Managing Data Warehouse and Reporting user accounts

OnCommand Insight

NetApp
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Table of Contents

Managing Data Warehouse and Reporting user accounts . . . 1
Accessing the Data Warehouse and Reporting portal . . . 1
Reporting user roles . . . 1
Adding a Reporting user . . . 3
Managing user accounts . . . 4
Configuring LDAP for Reporting . . . 4

Managing Data Warehouse and Reporting user accounts

User accounts, user authentication, and user authorization for the OnCommand Insight reporting tools are defined and managed from the Data Warehouse (DWH). Based on these configurations, users and administrators gain access to some or all of the available OnCommand Insight reports.

Access to the User Management in the Data Warehouse requires an account with System Administrator privileges. This includes:

- Full administrative capabilities for the Data Warehouse
- Configuration and maintenance of all user accounts
- Read access to the database
- Capability to set up connectors in the ETL, schedule Data Warehouse jobs, reset the database, assign or change roles, and add and remove user accounts

Accessing the Data Warehouse and Reporting portal

The Data Warehouse portal provides access to administration options. From the Data Warehouse portal, you can also access the Reporting portal.

Steps

1. Log in as an administrator to the Data Warehouse portal at `https://hostname/dwh`, where `hostname` is the name of the system where OnCommand Insight Data Warehouse is installed.
2. On the Data Warehouse toolbar, click  to open the Reporting portal.

Reporting user roles

Each user account is assigned a role with a set of permissions. The number of users is limited by the number of Reporting licenses attached to each role.

Each role can perform the following actions:

- **Recipient**

  Views OnCommand Insight Reporting portal reports and sets personal preferences such as those for languages and time zones.

  > Recipients cannot create reports, run reports, schedule reports, export reports, nor perform administrative tasks.

- **Business Consumer**

  Runs reports and performs all Recipient options.

- **Business Author**

  Views scheduled reports, runs reports interactively, creates stories, in addition to performing all Business Consumer options.

- **Pro Author**

  Creates reports, creates packages and data modules, in addition to performing all Business Author options.

- **Administrator**

  Performs reporting administrative tasks such as the import and export of report definitions, configuration of reports, configuration of data sources, and the shutdown and restart of reporting tasks.

The following table shows the privileges and the maximum number of users allowed for each role:

Feature	Recipient	Business Consumer	Business Author	Pro Author	Admin
View reports in the Team Content tab	Yes	Yes	Yes	Yes	Yes
Run reports	No	Yes	Yes	Yes	Yes
Schedule reports	No	Yes	Yes	Yes	Yes
Upload external files	No	No	Yes	Yes	No
Create stories	No	No	Yes	Yes	No
Create reports	No	No	Yes	Yes	No
Create Packages and Data Modules	No	No	No	Yes	No
Perform administrative tasks	No	No	No	No	Yes
Number of users	Number of OnCommand Insight users	20	2	1	1

When you add a new Data Warehouse and Reporting user, if you exceed the limit in a role, the user is added as “deactivated,” and you need to deactivate or remove another user with that role to give a new user membership.

Report authoring capabilities require Insight Plan license. You can add additional Business Author and Pro Author users by purchasing the ARAP (Additional Report Authoring Package). Contact your OnCommand Insight representative for assistance.

These reporting user roles do not affect direct database access. These reporting user roles do not impact your ability to create SQL queries using the data marts.

Adding a Reporting user

You must add a new user account for each person who requires access to the Reporting portal. Having a different user account for each person provides a way of controlling access rights, individual preferences, and accountability.

Before you begin

Before adding a Reporting user, you must have allocated a unique user name, determined what password to use, and verified the correct user role or roles. These roles are specialized in the Reporting portal.

