



One Identity Manager 8.0.2

# Report Subscriptions Administration Guide

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### Legend

-  **WARNING:** A WARNING icon indicates a potential for property damage, personal injury, or death.
-  **CAUTION:** A CAUTION icon indicates potential damage to hardware or loss of data if instructions are not followed.
-  **IMPORTANT, NOTE, TIP, MOBILE, or VIDEO:** An information icon indicates supporting information.

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# Report Subscriptions in One Identity Manager

The One Identity Manager provides several reports which present information about objects and their relations to other objects in the One Identity Manager database. For example, there are reports about employees and their user accounts, company structures, resources and system entitlements, attestation and compliance rule violations integrated into the One Identity Manager. Identification, analysis and summaries of relevant data are supported with the help of these reports.

Web Portal users request subscribable reports and configure their own personal report subscriptions. The reports are delivered to Web Portal users by email as specified in a personally configured schedule.

The One Identity Manager components for report subscription are available when the configuration parameter "QER/RPS" is set.

- Check whether the configuration parameter is set in the Designer. Otherwise, set the configuration parameter and compile the database.
- Other configuration parameters are installed when the module is installed. Check the configuration parameters and modify them as necessary to suit your requirements.

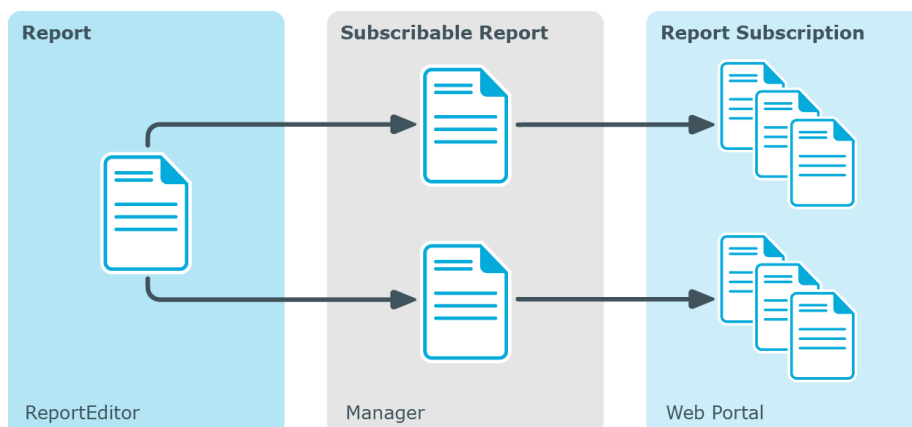
## Detailed information about this topic

- [Report Overview](#) on page 6
- [One Identity Manager Users for Providing Reports and Report Subscriptions](#) on page 7
- [Providing Subscribable Reports for Web Portal Users](#) on page 9
- [Creating and Editing Subscribable Reports](#) on page 11
- [Sending Subscribable Reports](#) on page 36
- [Appendix: Configuration Parameters for Subscribable Reports](#) on page 38

# Report Overview

The following components work together to create reports and make them available.

**Figure 1: Connection between Reports, Subscribable Reports and Report Subscriptions**



## Reports in the Report Editor

Create and edit reports in the Report Editor. Predefined reports are supplied with the One Identity Manager by default. You can also send reports to specified email addresses using scheduled subscriptions. You can create reports for the current state or over a specified period (change history). You can set up several subscribable reports for each report. You can also view reports using One Identity Manager administration tools, for example, the Manager.

## Subscribable Reports in the Manager

Set up and edit subscribable reports in the Manager. When you set up a subscribable report, enter the underlying report, either a default report or a custom report created with the Report Editor. Assign subscribable reports to employees through company organizations or the IT Shop. Web Portal users can request subscribable reports and configure their own personal report subscriptions.

## Report Subscriptions in the Web Portal

Web Portal users request subscribable reports and configure their own personal report subscriptions. When Web Portal users set up a subscribable report, they enter the underlying report. The reports are delivered to Web Portal users by email as specified in a personally configured schedule.

The report subscriptions and schedules are shown in the Manager where any technical problems can be solved.

## Related Topics

- [Providing Subscribable Reports for Web Portal Users](#) on page 9
- [Creating and Editing Subscribable Reports](#) on page 11
- One Identity Manager Configuration Guide
- One Identity Manager Web Portal User Guide

# One Identity Manager Users for Providing Reports and Report Subscriptions

The following users are used for providing and using reports and report subscriptions in the One Identity Manager.

**Table 1: Users**

User	Task
Report designer	<ul style="list-style-type: none"><li>• Creating and editing reports in the Report Editor.</li><li>• Creating report parameters in the Report Editor and configuring predefined values.</li></ul>
One Identity Manager administrator	<ul style="list-style-type: none"><li>• Create customized permissions groups for application roles for role-based login to administration tools in the Designer, as required.</li><li>• Create system users and permissions groups for non-role based login to administration tools, as required.</li><li>• Enable or disable additional configuration parameters in the Designer, as required.</li><li>• Create custom processes in the Designer, as required.</li><li>• Create and configures schedules, as required.</li><li>• Create and configure password policies, as required.</li></ul>
Report administrator	<p>Administrators must be assigned to the application role <b>Identity &amp; Access Governance   Company policies   Report Subscriptions</b>.</p> <p>Users with this application role:</p> <ul style="list-style-type: none"><li>• Create subscribable reports from existing reports.</li><li>• Configure report parameters for subscribable reports.</li><li>• Assign subscribable reports to employees, company structures</li></ul>

User	Task
	<p>or IT Shop shelves.</p> <ul style="list-style-type: none"> <li>• Create custom mail templates for sending subscribed reports by email.</li> </ul>
Web Portal users	<ul style="list-style-type: none"> <li>• Creates personal report subscriptions in the Web Portal.</li> <li>• Set up personal schedules for delivering subscribed reports.</li> </ul>



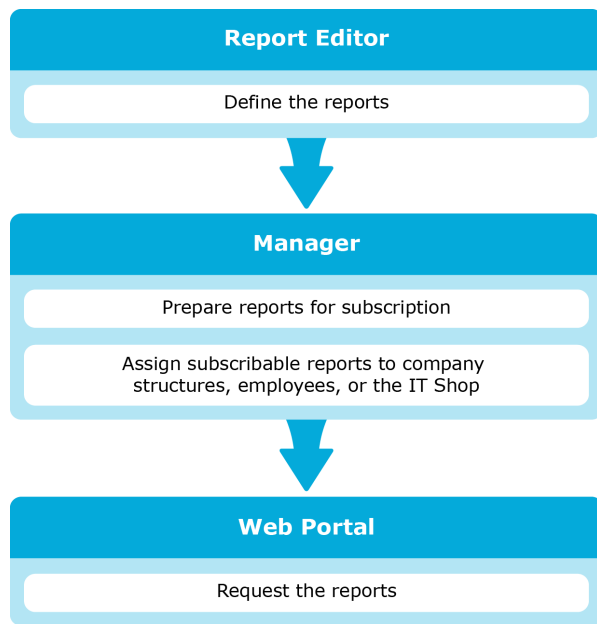
## Providing Subscribable Reports for Web Portal Users

In the default installation there are predefined reports available, which users can subscribe to in the Web Portal. You can also create new reports or make copies of predefined reports to modify.

