

Cognos Business Intelligence

Security Administration Tracking Application

Administration and User Guide



TPS of Illinois, Incorporated

www.tps-of-il.com

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Introduction

Thanks for purchasing your copy of the Cognos Business Intelligence (BI) Security Administration Tracking System by TPS of Illinois, Incorporated (www.tps-of-il.com).

We have created a ready-to-go application that can be used right away to:

- Create a complete database of all your existing Cognos BI users
- Easily generate reports to track users and user access
- Manage all security information in one central location

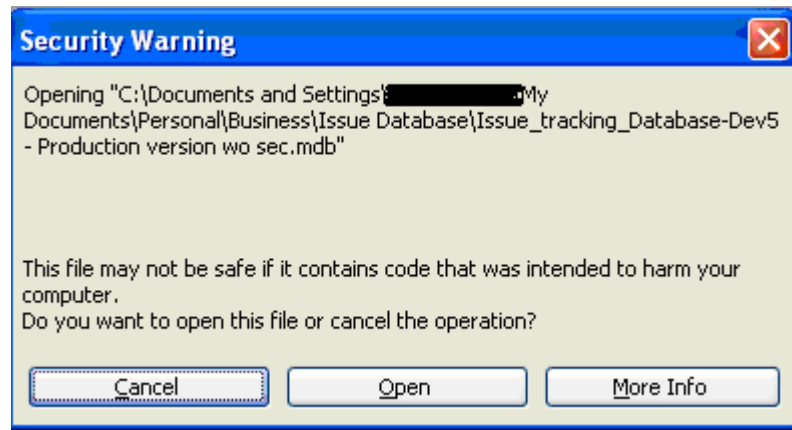
All you require is to have Microsoft Access 2000 or greater installed on your computer to use this application.

Enjoy and if you have any questions or comments, please contact us by visiting our website (www.tps-of-il.com).

Getting Started

Follow these steps to begin using your new application.

1. Double click on the MS Access file/icon to open the database. Note: all users need to have MS Access installed on there computer in order to utilize this system.
2. When you get the following screen, click on "Open".



3. This will then take you to the Security Administration home page. From here you can click on the appropriate button to access the function you require.

Cognos BI Security Administration

User Security Entry/Maintenance

User ID - Add/Update

User Data Security - Add/Update

Security Setting Maintenance

Roles

Packages

Portlets

Reports

Reports

Active User Report

Package Configuration

Role Configuration Mapping

Inactive User Report

Report Configuration

Data Security Mapping

Role Configuration

Portlet Configuration

Roles - Users Assigned To

User Specific (non-Role based) Security Settings

Packages - Users Assigned To

User ID - Roles Assigned To

User ID - Portlets Assigned To

Reports - Users Assigned To

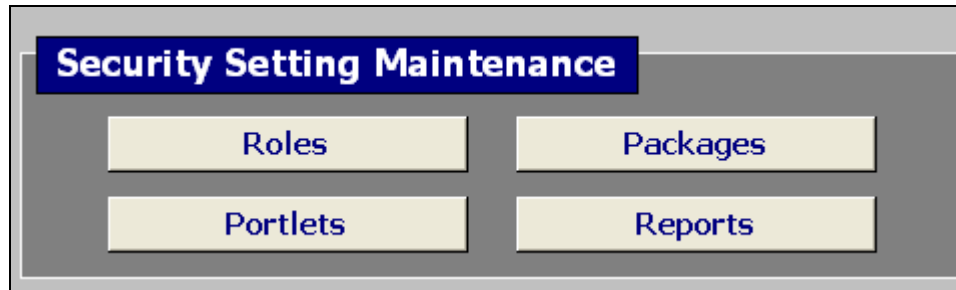
User ID - Packages Assigned To

User ID - Reports Assigned To

Portlets - Users Assigned To

Before entering User ID security information, we recommend setting up the appropriate security settings (i.e. Roles, Packages, Portlets, Reports). These settings will be based on your specific security configuration requirements for your Cognos BI environment.

Note: If you have questions regarding defining security within Cognos Business Intelligence, please feel free to contact us at cust_service@tps-of-il.com or visit our website at www.tps-of-il.com. We would be happy to work with you to properly define and configure your security within Cognos BI environment.



Security Setting	Description
Roles	Members of roles can be users, groups and other roles. Role membership is not part of the users' basic identity.
Packages	A subset of a model, which can be the whole model, to be made available to the Cognos.
Portlets	A mechanism for displaying Web content as part of a portal page.
Reports	A set of data deliberately laid out to communicate business information. Depending on the context, "report" may refer to report specification or report output.

