



OMNI Security

Using OMNI Security Role Lookup

Overview:

Understanding the OMNI Security Role Lookup Process

This OBIEE report allows you to search for OMNI security roles by department, employee ID, employee last name or role name, and view descriptions of security roles.

Security roles provide access to specific pages in OMNI. Understanding security roles allows managers to assign OMNI access based on an employee's responsibilities.

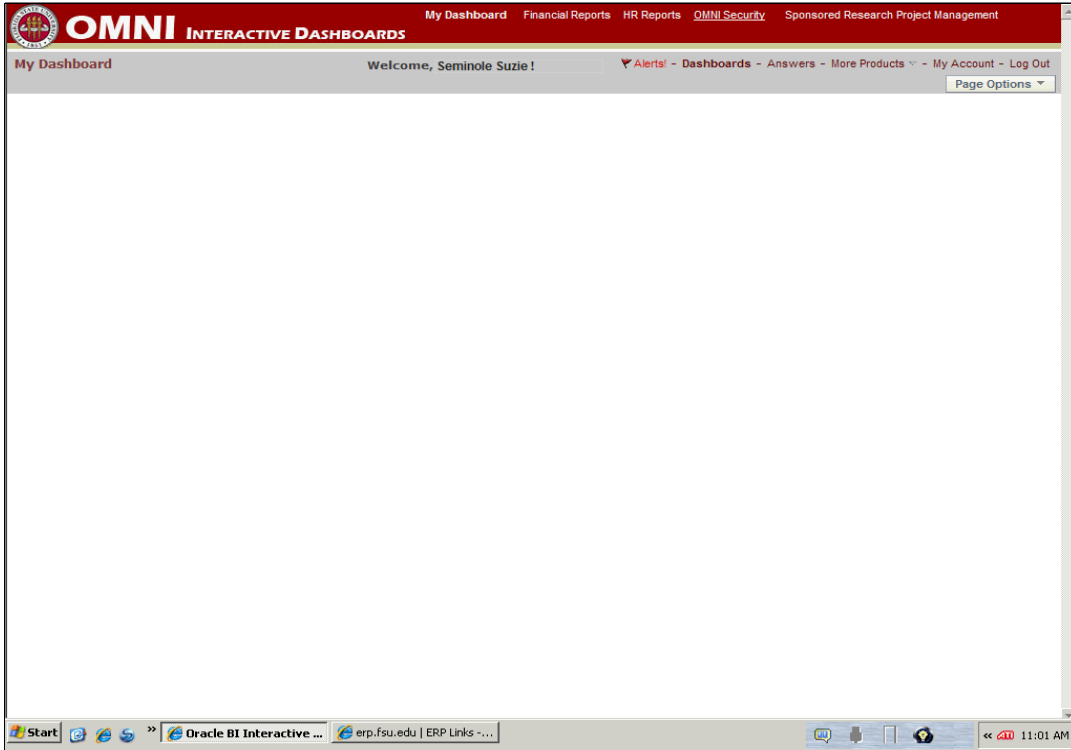
Procedure

In this topic, you will learn the steps to lookup roles assigned to users by department.

You will also learn the steps to lookup the roles and role description.




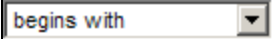


Step	Action
1.	Click the object. OBI Reporting



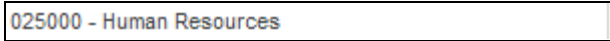



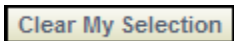



Step	Action
2.	<p>Clicking OMNI Security link will take you to the OMNI Security dashboard.</p> <p>Click the OMNI Security link.</p> <p>OMNI Security</p>
3.	<p>There are two tabs on this dashboard Role Lookup and Role Description.</p> <p>Role Lookup provides the rolenames and role descriptions by employee and department.</p> <p>Role Description provides the description for the rolename that you select.</p> <p>We begin this tutorial with the Role Lookup tab (the current tab), later, we will demonstrate the steps involved in using the Role Description tab.</p> <p>Lets Get Started!</p> <p>(All Choices) ▼</p>
4.	<p>Click the Database drop-down list.</p> <p>(All Choices) ▼</p>



