

# How to Run the Role Certification Report by Supervisor

## *Overview*

This Job Aid includes detailed instructions for running the Role Certification Report in myFSU BI.

## *Purpose*

The Role Certification Report provides supervisors, or their delegates, the information necessary to certify their employee's role assignments. This certification process should be completed by supervisors or their delegates on a quarterly basis.

Supervisors (or their delegates) should:

1. Ensure that the "Role Certification Report by Supervisor" is run on a quarterly basis for their employee(s).
2. Review their employee(s) role assignments on the "Role Certification Report by Supervisor" for accuracy.
3. Remove any unnecessary role assignments for their employee(s) by [submitting an eORR](#) request or by [opening a CRM Case](#) with the ITS Application Security team.
4. Sign the "Supervisor Certification" section of the "Role Certification Report by Supervisor" and maintain copies of the signed reports until approved for destruction by the University's Records Management Liaison Officer (see Records Management policy [OP-F-3](#)).

The report provides the supervisor a list of any non-default roles that their employees have within the systems listed below.

- OMNI Financials
- OMNI Human Resources
- myFSU BI
- FSU Service Center
- myFSU Student Central

Please note that if an employee has only default roles, the employee will not show on the report.



## *Access the Role Certification Report*

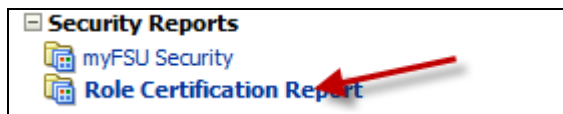
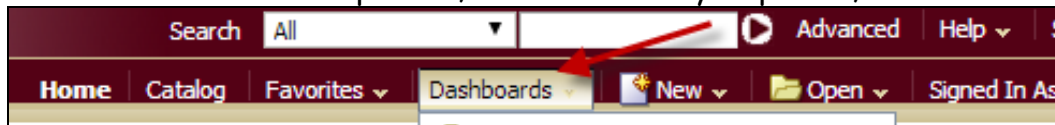
### Step 1

Login to my.fsu.edu and click on BI.



### Step 2

On the Dashboards drop down, under "Security Reports", select the "Role Certification Report" dashboard.

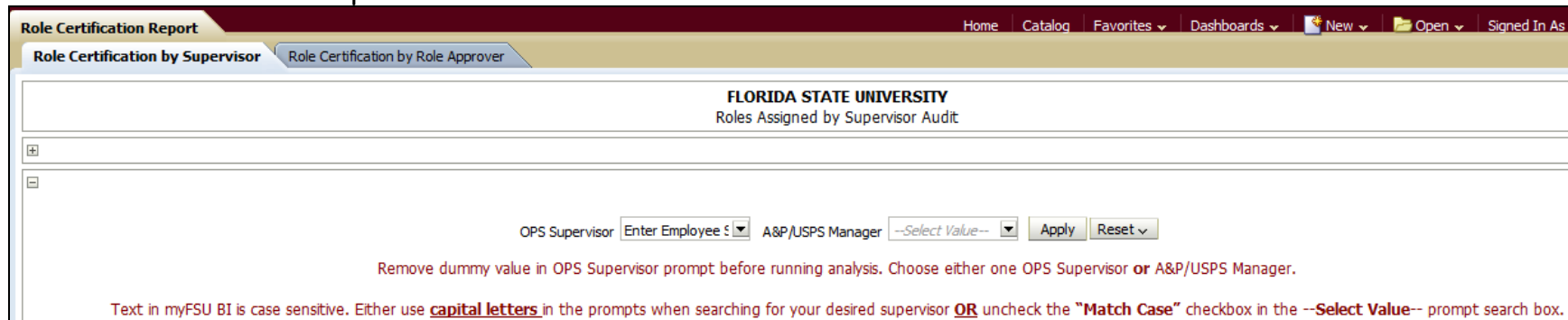


### Step 3

Once you are in the "Role Certification Report" dashboard, ensure you are on the "Role Certification by Supervisor" tab.