Note: This application has been designed based on the primary principal that Roles are the primary security control to Packages, Portlets and Reports.

Entering/Maintaining Role Definitions

This application has been designed based on the primary principal that Roles are the primary security control to Packages, Portlets and Reports.

Once you have defined a Package, Portlet or Report, you need to assign it to the appropriate Role. On this screen (see below), you will add/update the Role name and description. You can then add/update the appropriate security information accordingly (i.e. Packages, Reports, Portlets).

The screenshot displays the 'Cognos BI Security Administration' interface. The main title is 'Cognos BI Security Administration' in a large, bold, white font on a dark blue background. Below this, the section is titled 'Role Definitions' in a smaller, bold, white font on a dark blue background. The form contains the following fields:

- Status:** A dropdown menu set to 'Active'.
- Report:** A text input field containing 'Analysis_User_AM'.
- Description:** A text input field containing 'Give Analysis Studio to assigned members. Location: Directory > AM > Root User Class > CEC Role Security'.
- Data Security Role:** A checkbox that is checked.

Below the 'Role Definitions' section is the 'Assignments:' section, which contains three dropdown menus for selecting security information:

- Packages:** A dropdown menu with a blue arrow pointing down.
- Reports:** A dropdown menu with a blue arrow pointing down.
- Portlets:** A dropdown menu with a blue arrow pointing down.

At the bottom of the form, there are two icons on the left (a calendar and a document) and two buttons on the right: 'Close Form' and 'Main Menu'.

Entering/Maintaining User Information

Now its time to create your users within the Cognos BI Security Administration Tracking System.

On this screen (see below), you will add/update the user information.

All fields on this are optional. You can setup your user information based on your specific business needs.

Under the 'Security Setting' section, you can assign the Role(s) to the user, in addition to, assigning specific user security settings (i.e. Packages, Reports, Portlets).

Cognos BI Security Administration

User Information

User ID	JS12345	Title	Senior Director	Department	Accounting
User Name	Smith,John	Email	jsmith@abc.com	Active	<input checked="" type="checkbox"/>
<div style="border: 1px solid gray; padding: 2px;"> Additional Information <input style="width: 100%; height: 15px;" type="text"/> <input style="width: 100%; height: 15px;" type="text"/> <input style="width: 100%; height: 15px;" type="text"/> </div>					

Security Setting

<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr><th style="text-align: left;">Roles</th></tr> </thead> <tbody> <tr><td>Analysis_User_AM</td></tr> <tr style="border-bottom: 2px solid orange;"><td>▶ Consumers_AM</td></tr> <tr><td>* <input style="width: 90%; height: 15px;" type="text"/></td></tr> </tbody> </table>	Roles	Analysis_User_AM	▶ Consumers_AM	* <input style="width: 90%; height: 15px;" type="text"/>	<div style="background-color: #003366; color: white; padding: 2px; font-weight: bold; text-align: center;">User Specific (non-Role based) Security Settings</div> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%; border: 1px solid gray; padding: 2px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead><tr><th style="text-align: left;">Packages</th></tr></thead> <tbody><tr><td>▶ <input style="width: 90%; height: 15px;" type="text"/></td></tr> </tbody> </table> </td> <td style="width: 33%; border: 1px solid gray; padding: 2px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead><tr><th style="text-align: left;">Reports</th></tr></thead> <tbody><tr><td>▶ <input style="width: 90%; height: 15px;" type="text"/></td></tr> </tbody> </table> </td> <td style="width: 33%; border: 1px solid gray; padding: 2px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead><tr><th style="text-align: left;">Portlets</th></tr></thead> <tbody><tr><td>▶ <input style="width: 90%; height: 15px;" type="text"/></td></tr> </tbody> </table> </td> </tr> </table>			<table border="1" style="width: 100%; border-collapse: collapse;"> <thead><tr><th style="text-align: left;">Packages</th></tr></thead> <tbody><tr><td>▶ <input style="width: 90%; height: 15px;" type="text"/></td></tr> </tbody> </table>	Packages	▶ <input style="width: 90%; height: 15px;" type="text"/>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead><tr><th style="text-align: left;">Reports</th></tr></thead> <tbody><tr><td>▶ <input style="width: 90%; height: 15px;" type="text"/></td></tr> </tbody> </table>	Reports	▶ <input style="width: 90%; height: 15px;" type="text"/>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead><tr><th style="text-align: left;">Portlets</th></tr></thead> <tbody><tr><td>▶ <input style="width: 90%; height: 15px;" type="text"/></td></tr> </tbody> </table>	Portlets	▶ <input style="width: 90%; height: 15px;" type="text"/>
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Close Form
Main Menu

Click the 'Save' icon to save all your adds/updates.



