University of Maryland, Baltimore

eUMB Financials – Running the Roles Validation Report

Access: To run this report you must hold the eUMB Financials **Department Administrator** role.

1. Open **eUMB Financials**.
2. Navigate to **UMB Utilities > UMB Security > UMB Roles Validation report**
3. If you already have a **Roles Validation Run Control ID**, search, select it and move on to Step 4. Here's information for those who need **to create a Run Control ID** for the Roles Validation Report:
    a. The Run Control ID stores settings for running a report. If you have not done so already, you should **create a Run Control ID for the Roles Validation Report**. Use this Run Control ID each time you run this report.
    b. **To create a new Run Control ID: click the Add A New Value** tab.
    c. **Enter a name** for your new Run Control ID. Run Control IDs can contain up to 30 characters - uppercase, lowercase or mixed including numbers, dashes - or underscores _. They cannot include spaces. Some valid examples are: RolesValidationRpt or Roles_Validation_Rpt123 or Roles-validation-rpt)
    d. Click the **Add** button. Add
4. **Enter** a Department ID. To select the ID from the Department Tree:
    a. Click the **Find** tree icon. Locate your School or Unit.
    b. Click folder icons to open each branch of the tree until you locate the desired department.
    c. Click the desired **DeptID**. 06204000 - Financial Systems
    d. Click the **Select** button Select at the bottom of the tree list.
5. Click the **Run** button. Run
6. The Process Scheduler Request page opens. Do not change any settings. Click **OK**.
7. If you are running more than one instance of the report, write down the **Process Instance ID**. Process Instance:2386359 **REMINDER**: Allow reports to run to completion before re-using a Run Control ID.
8. **View results** from the Report Manager > Administration tab or the Process Monitor page. The following steps refer to viewing from the **Report Manager > Administration tab**. If you prefer to run reports and return later to view them, follow Reporting Tools > Report Manager > Administration tab to navigate directly to the page.
    a. **REMINDER: Report Manager > Administration tab** lists report information as soon as the report has run to success and Status=Posted. For most Roles Validation reports this takes a few minutes at most.
    b. Click the **Report Manager** link. Report Manager
    c. Click the **Administration** tab. Administration
    d. Click the **Details** link Details on the appropriate row. (If you ran more than one instance of the report, use the 'Prcs Instance' column (Process Instance) to identify the desired instance.)

e. Click the **PDF** link umrfn511_2386359.PDF to open the report.

NOTES on Using the Roles Validation Report in eUMB Financials:

1. **Active Employees and Affiliates Only**: The UMB Roles Validation Report displays data only for Active Employees or Affiliates. Be sure to **REMOVE roles for Affiliates** who change responsibilities or leave the department. If the role is not removed, the Affiliate will continue to have access until their access expires (up to 12 months).
2. **Access Dept ID** = the named user has access to view and/or complete role-related transactions for the listed department ID.
3. **Access Dept ID = UMB.** The role allows the user to view and/or create a role-related transaction in eUMB Financials for any UMB department. (Example: any Journal Entry Initiator can generate a GL journal for any UMB department.) You will see this for any role other than Dept Requisition Approver.
4. **Access Dept ID = a department ID (such as '10415010'):** This indicates that the department specified is related to the role only as a workflow department. The condition applies only to the Dept Requisition Approver role. The named Dept Requisition Approver will be part of the requisition approval process.
5. **User Dept ID** = the department which "owns" the named user; the user's home department.
6. **User Dept ID is outside your area:** The named user from outside your department has access to view or complete a role-related transaction for your department. **RECOMMENDED ACTION:** research further to determine whether or not such access is still required.
7. **'Outside Home Dept?' column** = a user "owned" by a different department has access to view and/or complete role-related transactions for the department you are viewing.