One Identity Manager On Demand (Starling Edition)

Report Subscriptions Administration Guide

Contents

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 identities 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.

NOTE: Prerequisite for the using report subscriptions in One Identity Manager is the installation of the Report Subscription Module. For more information about installing, see the *One Identity Manager Installation Guide*.

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.

  NOTE: If you disable the configuration parameter at a later date, model components and scripts that are no longer required, are disabled. SQL procedures and triggers are still carried out. For more information about the behavior of preprocessor relevant configuration parameters and conditional compiling, see the *One Identity Manager Configuration Guide*.

- 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

Report overview

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

Figure 1: Connection between reports, subscribable reports, and report subscriptions
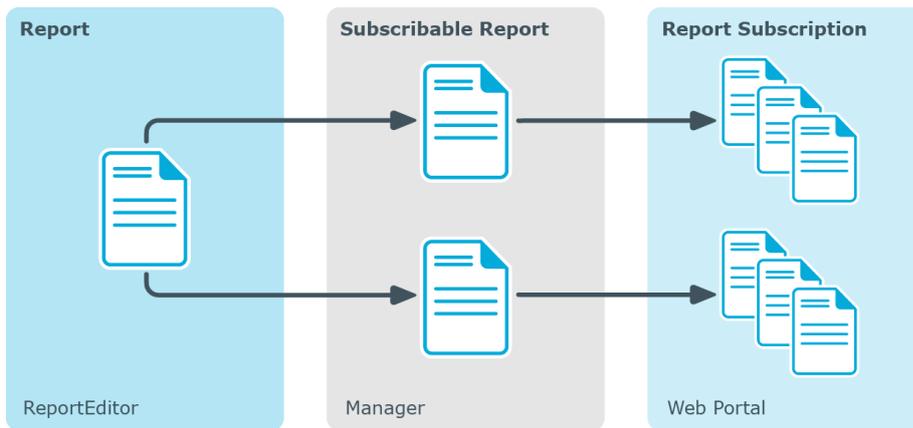
Reports in the Report Editor

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 n 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 identities 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 Designer 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

Users	Tasks
Report designer	• Creating and editing reports in the Report Editor. • Creating report parameters in the Report Editor and configuring predefined values.
Report administrator	Administrators must be assigned to the **Identity & Access Governance | Company policies | Report Subscriptions** application role. Users with this application role: • Create subscribable reports from existing reports. • Configure report parameters for subscribable reports. • Assign subscribable reports to identities, company structures or IT Shop shelves. • Create custom mail templates for sending subscribed reports by email.
Product owner for the IT Shop	Product owners must be assigned to the **Request & Fulfillment | IT Shop | Product owners** application role or a child application role.

Users	Tasks
	Users with this application role:
	• Approve through requests.
	• Edit service items and service categories under their management.
	NOTE: This application role is available if the **QER | ITShop** configuration parameter is set.
	You can use the **Request & Fulfillment | IT Shop | Product owners | Subscribable reports** default application role.
Web Portal users	• Creates personal report subscriptions in the Web Portal.
	• Set up personal schedules for delivering subscribed reports.
One Identity Manager administrator	One Identity Manager administrator and administrative system users Administrative system users are not added to application roles.
	One Identity Manager administrators:
	• 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.

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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 reports, 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 identities 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 identities. 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 information, see the *One Identity Manager Web Designer Web Portal User Guide*.

Figure 2: Providing reports workflow

Related topics

- Creating and editing subscribable reports on page 11
- Adding subscribable reports to the IT Shop on page 35
- Assigning subscribable reports to identities on page 33
- Assigning subscribable reports to business roles on page 35
- Assigning subscribable reports to departments, cost centers, and locations
- Assigning subscribable reports directly to identities on page 37

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.

Detailed information about this topic

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 various 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 43.

- 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 Mail templates for notifications about report subscriptions on page 16.

Report subscription schedules

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

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

If needed, you can change the default report subscription schedules or create new schedules.

For more information about schedules, see the *One Identity Manager Operational Guide*.

Detailed information about this topic

Creating and editing schedules for report subscriptions

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

If needed, you can change the default report subscription schedules or create new schedules.

To edit a schedule

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 main data** task.

3. Edit the schedule's main data.

4. Save the changes.

To create a schedule

1. In the Manager, select the **Report Subscriptions > Basic configuration data > Schedules** category.

2. Click 🔲 in the result list.

3. Edit the schedule's main data.

4. Save the changes.

Edit the following schedule properties.

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. NOTE: Only active schedules are run. Active schedules are only run if the **QBM | Schedules** configuration parameter is set.
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.
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. • If the schedule will be run for an unlimited period, select the **Unlimited duration** option.

Property	Meaning
	• 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. Other settings may be required depending on the settings.

• **Every minute**: The schedule is run once a minute. The starting point is calculated from the rate of occurrence and the interval type.

• **Hourly**: The schedule is run at defined intervals of a multiple of hours such as every two hours.

  • Under **Repeat every**, specify after how many hours the schedule is run again.

  • The starting point is calculated from the rate of occurrence and the interval type.

• **Daily**: The schedule is run at specified times in a defined interval of days such as every second day at 6am and 6pm.

  • Under **Start time**, specify the times to run the schedule.

  • Under **Repeat every**, specify after how many days the schedule is run again.

• **Weekly**: The schedule is run at a defined interval of weeks, on a specific day, at a specified time such as every second week on Monday at 6am and 6pm.

  • Under **Start time**, specify the times to run the schedule.

  • Under **Repeat every**, specify after how many weeks the schedule is run again.

  • Specify the set day of the week for running the schedule.

• **Weekly**: The schedule is run at a defined interval of months, on a specific day, at a specified time such as every second month on the 1st and the 15th at 6am and 6pm.

  • Under **Start time**, specify the times to run the schedule.

  • Under **Repeat every**, specify after how many months the schedule is run again.

  • Specify the days of the month (1st - 31st of the month).

NOTE: If the **Monthly** interval type with the sub interval **29**, **30** or **31** does not exist in this month, the last day of the month is used.

Example:

A schedule that is run on the 31st day of each month is run on April 30th. In February, the schedule is run on the 28th (or 29th in leap year).

Property	Meaning
	• **Yearly**: The schedule is run at a defined interval of years, on a specific day, at a specified time such as every year on the 1st, the 100th, and the 200th day at 6am and 6pm.
	• Under **Start time**, specify the times to run the schedule.
	• Under **Repeat every**, specify after how many years the schedule is run again.
	• Specify the days of the year (1st - 366th day of the year).
	NOTE: If you select the 366th day of the year, the schedule is only run in leap years.
	• **Monday**, **Tuesday**, **Wednesday**, **Thursday**, **Friday**, **Saturday**, **Sunday**: The schedule is run on a defined day of the week, in specified months, at specified times such as every second Saturday in January and June at 10am.
	• Under **Start time**, specify the times to run the schedule.
	• Under **Repeat every**, specify after how many days of the month the schedule is run again. The values **1** to **4**, **-1** (last day of the week), and **-2** (last day but one of the week) are permitted.
	• Specify in which month to run the schedule. The values **1** to **12** are permitted. If the value is empty, the schedule is run each month.
Start time	Fixed start time Enter the time in local format for the chosen time zone. If there is a list of start times, the schedule is started at each of the given times.
Repeat every	Rate of occurrence for running the schedule within the selected time interval.
Last planned run/Next planned run	Activation time calculated by the DBQueue Processor. Activation 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

Use this task to start a 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 information, see the *One Identity Manager Web Designer 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.

Mail templates for notifications about report subscriptions

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.

One Identity Manager supplies mail templates by default. These mail templates are available in English and German. If you require the mail body in other languages, you can add mail definitions for these languages to the default mail template.

To edit a default mail template

- In the Manager, select the **Report Subscriptions > Basic configuration data > Mail templates > Predefined** category.

In the default installation, mail templates for sending reports are entered in 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 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 and editing mail definitions for report subscriptions on page 18
- Base objects for report subscription templates on page 19
- Editing mail templates for report subscriptions on page 19
- Custom processes for report subscriber notifications on page 20

Creating and editing mail definitions for report subscriptions

For more information about creating and editing mail template, see the *One Identity Manager Operational Guide*.