Entering/Maintaining User Data Security Settings

On this screen (see below), you will add/update specific data security settings (i.e. apexing) that you wish to track.

All fields on this screen are optional. You can define this based on your specific business needs.



Cognos BI Security Administration

Data Security Mapping

Role


Security Structure:

#	Security Level	User ID
1	Department Security	
1	Department Security	
2	Department Security > Corporate	
3	Department Security > Corporate > Finance	
4	Department Security > Corporate > Finance > Corp Accounting	
5	Department Security > Corporate > Finance > Information Technology	▼
*	0	

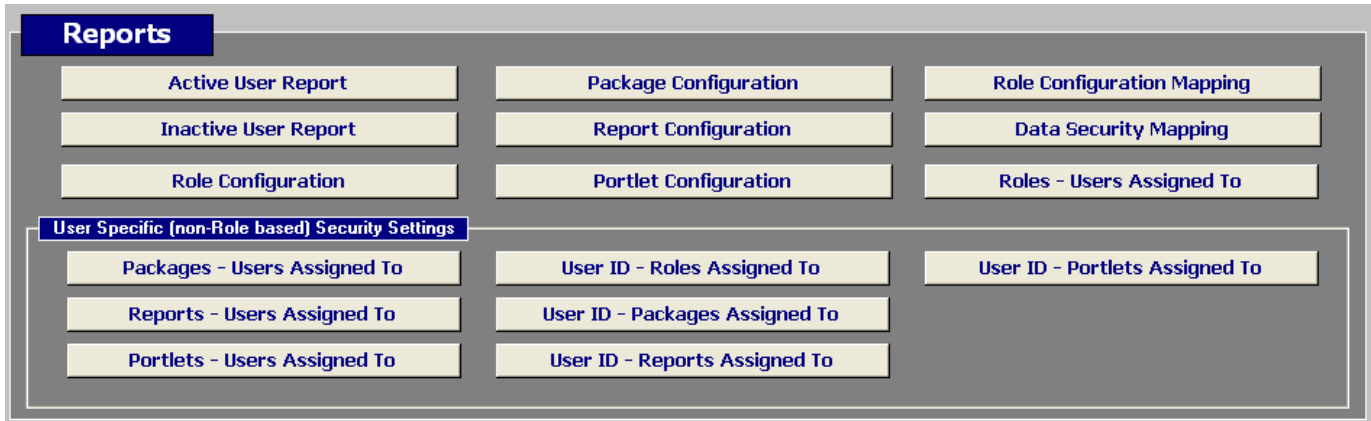
Close
Form

Main
Menu

Once you have completed entering all your information, click the 'Save' icon  to save.

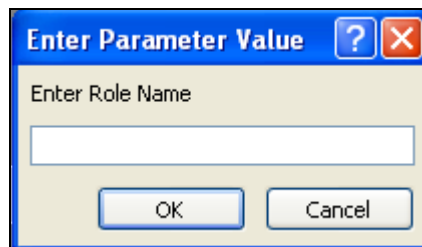
Reports

This System comes delivered with the following reports.



The 'User Specific' reports are to track user specific security settings (i.e. Portlets, Packages, Reports) that are defined directly to the user.

All the transaction reports that we deliver will allow you to enter your own reporting parameters (see example below).



In addition, you can also use wild-card parameters that will allow you greater flexibility in reporting. The following table identifies wild-cards that you can use with the transactional reports. Use these wild-cards in the 'Enter Parameter Values' prompt when running the report.

Character	Description	Example
*	Matches any number of characters. You can use the asterisk anywhere in a character string.	wh* finds what, white, and why, but not awhile or watch.
?	Matches any single alphabetic character.	B?ll finds ball, bell, and bill
[]	Matches any single character within the brackets.	B[ae]ll finds ball and bell but not bill
!	Matches any character not in the brackets.	b[!ae]ll finds bill and bull but not ball or bell
-	Matches any one of a range of characters. You must specify the range in ascending order (A to Z, not Z to A).	b[a-c]d finds bad, bbd, and bcd
#	Matches any single numeric character.	1#3 finds 103, 113, 123

Support

Any questions or comments that you have can be directed to the customer service department at TPS of Illinois, Incorporated. We can assist with ways to enhance or secure your specific application.

Our email address is cust_service@tps-of-il.com

Or

Visit our website at www.tps-of-il.com

In addition, if you have questions regarding defining security within Cognos Business Intelligence, please feel free to contact us. Our organization provides Cognos Business Intelligence consulting services and we would be happy to work with you to properly define and configure your security within Cognos BI environment.