

Dashboard Role Support

Last Updated: June 6, 2024

Dashboard and Reporting Role Request Guide

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Dashboard Roles

Dashboard roles are automatically assigned for most Sodexo US and Canada management roles based on HR Job Code. These roles define what responsibilities or activities you may be able to complete in standardized reporting tools.

Validate your Access

Log into E=Vision and review your current security access using the link in the Reference section.

E=Vision

- Essentials
 - Summary
 - Expanded
 - Comparison
- Financial
 - Summary
 - Expanded
 - Interactive Focus
 - Fiscal Year
 - Stack Rank
 - Side by Side
- Daily Financial Activity
 - P&L Summary
 - Detail
 - Interactive
 - Subledgers
 - Statistics
- Metrics
 - NorAm
 - Accounts Receivable
 - Accounts Payable
 - Labor
 - Inventory
 - Supply Management
 - Injury Reporting
 - CDM
 - Service
- Reporting
 - Unit Close Package
 - Board/Meals Served
 - Board/Meals Reported
 - Universities Worksheet
 - Retail Reporting
- E=Assist
 - Need Help?
- Homepage
- Home

Quick Links
Top News
Reference

E=Suite

- E=Planning
- Enterprise Analysis
- Static Reporting
- Vendor Compliance

Sodexo Initiatives

- STEP** Group KPI Dashboard
- LEAD** LEAD Dashboard
- ZERO HARM** Safety Dashboard
- sea** For a Better Tomorrow
- Hospitals/Seniors OMD & Compliance
- DRIVE** Analytics

E=Vision has a new Look!

We've transformed E=Vision with a modern look and feel that aligns with Sodexo's brand. The initial rollout significantly changes the landing page, header, and icons, with future releases centered around different pages and interactions within the dashboard.

[Take a look at the new E=Vision](#)

- New streamlined landing page for improved navigation and quick access to supporting tools and references.
- Updated standard header for a cleaner look with more icon interactions.
- Use the navigation bar to quickly access any page in E=Vision.

For users who used to click the DFAV button, go to the Daily Financial Activity section of the navigation bar and select Detail to view your weekly financial details.

For users who used to click the Financial button, go to the Financial section of the navigation bar and select Summary or Expanded to view your summarized financials compared to last year and budget.

E=Vision
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Calendar

PD 07 – FY23 Close Schedule

MON BD+1	4/3	UFS transmit deadline 11:45 pm ET
TUE BD+2	4/4	Midday transmit deadline 11:45am ET School
WED BD+3	4/5	Prelim results. Adj. due by 8:00 pm ET
THUR BD+4	4/6	Prelim results. Adj. due by 2:00 pm ET
FRI BD+5	4/7	Final financial results; client settlements

[View Financial Close Calendar](#)

Helpful Information

Security Access

[View / Request E=Vision Security Access](#)

Training

[View E=Vision Training Modules](#)

Dashboard Refresh

Daily Financial Activity View	Financial Dashboard Views
04/04/2023 01:38am EDT	04/04/2023 03:45am EDT

[View Essbase Cube Status](#)

➤ Select “View/Request E=Vision Security Access”

Dashboard Role / View

Your E=Vision security group is auto assigned based on your HR job code. If you do not have an auto assigned role or need to request an exception role, use the Dashboard Role request form on the Information Security Access Request system within the Operational Metrics Dashboard section.

Go to [Information Security Access Request System](#)

Evision POV	E=Vision Job Role
Above Unit	Senior Vice President

Hierarchy Access

Hierarchy access is manually updated based on user requests. If the hierarchy listed below needs to be updated, complete a Brio Report Portal request form on the Information Security Access Request system within the Finance section. The E=Vision application will default to the first location at your highest level of access. Use the hierarchy selector to view a different hierarchy within your access.

Go to [Information Security Access Request System](#)

Login ID	Hierarchy Access	Hierarchy Org Level
schapman	10-00001	10

➤ Your current E=Vision point of view (POV) and security role can be seen in the top section.

