



One Identity Manager 8.1.3

Report Subscriptions Administration Guide

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Legend

 **WARNING:** A WARNING icon highlights a potential risk of bodily injury or property damage, for which industry-standard safety precautions are advised. This icon is often associated with electrical hazards related to hardware.

 **CAUTION:** A CAUTION icon indicates potential damage to hardware or loss of data if instructions are not followed.

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Report subscriptions in the One Identity Manager

One Identity Manager provides several reports that 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 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 subscriptions are available when the **QER | RPS** configuration parameter is set.

- In the Designer, check if the configuration parameter is set. 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.

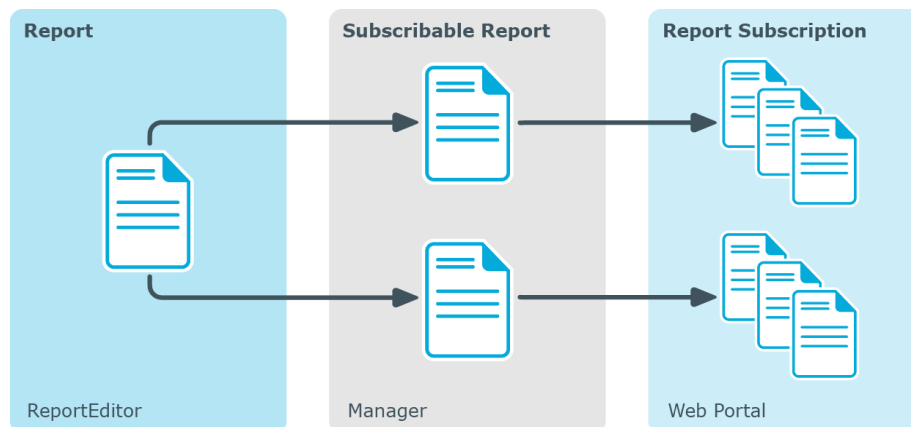
Detailed information about this topic

- [Report overview](#) on page 5
- [One Identity Manager users for providing reports and report subscriptions](#) on page 7
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- [Creating and editing subscribable reports](#) on page 11
- [Sending subscribed reports](#) on page 37
- [Configuration parameters for subscribable reports](#) on page 39

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 One Identity Manager.

Table 1: Users

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

User	Tasks
for the IT Shop	<p>Shop Product owners application role or a child application role.</p> <p>Users with this application role:</p> <ul style="list-style-type: none"> • Approve through requests. • Edit service items and service categories under their management. <p>You can use the Request & Fulfillment IT Shop Product owners Subscribable reports default application role.</p>
Web Portal users	<ul style="list-style-type: none"> • Creates personal report subscriptions in the Web Portal. • Set up personal schedules for delivering subscribed reports.

Providing subscribable reports for Web Portal users

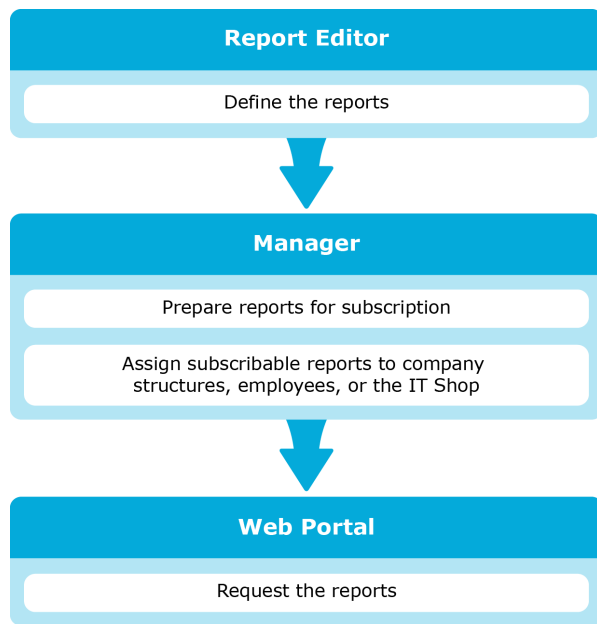
In the default installation there are predefined reports available, which users can subscribe to in the Web Portal. You can also create new reports or make copies of predefined reports to modify.