### ***To provide Web Portal users with a subscribable report***

1. Create the report with the Report Editor.
2. Prepare a subscribable report in Manager.
  - a. Create a subscribable report.
  - b. Assign the subscribable report to employees in the Manager.
    - Assign the subscribable report to IT Shop shelves so that Web Portal users can request subscribable reports.
    - Assign subscribable reports to company structures or directly to individual employees. Web Portal users can set up their personal report subscriptions without requesting a subscribable report first.
3. Web Portal users request subscribable reports and configure their own personal report subscriptions.

**Figure 2: Providing Reports Workflow**



## Related Topics

- [Creating and Editing Subscribable Reports](#) on page 11
- [Adding Subscribable Reports to IT Shop](#) on page 32
- [Assigning Subscribable Reports to Employees](#) on page 29
- [Assigning Subscribable Reports to Business Roles](#) on page 31
- [Assigning Subscribable Reports to Departments, Cost Centers and Locations](#)
- [Assigning Subscribable Reports Directly to Employees](#) on page 33
- [One Identity Manager Configuration Guide](#)
- [One Identity Manager Web Portal User Guide](#)

# Creating and Editing Subscribable Reports

In the default installation there are predefined reports available to which Web Portal users can subscribe. You can also create new reports or make copies of predefined reports to modify. All the reports available to Web Portal users for subscription, are those you have set up in the Report Editor. You can set up several subscribable reports with different parameters for each report.

The One Identity Manager components for report subscription are available when the configuration parameter "QER/RPS" is set.

- Check whether the configuration parameter is set in the Designer. Otherwise, set the configuration parameter and compile the database.
- Other configuration parameters are installed when the module is installed. Check the configuration parameters and modify them as necessary to suit your requirements.

## Detailed information about this topic

- [Basic Data for Subscribable Reports](#) on page 11
- [Editing Subscribable Reports](#) on page 20
- [Creating a Simple Report](#) on page 23
- [Report Parameters](#) on page 24
- [Assigning Subscribable Reports to Employees](#) on page 29

## Basic Data for Subscribable Reports

The following basic data is relevant to providing subscribable reports in One Identity Manager.

- Configuration parameter  
Use configuration parameters to configure the behavior of the system's basic settings. One Identity Manager provides default settings for different configuration

parameters. Check the configuration parameters and modify them as necessary to suit your requirements.

Configuration parameters are defined in the One Identity Manager modules. Each One Identity Manager module can also install configuration parameters. You can find an overview of all configuration parameters in the category **Base data | General | Configuration parameters** in the Designer.

For more information, see [Appendix: Configuration Parameters for Subscribable Reports](#) on page 38.

- Schedules

Each user specifies their personalized schedule for sending subscribed reports in the Web Portal. One Identity Manager supplies some default schedules. For more information, see [Schedules for Report Subscriptions](#) on page 12.

- Mail templates

Mail templates are used to send reports subscribed in the Web Portal, to the subscribers. There are some mail templates available in the default installation that can be used for sending report. For more information, see [Notification Mail Templates](#) on page 15.


## Schedules for Report Subscriptions

Each user specifies their personalized schedule for sending subscribed reports in the Web Portal. Furthermore, the One Identity Manager supplies the following schedules for report subscriptions by default.

- Daily report subscriptions
- Weekly report subscriptions
- Monthly report subscriptions
- Quarterly report subscriptions
- Bi-annual report subscriptions
- Annual report subscriptions

**!** **IMPORTANT:** Do not change any schedules set up by users using the Web Portal.






### **To edit schedules**

1. Select **Report Subscriptions | Basic configuration data | Schedules**.  
The result list shows exactly those schedules configured for report subscriptions.
2. Select a schedule in the result list and run the task **Change master data**.  
– OR –  
Click  in the result list toolbar.

3. Edit the schedule's master data.
4. Save the changes.

Enter the following properties for a schedule.

**Table 2: Schedule Properties**

Property	Meaning
Name	Schedule ID. Translate the given text using the  button.
Description	Detailed description of the schedule. Translate the given text using the  button.
Table	Table whose data can be used by the schedule. Report subscription schedules must reference the RPSSubscription table.
Enabled	Specifies whether the schedule is enabled or not.  <b>NOTE:</b> Only active schedules are executed.
Time zones	Unique identifier for the time zone that is used for executing the schedule. Select either "Universal Time Code" or one of the time zones.  <b>NOTE:</b> When you add a new schedule, the time zone is preset to that of the client from which you started the .
Start (date)	The day on which the schedule should be run for the first time.
Validity period	Period within which the schedule is executed. <ul style="list-style-type: none"> <li>• If the schedule will be run for an unlimited period, select the option <b>Unlimited duration</b>.</li> <li>• To set a validity period, select the option <b>Limited duration</b> and enter the day the schedule will be run for the last time in <b>End (date)</b>.</li> </ul>
Occurs	Interval in which the task is executed. Valid interval types are "Every minute", "Hourly", "Daily", "Weekly", "Monthly" and "Yearly". Specify the exact weekday for the interval type "Weekly". Specify the day of the month (1st - 31st) for the interval type "Monthly". Specify the day of the year (1 - 366) for the interval type "Yearly".  <b>NOTE:</b> Schedules that have the sub-interval "31" and interval type "monthly" are run on the "31st of the month". The task is, therefore, only run in months with 31 days. The same is true of the interval type "yearly" and the sub-interval "366".
Start time	Fixed start time for the interval types "daily", "weekly", "monthly" and "yearly". Enter the time in local format for the chosen time zone. The start time for interval types "Every minute" and "Hourly" is calculated from the rate of occurrence and the interval type.

Property	Meaning
Repeat every	Rate of occurrence for executing the schedule within the selected time interval. Select at least one weekday for the interval type "Weekly".
Last planned run/Next planned run	Execution time calculated by the DBQueue Processor. They are recalculated each time a schedule is run. The time of the next run is calculated from the interval type, rate of occurrence and the start time.

**i** **NOTE:** The One Identity Manager provides the start information in the time zone of the client where the program was started. Changes due to daylight saving are taken into account.

## Related Topics

- [Starting Schedules Immediately](#) on page 14
- [Displaying Report Subscriptions](#) on page 14

## Starting Schedules Immediately

Use this task to start the schedule immediately.

### *To start a schedule immediately*

1. Select **Report Subscriptions | Basic configuration data | Schedules**.
2. Select the schedule in the result list.
3. Select **Start immediately** from the task view.  
A message appears confirming that the schedule was started.
4. Click **OK**.

## Displaying Report Subscriptions

Every user sets up their personalized report subscriptions through the Web Portal. For more information, see the One Identity Manager Web Portal User Guide.

