

STATEWIDE MANAGEMENT, ACCOUNTING AND REPORTING TOOL



STATEWIDE HUMAN RESOURCE AND PAYROLL SYSTEM

Data Warehouse –
Security Guide for Power Users
(Lesson 8: RP301 Course)

State of Kansas

Lesson 8: Managing Security

Objectives

Upon completion of this lesson, you will be able to:

- Manage security for a folder
- Manage security for a request
- Manage security for a dashboard

Topic 1: Managing Security Overview

- Permissions control access to shared information in the data warehouse. This includes access to items including, shared folders, requests, and dashboards.
- The data warehouse has five permissions used to provide and restrict access

Permission Level	Description
Change/Delete	Gives access to view, make changes to, or delete the content
Full Control	Gives access to view, make changes, or delete the content, set permissions, and delete the item, folder, or dashboard.
No Access	Access is not allowed for this user or group. Note: Explicitly denying access takes priority over any other permission.
Read	Gives access to view the contents of the item, folder, or dashboard without allowing access to make any changes

Table 1. Data Warehouse Permission Levels

Participant Notes:



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- Permissions are assigned by group or by individual user
- Each agency has four default groups for assigning permissions

User Group	Description
SHARP_USER_XXX	This group includes all end-users assigned the HR User role, where “XXX” represents the agency’s three digit number
SMART_USER_XXX	This group includes all end-users assigned the Finance User role, where “XXX” represents the agency’s three digit number
SHARP_POWER_USER_XXX	This group includes all end-users assigned the HR Power User role, where “XXX” represents the agency’s three digit number
SMART_POWER_USER_XXX	This group includes all end-users assigned the Finance User role, where “XXX” represents the agency’s three digit number

Table 2. Data Warehouse Default User Groups

Participant Notes:

Topic 2: Managing Folder Security

- To modify security for a folder:
 1. Navigate to **Answers > Catalog > Manage Catalog**
 2. Click the **Permissions** button for the desired folder

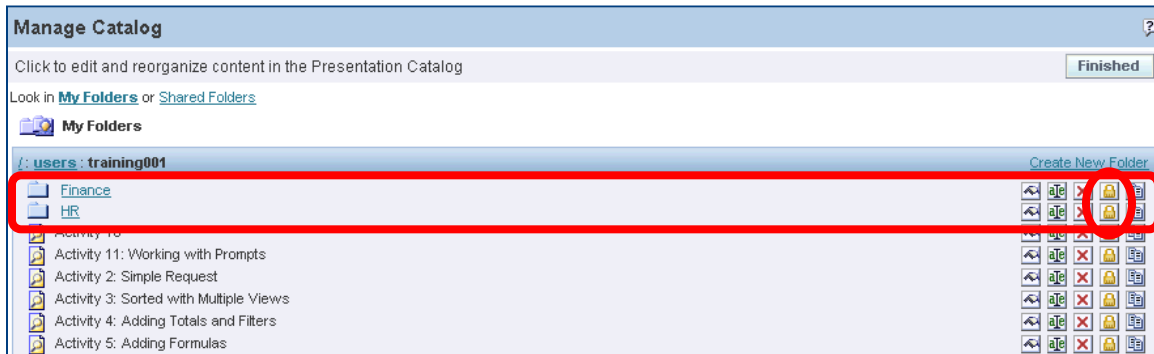


Figure 1. Manage Catalog Page - Folder Permissions

3. Use the **Change Permissions** page to add, change, or delete access for users and groups
4. Click the **Finished** button

Participant Notes:

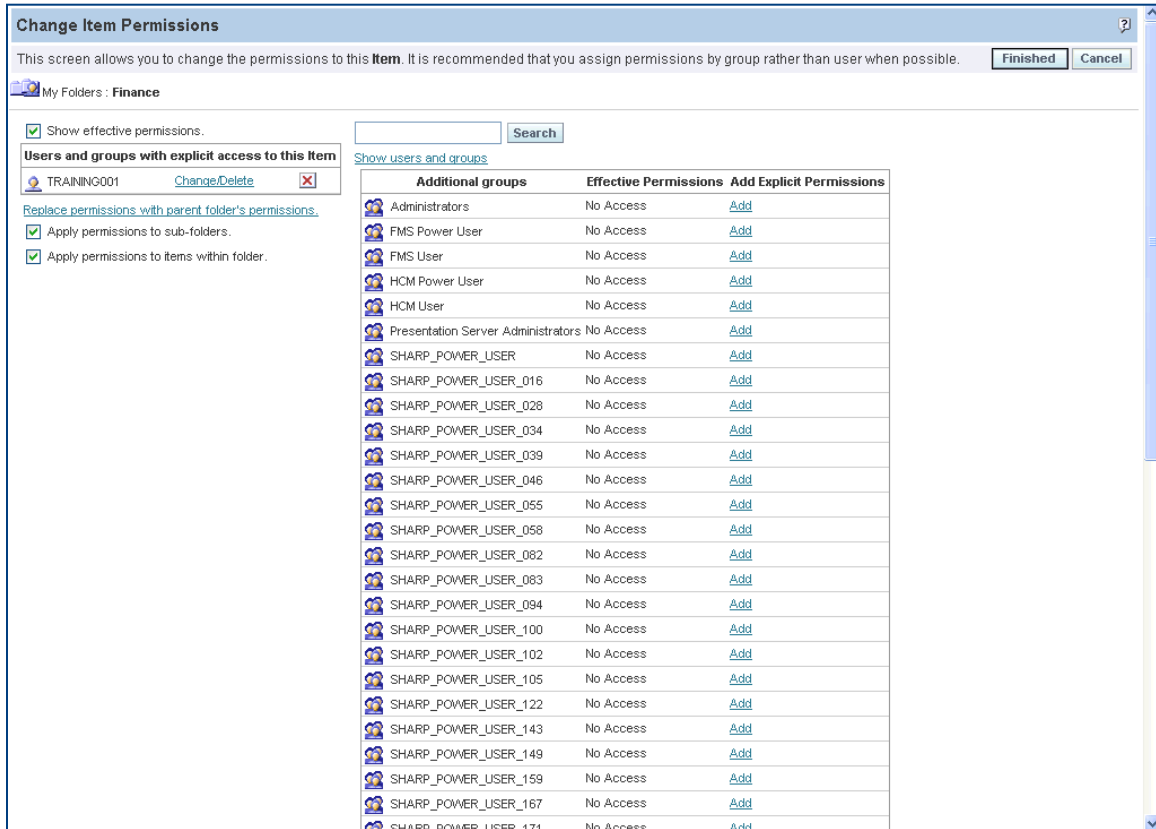


Figure 2. Change Item Permissions Page

Field	Description
Show effective permissions checkbox	Used to show inherited (effective) permissions in the Additional groups column of the Add Explicit Permissions table

Participant Notes:

Field	Description
Users and groups with explicit access to this Item table	Table used to list the users and groups with access to the item. <ul style="list-style-type: none"> Click the hyperlink next to the user or group name to change the permissions for this item Click the “X” button to delete the user’s or group’s permission for this item
Search	Used to look for users or groups by name in the Add Explicit Permissions table below it
Add Explicit Permissions table	Used to select users and groups to give permission to an item. Click the Add link next to a user or group name to add them to the Users and groups with explicit access to this Item table

Table 3. Change Item Permissions Page Fields

- NOTE:** If a sub folder does not have any reports saved inside of it, the folder will NOT be visible from Answers. Once a report is saved to the folder, then it will be visible.

