

Hierarchy Access Support

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Hierarchy Access Basics

Sodexo hierarchy access is not automatically assigned and must be requested and updated by users as their roles and responsibilities change. The type of access requested will depend on your role’s financial responsibility. You should request the highest level of access which contains all cost centers for which you have financial responsibility.

Sodexo Hierarchy Organization Levels

Sodexo organization levels are consolidations that are automatically updated based on changes to Sodexo’s organizational hierarchy.

Hierarchy Organization Level	Usage
10 Level – North America	Typically used by a finance director, president, or other senior leadership role. Includes all cost centers in North America.

20 Level – Country	Typically used by a finance director, president, or other senior leadership role. Includes all cost centers in the country.
30 Level – Division	Typically used by a finance director, president, or other senior leadership role. Includes all cost centers in the division.
40 Level – Area	Typically used by a finance director, senior vice president or other similar leadership role. Includes all cost centers in the area.
50 Level – Region	Typically used by a finance director, regional vice president or other similar senior leadership role. Includes all cost centers in the region.
60 Level – District	Typically used by a multi-loc controller, DM/CE or other similar senior leadership role. Includes all cost centers in the district.
70 Level – Sub-District	Typically used by a controller, DM/CE or other similar senior leadership role. Includes all cost centers in the sub-division.
Mainloc – Consolidation by Service	Typically used by a controller or general manager. Includes all cost centers with the same first 5 digits, that fall within the same hierarchy level and have the same service category.
Profit Center – Consolidation of Cost Centers	Typically used by a controller or general manager in schools. Includes all cost centers that fall within the defined profit center.
Cost Center – Individual Unit	Typically used by an in-unit manager. Access is only to the identified hierarchy.

What Access Level do I need?

To determine your correct access level, ask yourself the following questions.

Q. What cost centers do I have financial responsibility for?

Q. Am I responsible for all cost centers within the profit center?

If yes, continue to the next question.

If no, request those cost centers for which you have financial responsibility.

Q. Am I responsible for all profit centers within the Mainloc?

If yes, continue to the next question.

If no, request those profit centers for which you have financial responsibility.

Q. Am I responsible for all Mainlocs that fall within the sub-district?

If yes, continue to the next question.

If no, request the Mainloc for which you have financial responsibility.

Q. Am I responsible for all sub-districts that fall within the district?

If yes, continue through 10 level access or until you find the correct level of access.
If no, request the sub-district for which you have financial responsibility.

Validate your Access

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



The screenshot shows the E=Vision Standardized Reporting interface. At the top right, it says 'Welcome Chapman, Susan E', 'Role: Market', and 'English'. The main header is 'Standardized Reporting' with the date 'April 04, 2023'. The dashboard is divided into three main columns: 'Quick Links', 'Top News', and 'Reference'. The 'Quick Links' column lists various categories like 'Essentials', 'Financial', 'Daily Financial Activity', 'Metrics', and 'Reporting'. The 'Top News' column features a headline 'E=Vision has a new Look!' with a sub-headline 'We've transformed E=Vision with a modern look...' and a link 'Take a look at the new E=Vision'. Below this are three bullet points describing the updates. The 'Reference' column contains a 'Calendar' section with a table of dates and deadlines, and a 'Helpful Information' section with links for 'Security Access', 'Training', and 'Dashboard Refresh'. The footer includes the E=Vision logo and the text '© Sodexo 2023. Internal Confidential'.

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

X

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](#)  

E-Vision 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

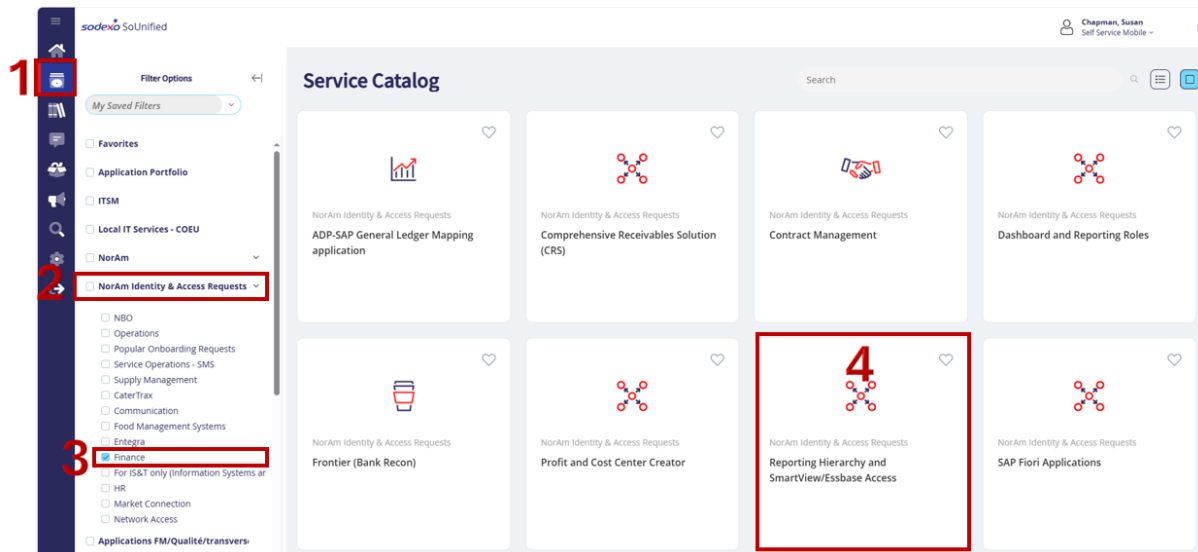
- Your current hierarchy access can be seen in the bottom section. If you have multiple hierarchies within your access, use the scroll bar to view all access.

