



One Identity Manager 9.2.1

# Report Subscriptions Administration Guide

**Copyright 2024 One Identity LLC.**

**ALL RIGHTS RESERVED.**

This guide contains proprietary information protected by copyright. The software described in this guide is furnished under a software license or nondisclosure agreement. This software may be used or copied only in accordance with the terms of the applicable agreement. No part of this guide may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying and recording for any purpose other than the purchaser's personal use without the written permission of One Identity LLC .

The information in this document is provided in connection with One Identity products. No license, express or implied, by estoppel or otherwise, to any intellectual property right is granted by this document or in connection with the sale of One Identity LLC products. EXCEPT AS SET FORTH IN THE TERMS AND CONDITIONS AS SPECIFIED IN THE LICENSE AGREEMENT FOR THIS PRODUCT, ONE IDENTITY ASSUMES NO LIABILITY WHATSOEVER AND DISCLAIMS ANY EXPRESS, IMPLIED OR STATUTORY WARRANTY RELATING TO ITS PRODUCTS INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTY OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR NON-INFRINGEMENT. IN NO EVENT SHALL ONE IDENTITY BE LIABLE FOR ANY DIRECT, INDIRECT, CONSEQUENTIAL, PUNITIVE, SPECIAL OR INCIDENTAL DAMAGES (INCLUDING, WITHOUT LIMITATION, DAMAGES FOR LOSS OF PROFITS, BUSINESS INTERRUPTION OR LOSS OF INFORMATION) ARISING OUT OF THE USE OR INABILITY TO USE THIS DOCUMENT, EVEN IF ONE IDENTITY HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. One Identity makes no representations or warranties with respect to the accuracy or completeness of the contents of this document and reserves the right to make changes to specifications and product descriptions at any time without notice. One Identity does not make any commitment to update the information contained in this document.

If you have any questions regarding your potential use of this material, contact:

One Identity LLC.  
Attn: LEGAL Dept  
4 Polaris Way  
Aliso Viejo, CA 92656

Refer to our website (<http://www.OneIdentity.com>) for regional and international office information.

**Patents**

One Identity is proud of our advanced technology. Patents and pending patents may apply to this product. For the most current information about applicable patents for this product, please visit our website at <http://www.OneIdentity.com/legal/patents.aspx>.

**Trademarks**

One Identity and the One Identity logo are trademarks and registered trademarks of One Identity LLC. in the U.S.A. and other countries. For a complete list of One Identity trademarks, please visit our website at [www.OneIdentity.com/legal/trademark-information.aspx](http://www.OneIdentity.com/legal/trademark-information.aspx). All other trademarks are the property of their respective owners.

**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.

One Identity Manager Report Subscriptions Administration Guide  
Updated - 16 October 2024, 15:59

For the most recent documents and product information, see [Online product documentation](#).

# Contents

<b>Report subscriptions in the One Identity Manager</b> .....	<b>5</b>
Report overview .....	6
One Identity Manager users for providing reports and report subscriptions .....	7
<b>Providing subscribable reports for Web Portal users</b> .....	<b>9</b>
<b>Creating and editing subscribable reports</b> .....	<b>11</b>
Basic data for subscribable reports .....	11
Report subscription schedules .....	12
Creating and editing schedules for report subscriptions .....	12
Starting schedules immediately .....	15
Displaying report subscriptions .....	16
Mail templates for notifications about report subscriptions .....	16
Creating and editing mail definitions for report subscriptions .....	18
Base objects for report subscription templates .....	19
Editing mail templates for report subscriptions .....	19
Custom processes for report subscriber notifications .....	20
Creating and editing subscribable reports .....	21
General main data of subscribable reports .....	22
Creating simple reports .....	23
Report parameters .....	25
Editing report parameters for subscribable reports .....	27
Adding or removing simple report parameters .....	28
General settings for report parameters .....	29
Value definition for report parameters .....	29
Value calculation for report parameters .....	32
Displaying report previews .....	33
Assigning subscribable reports to identities .....	33
Assigning subscribable reports to departments, cost centers, and locations .....	34
Assigning subscribable reports to business roles .....	35
Adding subscribable reports to the IT Shop .....	36
Assigning subscribable reports to application roles .....	37
Assigning subscribable reports directly to identities .....	38