Step	Action
5.	<p>You can choose to view only Financial roles, HR roles, or both. In this example, we wish to view both.</p> <p>Click the (All Choices) list item to view both Financial and HR roles.</p> <p>Click the (All Choices)</p> 
6.	<p>Click the ... link to open the prompt window.</p> 
7.	<p>Always begin your lookup by removing "Enter Department" text in the left pane of your prompt window.</p> <p>Double-click Enter Department to removes the text from the left pane of your prompt window.</p> 
8.	<p>The left pane is blank in the prompt window. Now we can proceed with our role lookup.</p> <p>You can begin your search by Department, Employee Id, Lastname or Rolename.</p> <p>We will begin our search with Department.</p>
9.	<p>Click the Match drop-down list.</p> <p>Choose the appropriate Match description for the value that you want to lookup.</p> <p>Click 'begins with'</p> 
10.	<p>Match drop-down list values:</p> <p>Begins with: Best used when the first characters or numbers of your desired value are known. Use of a wildcard (%) is optional.</p> <p>Ends with: Best used when the last characters or numbers of your desired value are known. Use of a wildcard (%) is optional, but recommended.</p> <p>Contains: Best used when at least one character or number falls within your desired value. Use of wildcards (%) is required. Include wildcards at the front and at the end of the text, as in the following example, %1000%.</p> <p>is Like (pattern match): Best used when there is a high degree of uncertainty. Use of wildcards (%) is required.</p>





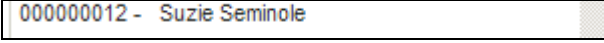


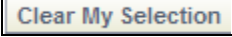




Step	Action
11.	We will use " begins with ". Click begins with . 
12.	We are looking up roles by employee in the Human Resource department. We know that the Department Id begins with " 025 ". Enter " 025 " into the field.
13.	Click the Go link. 
14.	Click 025000 - Human Resources . 
15.	You can select values one at a time by double-clicking on the value or by using the "<" link. Use the "<<" link when you would like to select all the values return by your search. Click the < link. 
16.	Notice that the lookup value " 025000-Human Resources " is now in the left pane of the prompt window, below " Selected. "
17.	Click the OK link. 
18.	Click the Go link. 
19.	The report displays on your screen.
20.	Click the Clear My Selection link when you are ready to begin a new search. We are now ready to search by Employee Id Start a new search by Employee ID. 
21.	Click the ... link. 











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Step	Action
22.	<p>Always begin your lookup by removing "Enter Department" text in the left pane of your prompt window.</p> <p>Double-click the Enter Department.</p> 
23.	<p>Click the OK link.</p> 
24.	<p>Click the ... link.</p> 
25.	<p>Enter your desired information into the field. We are searching for an Employee Id that begins with "00000012".</p> <p>Enter a valid Employee Id, if you are not sure, use wildcards (%) and "is Like" to expand your search.</p>
26.	<p>Click the Go link.</p> 
27.	<p>Double-click 00000012 - Suzie Seminole.</p> 
28.	<p>Click the OK link.</p> 
29.	<p>Click the Go link.</p> 
30.	<p>Click the Clear My Selection link.</p> <p>We are now ready to search by Last Name.</p> <p>Begin a new search by Last Name.</p> 
31.	<p>Always begin your lookup by removing "Enter Department" text in the left pane of your prompt window.</p>
32.	<p>Click the ... link.</p> 
33.	<p>Enter your desired information into the field. We are searching for the Last Name that begins with "Sem."</p> <p>Enter a valid Last Name, if you are not sure, use wildcards (%) and "is Like" to expand your search.</p>
34.	<p>Click the Go link.</p> 



Step	Action
35.	Double-click Seminole . 
36.	Click the OK link. 
37.	Click the Go link to generate the report. Begin a new search by Rolename . 
38.	Now let's search by Rolename . Remember always begin your lookup by removing "Enter Department" text in the left pane of your prompt window.
39.	Click the ... link. 
40.	Press [Caps Lock] . Note: Most roles are capitalized. If the role that you are searching for is not included in your search results, try searching again in lower case letters. Use wildcards (%) to expand results.
41.	Enter the desired information into the field. We are searching for the role "FSU_PO_BUYER" . Enter "FSU_PO_BUYER" into the field.
42.	Click the Go link. 
43.	Double-click FSU_PO_BUYER . 
44.	Click the OK link. 
45.	Click the Go link to generate the report. 