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. 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 main data** task.

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 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. 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.

1. Select a mail template in the result list and run the **Change main data** task.

2. In the **Mail definition** menu, select the language for the mail definition.

   NOTE: If the **Common | MailNotification | DefaultCulture** configuration parameter is set, the mail definition is loaded in the default language for email notifications when the template is opened.

3. Edit the mail subject line and the body text.

4. Save the changes.

Related topics

- Base objects for report subscription templates on page 19

Base objects for report subscription templates

NOTE: In subscribable report templates, use the `RPSSubscription` or the `RPSSubscriptionCC` base object.

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

Related topics

- Creating and editing mail definitions for report subscriptions on page 18
- Editing mail templates for report subscriptions on page 19

Editing mail templates for report subscriptions

For more information about creating and editing mail template, see the *One Identity Manager Operational Guide*.

A mail template consists of general main 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.

To create and 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 main data** task.

   - OR -

   Click ![icon] 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 main 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 main 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

- Creating and editing mail definitions for report subscriptions on page 18
- Base objects for report subscription templates on page 19
- Custom processes for report subscriber notifications on page 20

Custom processes for report subscriber notifications

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 5: Events for "RPSSubscription" and "RPSSubscriptionCC"

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

Creating and editing subscribable reports

To create or edit a subscribable report

1. In the Manager, select the **Report Subscriptions > Subscribable reports** category.
2. Select the report in the result list and run the **Change main data** task.

   - OR -

   Click in the result list.
3. Enter the required data for a subscribable report on the main data form.
4. Edit report parameters (optional).
5. Save the changes.

To copy an existing subscribable report

1. In the Manager, select the **Report Subscriptions > Subscribable reports** 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 main data form.
7. Save the changes.

Related topics

General main data of subscribable reports

Enter the following general main data of a subscribable report.

Table 6: General main data of 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.
Format (e-mail attach-ment)	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 information, see the *One Identity Manager IT Shop Administration Guide*.
Risk index	Value for evaluating the risk of subscribing reports to identities. Enter a value between 0 and 1. This field is only visible if the **QER	Calcu-lateRiskIndex** configuration parameter is set. For more information, see the *One Identity Manager Risk Assessment Administration Guide*.
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 identities. Only subscribable reports that are enabled can be assigned within the

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Property	Description
	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 and granted through defined approval procedures. The subscribable report can also be assigned directly to identities 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 and granted through defined approval procedures. The subscribable report may not be 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. 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.
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, in the Designer, you must alter the user interface of the **Manager** program. 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` table) with the following properties is generated internally for the simple report.

Table 7: 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 identities.

Related topics

- Adding or removing simple report parameters on page 28
- Creating and editing subscribable reports on page 21
- Assigning subscribable reports to identities on page 33