Adding subscribable reports to system roles .....	38
Displaying report subscriptions .....	39
Disabling subscribable reports .....	39
<b>Sending subscribed reports</b> .....	<b>41</b>
Saving subscribed reports in a central repository .....	42
<b>Appendix: Configuration parameters for subscribable reports</b> .....	<b>44</b>
<b>Appendix: Technical details for inheriting subscribable reports</b> .....	<b>46</b>
<b>About us</b> .....	<b>48</b>
Contacting us .....	48
Technical support resources .....	48
<b>Index</b> .....	<b>49</b>

# 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

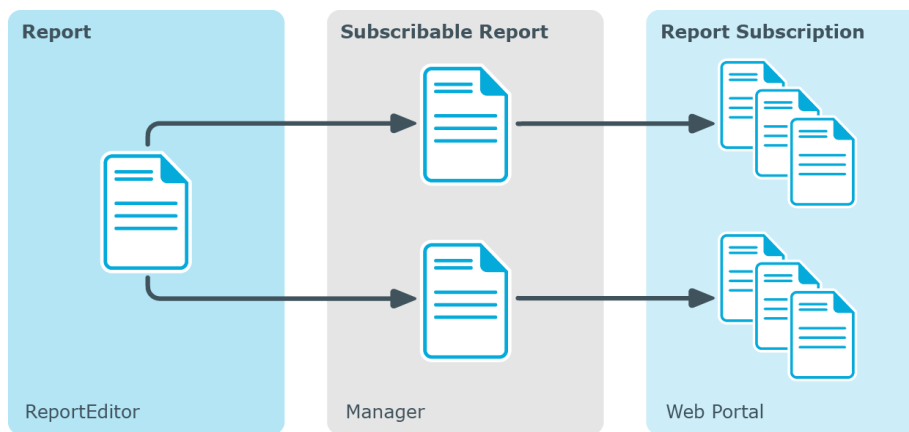
- [Report overview](#) on page 6
- [One Identity Manager users for providing reports and report subscriptions](#) on page 7
- [Providing subscribable reports for Web Portal users](#) on page 9
- [Creating and editing subscribable reports](#) on page 11

- [Sending subscribed reports](#) on page 41
- [Configuration parameters for subscribable reports](#) on page 44

## 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 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	<ul style="list-style-type: none"><li>• Creating and editing reports in the Report Editor.</li><li>• Creating report parameters in the Report Editor and configuring predefined values.</li></ul>
Report administrator	<p>Administrators must be assigned to the <b>Identity &amp; Access Governance   Company policies   Report Subscriptions</b> application role.</p> <p>Users with this application role:</p> <ul style="list-style-type: none"><li>• Create subscribable reports from existing reports.</li><li>• Configure report parameters for subscribable reports.</li><li>• Assign subscribable reports to identities, company structures or IT Shop shelves.</li><li>• Create custom mail templates for sending subscribed reports by email.</li></ul>
Product owner for the IT Shop	<p>Product owners must be assigned to the <b>Request &amp; Fulfillment   IT Shop   Product owners</b> application role or a child application role.</p>

## 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.

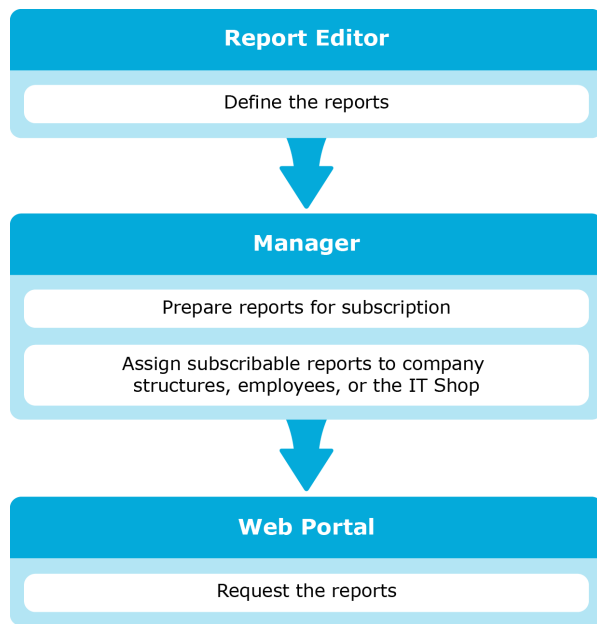
## Providing subscribable reports for Web Portal users