- i** **IMPORTANT:** Do not remove any assignments. Assignment of schedules for report subscriptions is compulsory and carried out by through the Web Portal.

### *To display report subscriptions assigned to a schedule*

1. Select **Report Subscriptions | Basic configuration data | Schedules**.
2. Select the schedule in the result list.
3. Select **Assign report subscriptions** in the task view.

# Notification Mail Templates

**Table 3: Configuration Parameters for Mail Templates**

Configuration parameter	Meaning
QER\RPS\MailTemplateIdents	Mail template names are defined under this configuration parameter which are used in association with report subscriptions.

Mail templates are used to send reports subscribed in the Web Portal, to the subscribers. The reports are attached to the notification generated from the mail template. The mail text in a mail template is defined in several languages. This ensures that the language of the recipient is taken into account when the email is generated. The report parameters are determined dynamically when the email is generated, replacing the values stored with the subscription.

There are some mail templates available in the default installation that can be used for sending report. Mail templates are entered in the configuration parameters.

### To use custom templates

- Enter the mail template into configuration parameter in the Designer.

**Table 4: Default Templates**

Mail template	Description	Usage in Configuration Parameter
Report subscription - delivery	Email to report subscribers. The report is sent as attachment. The report to be sent as parameter UID_DialogParameterSet is determined dynamically when the process is generated.	QER\RPS\MailTemplateIdents\InformSubscriber
Report subscription - delivery to cc	Email to report subscribers (cc). The report is sent as attachment. The report to be sent as parameter UID_DialogParameterSet is determined dynamically when the	QER\RPS\MailTemplateIdents\InformCC

Mail template	Description	Usage in Configuration Parameter
	process is generated.	
Report subscription - stored on server	Informs the subscriber that the report is stored on a server.	QER\RPS\MailTemplateIdents\StoredOnServer
Report subscription - stored on server for cc	Informs the subscriber (cc) that the report is stored on a server.	QER\RPS\MailTemplateIdents\StoredOnServerForCC

## Related Topics


- [Creating Custom Mail Templates for Notifications](#) on page 16

# Creating Custom Mail Templates for Notifications

A mail template consists of general master data such as target format, important or mail notification confidentiality and one or more mail definitions. Mail text is defined in several languages in the mail template. This ensures that the language of the recipient is taken into account when the email is generated.

There is a One Identity Manager in the Mail Template Editor to simplify writing notifications. You can use the Mail Template Editor to create and edit mail text in WYSIWYG mode.

### ***To edit mail templates***

1. Select **Subscribable Reports | Basic configuration data | Mail templates**.  
Mail templates that can be used for subscribable reports are displayed in the result list.
2. Select the mail template in the result list. Select **Change master data** in the task view.  
– OR –  
Click  in the result list toolbar.  
This opens the mail template editor.
3. Edit the mail template.
4. Save the changes.




### **To copy a mail template**

1. Select **Subscribable Reports | Basic configuration data | Mail templates**.
2. Select the mail template you want to copy from the result list. Select **Change master data** in the task view.
3. Select **Copy mail template...** in the task view.
4. Enter the name of the new mail template in **Name of copy**.
5. Click **OK**.

### **To display a mail template preview**

1. Select **Subscribable Reports | Basic configuration data | Mail templates**.
2. Select the template in the result list. Select **Change master data** in the task view.
3. Select **Preview...** in the task view.
4. Select the base object.
5. Click **OK**.

### **To delete a mail template**

1. Select **Subscribable Reports | Basic configuration data | Mail templates**.
2. Select the template in the result list.
3. Click  in the result list toolbar.
4. Confirm the security prompt with **Yes**.


### **Detailed information about this topic**


- [General Properties of a Mail Template](#) on page 17
- [Creating and Editing an Email Definition](#) on page 19
- [Customizing Email Signatures](#) on page 20
- [Custom Notification Processes](#) on page 20

## **General Properties of a Mail Template**

The following general properties are displayed for a mail template:

**Table 5: Mail Template Properties**

<b>Property</b>	<b>Meaning</b>
Mail template	Name of the mail template. This name will be used to display the mail templates in the administration tools and in the Web Portal. Translate the given text using the  button.
Base object	Mail template base object. A base object only needs to be entered if the


Property	Meaning								
	mail definition properties of the base object are referenced. Use the base object RPSSubscription or RPSSubscriptionCC for notifications about reports.								
Report (parameter set)	Report, made available through the mail template.								
Description	Mail template description. Translate the given text using the  button.								
Target format	Format in which to generate email notification. Permitted values are: <table border="1" data-bbox="419 658 1394 882"> <thead> <tr> <th>Value</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>HTML</td> <td>The email notification is formatted in HTML format. HTML format can contain formatting.</td> </tr> <tr> <td>TXT</td> <td>The email notification is formatted in text format. Text format cannot contain any formatting.</td> </tr> </tbody> </table>	Value	Description	HTML	The email notification is formatted in HTML format. HTML format can contain formatting.	TXT	The email notification is formatted in text format. Text format cannot contain any formatting.		
Value	Description								
HTML	The email notification is formatted in HTML format. HTML format can contain formatting.								
TXT	The email notification is formatted in text format. Text format cannot contain any formatting.								
Design type	Design in which to generate the email notification. Permitted values are: <table border="1" data-bbox="419 981 1394 1352"> <thead> <tr> <th>Value</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Mail template</td> <td>The generated email notification contains mail text corresponding to the mail definition.</td> </tr> <tr> <td>Report</td> <td>The email notification is generated with the report contained under <b>Report (parameter set)</b> as mail body.</td> </tr> <tr> <td>Mail template, report as attachment</td> <td>The generated email notification contains mail text corresponding to the mail definition. The report entered in the <b>Report (parameter set)</b> field is attached to the mail as PDF file.</td> </tr> </tbody> </table>	Value	Description	Mail template	The generated email notification contains mail text corresponding to the mail definition.	Report	The email notification is generated with the report contained under <b>Report (parameter set)</b> as mail body.	Mail template, report as attachment	The generated email notification contains mail text corresponding to the mail definition. The report entered in the <b>Report (parameter set)</b> field is attached to the mail as PDF file.
Value	Description								
Mail template	The generated email notification contains mail text corresponding to the mail definition.								
Report	The email notification is generated with the report contained under <b>Report (parameter set)</b> as mail body.								
Mail template, report as attachment	The generated email notification contains mail text corresponding to the mail definition. The report entered in the <b>Report (parameter set)</b> field is attached to the mail as PDF file.								
Importance	Importance for the email notification. Permitted values are "low", "normal" and "high".								
Confidentiality	Confidentiality for the email notification. Permitted values are "normal", "personal", "private" and "confidential".								
Can unsubscribe	Specifies whether the recipient can unsubscribe email notification. If this option is set, the emails can be unsubscribed through the Web Portal.								
Disabled	Specifies whether this mail template is disabled.								
Mail definitions	Unique name for the mail definition.								
Language	Language which applies to the mail template.								

Property	Meaning
culture	
Subject	Subject of the email message
Mail body	Content of the email message.

## Creating and Editing an Email Definition

Mail texts can be defined in these different languages in a mail template. This ensures that the language of the recipient is taken into account when the email is generated.

### **To create a new mail definition**

1. Open the mail template in Mail Template Editor.
2. Click the  button next to the **Mail definition** list.
3. Select the language culture you want the mail definition to apply to from the **Language culture** menu.

All active language cultures are shown in the list. To use other languages, enable the corresponding countries in the Designer. For more information, see the One Identity Manager Configuration Guide.

4. Enter the subject in the **Subject** field.
5. Edit the mail text in the **Mail definition** view with the help of the Mail Text Editor.
6. Save the changes.

### **To edit an existing mail definition**

1. Open the mail template in Mail Template Editor.
2. Select the language in the **Mail definition** list.
3. Edit the mail subject line and the body text.
4. Save the changes.

## Related Topics

- [Using Base Object Properties](#) on page 19

## Using Base Object Properties

You can use all the properties of the object entered under **Base object** in the subject line and in the mail body. You can also use the object properties that are referenced by foreign key relation.

To access properties use dollar notation. For more information, see the One Identity Manager Configuration Guide.

## Customizing Email Signatures

Configure the email signature for mail templates using the following configuration parameter.

**Table 6: Configuration Parameters for Email Signatures**

Configuration Parameter	Description
Common\MailNotification\Signature	Data for the signature in email automatically generated from mail templates.
Common\MailNotification\Signature\Caption	Signature under the salutation.
Common\MailNotification\Signature\Company	Company name.
Common\MailNotification\Signature\Link	Link to company website.

The script `VI_GetRichMailSignature` combines the components of an email signature according to the configuration parameters for use in mail templates.

## Custom Notification Processes

Set up customized processes to send email notifications. For more information, see the [One Identity Manager Configuration Guide](#).


You can use following events for generating processes.

**Table 7: Events for Objects "RPSSubscription" and "RPSSubscriptionCC"**

Event	Triggered by
GenerateMail	Creates a report subscription notification according to a defined schedule.

## Editing Subscribable Reports

### ***To edit a subscribable report***

1. Select **Report Subscriptions | Subscribable report**.
2. Select the report in the result list and run **Change master data** in the task view.  
- OR -  
Click  in the result list toolbar.
3. Enter the required data for a subscribable report on the master data form.
4. Edit report parameters (optional).
5. Save the changes.

### To copy an existing report

1. Select **Report Subscriptions | Subscribable report**.
2. Select the report in the result list.
3. Select **Create copy** in the task view.
4. Confirm the prompt with **Yes**.
5. Confirm the prompt with **Yes**, if you want to deactivate the original report.  
The original report can no longer be assigned, however, existing assignments remain intact.  
- OR -  
Confirm the prompt with **No**, if you want the original report to remain active.
6. Edit the data for a subscribable report on the master data form.
7. Save the changes.

### Related Topics

- [General Master Data for Subscribable Reports](#) on page 21
- [Editing Parameters for Subscribable Reports](#) on page 26
- [Creating a Simple Report](#) on page 23
- [Assigning Subscribable Reports to Employees](#) on page 29

## General Master Data for Subscribable Reports

Enter the following general master data for a subscribable report.

**Table 8: General Master Data for Subscribable Reports**

Property	Description
Identifier	Identifier for the subscribable report. The identifier is automatically copied when the report is selected. You can change the identifier if required.
Report	Report you want to make subscribable. All the reports that you have set up in the Report Editor are available for subscription editing. Some of the following data is transferred automatically.
Format (e-mail attachment)	Report formats when sent as an attachment. Permitted formats are: HTML, PDF, RTF, TEXT, XLS, TIFF, XML, CSV, XPS, DOCX, XLSX.

Property	Description
Owner	Owner of the report.
Service item	So that you can use subscribable reports in the IT Shop you need to assign a service item to the subscribable report or add a new one. For more information, see the One Identity Manager IT Shop Administration Guide.
Risk index	Value for evaluating the risk of subscribing reports to employees. This property is only visible when the configuration parameter QER\CalculateRiskIndex is set. For more information, see the One Identity Manager Risk Assessment Administration Guide.
Description	Spare text box for additional explanation. The description is automatically transferred when the report is selected. You can change the description if necessary.
Disabled	<p>Specifies whether the subscribable report can be inherited by employees. Only subscribable reports that are enabled can be assigned within the One Identity Manager database. If a subscribable report is disabled you are prevented from assigning it. Existing assignments remain intact.</p> <p><b>!</b> <b>IMPORTANT:</b> If you disable a subscribable report, existing Web Portal user report subscriptions are canceled.</p>
IT Shop	Specifies whether the subscribable report can be requested through the IT Shop. This report can be requested over the Web Portal by company employees and granted through defined approval procedures. The subscribable report can also be assigned directly to employees and hierarchical roles. For more information, see the One Identity Manager IT Shop Administration Guide.
Only for use in IT Shop	Specifies whether the subscribable report can only be requested through the IT Shop. This report can be requested over the Web Portal by company employees and granted through defined approval procedures. The subscribable report may not assigned directly to hierarchical roles. For more information, see the One Identity Manager IT Shop Administration Guide.
Simple List Report	Specifies whether this is a report in CSV format.
Report definition	Definition of a simple list report in XML syntax.
Preprocessor condition	Preprocessor condition for the subscribable report. A subscribable report available only when the preprocessor condition is fulfilled.

Property	Description
	<p><b>IMPORTANT:</b> If a preprocessor condition is given in a subscribable report, you must ensure that all report parameters depending on this preprocessor condition have a default value in the underlying report in the Report Editor. If the value "query" is used for a report parameter type, this must be overwritten with the value "fixed" in the subscribable report. Otherwise, errors may occur when the report is generated.</p>
Disabled by preprocessor	Specifies whether the subscribable report is disabled through a preprocessor condition.

## Creating a Simple Report

To create a simple report in CSV format, set up a data export in the Manager and save the export definition in the form of a subscribable report. You can display and subscribe to this report in the Web Portal. You make this report available to Web Portal users.

**NOTE:** To create the report with the export definition, enable the plugin "Data export as report" in the Manager settings.

### To create a simple report with the export definition

1. In the Manager menu, click **Database | Export data** to open the export form.
2. Create the export.
3. Click  in the title bar of the export form.
4. Select the option **Simple list report**.
5. Click  next to the report definition menu.
6. Enter the name of the report in **Name**.
7. Enter additional information about the report in **Description**.
8. Click **OK**.

A subscribable report with the following properties are created.

**Table 9: Properties for the subscribable report**

Property	Description
Identifier	Identifier for the subscribable report.
Report	Report for which the subscribable report is generated. The report "VI_Report_DefaultTemplate " is used as a basis for the report.

Property	Description
	<p><b>NOTE:</b> This report is specified in the configuration parameter "QER\RPS\DefaultReportTemplate". If you use a custom report, enter this in the configuration parameter.</p>
Simple List Report	Specifies whether this is a report in CSV format.
Report definition	Definition of a simple list report in XML syntax.

To make the report available to Web Portal users, assign the report to the employees.

### Related Topics

- [Editing Subscribable Reports](#) on page 20
- [Assigning Subscribable Reports to Employees](#) on page 29
- One Identity Manager User Guide for One Identity Manager Tools User Interface and Default Functions

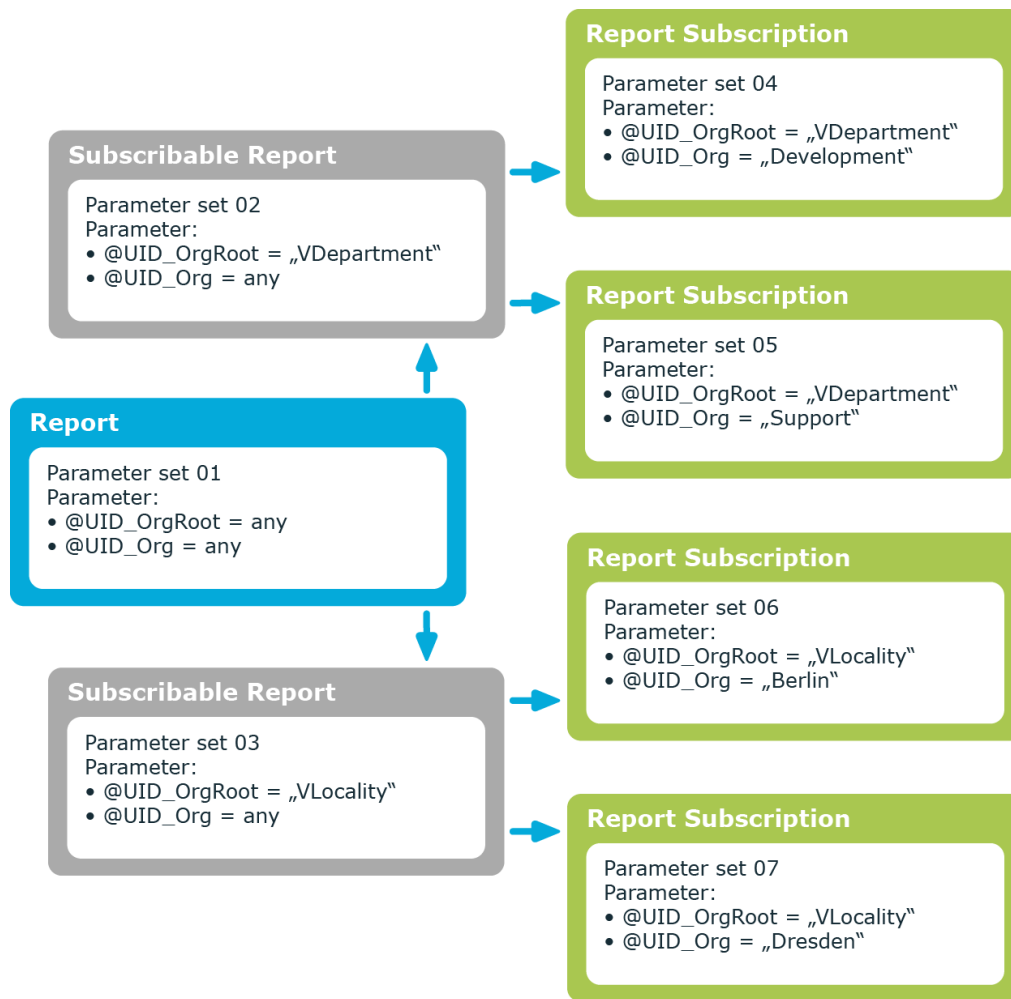
## Report Parameters

A report can contain several parameters that are determined when the report is created or when an email notification is generated and passed to the report. The generated report is then displayed or send by email to the subscriber corresponding to the report subscription set up. The user can query the report parameters before the report is displayed. This means, you can, for example, limit the time period or pass specific departments for displaying the report.

Report parameters are grouped internally into parameter sets. A separate parameter set is automatically created for very report, every subscribable report and every report subscription. The parameters and their settings are passed down in the sequence *report->subscribable report->report subscriptions*.



**Figure 3: Report Parameter Inheritance**



You can configure report parameters at several places.

### Parameters for Reports

Define the report parameters to use when you create the report in the Report Editor. This is where you specify which report parameters are viewable or writable and which are already predefined in a subscribable report.

### Parameters for Subscribable Reports

When you add a subscribable report viewable parameters are displayed in the Manager. You can make further changes to these report parameters assuming they can be overwritten. That means, you specify which report parameters can be viewed or overwritten by Web Portal users and define parameter values.

## Parameters for Report Subscriptions

Report parameters labeled as viewable and editable in subscribable reports, are shown to Web Portal users when they are setting up their personal report subscriptions. If the report parameters are editable, Web Portal users can modify the values in them.

### Related Topics

- [Editing Parameters for Subscribable Reports](#) on page 26
- One Identity Manager Configuration Guide
- One Identity Manager Web Portal User Guide

## Editing Parameters for Subscribable Reports

Report parameters are displayed in the Manager when a subscribable report is added. You can make further changes to these report parameters assuming they can be overwritten. That means, you specify which report parameters can be viewed or overwritten by Web Portal users and define parameter values.

### To edit report parameters

1. Select the subscribable report in the category **Report Subscriptions | Subscribable report**.
2. Select **Change master data** in the task view.
3. Select the report parameter on the **Parameter** tab on the left side of the master data form to load the parameter properties.

**TIP:** The actual parameter values are shown next to the text boxes and menus.

Use the following settings when editing subscribable reports to inherit parameter properties:

- Value <inherited>

This value is provided by a simple menu on the form for various parameter properties.

- Empty

Leave the input field for menu item empty. This ensures that the parameter property settings are inherited from the report.

**IMPORTANT:** If a preprocessor condition is given in a subscribable report, you must ensure that all report parameters depending on this preprocessor condition have a default value in the underlying report in the Report Editor. If the value "query" is used for a report parameter type, this must be overwritten with the value "fixed" in the subscribable report. Otherwise, errors may occur when the report is generated.

## Detailed information about this topic

- [General Parameter Settings](#) on page 27
- [Defining Parameter Values](#) on page 27
- [Settings for Calculating Values](#) on page 29

## General Parameter Settings

Enter the following general parameter settings.

