

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

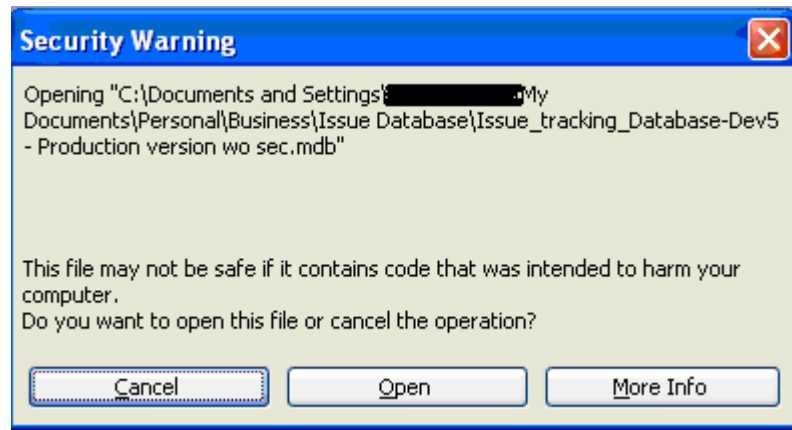
All you require is to have Microsoft Access 2000 or greater installed on your computer to use this application.

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

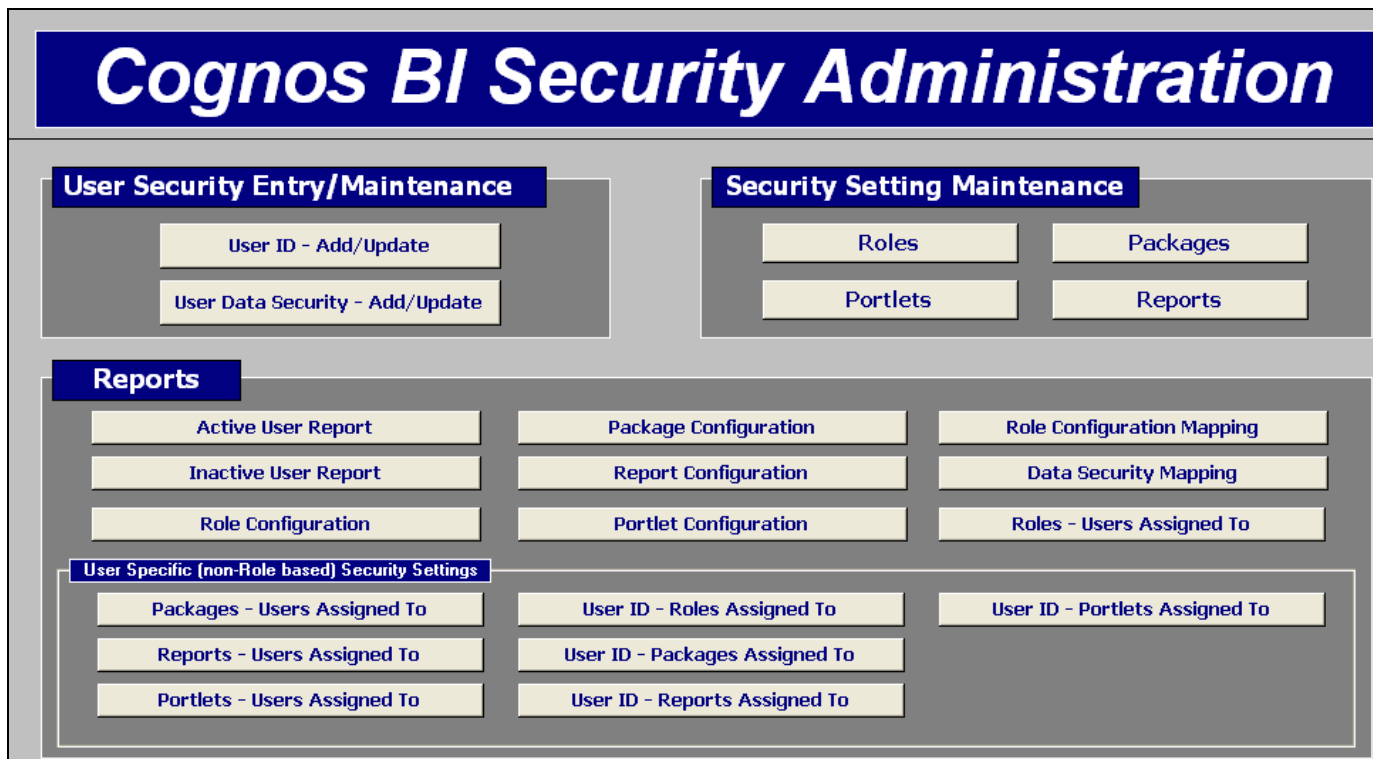
Getting Started

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".