Steps

1. Log in as an administrator to the Data Warehouse Portal at `https://hostname/dwh`, where `hostname` is the name of the system where OnCommand Insight Data Warehouse is installed.
2. From the navigation pane on the left, click **User Management**.
3. In the **User Management** window, click **Add New User**.
4. Enter the following information for the new Reporting user:
   - **User name**

     User name (alphanumeric, including a-z, A-Z, and 0-9) for the account
   - **E-mail Address**

     Email address associated with the user account and required if the user subscribes to any reports
   - **Password**

     Password to log in toOnCommand Insight with this user account, which is typically selected by the user and confirmed in the interface
   - **Insight role**

     Roles available to the user with appropriate permissions

     The options for the OnCommand Insight role are shown only if OnCommand Insight is installed on the same machine as the reporting facilities, which is not typical.
   - **Reporting roles**

     Reporting role for this user account (for example, Pro Author)

     The Administrator role is unique. You can add this role to any user.

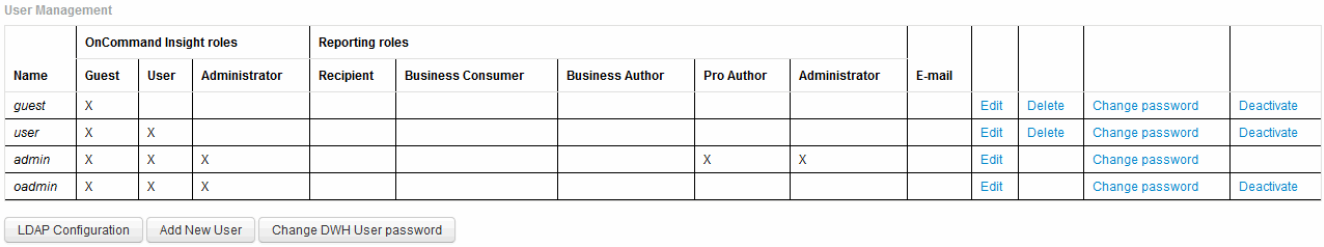
5. Click **Add**.

Managing user accounts

You can configure user accounts, user authentication, and user authorization from the Data Warehouse portal. Each user account is assigned a role with one of the following permission levels. The number of users is limited by the number of Reporting licenses attached to each role.

Steps

1. Log in to the Data Warehouse Portal at `https://hostname/dwh`, where `hostname` is the name of the system where OnCommand Insight Data Warehouse is installed.
2. From the navigation pane on the left, click **User Management**.



User Management

	OnCommand Insight roles			Reporting roles									
Name	Guest	User	Administrator	Recipient	Business Consumer	Business Author	Pro Author	Administrator	E-mail				
guest	X									Edit	Delete	Change password	Deactivate
user	X	X								Edit	Delete	Change password	Deactivate
admin	X	X	X				X	X		Edit		Change password	
oadmin	X	X	X							Edit		Change password	Deactivate

LDAP Configuration | Add New User | Change DWH User password

The following table shows the privileges for each reporting role:

Feature	Recipient	Business Consumer	Business Author	Pro Author	Administrator
View reports (in Public Folder tab, My Folders)	Yes	Yes	Yes	Yes	Yes
Run reports	No	Yes	Yes	Yes	Yes
Schedule Reports	No	Yes	Yes	Yes	Yes
Create reports in Query Studio	No	No	Yes	Yes	No
Create reports in Workspace (Standard)	No	Yes	Yes	Yes	No
Create reports in Workspace (Advanced)	No	No	Yes	Yes	No
Create reports in Report Studio	No	No	No	Yes	No
Perform administrative tasks	No	No	No	No	Yes

3. Do one of the following:
   - To edit an existing user, select the row for the user and click **Edit**.
   - To change a user's password, select the row for the user and click **Change password**.
   - To delete a user, select the row for the user and click **Delete**
4. To activate or deactivate a user, select the row for the user and click **Activate** or **Deactivate**.

Configuring LDAP for Reporting

From the Data Warehouse portal, the Administrator can configure LDAP usage for Data Warehouse and Reporting.

Before you begin

You must log in to Insight as an Administrator to perform this task.