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 36](#)
- [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 38](#)

# 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](#) on page 11
- [Creating and editing subscribable reports](#) on page 21
- [Creating simple reports](#) on page 23
- [Report parameters](#) on page 25
- [Assigning subscribable reports to identities](#) on page 33

## 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 44.

- 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](#) on page 12
- [Starting schedules immediately](#) on page 15
- [Displaying report subscriptions](#) on page 16

## 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. <b>NOTE:</b> Only active schedules are run. Active schedules are only run if the <b>QBM   Schedules</b> configuration parameter is set.
Time zones	Unique identifier for the time zone that is used for running the schedule. Choose between <b>Universal Time Code</b> 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. <ul style="list-style-type: none"><li>• If the schedule will be run for an unlimited period, select the <b>Unlimited duration</b> option.</li></ul>

Property	Meaning
Occurs	<ul style="list-style-type: none"> <li>• To set a validity period, select the <b>Limited duration</b> option and enter the day the schedule will be run for the last time in <b>End (date)</b>.</li> </ul> <p>Interval in which the task is run. Other settings may be required depending on the settings.</p> <ul style="list-style-type: none"> <li>• <b>Every minute:</b> The schedule is run once a minute. The starting point is calculated from the rate of occurrence and the interval type.</li> <li>• <b>Hourly:</b> The schedule is run at defined intervals of a multiple of hours such as every two hours. <ul style="list-style-type: none"> <li>• Under <b>Repeat every</b>, specify after how many hours the schedule is run again.</li> <li>• The starting point is calculated from the rate of occurrence and the interval type.</li> </ul> </li> <li>• <b>Daily:</b> The schedule is run at specified times in a defined interval of days such as every second day at 6am and 6pm. <ul style="list-style-type: none"> <li>• Under <b>Start time</b>, specify the times to run the schedule.</li> <li>• Under <b>Repeat every</b>, specify after how many days the schedule is run again.</li> </ul> </li> <li>• <b>Weekly:</b> 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. <ul style="list-style-type: none"> <li>• Under <b>Start time</b>, specify the times to run the schedule.</li> <li>• Under <b>Repeat every</b>, specify after how many weeks the schedule is run again.</li> <li>• Specify the set day of the week for running the schedule.</li> </ul> </li> <li>• <b>Monthly:</b> 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. <ul style="list-style-type: none"> <li>• Under <b>Start time</b>, specify the times to run the schedule.</li> <li>• Under <b>Repeat every</b>, specify after how many months the schedule is run again.</li> <li>• Specify the days of the month (1st - 31st of the month).</li> </ul> </li> </ul> <p><b>NOTE:</b> If the <b>Monthly</b> interval type with the sub interval <b>29</b>, <b>30</b> or <b>31</b> does not exist in this month, the last day of the month is used.</p> <p>Example:</p> <p>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).</p>

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. <p><b>NOTE:</b> 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.</p>

## 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**

<b>Configuration parameter</b>	<b>Meaning</b>
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  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](#) on page 22
- [Editing report parameters for subscribable reports](#) on page 27
- [Creating simple reports](#) on page 23
- [Assigning subscribable reports to identities](#) on page 33

# 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 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 information, see the <i>One Identity Manager IT Shop Administration Guide</i> .
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 <b>QER   CalculateRiskIndex</b> configuration parameter is set. For more 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 identities. Only subscribable reports that are enabled can be assigned within the