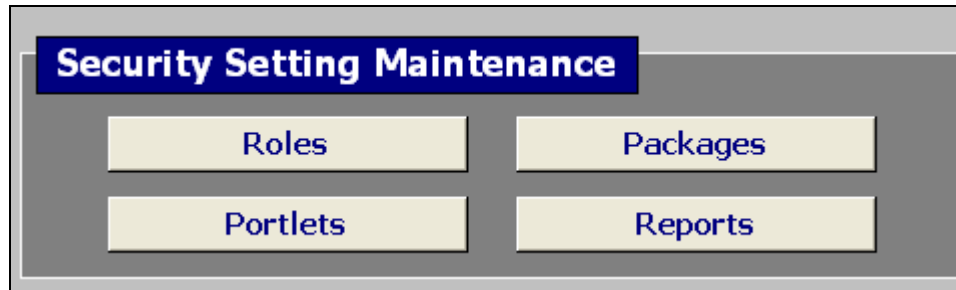


3. This will then take you to the Security Administration home page. From here you can click on the appropriate button to access the function you require.



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, blue font. Below the title is a section titled 'Role Definitions' in a blue header. This section contains three input fields: 'Status' with a dropdown menu set to 'Active', 'Report' with a text box containing 'Analysis_User_AM', and 'Description' with a text box containing 'Give Analysis Studio to assigned members. Location: Directory > AM > Root User Class > CEC Role Security'. To the right of these fields is a checkbox labeled 'Data Security Role' which is checked. Below the 'Role Definitions' section is an 'Assignments:' section with a blue header. This section contains three columns, each with a dropdown menu: 'Packages', 'Reports', and 'Portlets'. At the bottom of the screen, there are two icons on the left (a calendar and a folder) and two buttons on the right labeled '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).

The screenshot shows the 'Cognos BI Security Administration' interface. The 'User Information' section contains fields for User ID (JS12345), Title (Senior Director), Department (Accounting), User Name (Smith, John), Email (jsmith@abc.com), and an Active checkbox (checked). There is also an 'Additional Information' section with three empty text boxes. The 'Security Setting' section includes a 'Roles' list with 'Analysis_User_AM' and 'Consumers_AM' (selected), and a 'User Specific (non-Role based) Security Settings' section with three sub-sections: 'Packages', 'Reports', and 'Portlets', each with a selection arrow. At the bottom, there are icons for a calendar and a save icon, and buttons for 'Close Form' and '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.

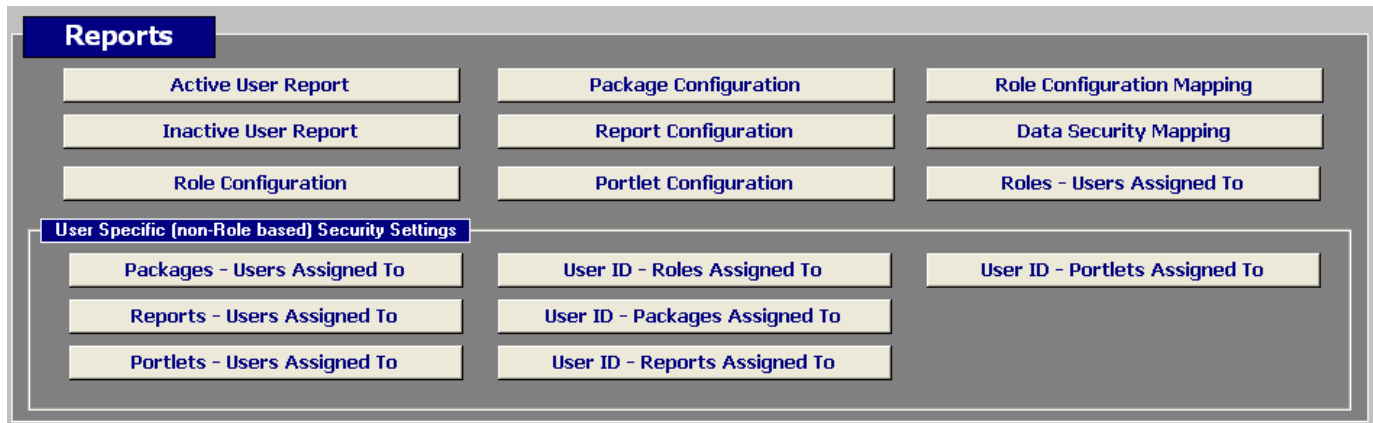
All fields on this screen are optional. You can define this based on your specific business needs.

#	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	

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

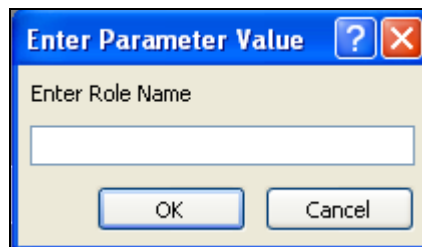
Reports

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.