To provide Web Portal users with a subscribable report

1. Create the report with the Report Editor.
For more information about creating scripts, see the *One Identity Manager Configuration Guide*.
2. Prepare a subscribable report in the 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.

For more detailed information, see the *One Identity Manager Web Portal User Guide*.

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](#)

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 subscriptions are available when the **QER | RPS** configuration parameter is set.

- In the Designer, check if the configuration parameter is set. 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 simple reports](#) 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. In the Designer, you can find an overview of all configuration parameters in the **Base data | General | Configuration parameters** category.

For more information, see [Configuration parameters for subscribable reports](#) on page 39.

- 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 [Report subscription schedules](#) 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.

Report subscription schedules

Each user specifies their personalized schedule for sending subscribed reports in the Web Portal. Furthermore, 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. In the Manager, select the **Report Subscriptions | Basic configuration data | Schedules** category.

The result list shows exactly those schedules configured for report subscriptions.

2. Select a schedule in the result list and run the **Change master data** task.



– OR –

Click  in the result list.

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. Schedules for report subscriptions must refer to the RPSSubscription table.
Enabled	Specifies whether the schedule is enabled or not. NOTE: Only active schedules are run.
Time zones	Unique identifier for the time zone that is used for running the schedule. Choose between Universal Time Code or one of the time zones in the menu. NOTE:
Start (date)	The day on which the schedule should be run for the first time. If this day conflicts with the defined interval type, the first run is on the next available day based on the start date.
Validity period	Period within which the schedule is run. <ul style="list-style-type: none"> • If the schedule will be run for an unlimited period, select the Unlimited duration option. • To set a validity period, select the Limited duration option and enter the day the schedule will be run for the last time in End (date).
Occurs	Interval in which the task is run. Permitted interval types are Every minute, Hourly, Daily, Weekly, Monthly, and Yearly . For the Weekly interval type, specify the precise weekday. For the Monthly interval type, specify the day of the month (1st to 31st day of the month). For the Yearly interval type, specify the day of the year (1st to 366th day of the year). NOTE: If the schedule is not going to be run until next month because the interval type is Monthly with sub-interval 29, 30, or 31 , the last day of the current month is used. Example: A schedule that is run on the 31st day of each month is run on 30th April. In February, the schedule is run on the 28th (or 29th in leap year). Schedules with the interval type Yearly with sub interval 366 are only

Property	Meaning
	run in leap year.
Start time	Fixed start type for the Daily , Weekly , Monthly , and Yearly interval types. Enter the time in local format for the chosen time zone. For the interval types Every minute and Hourly , the start time is calculated from the rate of occurrence and the interval type.
Repeat every	Rate of occurrence for running the schedule within the selected time interval. For the Weekly interval type, select at least one weekday.
Last planned run/Next planned run	Execution time calculated by the DBQueue Processor. Execution times are recalculated whilst the schedule is running. The time of the next run is calculated from the interval type, rate of occurrence, and the start time. NOTE: 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. In the Manager, select the **Report Subscriptions | Basic configuration data | Schedules** category.
2. Select the schedule in the result list.
3. Select the **Start immediately** task.
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 detailed information, see the *One Identity Manager Web Portal User Guide*.

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. In the Manager, select the **Report Subscriptions | Basic configuration data | Schedules** category.
2. Select the schedule in the result list.
3. Select the **Assign report subscriptions** task.

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

- In the Designer, enter the mail template into configuration parameter.

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 that is sent as a UID_DialogParameterSet parameter 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 that is sent as a UID_DialogParameterSet parameter is determined dynamically when the process is generated.	QER RPS MailTemplateIdents InformCC
Report subscription - stored on	Informs the subscriber that the report is stored on a server.	QER RPS MailTemplateIdents StoredOnServer

Mail template	Description	Usage in Configuration Parameter
server		
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, importance, 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.

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

To edit mail templates

1. In the Manager, select the **Report Subscriptions | Basic configuration data | Mail templates** category.
Mail templates that can be used for subscribable reports are displayed in the result list.
2. Select a mail template in the result list and run the **Change master data** task.
- OR -
Click  in the result list.
This opens the mail template editor.
3. Edit the mail template.
4. Save the changes.