Topic 3: Managing Request Security

- To modify security for a request:
 1. Navigate to **Answers > Catalog > Manage Catalog**
 2. Click the **Permissions** button for the desired request

Participant Notes:

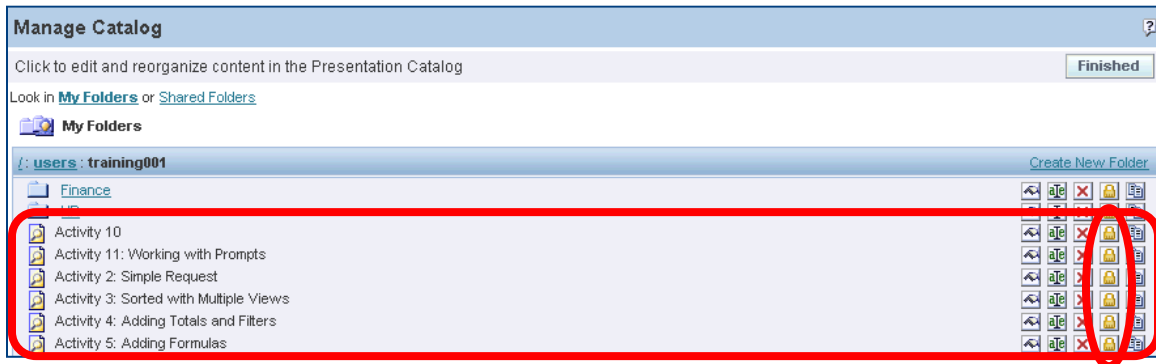


Figure 3. Manage Catalog Page - Request Permissions

3. Use the **Change Permissions** page to add, change, or delete access for users and groups
4. Click the **Finished** button

Note: This is the same page used to manage folder security.

Topic 4: Creating a New, Shared Dashboard

- Within an Agency folder, dashboards can be created by the Agency's Power User and can be shared within the Agency to other groups or people across the organization.
 1. Navigate to **Settings>Administration>Manage Interactive Dashboards**
 2. Click the **Create Dashboard** button
 3. Enter a location and name for the dashboard, and the user ID of the person developing the dashboard. Be sure to enter your own User ID if you are the developer!
 4. Click the **Finished** button

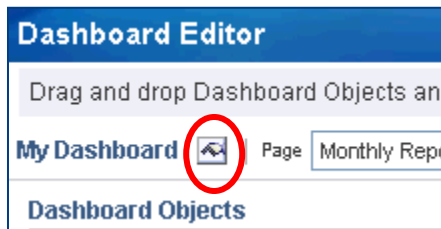
NOTE: Newly-created dashboards contain one blank page. Dashboards that contain only one page do not display the page name as a tab at the top of the

Participant Notes:

dashboard. Dashboard page names appear at the top of a dashboard only when the dashboard contains multiple pages.

Topic 5: Managing Shared Dashboard/Filter/Prompt Security

- The Dashboard folder is automatically created by the system when the Agency's Power User creates a new Interactive Dashboard. The folder where the dashboard is saved is named '_portal'.
- For example, if the Dept of Administration creates a shared dashboard, then it will be created under the folder below and the Agency Power User will grant it access. (/Shared Folders/Department of Administration – 173/_portal)
- To manage the security for a dashboard:
 1. Navigate to **Dashboards > Page Options > Edit Dashboard**
 2. Click the **Dashboard Properties** button




3. Under **Dashboard Pages** section, click the **Page Security** button for the desired dashboard page

Participant Notes:

Dashboard Properties

Set properties for the Dashboard. Delete, rename, and reorder Dashboard pages.

General Properties

























 **My Dashboard**

Style: Default (oracle10) ▾

Description:

Dashboard Pages

Clicking Cancel does not undo operations in this section.

Pages	Hide Page	Operations	Reorder
 Monthly Report 2	<input type="checkbox"/>	  	▾
 Activity 13	<input type="checkbox"/>	  	▴ ▾
 Cindy	<input type="checkbox"/>	  	▴ ▾
 Training	<input type="checkbox"/>	  	▴ ▾
 My Content	<input type="checkbox"/>	  	▴ ▾
 Prompt Testing	<input type="checkbox"/>	  	▴

4. Use the **Dashboard Properties** page to add, change, or delete access for users and groups

- If the Power User creates shared prompts or filters, they will be stored under the following folders, using Dept of Administration as an example:
 - /Shared Folders/Department of Administration – 173/_prompt
 - /Shared Folders/Department of Administration – 173/_filter

Participant Notes:

Lesson Review

In this lesson, you learned how to:

- Manage security for a folder
- Manage security for a request
- Manage security for a dashboard

Participant Notes: