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.

![myFSU Links](image)

**Step 2**

![Dashboards](image)
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.

<table>
<thead>
<tr>
<th>EmpIID and Name</th>
<th>Oprid</th>
<th>Application</th>
<th>Rolename</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>000060031 - Jody O'Steen</td>
<td>JJOSTEEN</td>
<td>FSU Service Center</td>
<td>CRM Dashboard Administrator</td>
<td>CRM Dashboard Administrator</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Dialog Administrator</td>
<td>Manages the DES, MCR, ERP and WDG environment.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>EOLT_ADMIN</td>
<td>LifeCycle Tools Administrator has access to all Enterprise tools.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>EORP_USER</td>
<td>Assign this role to every user (other than the Guest users).</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>EOTF_ADMIN</td>
<td>The Enterprise Transformation Framework Administrator manages data in those maps, and running trans</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Ent Utilities Administrator</td>
<td>System administrator for all Common Components objects.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>FSU_CORE_ERP</td>
<td>FSU_CORE_ERP</td>
</tr>
</tbody>
</table>
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.
A new page will open with the complete report. Print the PDF document, sign and date the report, and retain the signed report.

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).