Property	Description
	<p>One Identity Manager. If a subscribable report is disabled you are prevented from assigning it. Existing assignments remain intact.</p> <p><b>IMPORTANT:</b> If you disable a subscribable report, existing Web Portal user report subscriptions are canceled.</p>
IT Shop	<p>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 <i>One Identity Manager IT Shop Administration Guide</i>.</p>
Only for use in IT Shop	<p>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 <i>One Identity Manager IT Shop Administration Guide</i>.</p>
Simple list report	<p>Specifies whether this is a report in CSV format.</p>
Report definition	<p>Definition of a simple list report in XML syntax.</p>
Preprocessor condition	<p>Preprocessor condition for the subscribable report. A subscribable report available only when the preprocessor condition is fulfilled.</p> <p><b>IMPORTANT:</b> If a preprocessor condition is given in a subscribable report, you must ensure that all report parameters depending on this preprocessor condition have a default value in the underlying report in the Report Editor. If the value <code>query</code> is used for a report parameter type, this must be overwritten with the value <code>fixed</code> in the subscribable report. Otherwise, errors may occur when the report is generated.</p>
Disabled by preprocessor	<p>Specifies whether the subscribable report is disabled through a preprocessor condition.</p>

## 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 <b>VI_Report_DefaultTemplate</b> report is used as the underlying report.  <b>NOTE:</b> The report is defined in the <b>QER   RPS   DefaultReportTemplate</b> 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

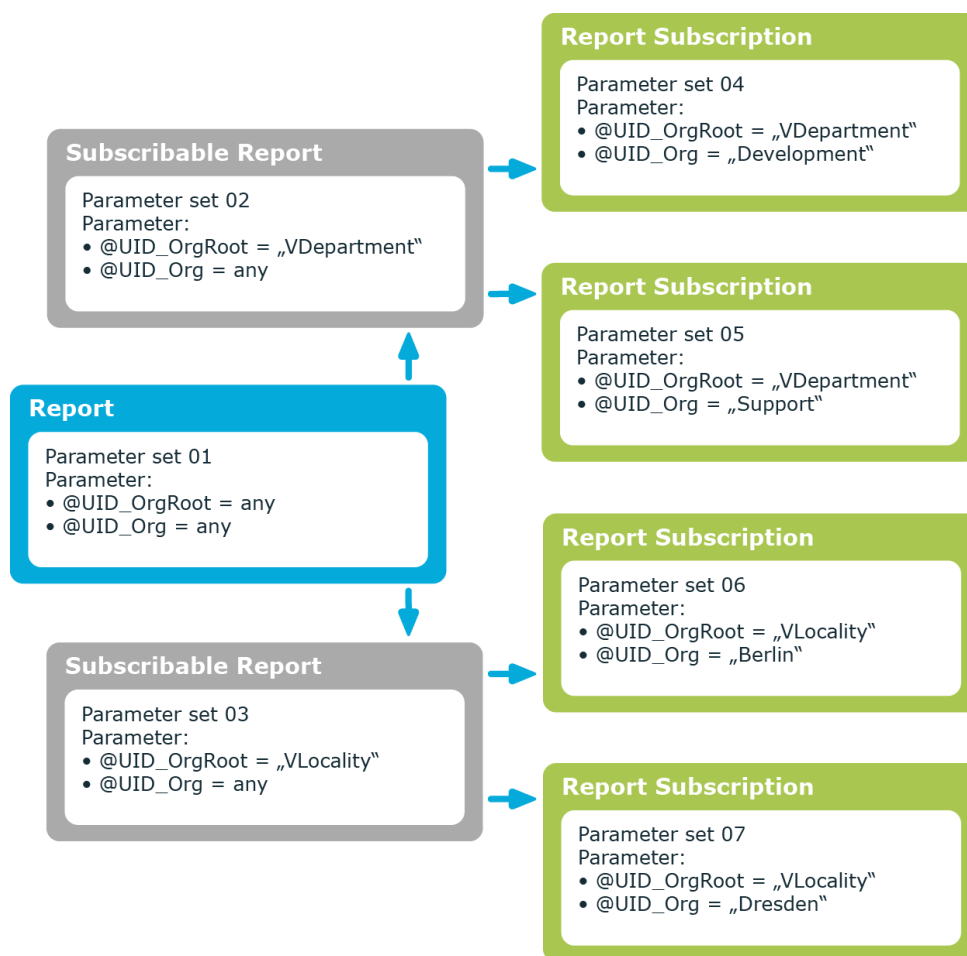
- [Adding or removing simple report parameters](#) on page 28
- [Creating and editing subscribable reports](#) on page 21
- [Assigning subscribable reports to identities](#) on page 33