Reporting Hierarchy and SmartView/Essbase Access Form

Hierarchy access requests are completed using the Reporting Hierarchy and SmartView/Essbase Access form on the SoUnified system. If requesting access for cost center, profit center or Mainloc, use the Reporting Hierarchy In Unit request process. If requesting access for 70 level through 10 level or Admin levels, use the Reporting Hierarchy Above Unit request process.

Accessing the Form

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 Reporting Hierarchy and SmartView/Essbase Access form.

After opening the request form, review your Employee Details and current hierarchy access. To submit a request for another employee, use the beneficiary drop down. To search, begin typing the employee name.

Reporting Hierarchy and SmartView/Essbase Access
Assigns hierarchy access for BRIO, E=Vision, Enterprise Analysis, STEP, SMART, OMD, CCOR etc. Add to Favorites

Employee Details

My Direct Reports To

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

Assigned Cost Centers (View Only)
 10-00001 - SODEXO NA

Reporting Hierarchy In Unit Request

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

Request Details

Reporting Hierarchy & Smartview Access Application Information

1 Request Type *
 New/Update Access New Access / Add or remove assigned access

2 Account Type *
 Dashboard and Reporting Hierarchy access Assigns hierarchy access for E=Vision, Enterprise Analysis, STEP, SMART, OMD, CCOR etc.

Select Cost centers to be maintained. Unchecked cost centers will be removed.

3

<input checked="" type="checkbox"/>	Select All
<input checked="" type="checkbox"/>	10-00001 - SODEXO NA

1. Begin by selecting a Request Type.
 - New/Update Access – allows users to remove old access that is no longer needed or add new hierarchy access.
 - Delete Access – Eliminates hierarchy access for the user.
2. Next select the Account Type.
 - Dashboard and Reporting Hierarchy Access – allows user to update their hierarchy access for standardized reporting tools like E=Vision, Enterprise Analysis, E=Planning, Static Reporting, etc.
 - SmartView Cubes Access – allows user to update their SmartView/Essbase access hierarchy (separate from dashboard and reporting hierarchy access) and the data cubes where they have access.
3. Review your current access and place a check mark next to all hierarchies you want to keep. If no new access is needed, skip to the final step.

Please note, any unchecked cost centers will be removed.

4 Do you wish to add new hierarchy access? *

Yes

5 Org Level Access *

Unit

6 Select a Data Type *

Mainloc

7 Mainloc *

10003001 - BOY SCOUTS SF - ROYANEH

Add multiple MainLocs by repeating the search and selecting the value from the "MainLoc" field

Selected Access

10003001 - BOY SCOUTS SF - ROYANEH

Edit Selected Access

Selected Mainloc Cost Centers

10003001 - BOY SCOUTS SF - ROYANEH
10003001,10003002,10003003,10003004,10003005,10003102

Notes

8

Save for Later **9** Review & Submit Cancel

If you do not know what Org Levels you need access to, please contact your manager or your account request approver. For unit level requests, select the appropriate MainLoc or Profit Center for consolidations.

4. To add access, select yes to the add new hierarchy access question.
5. Operational users should select Unit to the Org Level Access question.
 - Unit allows hierarchy selections for Mainloc, Profit Center or Cost Center.
6. Within Select a Data Type enter the desired hierarchy level.
7. Select the desired hierarchy from the drop down. To search begin typing the hierarchy number. As you enter the hierarchy, the tool will begin listing active hierarchies based on the data entered.
 - View your selections below within Selected Access. To remove any newly selected hierarchies from this section click Edit and then edit as desired.
 - If Mainloc level was selected, view all cost centers included in the Mainloc within the Selected Mainloc Cost Centers.
8. Enter any notes as desired.
9. Once completed, submit the request for the approval process.

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

Reporting Hierarchy Above Unit Request

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

Request Details

Reporting Hierarchy & Smartview Access Application Information

1 Request Type *
New/Update Access New Access / Add or remove assigned access

2 Account Type *
Dashboard and Reporting Hierarchy access Assigns hierarchy access for E=Vision, Enterprise Analysis, STEP, SMART, OMD, CCOR etc.

Select Cost centers to be maintained. Unchecked cost centers will be removed.