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Dashboard Exception Roles

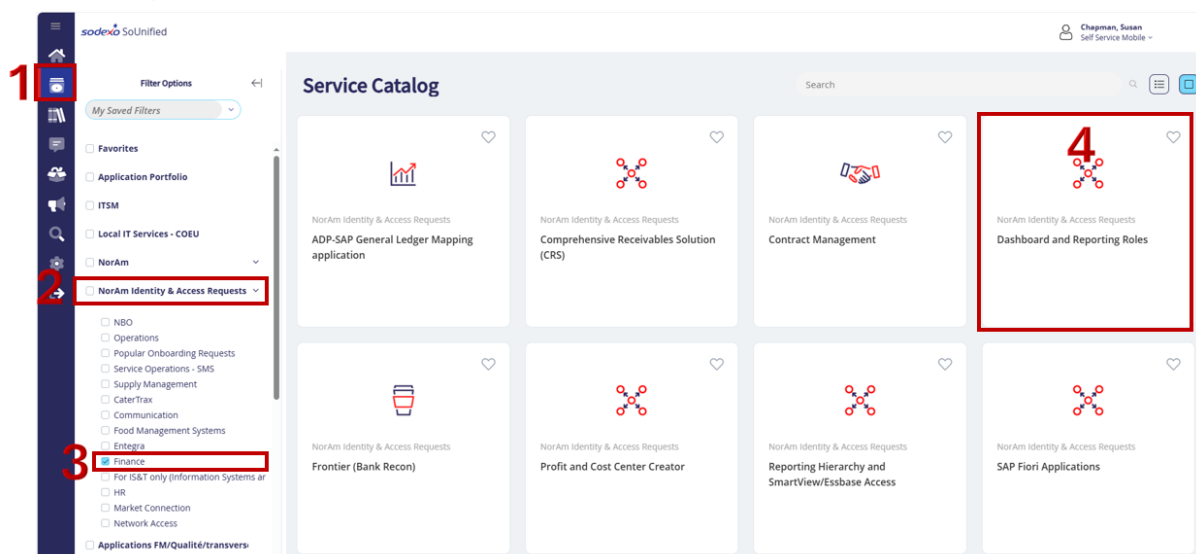
If you do not have a role assigned or need a different role than your auto assigned role, choose from the below exceptions. To determine which role is best suited to your needs review the usage column to find one that aligns with your hierarchy access levels and scope of work.

Dashboard Roles	Usage	E=Planning
Area General Manager (AGM)	In Unit POV with hierarchy access usually at ML	Data Input
Area Support Manager (ASM)	Outside Unit POV with outside the unit responsibilities	View Only
District Manager (DM/CE 1 or 2)	Outside Unit POV with hierarchy access usually at 70/60 level	Data Input
Division Vice President (DVP/EVP)	Outside Unit POV with hierarchy access usually at 30 level	View Only
DM Exception	Outside Unit POV with data entry capabilities in OMD, E=Planning and E=Vision	Data Input
Finance	Outside Unit POV with hierarchy access usually at or above 50 level	Data Input
General Manager	In Unit POV with hierarchy access usually at ML/PC	Data Input
Human Resources	Outside Unit POV with outside the unit responsibilities	View Only
In Unit Controller	Outside Unit POV with hierarchy access usually at or above ML	Data Input
In Unit Manager	In Unit POV with hierarchy access usually at ML/PC/CC	Data Input
IT Support	Outside Unit POV with help desk responsibilities	View Only
Marketing	Outside Unit POV with outside the unit responsibilities	View Only
Regional Vice President (RVP/CE 4)	Outside Unit POV with hierarchy access usually at 40/50 level	View Only
Resident District Manager (RDM)	Outside Unit POV with hierarchy access usually at 70 level	Data Input
Sales	Outside Unit POV with outside the unit responsibilities	View Only
Senior Vice President (SVP)	Outside Unit POV with hierarchy access usually at 40/50 level	View Only

Standard User Role	In Unit POV with hierarchy access usually at cost center level	View Only
Strategy	Outside Unit POV with outside the unit responsibilities	View Only
Vice President Operations (VPO/CE 3)	Outside Unit POV with hierarchy access usually at 50/60	Data Input

Dashboard and Reporting Roles Form

If you find that you require a dashboard role or need to change your role, requests are made using the [SoUnified](#) request system.



Access [SoUnified](#) and complete the following steps:

1. Select the Service Request Icon.
2. Expand the NorAm Identify & Access Requests section.
3. Filter to Finance requests.
4. Select the Dashboard and Reporting Roles form.