**Table 10: General Parameter Settings**

Property	Description						
Parameter type	Type of parameter. The following are available: <table><tbody><tr><td>Fixed</td><td>Fixed parameter values are used.</td></tr><tr><td>User prompt</td><td>The user must select a parameter value through a user prompt.</td></tr><tr><td>Calculation</td><td>The parameter value is calculated at runtime when the report is created.</td></tr></tbody></table> <p>Other settings are shown or hidden depending on the type.</p>	Fixed	Fixed parameter values are used.	User prompt	The user must select a parameter value through a user prompt.	Calculation	The parameter value is calculated at runtime when the report is created.
Fixed	Fixed parameter values are used.						
User prompt	The user must select a parameter value through a user prompt.						
Calculation	The parameter value is calculated at runtime when the report is created.						
Display name	User friendly name for the report parameter. Enter a translation using the button next to the input field for multilingual implementation.						
Description	Spare text box for additional explanation.						
Sort order	Position of the report parameter in the subscribable report view and in the Web Portal.						
Mandatory parameter	Specifies whether this is a supplier. You must enter value into a mandatory parameter.						
Viewable	Specifies whether the report parameter is shown when a report subscription is set up in the Web Portal.						
Can be overwritten	Specifies whether the report parameter can be overwritten by Web Portal users when a report subscription is created.						

## Defining Parameter Values

Use the value definition to specify the parameter value and define the characteristics of the parameter value. Other input is shown or hidden depending on the parameter definition values.

**NOTE:** The input **Parameter value** and **Default value** are heavily influenced by the parameter value definition. This is shown, on the one hand, by dynamic customizing of the controls available for the parameter value and default value and on the other, dynamic customizing of the values available themselves.

That is why it is recommended to edit the parameter definition first assuming this is necessary.

Enter the following data for a parameter definition:

Property	Description
Data type	Data type for the report parameter.
Value range	Specifies whether the report parameter value has to be within a given range. If <Yes>, additional data is shown, <b>Parameter value (from)</b> , <b>Parameter value (to)</b> and <b>Default value (from)</b> , <b>Default value (to)</b> .
Multivalue	The report parameter can have multiple values. You can select more than one value.
Multiline	The report parameter can have more than one line, which means that line breaks are allowed.
Data source	Type of data source. You can select the values "None", "table", "List of permitted values". You may required additional data depending on the data source.
Table column (query)	Additional data for the data source "Table". Table column for selecting the value. You can select a value from this table column. You can select several values from this column if the report parameter is multi-value as well.
Condition (query)	Additional data for the data source "Table". Limiting condition (where clause) for selecting the value through a table column. You can select a value from the result set. You can select several values from this set if the report parameter is multi-value as well.
List of permitted values	Additional data for the data source "List of permitted values". Lists the permitted values in this report parameter in the notation value=description. If no = is given, the entry counts as value AND description.
Overwrite empty value	Parameter value data. Specified whether an empty report parameter overwrites the default value.
Parameter value	Parameter value data. Report parameter value.
Default value	Parameter value data. Report parameter default value. This is used, for example, if the Web Portal user does not specify a parameter value.

## Settings for Calculating Values

Enter the following data if the report parameter is calculated:

**Table 11: Master Data for Calculating Values**

Property	Description
Table column (calc.)	Table column for selecting the value. The parameter value is determined at runtime when the report is created.
Condition (calc.)	Limiting condition (where clause) for selecting the value through a table column. The parameter value is determined at runtime when the report is created. If the report parameter is multivalue as well, several values may be found.

## Report Preview

Use this task to the display subscribable report while you are editing it. Enter any report parameters required in the dialog box.

### *To display a report preview*

1. Select **Report Subscriptions | Subscribable report**.
2. Select the report in the result list.
3. Select **Change master data** in the task view.
4. Select **Report preview** in the task view.
5. Enter the report parameter value in the dialog box and confirm with **OK**.

**NOTE:** The dialog window is only shown if required for displaying report parameters for this report.

## Assigning Subscribable Reports to Employees

Subscribable reports can be assigned to employees directly, indirectly or through IT Shop requests. In the case of indirect assignment, employees and subscribable reports are arranged in hierarchical roles. The number of subscribable reports assigned to an employee is calculated from the position in the hierarchy and the direction of inheritance.

Add employees to a shop as customers so that subscribable reports can be assigned through IT Shop requests. All subscribable reports assigned to this shop can be requested by the customers. Requested subscribable reports are assigned to the employees after approval is granted.

### Prerequisites for indirect assignment to employees

- Assignment of employees and subscribable reports is permitted for role classes (department, cost center, location or business role).

### Detailed information about this topic

- [Assigning Subscribable Reports to Departments, Cost Centers and Locations](#) on page 30
- [Assigning Subscribable Reports to Business Roles](#) on page 31
- [Adding Subscribable Reports to IT Shop](#) on page 32
- [Assigning Subscribable Reports to Application Roles](#) on page 32
- [Assigning Subscribable Reports Directly to Employees](#) on page 33
- [Adding Subscribable Reports to System Roles](#) on page 34

### Related Topics

- [Appendix: Technical Details for Inheriting Subscribable Reports](#) on page 40
- One Identity Manager Identity Management Base Module Administration Guide

## Assigning Subscribable Reports to Departments, Cost Centers and Locations

Assign the subscribable report to departments, cost centers and locations for it to be assigned to employees through these organizations.

### *To assign a subscribable report to departments, cost centers and locations*

1. Select **Report Subscriptions | Subscribable report**.
  2. Select the report in the result list.
  3. Select **Assign organizations**.
  4. Assign organizations in **Add assignments**.
    - Assign departments on the **Departments** tab.
    - Assign locations on the **Locations** tab.
    - Assign cost centers on the **Cost center** tab.
- OR -

Remove the organizations from **Remove assignments**.

5. Save the changes.

## Related Topics

- [Assigning Subscribable Reports to Business Roles](#) on page 31
- [Adding Subscribable Reports to IT Shop](#) on page 32
- [Assigning Subscribable Reports to Application Roles](#) on page 32
- [Assigning Subscribable Reports Directly to Employees](#) on page 33
- [Adding Subscribable Reports to System Roles](#) on page 34

# Assigning Subscribable Reports to Business Roles

Installed Modules: Business Roles Module

Assign the subscribable report to business roles for it to be assigned to employees through these business roles.

### *To assign a subscribable report to business roles*

1. Select **Report Subscriptions | Subscribable report**.
2. Select the report in the result list.
3. Select **Assign business roles** in the task view.
4. Assign business roles in **Add assignments**.

- OR -

Remove business roles from **Remove assignments**.

5. Save the changes.

## Related Topics

- [Assigning Subscribable Reports to Departments, Cost Centers and Locations](#) on page 30
- [Adding Subscribable Reports to IT Shop](#) on page 32
- [Assigning Subscribable Reports to Application Roles](#) on page 32
- [Assigning Subscribable Reports Directly to Employees](#) on page 33
- [Adding Subscribable Reports to System Roles](#) on page 34

# Adding Subscribable Reports to IT Shop

Once a subscribable report has been assigned to an IT Shop shelf, it can be requested by the shop customers through the Web Portal. There are other prerequisites requirements to make a subscribable report requestable.

- The subscribable report must be labeled with the option **IT Shop**.
- The subscribable report must be assigned a service item.
- The subscribable report must be labeled with the option **Only use in IT Shop** if the report can only be assigned to employees using IT Shop requests. This means that the subscribable report may not be directly assigned to roles outside the IT Shop.