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
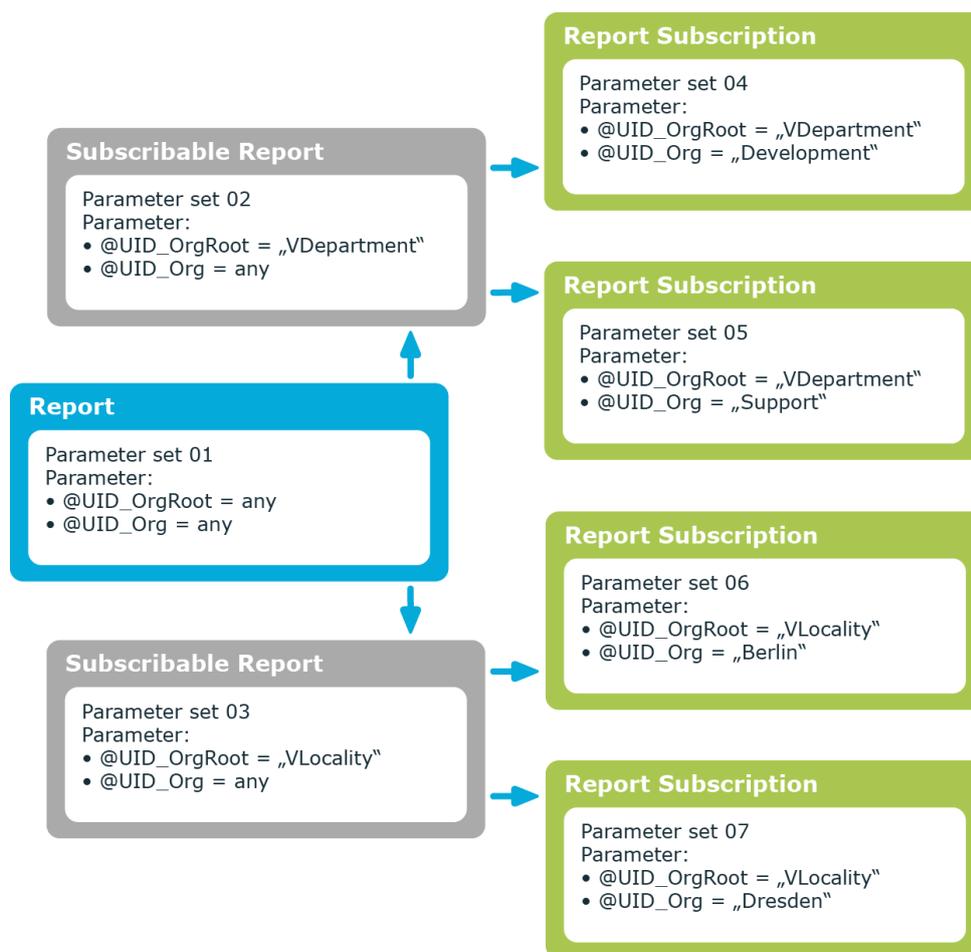
You can configure report parameters at several places.

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

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.

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.

To edit report parameters

1. In Manager, in the **Report Subscriptions > Subscribable Reports** category, select the subscribable report.

2. Select the **Change main data** task.

3. To load the parameter's main data, on the **Parameters** tab, select the report parameter in the upper section of the main data form.

4. Edit the report parameters.

   TIP: The actual parameter values are shown next to the fields and menus.

5. Click **Save**.

Related topics

Adding or removing simple report parameters

| NOTE: You can only perform these tasks for simple reports.

When you create a simple report in Manager, you use the **VI_Report_DefaultTemplate** report is used as a template. This report does not contain any report parameters itself. To use report parameters in the report definition of simple reports, you can add the report parameters in the Manager. You can remove report parameters that are no longer needed.

To add a report parameter

1. In Manager, in the **Report Subscriptions > Subscribable Reports** category, select the subscribable report.
2. Select the **Change main data** task.
3. On the **Parameters** tab, select the **Add** button.
4. Enter the report parameter's main data.
5. Click **Save**.

To remove a report parameter

1. In Manager, in the **Report Subscriptions > Subscribable Reports** category, select the subscribable report.
2. Select the **Change main data** task.
3. Select the report parameter on the **Parameters** tab in the upper section of the main data form.
4. Click the **Remove** button.
5. Click **Save**.

Related topics

General settings for report parameters

Enter the following general parameter settings.

Table 8: General parameter settings

Property	Description
Parameter name	Parameter name.
Parameter type	Type of parameter. Permitted values are: • **Fixed**: Fixed parameter values are used. On the **Value definition** tab, enter the parameter value. • **User prompt**: The user must select a parameter value in the user prompt at runtime. • **Calculation**: The parameter value is calculated at runtime when the report is created. On the **Value calculation** tab, enter the table column and the condition for calculating the value. Other settings are shown or hidden depending on the type.
Display name	User friendly name for the parameter. To display language dependent display names, translate the given text with the 🌐 button.
Description	Text field for additional explanation.Translate the given text with the 🌐 button.
Sort order	Position of the parameter in the subscribable report view and in the Web Portal.
Mandatory parameter	Specifies whether this is a mandatory parameter. You must give a value for a mandatory parameter.
Viewable	Specifies whether the parameter is shown when a report subscription is set up in the Web Portal.
Can be overwritten	Specifies whether the parameter can be overwritten by Web Portal users when a report subscription is created.

