create a Position", "Create a Job Requisition", "Create a Prospect" and "Hiring When Using the Offer Process"
Hiring Using the Offer Process (After Ready for Hire)	Human Resources	PI Supervisory Org. Manager HR Partner	Supervisory Org. Manager (<i>Wage Theft Notice and Assign Work Schedule</i>) Employee (<i>Hiring Paperwork</i>)	Supervisory Organization Manager (initiator) -> HR Partner -> Grants Manager -> Supervisory Organization Manager (sign Wage Theft Notice and Assign Work Schedule) & Employee (Hiring Paperwork) -> Payroll Coordinator & Benefits Coordinator (if applicable)		Yes	Yes	
Performance Appraisal	Human Resources	PI Supervisor	Supervisor Employee	Supervisor -> Employee -> Supervisor -> RFCUNY HR Team		No	No	
Request a One-Time Payment	Human Resources	PI Supervisory Org. Manager HR Partner	PI (<i>no other field approval</i>)	PI Initiator -> HR Partner -> Grant Managers -> Payroll Partner		Yes	Yes	
Request a Return from Leave of Absence	Human Resources	PI GO AS HR	PI (<i>no other field approval</i>)	Initiator -> HR Absence Partner		Yes	Yes	
Request Compensation Change	Human Resources	PI Supervisory Org. Manager HR Partner AS Timekeeper (grant)	GO (<i>if GO driven school</i>) Supervisory Org. Manager (<i>to sign Wage Theft Notice</i>) Employee (<i>to sign Wage Theft Notice & change Benefits Elections if eligible</i>)	PI Initiator (if not HR) -> GO (if GO driven school) -> HR Partner -> Grant Managers -> HR Partner (if need to switch primary job) -> Supervisory Org Manager to sign Wage Theft Notice -> Employee (Sign Wage Theft Notice & Change Benefits Elections if eligible)		Yes	Yes	
Request Leave of Absence for an Employee	Human Resources	PI GO AS HR	PI (<i>no other field approval</i>)	Initiator -> HR Absence Partner		Yes	Yes	

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Request Time Off for an Employee	Human Resources	PI Supervisory Org. Manager AS Timekeeper (of the Grant) GO HR Absence	PI (no other field approval)	N/A		Yes	Yes	
Schedule Weekly Hours	Human Resources	PI Supervisory Org. Manager Timekeeper AS GO HR Partner/HR Absence	PI (no other field approval)	N/A		Yes	Yes	
Send Back or Deny Employee's Time Off Request	Human Resources	PI Supervisory Org. Manager AS Timekeeper (of the Grant) GO HR Absence	PI (no other field approval)	N/A		Yes	Yes	
Start a Job Change	Human Resources	PI or Supervisory Org Manager	GO (if GO driven school) Supervisory Org. Manager (to sign Wage Theft Notice) Employee (to sign Wage Theft Notice & change Benefits Elections if eligible)	PI Initiator (if not HR) -> GO (if GO driven school) -> HR Partner -> Grant Managers -> HR Partner (change job detail) -> routes to Sup Org Manager to sign Wage Theft Notice (if applicable) -> Employee (Sign Wage Theft Notice, if applicable & Change Benefits Elections if eligible)		Yes	Yes	
Terminate Employee	Human Resources	PI Supervisory Org. Manager HR Partner	GO (if GO driven school)	PI Initiator (if not initiated by HR Partner, HR Admin) -> GO (if Grants Officer driven campus -> HR Partner -> Grant Managers (GM or AGM) > Benefits Partner (if applicable) > Payroll Partner		Yes	Yes	
Update a Work Schedule	Human Resources	PI Supervisory Org. Manager Timekeeper AS GO HR Partner/HR Absence	PI (no other field approval)	N/A		Yes	Yes	
Create a Catalog (Punch-Out) Purchase Order	Procurement	Contingent Worker (As Self) Employee (As Self)	AS PI	Initiator -> Authorized Signatory -> PI -> Buyer -> Grant Spend Approver -> Buyer	Questionnaire	No	Yes	If PI is the initiator, there is no 2nd PI approval (auto-approved)