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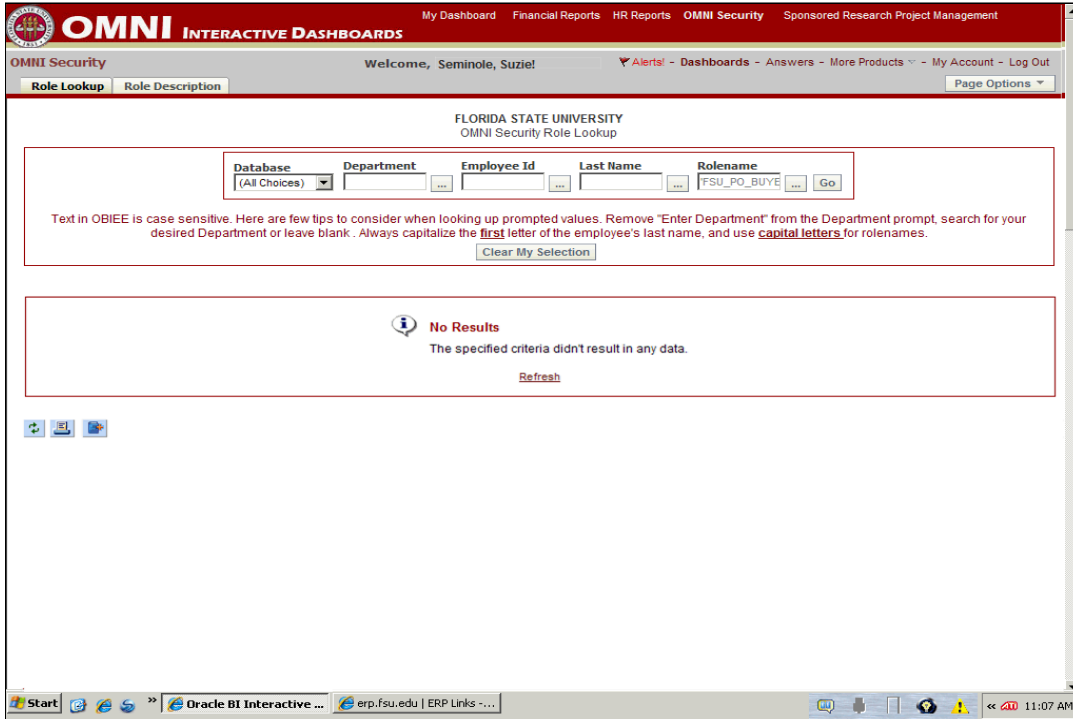
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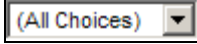



Step	Action
46.	Let's move on to the Role Description tab. Role Description: This tab provides role descriptions only. Role Description



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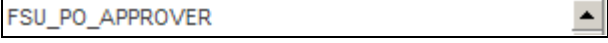






Step	Action
47.	Click the Role Description tab. 
48.	Click the Database drop-down list. 
49.	You can choose to view roles from the OMNI Financial or OMNI HR. We have selected "OMNI Financial" database. Click the OMNI Financial list item. Note: If you are not sure of the Database , select (All Choices) . Click the OMNI Financial list item. 
50.	Click the ... link. 
51.	Enter the desired information into the field. We have chosen to lookup the role description of a purchase order approver. The actual rolename is not known, however, we know that all purchase order roles begins with "FSU_PO" . Search for a role that begins with "FSU_PO" .
52.	Click the Go link. 