## **To add a subscribable report to the IT Shop**

1. Select **Report Subscriptions | Subscribable report**.
2. Select the report in the result list.
3. Select **Add to IT Shop** in the task view.
4. Assign the report to the IT Shop shelves in **Add assignments**.
5. Save the changes.

## **Related Topics**

- [Assigning Subscribable Reports to Departments, Cost Centers and Locations](#) on page 30
- [Assigning Subscribable Reports to Business Roles](#) on page 31
- [Assigning Subscribable Reports to Application Roles](#) on page 32
- [Assigning Subscribable Reports Directly to Employees](#) on page 33
- [Adding Subscribable Reports to System Roles](#) on page 34
- One Identity Manager IT Shop Administration Guide

# Assigning Subscribable Reports to Application Roles

Subscribable reports can be inherited by members of these roles through report assignment to the application roles. For more detailed information about implementing and editing application roles, see the One Identity Manager Application Roles Administration Guide.

- ① **NOTE:** Subscribable reports are not inherited by members of the application roles **Base roles | Employee Manager, Base roles | everyone (Lookup)** and **Base roles | Everyone (change)**.



### ***To assign a subscribable report to application roles***

1. Select **Report Subscriptions | Subscribable report**.
2. Select the report in the result list.
3. Select **Assign to application roles**.
4. Assign applications roles in **Add assignments**.
5. Save the changes.

### **Related Topics**

- [Assigning Subscribable Reports to Departments, Cost Centers and Locations](#) on page 30
- [Assigning Subscribable Reports to Business Roles](#) on page 31
- [Adding Subscribable Reports to IT Shop](#) on page 32
- [Assigning Subscribable Reports Directly to Employees](#) on page 33
- [Adding Subscribable Reports to System Roles](#) on page 34

## **Assigning Subscribable Reports Directly to Employees**

You can assign subscribable reports directly or indirectly to employees. Indirect assignment is carried out by assigning the employee and subscribable report to company structures, like departments, cost centers, locations or business roles.

In order to react quickly to special requests, you can also assign subscribable reports directly to employees.

### ***To assign a subscribable report to individual employees***

1. Select **Report Subscriptions | Subscribable report**.
2. Select the report in the result list.
3. Select **Assign to employees** in the task view.
4. Assign employees in **Add assignments**.
5. Save the changes.

### **Related Topics**

- [Assigning Subscribable Reports to Departments, Cost Centers and Locations](#) on page 30
- [Assigning Subscribable Reports to Business Roles](#) on page 31
- [Adding Subscribable Reports to IT Shop](#) on page 32

- [Assigning Subscribable Reports to Application Roles](#) on page 32
- [Adding Subscribable Reports to System Roles](#) on page 34

## Adding Subscribable Reports to System Roles

Installed Modules: System Roles Module

Use this task to add the subscribable report to system roles. If you assign a system role to employees, the subscribable reports contained in the system role are inherited by the employees.

**i** **NOTE:** Subscribable reports with the option **Only use in IT Shop** set, can only be assigned to system roles that also have this option set. For more information, see the [One Identity Manager System Roles Administration Guide](#).

### *To assign a subscribable report to system role*

1. Select **Report Subscriptions | Subscribable report**.
2. Select the report in the result list.
3. Select **Assign system roles in the task view**.
4. Assign system roles in **Add assignments**.  
- OR -  
Remove system roles from **Remove assignments**.
5. Save the changes.

### Related Topics

- [Assigning Subscribable Reports to Departments, Cost Centers and Locations](#) on page 30
- [Assigning Subscribable Reports to Business Roles](#) on page 31
- [Adding Subscribable Reports to IT Shop](#) on page 32
- [Assigning Subscribable Reports to Application Roles](#) on page 32
- [Assigning Subscribable Reports Directly to Employees](#) on page 33

## Displaying Report Subscriptions

Every user sets up their personalized report subscriptions through the Web Portal. For more information, see the [One Identity Manager Web Portal User Guide](#).

### ***To show subscription settings***

- Select the **Report Subscriptions | Report subscriptions**.

This shows you which employees have subscribed to which reports. If necessary, you can view the subscription settings at this point.

**IMPORTANT:** Do not change any report subscription settings. The settings are generated by the Web Portal user when report subscriptions are set up.

## **Disabling Subscribable Reports**

Only subscribable report that are enabled can be assigned within the One Identity Manager database. If a subscribable report is disabled you are prevented from assigning it. Existing assignments remain intact.

**IMPORTANT:** If you disable a subscribable report, existing Web Portal user report subscriptions are canceled.

### ***To disable a report***

1. Select **Report Subscriptions | Subscribable report**.
2. Select the report in the result list.
3. Select **Change master data** in the task view.
4. Set the option **Disabled**.
5. Save the changes.

**NOTE:** You can disable subscribable reports through preprocessor conditions. For more information, see [General Master Data for Subscribable Reports](#) on page 21.

### ***To display a disabled report***

- Select **Report Subscriptions | Basic configuration data | Disabled reports**.

## Sending Subscribable Reports

**Table 12: Configuration Parameters for Sending Subscribable Reports**

Configuration parameter	Meaning
QER\RPS\DefaultSenderAddress	This configuration parameter contains the sender email address for automatically generated notifications.

The following prerequisites are required to send reports by email:

- Ensure that the email notification system is configured in One Identity Manager. For more detailed information, see the One Identity Manager Configuration Guide.
- Set the configuration parameter "QER\RPS\DefaultSenderAddress" in the Designer and enter the sender address for sending the email notification.
- Ensure that all employees have a default email address. Notifications are sent to this address. For more detailed information, see the One Identity Manager Identity Management Base Module Administration Guide.
- Ensure that a language culture can be determined for all employees. Only then can they receive email notifications in their own language. For more detailed information, see the One Identity Manager Identity Management Base Module Administration Guide.

## Saving Subscribed Reports in a Drop Box

**Table 13: Configuration Parameters for Storing Reports on a Drop Server**

Configuration parameter	Meaning
QER\RPS\StoreSubscription	This configuration parameter specifies whether subscribed reports are stored in a directory rather than being sent by mail.

Configuration parameter	Meaning
QER\RPS\SubscriptionStorageLifeTime	This configuration parameter specifies the maximum retention period (in days) that a report is available on the drop server. After this period, reports are deleted.
QER\RPS\SubscriptionStorageShare	Configuration parameter containing the path for storing the subscribed reports.

If an error occurs when sending a subscribed report, it can be saved on a drop server. It might also be necessary to always save the subscribed report in a drop box. The subscriber owner then receives an email message with the drop location of the report. The report is deleted from the drop server after a specified period of time.

### **To save a report on a drop server**

1. Configure a default report server. You need to provide a server installed with the One Identity Manager Service and started.
2. Declare the default report server in the One Identity Manager.
  - Enter a new Job server in the category **Base Data | Installation | Job servers** in the Designer or select an existing Job server and mark it with the server mask **Default report server**.
3. Set up a drop box. The default report server One Identity Manager Service requires write access to this directory.
4. Declare the drop box in the One Identity Manager.
  - Set the configuration parameter "QER\RPS\SubscriptionStorageShare" in the Designer and enter the repository for the report as value using the syntax \\<server>\<share>.