After opening the request form, review your employee details and dashboard role access. To submit a request for another employee, use the beneficiary drop down. To search, begin typing the employee name.

Dashboard and Reporting Roles
 Assigns specialty reporting roles for use by contractors, managers needing to adjust their auto assigned role, or managers needing access to specialty reporting views. Please note, standard dashboard and reporting roles are auto assigned based on your job code for most salaried employees.

Employee Details

Requester Name Chapman, Susan	Beneficiary Chapman, Susan
Title SR MGR, BUS ANALYTICS	Email Susan.Chapman@sodexo.com
Company CORPORATE STAFF	Primary Address
Primary Phone	City CHEEKTOWAGA
Manager Beehler, Teresa	ZIP 14225
OU OSS	Country United States
Cost Center Code 70307316	Location US
Cost Center Name FSI-EVISION ADMIN	Allocation Site 70307316 - FSI-EVISION ADMIN

Current Access Details

Current Access Role(s)
 Senior Vice President

Requesting/Updating a Dashboard Role

Scroll to the Request Details section to begin your access request.

Request Details

1 **Request Type ***
New/Update Access

2 **Account Type ***
E=Vision

3 **Dashboard and Roles(Roles if applicable) ***
General Manager

4 **System ***
E=Vision

Notes
Need data entry capabilities in E=Planning

5

6 **Review & Submit** | Save for Lat | Cancel

For new users only / add or remove assigned access

E=Vision roles are auto assigned based on your job code for most salaried employees. If you have Dashboard and Reporting hierarchy access and are unable to successfully log into E=Vision or Enterprise Analysis, contact the Help Desk at 888-667-9111 to determine if this exception request is needed.

Active Directory Security Group
SG.NA.GG.BI-Reporting.GM.Exp

1. Select a Request Type.

- New/Update Access – allows users to add new dashboard role access.
- Delete Access – Removes any exception level access for the user. Any auto assigned roles based on HR Job Code cannot be removed.

2. Next select your Account Type:

- E=Vision allows you to request a dashboard role to define your view/data entry capabilities within Standardized reporting tools like E=Vision, OMD, E=Planning and Enterprise Analysis.
- Enterprise Analysis allows you to request dashboard access to Group Reporting or Halo applications within Enterprise Analysis.

NOTE: Both E=Vision and Enterprise Analysis roles are needed for exception level users ONLY! Most management users are auto-assigned a dashboard role and standard access to Enterprise Analysis based on their HR Job Code.

3. Select the most appropriate role that aligns with your hierarchy access and scope of work as defined in the Dashboard Exception Role section.
4. Select E=Vision from the System drop down.
5. Within notes, write a brief explanation for why the role is needed.
6. Once completed submit the request to begin the approval process.

Once approved and completed by access management, the new role will be visible within standardized reporting tools after an overnight update.

E=nterprise Analysis Specialty Dashboard Roles

Users with a standardized dashboard role will have access to all standard E=nterprise Analysis dashboards and do not need to complete this form. Only submit for an E=nterprise Analysis specialty role if you need to access Group Reporting or Halo Dashboards within Enterprise Analysis. To submit a specialty role request, scroll to the Request Details section.