For all Secure Active Directory (i.e. LDAPS) users, you must use the AD server name exactly as it is defined in the certificate. You can not use IP address for secure AD login.

If you changed *server.keystore* and/or *server.trustore* passwords using securityadmin, restart the *sanscreen* service before importing the LDAP certificate.

Steps

1. Log in to the Data Warehouse Portal at `https://hostname/dwh`, where `hostname` is the name of the system on which OnCommand Insight Data Warehouse is installed.
2. From the navigation pane on the left, click **User Management**.
3. Click **LDAP Configuration**.
4. Select **Enable LDAP** to start the LDAP user authentication and authorization process.
5. Make whatever changes are necessary to configure LDAP.

   The majority of the fields contain default values. The default settings are valid for the Active Directory.

   - **User principal name attribute**

     Attribute that identifies each user in the LDAP server. Default is `userPrincipalName`, which is globally unique. OnCommand Insight attempts to match the contents of this attribute with the username that has been supplied above.

   - **Role attribute**

     LDAP attribute that identifies the user's fit within the specified group. Default is `memberOf`.

   - **Mail attribute**

     LDAP attribute that identifies the user's email address. Default is `mail`. This is useful if you want to subscribe to reports available from OnCommand Insight. Insight picks up the user's email address the first time each user logs in and does not look for it after that.

     If the user's email address changes on the LDAP server, be sure to update it in Insight.

   - **Distinguished name attribute**

     LDAP attribute that identifies the user's distinguished name. default is `distinguishedName`.

   - **Referral**

     Indicates whether to follow the path to other domains if there are multiple domains in the enterprise. You must always use the default `follow` setting.

   - **Timeout**

     Length of time to wait for a response from the LDAP server before timing out, in milliseconds. default is 2,000, which is adequate in all cases and should not be modified.

   - **LDAP servers**

     This is the IP address or DNS name to identify the LDAP server. To identify a specific port, where `ldap-server-address` is the name of the LDAP server, you can use the following format:

```
ldap://ldap-server-address:port
```

To use the default port, you can use the following format:

```
ldap://ldap-server-address
```

> When entering multiple LDAP servers in this field, separate entries with a comma, and ensure that the correct port number is used in each entry.

+ To import the LDAP certificates, click **Import Certificates** and automatically import or manually locate the certificate files.

- **Domain**

  LDAP node where OnCommand Insight should start looking for the LDAP user. Typically this is the top-level domain for the organization. For example:

  ```
  DC=<enterprise>,DC=com
  ```

- **Insight server admins group**

  LDAP group for users with Insight Server Administrator privileges. Default is `insight.server.admins`.

- **Insight administrators group**

  LDAP group for users with Insight Administrator privileges. Default is `insight.admins`.

- **Insight users group**

  LDAP group for users with Insight User privileges. Default is `insight.users`.

- **Insight guests group**

  LDAP group for users with Insight Guest privileges. Default is `insight.guests`.

- **Reporting administrators group**

  LDAP group for users with Insight Reporting administrator privileges. Default is `insight.report.admins`.

- **Reporting pro authors group**

  LDAP group for users with Insight Reporting pro authors privileges. Default is `insight.report.proauthors`.

- **Reporting business authors group**

  LDAP group for users with Insight Reporting business authors privileges. Default is `insight.report.business.authors`.

- **Reporting business consumers group**

  LDAP group for users with Insight Reporting business consumers privileges. Default is `insight.report.business.consumers`.

- **Reporting recipients group**

  LDAP group for users with Insight Reporting recipient privileges. Default is `insight.report.recipients`.

6. Enter values in the **Directory lookup user** and **Directory lookup user password** fields if you made any changes.

   If you do not enter the revised values in these fields, your changes are not saved.

7. Retype the directory lookup user password in the **Confirm directory lookup user password** field, and click **Validate Password** to validate the password on the server.
8. Click **Update** to save the changes. Click **Cancel** to remove changes.

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