To copy a mail template


1. In the Manager, select the **Report Subscriptions | Basic configuration data | Mail templates** category.
Mail templates that can be used for subscribable reports are displayed in the result list.

2. Select the mail template that you want to copy in the result list and run the **Change master data** task.
3. Select the **Copy mail template** task.
4. Enter the name of the new mail template in the **Name of copy** field.
5. Click **OK**.

To display a mail template preview

1. In the Manager, select the **Report Subscriptions | Basic configuration data | Mail templates** category.
Mail templates that can be used for subscribable reports are displayed in the result list.
2. Select a mail template in the result list and run the **Change master data** task.
3. Select the **Preview** task.
4. Select the base object.
5. Click **OK**.

To delete a mail template

1. In the Manager, select the **Report Subscriptions | Basic configuration data | Mail templates** category.
Mail templates that can be used for subscribable reports are displayed in the result list.
2. Select the template in the result list.
3. Click  in the result list.
4. Confirm the security prompt with **Yes**.

Detailed information about this topic



- [General properties of a mail template](#) on page 17
- [Creating and editing mail definitions](#) 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

Property	Meaning
Mail template	Name of the mail template. This name will be used to display the mail


Property	Meaning
	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 mail definition properties of the base object are referenced. Use the RPSSubscription or RPSSubscriptionCC base object 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: <ul style="list-style-type: none"> • HTML: The email notification is formatted in HTML. Text formats, for example, different fonts, colored fonts, or other text formatting, can be included in HTML format. • TXT: The email notification is formatted as text. Text format does not support bold, italics, or colored font, or other text formatting. Images displayed directly in the message are not supported.
Design type	Design in which to generate the email notification. Permitted values are: <ul style="list-style-type: none"> • Mail template: The generated email notification contains the mail body in accordance with the mail definition. • Report: The generated email notification contains the report specified under Report (parameter set) as its mail body. • Mail template, report in attachment: The generated email notification contains the mail body in accordance with the mail definition. The report specified under Report (parameter set) is attached to the notification as a 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.
Deactivated	Specifies whether this mail template is disabled.
Mail definition	Unique name for the mail definition.
Language	Language that applies to the mail template. The recipient's language preferences are taken into account when an email notification is

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

Creating and editing mail definitions

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 the Mail Template Editor.
2. Click the  button next to the **Mail definition** list.
3. In the result list, select the language for the mail definition in the **Language** menu.
All active languages are shown. To use another language, in the Designer, enable the corresponding countries. For more detailed information, see the *One Identity Manager Configuration Guide*.
4. Enter the subject in **Subject**.
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 the Mail Template Editor.
2. Select the language in **Mail definition**.
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

In the subject line and body text of a mail definition, you can use all properties of the object entered under **Base object**. You can also use the object properties that are referenced by foreign key relation.

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

Customizing email signatures

Configure the email signature for mail templates using the following configuration parameter. Edit the configuration parameters in the Designer.

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 the company's website.
Common MailNotification Signature LinkDisplay	Display text for the link to the company's website.

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 detailed information, see the *One Identity Manager Configuration Guide*.

You can use following events for generating processes.

Table 7: Events for "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 the **Report Subscriptions | Subscribable report** category.
 2. Select the report in the result list and run the **Change master data** task.
- OR -

Click  in the result list.

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 the **Report Subscriptions | Subscribable report** category.
2. Select the report in the result list.
3. Select the **Create copy** task.
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 report parameters for subscribable reports](#) on page 26
- [Creating simple reports](#) 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
Name	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.