# 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 sent 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 every 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 27
- [Adding or removing simple report parameters](#) on page 28
- [General settings for report parameters](#) on page 29
- [Value definition for report parameters](#) on page 29
- [Value calculation for report parameters](#) on page 32

# 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 the 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](#) on page 28
- [General settings for report parameters](#) on page 29
- [Value definition for report parameters](#) on page 29
- [Value calculation for report parameters](#) on page 32

# Adding or removing simple report parameters

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

When you create a simple report in the Manager, you use the **VI\_Report\_DefaultTemplate** report 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 the 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 the 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

- [Editing report parameters for subscribable reports](#) on page 27
- [General settings for report parameters](#) on page 29
- [Value definition for report parameters](#) on page 29
- [Value calculation for report parameters](#) on page 32

# 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: <ul style="list-style-type: none"><li>• <b>Fixed:</b> Fixed parameter values are used. On the <b>Value definition</b> tab, enter the parameter value.</li><li>• <b>User prompt:</b> The user must select a parameter value in the user prompt at runtime.</li><li>• <b>Calculation:</b> The parameter value is calculated at runtime when the report is created. On the <b>Value calculation</b> tab, enter the table column and the condition for calculating the value.</li></ul> 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	<p>Additional information about calculating date and time data for displaying in the user interface. The value can be edited if the <b>Date</b> data type is selected.</p> <p>Permitted values are:</p> <ul style="list-style-type: none"><li>• <b>Date and time:</b> Date-time values can be entered and read. In One Identity Manager tools, the data saved in UTC is automatically converted to local time. The user, therefore, sees all the values in local time.</li><li>• <b>Date only:</b> Only the date can be entered and displayed. Time slices are ignored and there is not time zone conversion.</li><li>• <b>End of day:</b> Only the date is relevant for this format. The time slice of <b>23:59:59</b> local time is automatically assumed unless a time (not equal to <b>00:00:00</b>) is explicitly passed down. A user or service that writes a time entry like this, defines the end of the day according to its time zone.</li><li>• <b>UTC date and time:</b> Date-time values can be entered and read out. In the One Identity Manager tools, there is no conversion from UTC to local time or vice versa.</li></ul>
Value range	Specifies whether the report parameter value has to be within a given range. If <b>Yes</b> , additional fields appear.
Multivalue	Specifies whether the parameter accepts multiple values. If <b>Yes</b> , users can select multiple value from a list.
Multiline	Specifies whether the parameter contents can have multiple lines. If <b>Yes</b> , line breaks are permitted.
Data source	<p>Type of data source. Permitted values are:</p> <ul style="list-style-type: none"><li>• <b>None:</b> The user can give any value.</li><li>• <b>Table:</b> The user selects a value from a specified table column.</li><li>• <b>List of permitted values:</b> The user selects a value from a predefined list.</li></ul>

You may require additional data depending on the data source.

Property	Description
Table column (query)	<p>Additional data for the data source <b>Table</b>.</p> <p>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.</p>
Display pattern	<p>Additional data for the data source <b>Table</b>.</p> <p>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.</p> <p>Example: %column1??column2??column3%</p>
Type of display	<p>Specifies how data for the value query is displayed. For example, data from a hierarchical table can be displayed either hierarchically or in a list without a hierarchy.</p> <p>Permitted values are:</p> <ul style="list-style-type: none"> <li>• <b>Hierarchical:</b> (Default) The data is displayed hierarchically.</li> <li>• <b>List:</b> The data is displayed in a list.</li> <li>• <b>Inherited:</b> The setting is inherited.</li> </ul>
Condition (query)	<p>Additional data for the data source <b>Table</b>.</p> <p>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.</p> <p>You can reference other parameters in the condition using the following syntax:</p> <p><code>\$PC(&lt;Parametername&gt;)\$</code></p> <p>Example:</p> <p><code>UID_Database = \$PC(UID)\$</code></p> <p>where UID is the name of the referenced report parameter.</p>
List of permitted values	<p>Additional data for the data source <b>List of permitted values</b>.</p> <p>List of values permitted in this parameter in the <b>value=display name</b> notation. If an = is no given, the entry counts as both value and display name.</p> <p>Example: 1=internal 2=external</p> <p>To display language dependent display names, translate each display name using the  button.</p>
Overwrite empty value	<p>Specifies whether an empty parameter value overwrites the default value.</p> <p>If this option is disabled, the default value is overwritten if a parameter</p>