The Role Certification Report should look like the screenshot below.



**NOTE:** There are two search boxes to find Supervisors/Managers.

1. OPS Supervisor: This is to search for a supervisor's OPS employees. If the supervisor has only OPS employees, then this is the only search box that needs to be used.
2. A&P/USPS Manager: This is to search for a supervisor's A&P and/or USPS employees. If the supervisor has only A&P and/or USPS employees, then this is the only search box that needs to be used.

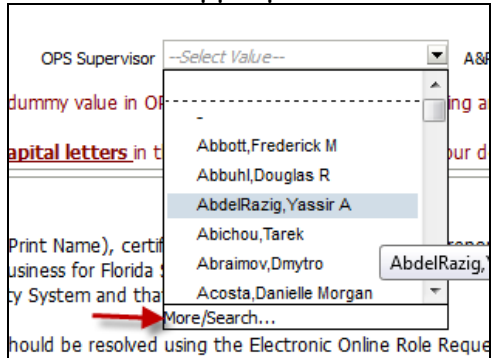
If the supervisor has a combination of OPS, USPS, and/or A&P employees, both search boxes will need to be utilized.



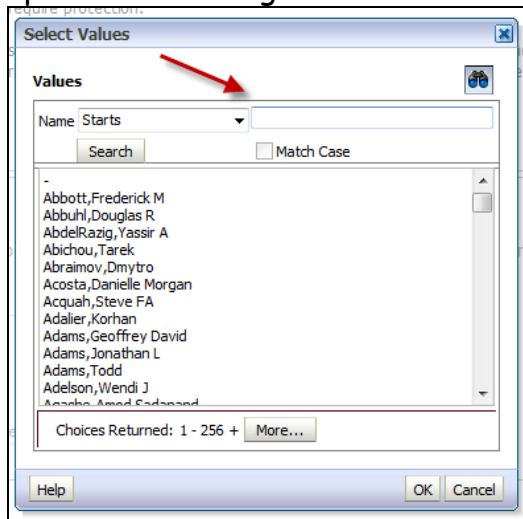
## Run the Role Certification Report

### Step 1

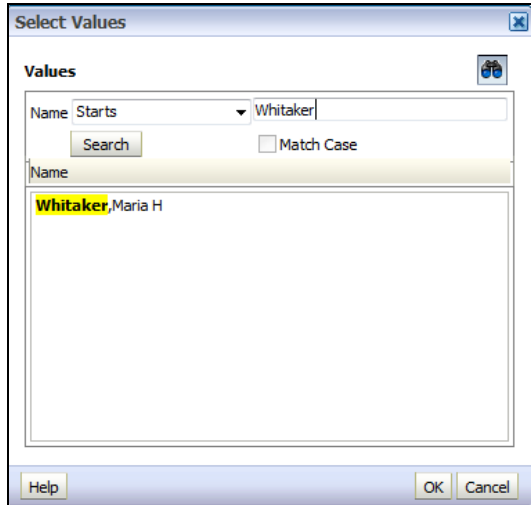
Click in the appropriate search box to find the supervisor's/manager's name.



You can scroll through the list of names or click on the "More/Search..." option. The "More/Search..." option will open the following "Select Values" window which allows you type in a name.



The following example shows a search for "Whitaker". Type the name where shown and hit enter. To select the name, double click the name from the list. This will close the "Select Values" window and insert the name in the search box.



### Step 2

When you click "Apply" with the following search criteria, the report will return results for Maria Whitaker's OPS employees.


If Maria Whitaker also has A&P/USPS employees, the "A&P/USPS Manager" search box should also be utilized. When you click "Apply" with the following search criteria, the report will return results for Maria Whitaker's OPS, A&P and/or USPS employees.