Property	Description
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.
Owner	Owner of the report. If the subscribable report can be requested in the IT Shop, the owner will automatically be a member of the application role for product owners that are assigned the service item.
Service item	So 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 detailed information, see the <i>One Identity Manager IT Shop Administration Guide</i> .
Risk index	Value for evaluating the risk of subscribing reports to employees. Enter a value between 0 and 1. This input field is only visible if the QER CalculateRiskIndex configuration parameter is activated. For more detailed information, see the <i>One Identity Manager Risk Assessment Administration Guide</i> .
Description	Text field for additional explanation. The description is automatically transferred when the report is selected. You can change the description if necessary.
Deactivated	Specifies whether the subscribable report can be inherited by employees. Only subscribable reports that are enabled can be assigned within the One Identity Manager. 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.
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 detailed information, see the <i>One Identity Manager IT Shop Administration Guide</i> .
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 be assigned directly to hierarchical roles. For more detailed information, see the <i>One Identity Manager IT Shop Administration Guide</i> .
Simple list report	Specifies whether this is a report in CSV format.
Report defin-	Definition of a simple list report in XML syntax.

Property	Description
Preprocessor condition	<p>Preprocessor condition for the subscribable report. A subscribable report available only when the preprocessor condition is fulfilled.</p> <p>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.</p>
Disabled by preprocessor	Specifies whether the subscribable report is disabled through a preprocessor condition.

Creating simple reports



To create a simple report in CSV format, you can create a data export in the Manager and save the export definition in the form of a subscribable report. This report can be displayed and subscribed to in the Web Portal. You make this report available to Web Portal users.

NOTE:

- To create a simple report with export definitions, enable the **Data export as report** plug-in in the program settings in the Manager.
- Simple reports that you create in the Manager can be displayed as statistics in the Manager's info system. To do this, you must alter the **Manager's** user interface in the Designer. In the Manager's info system, the report opens when you double-click on the statistic's header.

For more information about how to implement statistics in the user interface for using in simple reports, see the *One Identity Manager Configuration Guide*.

To create a simple report with the export definition

1. In the Manager, select the **Database | Export data** menu item to open the export form.
2. Create the export.
3. Click  in the title bar of the export form.
4. Enable **Simple list report**.
5. Click the  button next to the report definition menu and enter the following information:
 - **Name:** Name of the report.
 - **Description:** Additional information about the report.

6. Click **OK**.
7. Click **Save**.

A subscribable report (RPSReport) with the following properties is generated internally for the simple report.

Table 9: Properties for the subscribable report

Property	Description
Name	Identifier for the subscribable report.
report	Report for which the subscribable report is generated. The VI_Report_DefaultTemplate report is used as the underlying report. NOTE: The report is defined in the QER RPS DefaultReportTemplate configuration parameter. If you use a custom report, enter this in the configuration parameter.
Simple List Report	Specifies whether this is a report in CSV format.
Report definition	Definition of the simple list report in XML syntax.