Property	Description
	value is not given.
Parameter value	Parameter value If a value range is given, the <b>Parameter value (from)</b> and the <b>Parameter value (to)</b> 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 <b>Example value (from)</b> and the <b>Example value (to)</b> are displayed.
Default value	Default value of the parameter. This is used if the user does not specify a parameter value and the <b>Overwrite empty value</b> option is not set. If a value range is given, the <b>Default value (from)</b> and the <b>Default value (to)</b> 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 <b>Calculated</b> parameter type. Table column for selecting the parameter value. The parameter value is determined at runtime when the report is created.
Condition (calc.)	Additional input for <b>Calculated</b> 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 multivalued as well, several values may be found. If a condition is not given and the parameter is not multivalued, the first value is used that is determined by the table column. If the parameter is multivalued 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

Property	Description
	<p>dynamically determine whether a parameter is read-only or mandatory.</p> <p>Example:</p> <p>The <b>P2</b> parameter should be a mandatory field when the <b>P1</b> parameter has the value <b>Mandatory</b> field. The following script must be stored with the <b>P1</b> parameter:</p> <pre>ParameterSet("P2").IsMandatory = (Value IsNot Nothing AndAlso Value.ToString() = "Mandatory")</pre>

## 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 on page 34](#)
- [Assigning subscribable reports to business roles on page 35](#)
- [Adding subscribable reports to the IT Shop on page 36](#)
- [Assigning subscribable reports to application roles on page 37](#)
- [Assigning subscribable reports directly to identities on page 38](#)
- [Adding subscribable reports to system roles on page 38](#)
- [Technical details for inheriting subscribable reports on page 46](#)

# 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](#) on page 35
- [Adding subscribable reports to the IT Shop](#) on page 36
- [Assigning subscribable reports to application roles](#) on page 37
- [Assigning subscribable reports directly to identities](#) on page 38
- [Adding subscribable reports to system roles](#) on page 38

## **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**

- [Assigning subscribable reports to departments, cost centers, and locations on page 34](#)
- [Adding subscribable reports to the IT Shop on page 36](#)
- [Assigning subscribable reports to application roles on page 37](#)
- [Assigning subscribable reports directly to identities on page 38](#)
- [Adding subscribable reports to system roles on page 38](#)

## **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 37](#)

- [Assigning subscribable reports directly to identities](#) on page 38
- [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 36
- [Assigning subscribable reports directly to identities](#) on page 38
- [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**

- [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 36
- [Assigning subscribable reports to application roles](#) on page 37
- [Adding subscribable reports to system roles](#) on page 38

# 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**

- [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 36
- [Assigning subscribable reports to application roles](#) on page 37
- [Assigning subscribable reports directly to identities](#) on page 38

## **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 42

# 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 41

## 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	<p>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.</p> <p>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 <i>One Identity Manager Configuration Guide</i>.</p>
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   MailTemplateIdent	Mail template names are defined under this configuration parameter which are used in association with report subscriptions.
QER   RPS   MailTemplateIdent   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   InformSubscriber	report's subscriber. The report is sent as attachment.
QER   RPS   MailTemplateIdents   StoredOnServer	Mail template used for sending email notification to a report's subscriber. The report is stored on the server.
QER   RPS   MailTemplateIdents   StoredOnServerForCC	Mail template used for sending email notification to a report's subscriber (CC). The report is stored on the server.
QER   RPS   StoreSubscription	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 <b>QER   RPS   SubscriptionStorageShare</b> and <b>QER   RPS   SubscriptionStorageLifeTime</b> configuration parameters.
QER   RPS   SubscriptionStorageLifeTime	Maximum retention period (in days) that a report is available in the storage share. After this period, reports are deleted.
QER   RPS   SubscriptionStorageShare	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.