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Create a Requisition for Goods or Services (Non-Catalog Purchase)	Procurement	Contingent Worker (As Self) Employee (As Self)	AS PI	Initiator -> Authorized Signatory -> PI -> Buyer -> Grant Spend Approver -> Buyer to source the requisition	Questionnaire	No	Yes	Equipment over \$5,000 requires campus Property Manager approval. Animal Purchases will require campus Animal Care approver. NRA Reviewer (RFCUNY Finance) will be required if the supplier is a non-US based entity. If PI is the initiator, there is no 2nd PI approval (auto-approved)
Create a Supplier Contract	Procurement	<i>No Field roles - RFCUNY P&P Buyer creates Supplier Contract from a Requisition</i>						
Create a Supplier Invoice Request	Procurement	Contingent Worker (As Self) Employee (As Self)	AS PI	Initiator -> Authorized Signatory -> PI -> Accounts Payable Data Entry Specialist - Grant (P&P) -> Grant Spend Approver -> Accounts Payable Data Entry Specialist by fund (to create Supplier Invoice from Supplier Invoice Request)	No	No	Yes	Animal Purchases will require campus Animal Care approver. NRA Reviewer (RFCUNY Finance) will be required if the supplier is a non-US based entity. No auto-approval if the PI is the Initiator
Create Animal Requisition	Procurement	Contingent Worker (As Self) Employee (As Self)	AS PI Animal Care Approver	Initiator -> Authorized Signatory -> Principal Investigator -> Animal Care Approver -> Buyer -> Grant Spend Approver -> Buyer to source the requisition	Questionnaire			
Create Receipt of Goods or Services	Procurement	Contingent Worker (as Self) Employee (as Self) <i>(Requester of Requisition)</i>	N/A	N/A	Restriction by Organization (Grant or Cost Center)	No	N/A	
Request a New Supplier (Vendor) or Stipend Recipient	Procurement	Contingent Worker (As Self) Employee (As Self)	N/A	PI Initiator--> Students and other suppliers will complete the registration	No	No	No	
Request a One Time Stipend Payment	Procurement	<i>See Task: "Create a Supplier Invoice Request"</i>						

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Request a Recurring Stipend Payment	Procurement	<i>See Task: "Create Requisition for Goods or Services (Non-Catalog Purchase)"</i>						
Submit Invoice Payment Against a Contract Manager Contract	Procurement	Supplier	AS PI	Supplier emails an invoice to rfcuny_contractmanagerinvoices@rfcuny.org	Use only if Paying Against a CM Contract	No	N/A	Email can also be sent by the PI. Email should only contain an invoice against a valid CM Contract
Submit Invoice Payment Against a Purchase Order	Procurement	Supplier	N/A	Supplier emails an invoice to RF_CUNYInvoices@rfcuny.org	Use only if Paying Against a PO	No	N/A	Email can also be sent by the PI. Email should only contain an invoice against a valid PO
View Receipt of Goods or Services (XpressO report)	Procurement	Contingent Worker (as Self) Employee (as Self) AS GO	N/A	N/A	Restriction by Organization (Grant or Cost Center)	No	N/A	
View Requisitions for Goods or Services (XpressO report)	Procurement	Contingent Worker (as Self) Employee (as Self) AS GO	N/A	N/A	For AS and GO roles - restriction by organization (Grant or Cost Center)	N/A	N/A	This is a self-service task
View Supplier Invoice Request (XpressO report)	Procurement	Contingent Worker (as Self) Employee (as Self) AS GO	N/A	N/A	For AS and GO roles - restriction by organization (Grant or Cost Center)	N/A	N/A	This is a self-service task