Value definition for report parameters

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:

Table 9: Value definition

Property	Description
Data type	Parameter data type.
Date add-on	Additional information about calculating date and time data for displaying in the user interface. The value can be edited if the **Date** data type is selected.
Value range	Specifies whether the report parameter value has to be within a given range. If **Yes**, additional fields appear.
Multivalue	Specifies whether the parameter accepts multiple values. If **Yes**, users can select multiple value from a list.
Multiline	Specifies whether the parameter contents can have multiple lines. If **Yes**, line breaks are permitted.
Data source	Type of data source. Permitted values are: • **None**: The user can give any value. • **Table**: The user selects a value from a specified table column. • **List of permitted values**: The user selects a value from a predefined list. 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 parameter value. The user can select a value from this table column. If the parameter is multi-value, you can select several values from this column as well.
Display pattern	Additional data for the data source **Table**. Display pattern for table elements in lists in `%column%` notation. The `??` operator is permitted. This means, when one column's value is empty, another column's value is displayed. Example: `%column1??column2??column3%`
Condition (query)	Additional data for the data source **Table**. Limiting condition (Where clause) for selecting the parameter value using a table column. The user can select a value from the result set. If the parameter is multi-value, you can select several values from this result set as well.

Property	Description
	You can reference other parameters in the condition using the following syntax: $PC(<Parametername>)$ Example: UID_Database = $PC(UID)$ where UID is the name of the referenced report parameter.
List of permitted values	Additional data for the data source **List of permitted values**. List of values permitted in this parameter in the **value=display name** notation. If an **=** is no given, the entry counts as both value and display name. Example: 1=internal 2=external To display language dependent display names, translate each display name using the 🌐 button.
Overwrite empty value	Specifies whether an empty parameter value overwrites the default value. If this option is disabled, the default value is overwritten if a parameter value is not given.
Parameter value	Parameter value If a value range is given, the **Parameter value (from)** and the **Parameter value (to)** are displayed.
Example value	Example of the parameter. The example value is used to create a report preview. If a value range is given, the **Example value (from)** and the **Example value (to)** are displayed.
Default value	Default value of the parameter. This is used if the user does not specify a parameter value and the **Overwrite empty value** option is not set. If a value range is given, the **Default value (from)** and the **Default value (to)** are displayed.

Value calculation for report parameters

Enter the following data if the report parameter is calculated:

Table 10: Scripts for calculating values

Property	Description
Table column (calc.)	Additional input for **Calculated** parameter type. Table column for selecting the parameter value. The parameter value is

Property	Description
	determined at runtime when the report is created.
Condition (calc.)	Additional input for **Calculated** parameter type.
	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 parameter is multivalue as well, several values may be found.
	If a condition is not given and the parameter is not multivalue, the first value is used that is determined by the table column. If the parameter is multivalue and a condition is not given, all determined values are used.
Valuation script	Script in VB.Net syntax for modifying the parameter value. The script can be used as a formatting script and the existing parameter value modified or reset the parameter value.
Validation script	Script in VB.Net syntax for checking permitted values of parameters. Create a script that checks the user input.
Data dependencies script	Script in VB.Net syntax. The script allows parameter settings to be configured depending on the data. It is run during initialization and when values are changed. For example, the script can be used to dynamically determine whether a parameter is read-only or mandatory.
	Example:
	The **P2** parameter should be a mandatory field when the **P1** parameter has the value **Mandatory field**. The following script must be stored with the **P1** parameter:
	`ParameterSet("P2").IsMandatory = (Value IsNot Nothing AndAlso Value.ToString() = "Mandatory")`

Displaying report previews

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

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 main data** task.
4. Select the **Report preview** task.
5. Enter the report parameter value in the dialog and confirm with **OK**.

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

Assigning subscribable reports to identities

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

Add identities 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 identities after approval is granted.