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

Related topics

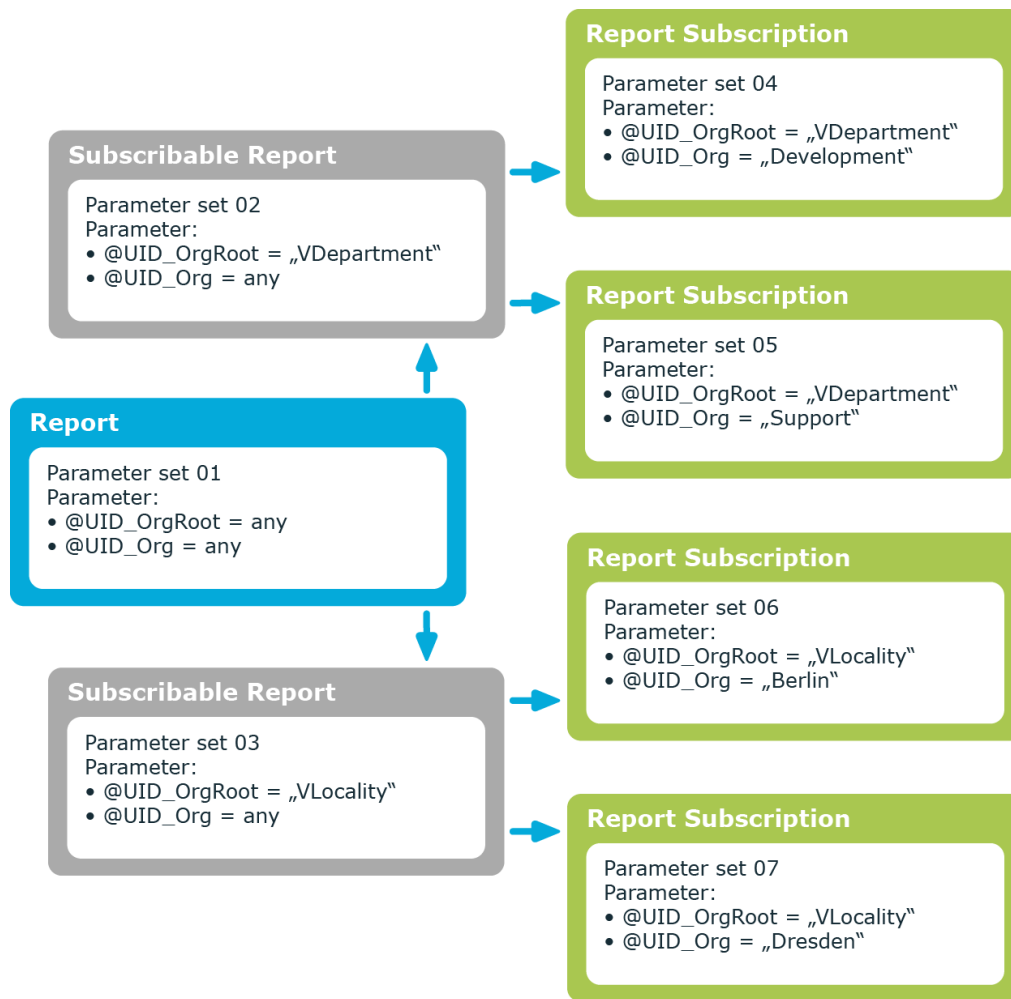
- [Editing subscribable reports](#) on page 20
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Report parameters

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 report parameters for subscribable reports](#) on page 26

Editing report 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. In the Manager, select the subscribable report in the **Report Subscriptions | Subscribable report** category.
2. Select the **Change master data** task.
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 fields 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. Permitted values are: <ul style="list-style-type: none">• 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. Other settings are shown or hidden depending on the type.
Display name	User friendly name for the report parameter. Enter a translation using the button next to the input field for multilingual implementation.
Description	Text field 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: **Parameter value** and **Default value** are heavily influenced by the parameter

value definition. This is shown, on one hand, by dynamic customizing of the controls available for the parameter value and default value, and on the other hand, by 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, Parameter value (from) , Parameter value (to) and Default value (from) , Default value (to) .
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 require 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. If the report parameter is multi-value, you can select several values from this column 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. If the report parameter is multi-value, you can select several values from this set 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 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 multivalued as well, several values may be found.

Displaying a report preview

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

To display a report preview

1. In the Manager, select the **Report Subscriptions | Subscribable reports** category.
2. Select the report in the result list.
3. Select the **Change master data** task.
4. Select the **Report preview** task.
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 (departments, cost centers, locations, or business roles).

For more detailed information about "Basics for Assigning Company Resources", see the One Identity Manager Identity Management Base Module Administration Guide.

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
- [Technical details for inheriting subscribable reports](#) on page 41

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. In the Manager, select the **Report Subscriptions | Subscribable reports** category.
2. Select the report in the result list.
3. Select the **Assign organizations** task.
4. In the **Add assignments** pane, assign the organizations:
 - On the **Departments** tab, assign departments.
 - On the **Locations** tab, assign locations.
 - On the **Cost centers** tab, assign cost centers.

| **TIP:** In the **Remove assignments** pane, you can remove assigned organizations.

To remove an assignment

- Select the organization and double-click .
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. In the Manager, select the **Report Subscriptions | Subscribable reports** category.
2. Select the report in the result list.
3. Select the **Assign business roles** task.
4. In the **Add assignments** pane, assign business roles.

TIP: In the **Remove assignments** pane, you can remove assigned business roles.

To remove an assignment

- Select the business role and double-click .
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. For more detailed information about the IT Shop, see the *One Identity Manager IT Shop Administration Guide*.

There are other prerequisites requirements to make a subscribable report requestable.