### **To always save a report in a drop box**

- Set the configuration parameter "QER\RPS\StoreSubscription" in the Designer.
- NOTE:** If the configuration parameter is not set, subscribed reports are only saved in the drop box if an error occurred when the emails are sent.

### **To delete a report on the drop server**

1. Specify a retention period for the report on the drop server, after which the report is deleted.
  - Set the configuration parameter "QER\RPS\SubscriptionStorageLifeTime" in the Designer and enter the number of days as value.

Reports are deleted at the end of this period. The default retention time is 7 days.
2. Select the schedule "Cleans up RPS subscription storage" in the Designer and adjust the settings as required.

## Appendix: Configuration Parameters for Subscribable Reports

The following configuration parameters are additionally available in One Identity Manager after the module has been installed.

**Table 14: Configuration Parameter for Report Subscriptions**

Configuration parameter	Meaning
QER\RPS	Preprocessor relevant configuration parameter for controlling model components for report subscriptions. If the parameter is set, the report subscription components are available. Changes to the parameter require recompiling the database.
QER\RPS\DefaultReportTemplate	This configuration parameter contains the report to use for creating simple list reports.
QER\RPS\DefaultSenderAddress	This configuration parameter contains the sender email address for automatically generated notifications.
QER\RPS\MailTemplateIdsents	Mail template names are defined under this configuration parameter which are used in association with report subscriptions.
QER\RPS\MailTemplateIdsents\InformCC	Mail template used for sending email notification to a report's subscriber (CC). The report is sent as attachment.
QER\RPS\MailTemplateIdsents\InformSubscriber	Mail template used for sending

<b>Configuration parameter</b>	<b>Meaning</b>
	email notification to a report's subscriber. The report is sent as attachment.
QER\RPS\MailTemplateIdents\StoredOnServer	Mail template used for sending email notification to a report's subscriber. The report is stored on the server.
QER\RPS\MailTemplateIdents\StoredOnServerForCC	Mail template used for sending email notification to a report's subscriber (CC). The report is stored on the server.
QER\RPS\StoreSubscription	This configuration parameter specifies whether subscribed reports are stored in a directory rather than being sent by mail.
QER\RPS\SubscriptionStorageLifeTime	This configuration parameter specifies the maximum retention period (in days) that a report is available on the drop server. After this period, reports are deleted.
QER\RPS\SubscriptionStorageShare	Configuration parameter containing the path for storing the subscribed reports. Syntax: \\<Server>\<Share>

## Appendix: Technical Details for Inheriting Subscribable Reports

An employee can directly obtain subscribable reports. An employee also inherits all subscribable reports (including those passed on) of all roles in which they are a member (table `PersonIn<BaseTree>`) and the subscribable reports of all roles referenced through foreign key relations (table `Person`, column `UID_<BaseTree>`). Assignments of subscribable reports to roles are saved in the table `<BaseTree>HasRPSReport`.

Subscribable reports can be inherited by system roles. For more information, see the One Identity Manager System Roles Administration Guide.

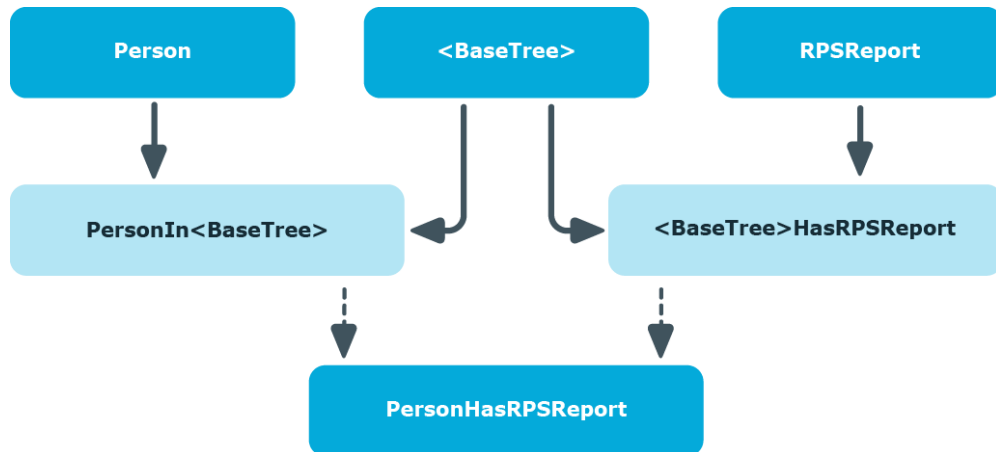
Direct and indirect assignments of subscribable reports to employees are mapped in the table `PersonHasRPSReport`.

**Figure 4: Inheritance with Direct Assignment of Subscribable Reports to Employees**

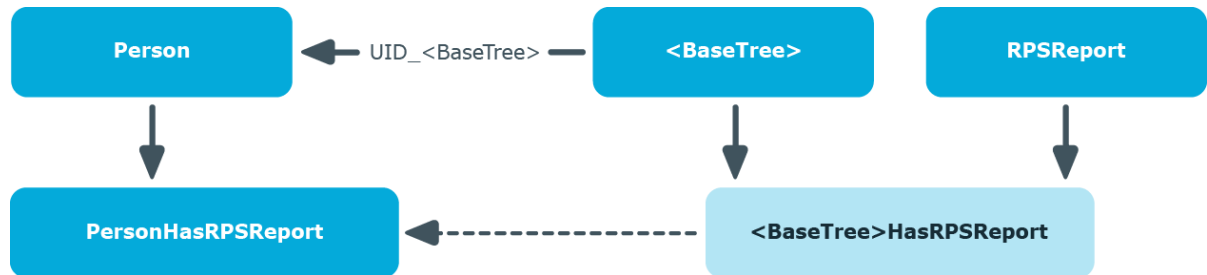




**Figure 5: Inheritance with Indirect Secondary Assignment of Subscribable Reports to Employees**



**Figure 6: Inheritance with Indirect Primary Assignment of Subscribable Reports to Employees**



One Identity solutions eliminate the complexities and time-consuming processes often required to govern identities, manage privileged accounts and control access. Our solutions enhance business agility while addressing your IAM challenges with on-premises, cloud and hybrid environments.

## Contacting us

For sales or other inquiries, visit <https://www.oneidentity.com/company/contact-us.aspx> or call +1-800-306-9329.

## Technical support resources

Technical support is available to One Identity customers with a valid maintenance contract and customers who have trial versions. You can access the Support Portal at <https://support.oneidentity.com/>.

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. The Support Portal enables you to:

- Submit and manage a Service Request
- View Knowledge Base articles
- Sign up for product notifications
- Download software and technical documentation
- View how-to-videos at [www.YouTube.com/OneIdentity](http://www.YouTube.com/OneIdentity)
- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product

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