Prerequisites for indirect assignment to identities

- Assignment of identities and subscribable reports is permitted for role classes (departments, cost centers, locations, or business roles).

    To configure assignments to roles of a role class

    1. In the Manager, select role classes in the **Organizations > Basic configuration data > Role classes** category.

        - OR -

        In the Manager, select role classes in the **Business roles > Basic configuration data > Role classes** category.

    2. Select the **Configure role assignments** task and configure the permitted assignments.

        - To generally allow an assignment, enable the **Assignments allowed** column.

        - To allow direct assignment, enable the **Direct assignments permitted** column.

    3. Save the changes.

NOTE: There are other configuration settings that play a role when company resources are inherited through departments, cost centers, locations, and business roles. For example, role inheritance might be blocked or inheritance of identities not allowed. For more detailed information about the basic principles 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

Assign the subscribable report to departments, cost centers, and locations for it to be assigned to identities 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

| NOTE: This function is only available if the Business Roles Module is installed.

Assign the subscribable report to business roles for it to be assigned to identities 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, select the role class and 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

Adding subscribable reports to the 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 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 have the **IT Shop** option set.

- The subscribable report must be assigned a service item.

- The subscribable report must have the **Only use in IT Shop** option set if it can only be assigned to identities 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 34
- Assigning subscribable reports to business roles on page 35
- Assigning subscribable reports to application roles on page 36
- Assigning subscribable reports directly to identities on page 37
- Adding subscribable reports to system roles on page 38

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 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 | Identity Managers**, **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 34
- Assigning subscribable reports to business roles on page 35
- Adding subscribable reports to the IT Shop on page 35
- Assigning subscribable reports directly to identities on page 37
- Adding subscribable reports to system roles on page 38

Assigning subscribable reports directly to identities

You can assign subscribable reports directly or indirectly to identities. Indirect assignment is carried out by assigning the identity 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 identities.

To assign a subscribable report to individual identities

1. In the Manager, select the **Report Subscriptions > Subscribable reports** category.
2. Select the report in the result list.
3. Select the **Assign to identities** task.
4. In the **Add assignments** pane, add identities.

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

   To remove an assignment

   - Select the identity and double-click ⊘.

5. Save the changes.

Related topics

Adding subscribable reports to system roles

NOTE: This function is only available if the System Roles Module is installed.

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

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 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

Displaying report subscriptions

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

To show subscription settings

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

  This shows you which users 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 main data** task.

4. Set the **Disabled** option.

5. Save the changes.

You can disable subscribable reports using preprocessor conditions. For more information, see General main data of subscribable reports on page 22.

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 more 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 more information about connecting to the One Identity Manager History Database through an application server and the required configuration, see the *One Identity Manager Data Archiving Administration Guide*.

- Ensure that the email notification system is configured in One Identity Manager. For more 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 identities have a default email address. Notifications are sent to this address. For more information, see the *One Identity Manager Identity Management Base Module Administration Guide*.

- Ensure that a language can be determined for all identities. Only then can they receive email notifications in their own language. For more information, see the *One Identity Manager Identity Management Base Module Administration Guide*.

Related topics

- Saving subscribed reports in a central repository on page 41

Saving 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 more information about connecting to the One Identity Manager History Database through an application server and the required configuration, see the *One Identity Manager Data Archiving Administration 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 occurs 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.

Related topics

- Sending subscribed reports on page 40

Configuration parameters for subscribable reports

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

Table 11: 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.
	If you disable the configuration parameter at a later date, model components and scripts that are no longer required, are disabled. SQL procedures and triggers are still carried out. For more information about the behavior of preprocessor relevant configuration parameters and conditional compiling, see the *One Identity Manager Configuration Guide*.
QER | RPS | DefaultReportTemplate	Default report that is used as a template for creating simple list reports.
QER | RPS | DefaultSenderAddress	Sender's default email address for sending automatically generated notifications about report subscriptions. Replace the default address with a valid email address.
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 | MailTem-	Mail template used for sending email notification to a