3 Select All
 10-00001 - SODEXO NA

1. Begin by selecting a Request Type.
 - New/Update Access – allows users to remove old access that is no longer needed or add new hierarchy access.
 - Delete Access – Eliminates hierarchy access for the user.
2. Next select the Account Type.
 - Dashboard and Reporting Hierarchy Access – allows user to update their hierarchy access for standardized reporting tools like E=Vision, Enterprise Analysis, E=Planning, Static Reporting, etc.
 - SmartView Cubes Access – allows user to update their SmartView/Essbase access hierarchy (separate from dashboard and reporting hierarchy access) and the data cubes where they have access.
3. Review your current access and place a check mark next to all hierarchies you want to keep. If no new access is needed, skip to the final step.

Please note, any unchecked cost centers will be removed.

4 Do you wish to add new hierarchy access? *
Yes

5 Org Level Access *
Above Unit If you do not know what Org Levels you need access to, please contact your manager or your account request approver.

6 Select a Data Type *
30 - Division

7 Division *
30-00002 - UNIVERSITIES
Add multiple Divisions by repeating the search and selecting the value from the "Division" field

8 Selected Access
30-00002 - UNIVERSITIES Edit Selected Access

Notes

8 [Empty text area]

Save for Later **Review & Submit** Cancel

4. To add access, select yes to the add new hierarchy access question.
5. Non-Operational users should select Above Unit to the Org Level Access question.
 - Above Unit allows hierarchy selections for North America through Cost Center level and Admin level hierarchies.
6. Within Select a Data Type, choose the desired hierarchy level.
7. Select the desired hierarchy from the drop down. To search begin typing the hierarchy number. As you enter the hierarchy, the tool will begin listing active hierarchies based on the data entered.
 - View your selections below within Selected Access. To remove any newly selected hierarchies from this section click Edit and then edit as desired.
8. Enter any notes as desired.
9. Once completed, submit the request for the approval process.

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

SmartView Hierarchy & Cube Access

If you require access to SmartView, also referred to as Essbase, scroll to the Request Details section to begin your access request.

Request Details

Reporting Hierarchy & Smartview Access Application Information

1 Request Type *

2 Account Type *

3 Org Level Access *

New Access / Add or remove assigned access

Access to specialty data cubes for SmartView reporting. Includes access to SmartView, which requires installation of Excel add on software.

1 Enter a maximum of 8 digits and an optional dash. *

3

4

2

4

1. Select New/Update Access.
2. Within Account Type select SmartView Cube Views.
3. Within Org Level Access indicate if In Unit or Above Unit access is required.
 - In Unit – For Mainloc, Profit Center or Cost Center level access and drives which cubes are available for selection.
 - Above Unit – For hierarchy levels from North America through Cost Center and Admin level hierarchies and drives which cubes are available for selection.
4. Type in the hierarchies needed for SmartView/Essbase access. Hierarchy is zero based so enter all hierarchy needed with this submission.

Standardized hierarchy access may be different from SmartView hierarchy access. Hierarchy requests are currently separated within the access system.



The screenshot shows a web interface for managing access. At the top, it states: "These cubes will be assigned by default - please do not remove:". Below this, there are four categories of cubes: PNL - Profit & Loss - Weekly, BAL - Balance Sheet, STAT - Statistics, and PNLHIST - Profit & Loss - Periodic. A section titled "List of available Specialty Cubes" contains a list of 10 items, each with a checkbox. The "BAL - Balance Sheet" checkbox is checked. Below this is a section titled "Specialty Cube Views To Remove" with another list of 10 items, all with unchecked checkboxes. A "Notes" field is present below the lists. At the bottom, there are three buttons: "Save for Later" (with a red '7' next to it), "Review & Submit" (with a red box around it), and "Cancel". A red '5' is placed to the left of the main list area, and a red '6' is placed inside the Notes field.

5. Select from the two lists to add or remove any specialty cube access.
 - a. The top section adds access to specialty cubes. The four standard cubes all SmartView users should receive have been pre-checked within the list.
 - b. The bottom section allows you to remove cubes from your current access.
6. Submit any notes as desired.
7. Once completed, submit the request for the approval process.

Delete Access

If all hierarchy access needs to be removed for an employee for either standardized reporting tools or SmartView, it can be done using the below process.

Request Details

Reporting Hierarchy & Smartview Access Application Information

1 Request Type *
Delete Access

2 Account Type *
Dashboard and Reporting Hierarchy access

Notes

3

Delete all Dashboard and Reporting Hierarchy access

Save for Later
Review & Submit
Cancel

1. Select Delete Access from Request Type.
2. Indicate the correct Account Type.
 - Dashboard and Reporting Hierarchy Access – Removes all hierarchy access to standardized reporting tools.
 - SmartView Cubes – Removes all EDW (Enterprise Data Warehouse) hierarchy and cube access.
3. Enter any notes as desired.
4. Submit the request for the approval process.

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