## Review the Role Certification Report

The report results will return in the bottom portion of the page. Supervisors, or their delegates, should do the following:

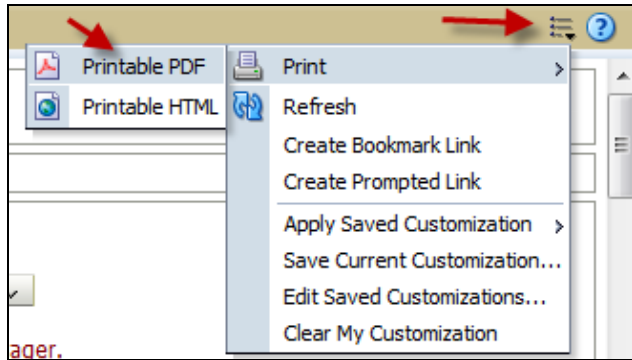
1. Review their employee(s) role assignments on the "Role Certification Report by Supervisor" for accuracy.
2. Remove any unnecessary role assignments for their employee(s) by [submitting an eORR request](#) or by [opening a CRM Case](#) with the ITS Application Security team.

 <b>Security Audit Analysis by Supervisor</b> Time run: 6/18/2014 3:18:10 PM				
EmplID and Name	Oprid	Application	Rolename	Descript
000060031 - Jody O'Steen	JJOSTEEN	FSU Service Center	CRM Dashboard Administrator	CRM Dashboard Administrator
			Dialog Administrator	Manages the DES, MCR, ERP and WDG environment. M
			EOLT_ADMIN	LifeCycle Tools Administrator has access to all Enterpris
			EOPP_USER	Assign this role to every user (other than the Guest us users.
			EOTF_ADMIN	The Enterprise Transformation Framework Administrato and maintaining data in those maps, and running trans
			Ent Utilities Administrator	System administrator for all Common Components obje
			FSU_CORE_ERP	FSU_CORE_ERP



## Print/Save and Sign the Role Certification Report

At the top right of the page, click on the "Page Options" icon. Click "Print", then click "Printable PDF".



**NOTE:** If the report has more than 25 rows, the list must be expanded before printing.

Role Certification Report

Role Certification by Supervisor

Any inappropriate role assignments identified on this report should be resolved using the Electronic Online Role Request System (eORR) to remove or add roles. In cases where the eORR system cannot be utilized, a CRM Case should be created via the FSU Service Center and assigned to the ITS Application Security provider group. The assigned case number should be noted on the printed Role Certification report.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Security Audit Analyze by Supervisor  
Time ran: 6/30/2014 1:29:21 PM