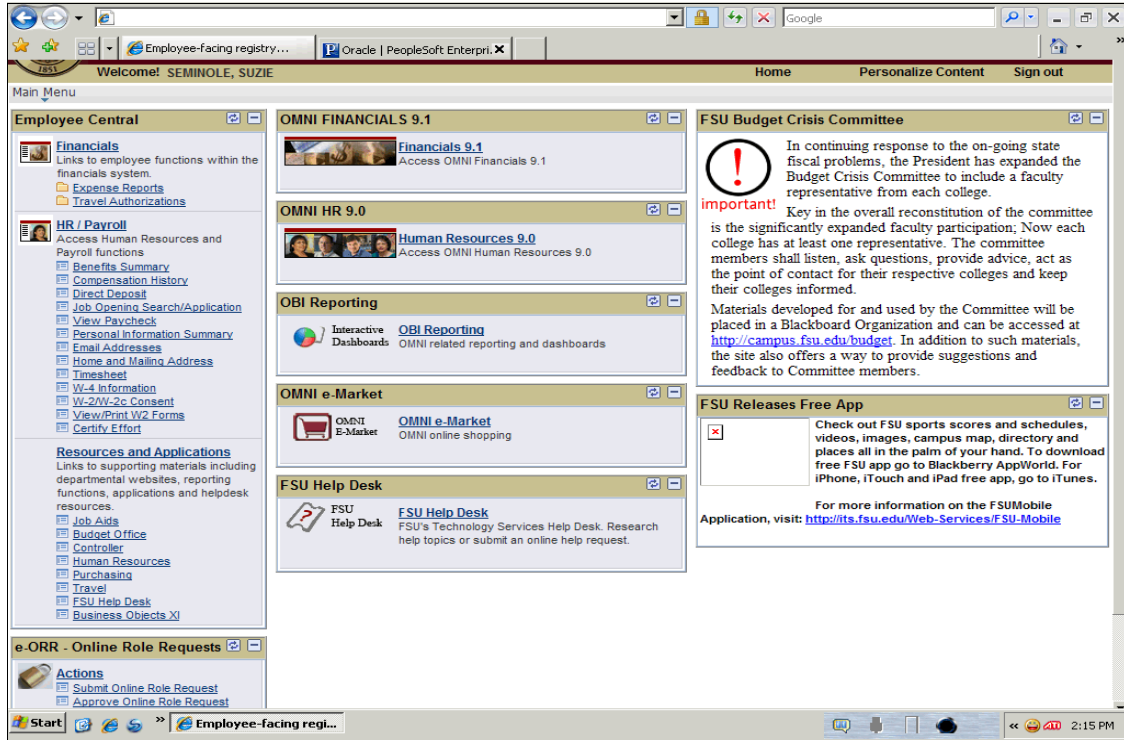
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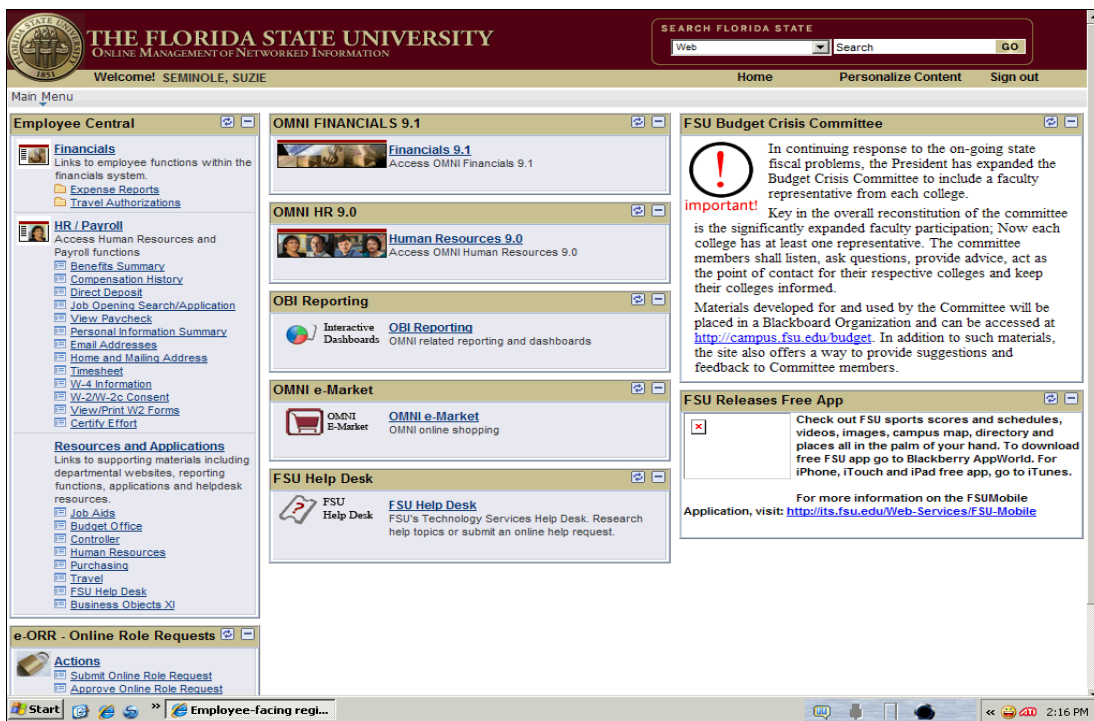
Step	Action
53.	<p>Your search brings back all values that begin with "FSU_PO." Scroll down to select your desired value.</p> <p>Double-click FSU_PO_APPROVER.</p> 
54.	<p>Click the OK link.</p> 
55.	<p>Click the Go link.</p> 
56.	<p>The report displays on your screen.</p> <p>OBI provides additional functionality.</p> <p>Refresh Link: Refreshes the report results.</p> <p>Print Link: Printer friendly version.</p> <p>Download Link: Downloads report to PDF, Excel (with or without XML formatting).</p> 
57.	<p>Click the Log Out link to exit OBI Dashboard.</p> 



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Step	Action
58.	Close the Oracle PeopleSoft Enterprise tab. 





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Step	Action
59.	You are now at the OMNI Home page. Home
60.	Congratulations! You have completed this topic! End of Procedure.