Configuration parameter	Meaning
plateIdents | InformSub-scriber	report's subscriber. The report is sent as attachment.
QER | RPS | MailTem-plateIdents | StoredOnServer	Mail template used for sending email notification to a report's subscriber. The report is stored on the server.
QER | RPS | MailTem-plateIdents | StoredOnServer-ForCC	Mail template used for sending email notification to a report's subscriber (CC). The report is stored on the server.
QER | RPS | StoreSubscription	Specifies whether subscribable reports are not sent by email but are kept in a drop folder. If you enable the configuration parameter, edit the required settings in the **QER | RPS | SubscriptionStorageShare** and **QER | RPS | SubscriptionStorageLifeTime** configuration parameters.
QER | RPS | Subscrip-tionStorageLifeTime	Maximum retention period (in days) that a report is available in the storage share. After this period, reports are deleted.
QER | RPS | Subscrip-tionStorageShare	Path to the repository for subscribed reports. Syntax: \\<server>\<share>

Technical details for inheriting subscribable reports

An identity (`person` table) can receive subscribable report (`RPSReport` table) directly. An identity 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 information, see the *One Identity Manager System Roles Administration Guide*.

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

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

Figure 5: Inheritance with indirect secondary assignment of subscribable reports to identities
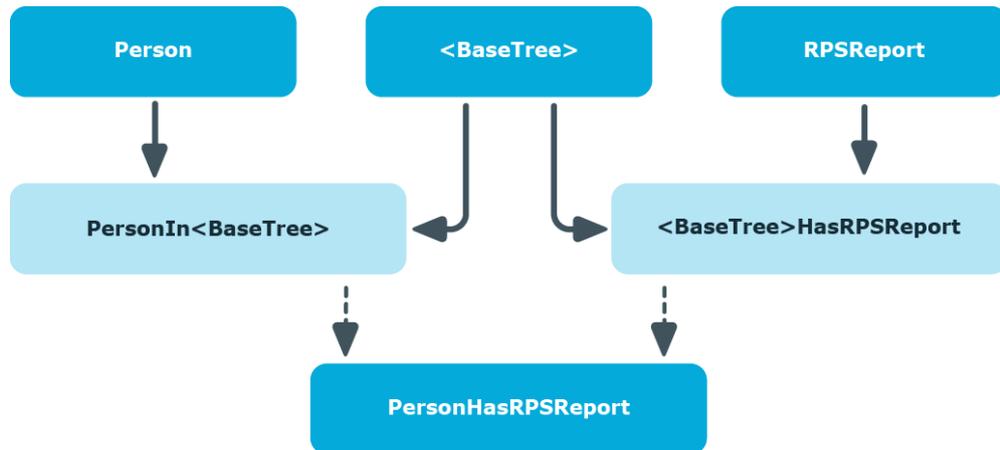
Figure 6: Inheritance with indirect primary assignment of subscribable reports to identities

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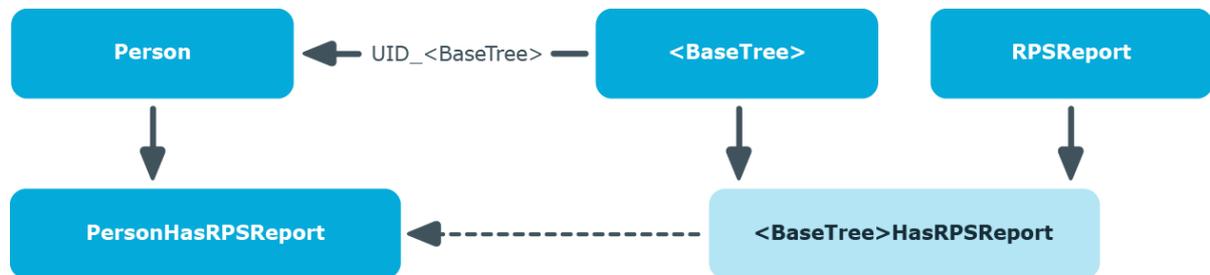
One Identity solutions eliminate the complexities and time-consuming processes often required to govern identities, manage privileged accounts and control access. Our solutions enhance business agility while addressing your IAM challenges with on-premises, cloud and hybrid environments.

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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