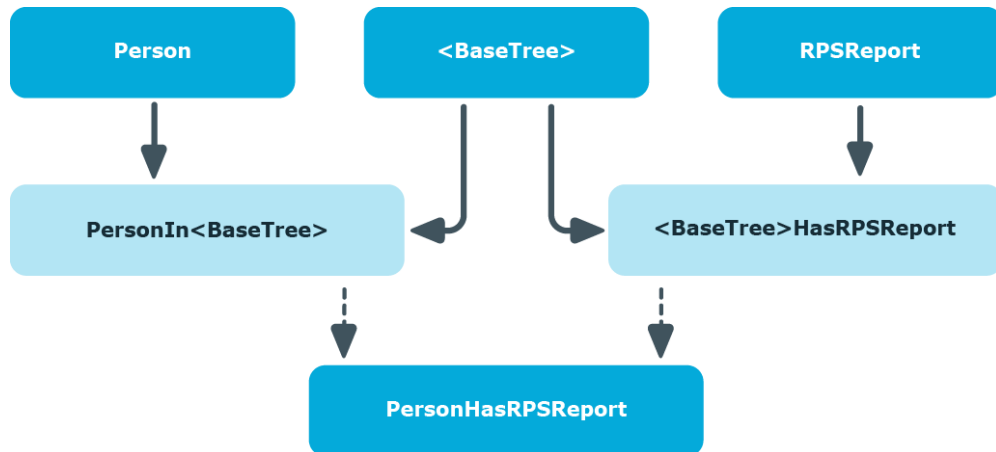
Subscribable reports can be inherited by system roles. For more information, see the *One Identity Manager System Roles Administration Guide*.

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

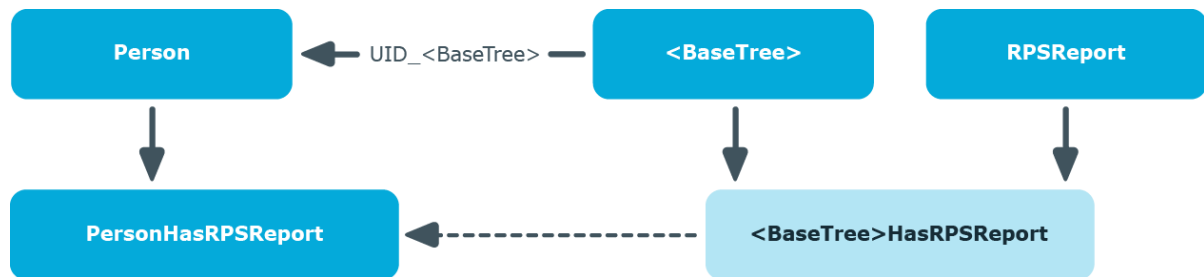
**Figure 4: Inheritance with direct assignment of subscribable reports to identities**



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



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



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](http://www.YouTube.com/OneIdentity)
- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product

## C

- calculation schedule
  - default schedule 12
  - report subscription 12, 16
  - run immediately 15
  - set up 12

## M

- mail definition 18

## N

- notification
  - default mail template 16
  - GenerateMail 20
  - mail template 16
  - report server 42
  - repository 42
  - save 42

## R

- report 6
- report parameter
  - can be overwritten 29
  - condition (calc.) 32
  - condition (query) 29
  - data source 29
  - data type 29
  - default value 29
  - description 29
  - display name 29

- edit 27
- inherit 27
- inheritance 25
- list of permitted values 29
- mandatory parameter 29
- multiline 29
- multivalue 29
- overwrite empty value 29
- parameter definition 29
- parameter type 29
- parameter value 29
- sort order 29
- table column (calc.) 32
- table column (query) 29
- value calculation 32
- value range 29
- viewable 29
- report subscription 5-6
  - application roles 7
  - calculation schedule 12
  - display 39
  - save 42
  - send 41
  - user 7

## S

- simple report
  - create 23
- subscribable report 6
  - add to IT Shop 36

- add to system role 38
- assign application role 37
- assign to business role 35
- assign to cost center 34
- assign to department 34
- assign to identities 33, 38
- assign to location 34
- configuration parameter 44
- copy 21
- create 11, 21
- deactivate 39
- deactivated 22
- edit 21-22
- for Web Portal 9
- identifier 22
- IT Shop 22
- owner 22
- pass down 46
- prepare 9
- preprocessor condition 22
- report definition 22
- report preview 33
- risk index 22
- service item 22
- simple list report 22-23