- The subscribable report must be labeled with the **IT Shop** option.
- The subscribable report must be assigned a service item.
- The subscribable report must be labeled with the **Only use in IT Shop** option 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. In the Manager, select the **Report Subscriptions | Subscribable reports** category.
2. Select the report in the result list.
3. Select the **Add to IT Shop** task.
4. In the **Add assignments** pane, assign the report to IT Shop shelves.
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

Assigning subscribable reports to application roles

Subscribable reports can be inherited by members of these roles through report assignment to the application roles. For detailed information about implementing and

editing application roles, see the *One Identity Manager Authorization and Authentication Guide*.


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

To assign a subscribable report to application roles

1. In the Manager, select the **Report Subscriptions | Subscribable reports** category.
2. Select the report in the result list.
3. Select the **Assign to application roles** task.
4. In the **Add assignments** pane, assign the application roles.

TIP: In the **Remove assignments** pane, you can remove application role assignments.

To remove an assignment

- Select the application role and double-click .
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. In the Manager, select the **Report Subscriptions | Subscribable reports** category.
2. Select the report in the result list.

3. Select the **Assign to employees** task.
4. In the **Add assignments** pane, add employees.

TIP: In the **Remove assignments** pane, you can remove assigned employees.

To remove an assignment

- Select the employee and double-click .
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.


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

To assign a subscribable report to system role

1. In the Manager, select the **Report Subscriptions | Subscribable reports** category.
2. Select the report in the result list.
3. Select the **Assign system roles** task.
4. In the **Add assignments** pane, assign system roles.

TIP: In the **Remove assignments** pane, you can remove assigned system roles.

To remove an assignment

- Select the system role and double-click .
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 detailed information, see the *One Identity Manager Web Portal User Guide*.

To show subscription settings

- In the Manager, select the **Report Subscriptions | Report subscriptions** category.

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 reports that are enabled can be assigned within the One Identity Manager. 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. In the Manager, select the **Report Subscriptions | Subscribable reports** category.
2. Select the report in the result list.
3. Select the **Change master data** task.
4. Set the **Disabled** option.
5. Save the changes.

You can disable subscribable reports using preprocessor conditions. For more information, see [General master data for subscribable reports](#) on page 21.

To display a disabled report

- In the Manager, select the **Report Subscriptions | Basic configuration data | Disabled reports** category.

Sending subscribed reports

The following prerequisites are required to send reports by email:

- A Job server is set up for sending mail with the **SMTP Host** server function. For detailed information about setting up a Job server and about configuring the One Identity Manager Service, see the *One Identity Manager Configuration Guide*.

NOTE: To generate and send report subscriptions and reports with data changes by email, information is taken from a One Identity Manager History Database. If the One Identity Manager History Database is linked to the One Identity Manager database's TimeTrace with an ID, the Job server must operate through an application server that has this ID in its configuration file (*web.config*). For detailed information about connecting to the One Identity Manager History Database through an application server and the required configuration, see the *One Identity Manager Operational Guide*.

- Ensure that the email notification system is configured in One Identity Manager. For more detailed information, see the *One Identity Manager Installation Guide*.
- In the Designer, set the **QER | RPS | DefaultSenderAddress** configuration parameter 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 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 the subscribed reports in a central repository

If an error occurs when sending a subscribed report, it can be saved on a drop server. It may 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.

NOTE: To generate and send report subscriptions and reports with data changes by email, information is taken from a One Identity Manager History Database. If the One Identity Manager History Database is linked to the One Identity Manager database's TimeTrace with an ID, the Job server must operate through an application server that has this ID in its configuration file (`web.config`). For detailed information about connecting to the One Identity Manager History Database through an application server and the required configuration, see the *One Identity Manager Operational Guide*.

2. Declare the default report server in One Identity Manager.
 - In the Designer, enter a new Job server in the **Base Data | Installation | Job servers** category or select an existing Job server and mark it with the **Default report server** server mask.
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 One Identity Manager.
 - In the Designer, set the **QER | RPS | SubscriptionStorageShare** configuration parameter and enter the repository for the reports as the value using the `\\<Server>\<Share>` syntax.