Request Details ^

<p>1 Request Type * New/Update Access</p> <p>2 Account Type * E=nterprise Analysis</p> <p>3 Business Role * Halo Analyst</p> <p>4 System * E=nterprise Analysis</p> <p>Notes</p> <div style="border: 2px solid red; width: 100%; height: 60px; display: flex; align-items: center; justify-content: center; font-size: 2em; font-weight: bold; color: red;">5</div>	<p><small>For new users only / add or remove assigned access</small></p> <p><small>This exception request is to obtain access to Group Reporting and Halo Applications in E=nterprise Analysis. All other financial dashboards will be automatically obtained from the Dashboard and Reporting Hierarchy Access Request.</small></p> <p><small>Active Directory Security Group</small> SG.NA.GG.OBIEE.HALO.Analyst</p>
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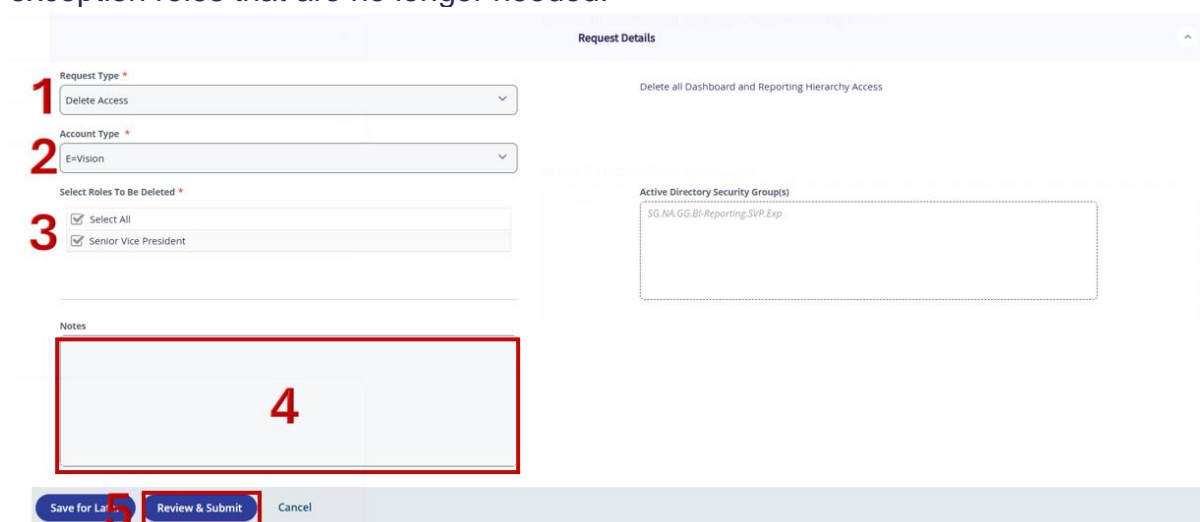
6
Review & Submit
Cancel

1. Select New/Update Access.
2. Select the E=nterprise Analysis Account Type.
3. Under Business Role, select the specialty dashboard access required.
 - CRM Finance Analyst – Provides access to the CRM and New Loss Reporting Dashboards as well as the CRM ad hoc subject area (BRU Access also required).
 - CRM Finance Consumer – Provides access to the CRM and New Loss Reporting Dashboards (BRU Access also required).

- Group Reporting Advanced Analyst – Provides edit access to the entire Group Reporting subject area for ad hoc and published reporting.
 - Group Reporting Analyst – Provides access to select Group reporting published reports and dashboards.
 - Halo Analyst – Provides access to the POS Point of Sale subject areas in Enterprise Analysis.
4. Select the Enterprise Analysis System.
 5. Within notes, write a brief explanation for why the role is needed.
 6. Once completed, submit the request to begin the approval process.

Deleting Exception Roles

While any auto assigned dashboard roles cannot be removed, you can delete any old exception roles that are no longer needed.



The screenshot shows a 'Request Details' form with the following elements:

- Request Type:** A dropdown menu with 'Delete Access' selected.
- Account Type:** A dropdown menu with 'E=Vision' selected.
- Select Roles To Be Deleted:** A list with checkboxes for 'Select All' and 'Senior Vice President', both of which are checked.
- Active Directory Security Group(s):** A text box containing 'SG.NA.GG.BI-Reporting.SVP.Exp'.
- Notes:** A large text area with a red box around it and the number '4' inside, indicating where to add notes.
- Buttons:** 'Save for Later', 'Review & Submit' (highlighted with a red box), and 'Cancel'.

1. Select the Delete Access request type.
2. Next select your Account Type:
 - E=Vision allows you to remove exception roles for standardized reporting tools.
 - Enterprise Analysis allows you to remove specialty access to Group Reporting or Halo applications within Enterprise Analysis.
3. Place a check mark on all exception roles to be removed.
4. Add any notes as desired.
5. Once completed submit the request to begin the approval process.

Once approved and completed by access management, your dashboard role access will be visible within standardized reporting tools after an overnight update.

Support

Technical support: Contact the service desk at 1-888-667-9111

Access Request Issues: Contact the Access Management team by submitting a general incident request using [SoUnified](#).

Functional assistance or suggestions for E=Vision: Contact the Reporting & Analysis team at ReportingAndAnalysis.Noram@sodexo.com