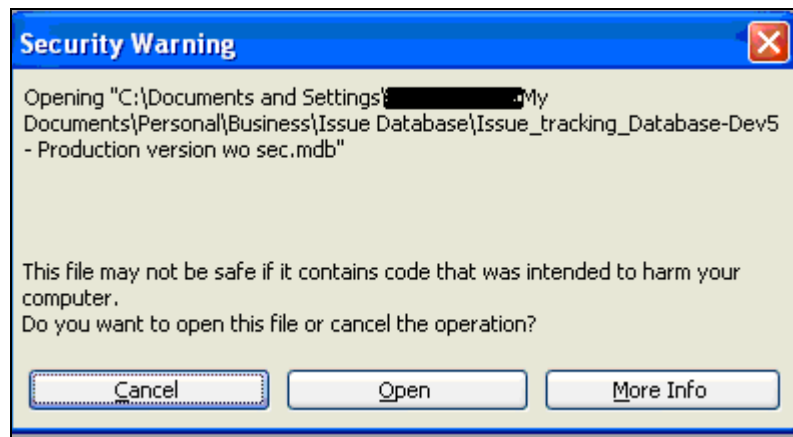
Character	Description	Example
*	Matches any number of characters. You can use the asterisk anywhere in a character string.	wh* finds what, white, and why, but not awhile or watch.
?	Matches any single alphabetic character.	B?ll finds ball, bell, and bill
[]	Matches any single character within the brackets.	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

Customizing Your Application

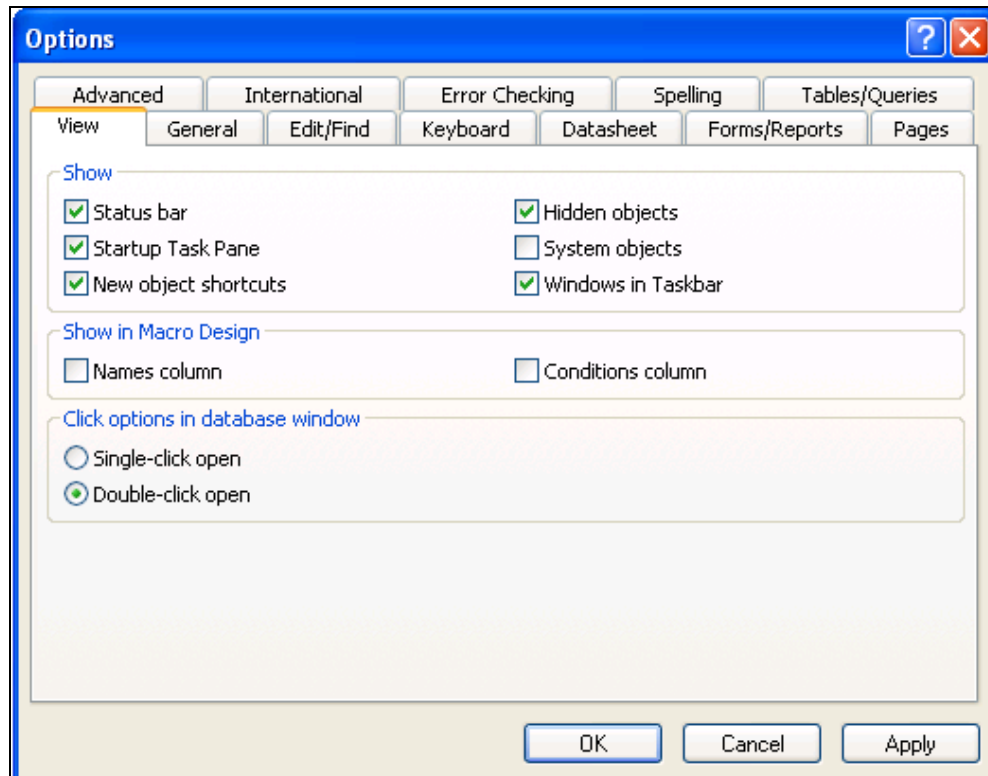
TPS of Illinois, Incorporated encourages you to make any changes you believe will enhancement the system for your specific business needs. The following section discusses how you can access the necessary objects in your system.

Note: These steps should be performed by the person who is the administrator for this system and is familiar with MS Access databases.

1. Double click on the MS Access file to open the database.
2. When you get the following screen, hold the Shift key and click on "Open".



3. Once the database opens, click on the "Tools" menu and open the "Options" submenu. Then click on the "Hidden objects" check box and click "OK". This will display all the hidden database objects and will allow you to make the necessary changes.



4. Once you have completed all your changes, click on the "Tools" menu and open the "Options" submenu again. Then uncheck the "Hidden objects" check box and click "OK". This will hide all database objects to avoid accidental changes from happening.
5. Your application is now ready for use.

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.