EmpID and Name	Opnd	Application	RoleName	FSU Role Description	Last Update Date
000003635 - Brian Lupiani	BLUPANI	FSU Service Center	CRM Dashboard Administrator	CRM Dashboard Administrator	6/29/2014
			SCS_ADMIN	Lifecycle Tools Administrator has access to all Enterprise Lifecycle Tools components.	6/29/2014
			ECOPF_USER	Assign this role to every user (other than the guest user) who signs onto the system. This role grants access to the base common portal objects needed by all users.	6/29/2014
			ECOTF_ADMIN	The Enterprise Transformation Framework Administrator is allowed to perform all tasks related to this feature including defining and classifying maps, populating and maintaining data in those maps, and running transformations and services using those files.	6/29/2014
			FSU_CORE_ADMIN	System administrator for all Common Components objects	6/29/2014
			FSU_CORE_ERP	System administrator for all Common Components objects	6/29/2014
			FSU_CORE_ERP	System administrator for all Common Components objects	6/29/2014
			FSU_CRM_AGENT	Allows access to submit cases on behalf of FSU students and employees, reassign cases and work cases in the FSU Service Center.	6/29/2014
			FSU_CRM_DASHBOARD_ADMIN	FSU_CRM_DASHBOARD_ADMIN	6/29/2014
			FSU_CRM_SUPERUSER	Contains the relevant delivered PLS from the THE Administrator? role.	6/29/2014
			PAAGS_USER	Enterprise Postal User	6/29/2014
			Paagsoft Administrator	This role is for rolseaus who are Paagsoft system administrators	6/29/2014
			Paagsoft User	Paagsoft User	6/29/2014
			PeopleTools	PeopleTools	6/29/2014
			Process Scheduler Admin	This is for rolseaus who are Process Scheduler Administrators.	6/29/2014
			Security Administrator	Security Administrator	6/29/2014
			UNPL_ALLPROCS	ALL PROCS	6/29/2014
			UNPL_APPROVER	Can start application server	6/29/2014
			FSU_APPRSG_ADMIN	6/24/13 Added in order to designate approver for role auditing purposes	6/29/2014
			FSU_DEPT_APP_ACCESS	Ability to add address profile to departmental report distribution	6/29/2014
			FSU_JHM_ACT_CFO	FSU_JHM_ACT_CFO	6/29/2014
			FSU_INT_BROKER_STD	6/24/13 Added in order to designate approver for role auditing purposes	6/29/2014
			FSU_RPT_FINSMETA	Role needed to process the monthly financial reports.	6/29/2014
			FSU_SECURITY_REPORT_MGR_ALL	This role grants Query Manager Access in Financials.	6/29/2014
			FSU_SEC_ADMIN_NODM	This is a clone of the delivered Security Administrator role minus Data Mover access. - RDALTON - 11/08/11	6/29/2014
			FSU_SEC_CONFIG	6/24/13 Added in order to designate approver for role auditing purposes	6/29/2014

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"FSU Role" ("eORR" Default Role" IN (';', 'N;', '1') and Reports... To is equal to Whitaker, Maria H or Supervisor is equal to Enter Employee Supervisor and "FSU Employee", "Empl Effective Date" = "FSU Role", "Role Effective Date" and "FSU Role", "Role Effective Date" IN (SELECT MAX("FSU Employee", "Empl Effective Date") FROM "FSU - HCM - Security Auditing"))



A new page will open with the complete report. Print the PDF document, sign and date the report, and retain the signed report.

**FLORIDA STATE UNIVERSITY Roles Assigned by Supervisor Audit**

**OPS Supervisor**  
Whitaker, Maria H

**A&P/USPS Manager**  
Whitaker, Maria H

Remove dummy value in OPS Supervisor prompt before running analysis. Choose either one OPS Supervisor or A&P/USPS Manager. Text in myFSU BI is case sensitive. Either use capital letters in the prompts when searching for your desired supervisor OR uncheck the "Match Case" checkbox in the --Select Value-- prompt search box.

Supervisor Certification of Application Security Roles I, \_\_\_\_\_ (Print Name), certify that the persons named heron report to me and have the right to perform certain business functions within the FSU ERP system, I hereby affirm that each role is necessary for these persons to conduct official business for Florida State University. I acknowledge that these users occupy a position of special trust with duties that require bringing them into contact with information or information resources that are of value to the State University System and that require protection. Any inappropriate role assignments identified on this report should be resolved using the Electronic Online Role Request System (eORR) to remove or add roles. In cases where the eORR system cannot be utilized, a CRM Case should be created via the FSU Service Center and assigned to the ITS Application Security provider group. The assigned case number should be noted on the printed Role Certification report. Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Security Audit Analysis by Supervisor**  
Time run: 6/18/2014 3:18:10 PM

EmplID and Name	Opid	Application	Rolename	Descript	Role Effective Date
000060031 - Jody O'Steen	JJOSTEEN	FSU Service Center	CRM Dashboard Administrator	CRM Dashboard Administrator	6/18/2014
			Dialog Administrator	Manages the DES, MCR, ERP and WDG environment. Monitors	6/18/2014

## Questions?

We're here to help. Submit a support request or contact the ITS Service Desk at <http://its.fsu.edu/ITS-Service-Desk> or 850-644-HELP(4357).