To always save a report in a drop box

- In the Designer, set the **QER | RPS | StoreSubscription** configuration parameter.

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.
 - In the Designer, set the **QER | RPS | SubscriptionStorageLifeTime** configuration parameter and enter the number of days as the value.
Reports are deleted at the end of this period. The default retention time is 7 days.
2. In the Designer, select the **Cleans up report subscription storage** schedule and adjust the settings as required.

Configuration parameters for subscribable reports

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

Table 12: 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 this parameter require the database to be recompiled.
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 MailTemplateIdents	Mail template names are defined under this configuration parameter which are used in association with report subscriptions.
QER RPS MailTemplateIdents InformCC	Mail template used for sending email notification to a report's subscriber (CC). The report is sent as attachment.
QER RPS MailTemplateIdents InformSubscriber	Mail template used for sending 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.

Configuration parameter	Meaning
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>

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 (PersonIn<BaseTree> table) and the subscribable reports of all roles referenced through foreign key relations (Person table, UID_<BaseTree> column). Assignments of subscribable reports to roles are saved in the <BaseTree>HasRPSReport table.

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

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

Figure 4: Inheritance with direct assignment of subscribable reports to employees



Figure 5: Inheritance with indirect secondary assignment of subscribable reports to employees

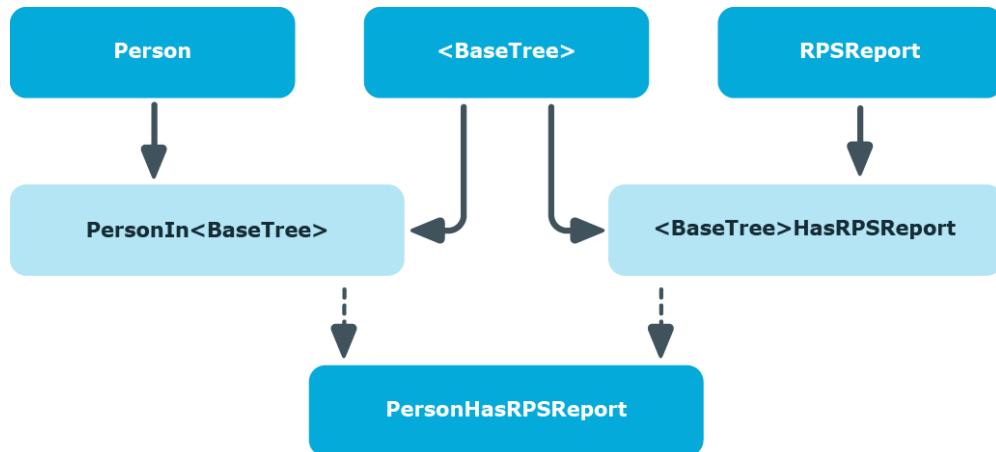
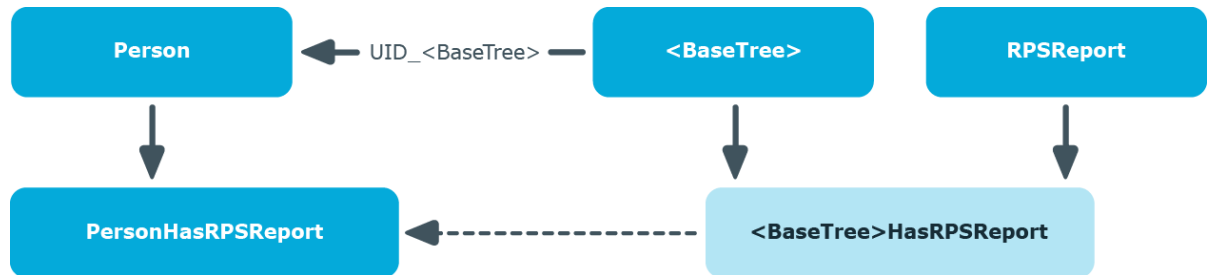


Figure 6: Inheritance with indirect primary assignment of subscribable reports to employees



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 and other inquiries, such as licensing, support, and renewals, visit <https://www.oneidentity.com/company/contact-us.aspx>.

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
- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product

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