

Checklist for Creating New Actuate User Accounts

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About the Author

Chris Geiss is an independent consultant and software developer with 17 years of software development and IT industry experience. He has been working with the Actuate reporting products for over 4 years and specializes in consulting, development, training and mentoring services for the Actuate e.Reporting Suite. Chris can be contacted at chris_geiss@yahoo.com. See his web site at <http://www.chrisgeiss.com>.

The Mailing List and How to Report Errors and Omissions

If you find any errors or omissions in this document, or have any suggestions, please email them to chris_geiss@yahoo.com so I can update this document accordingly. Also, if you email your contact information to me, I will include you on the mailing list for future updates to this document.

Do You Have Suggestions for a New Article?

If there is a particular Actuate related topic that you would like more information on, please email me and let me know. If the topic seems of interest to the general Actuate developer and user communities, I may base a future article on it.

Introduction

This document outlines the steps that I follow when creating new Actuate user accounts using Administrator Desktop. You can use these steps as a checklist to make sure that you are making all the user settings that are appropriate for your Actuate environment. Note, this article only applies to user accounts that are managed using Actuate's built-in security database. It does not apply to user accounts that are maintained in a separate security database using the Open Security feature.

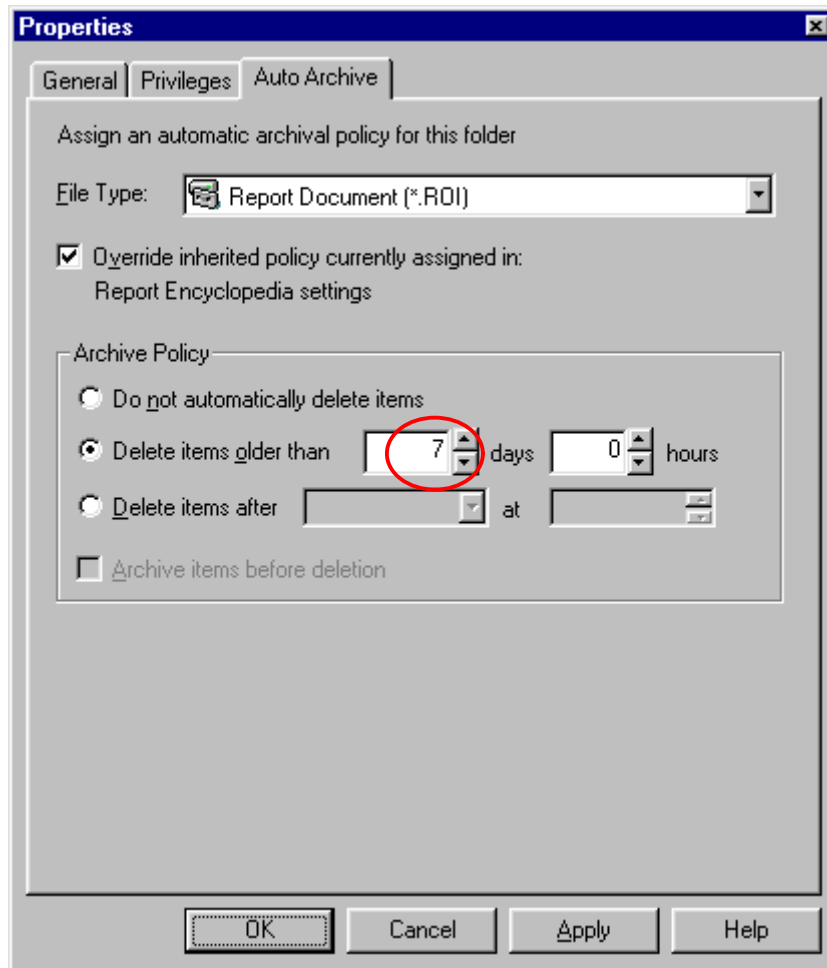
STEP 1 - Make Sure you have Folders to hold the "Personal Folders"

A "personal folder" is a folder that is assigned to a user for their exclusive use. If the user has a personal folder assigned to them, that folder becomes the default destination for the report documents that they generate. I usually create a folder off the Report Encyclopedia root named "Personal Folders." If you have a lot of users (over 100), it is a good idea to create subfolders under this root folder to break up the entire set of personal folders into separate groups. This helps to improve Report Server performance when accessing the folder contents. These subfolders can be named using lots of different schemes:

- Organizational department
 - "Sales"
 - "Marketing"
 - "Manufacturing"
 - etc.
- User classification
 - "Employees"
 - "Business Partners"
 - "Consultants"
 - etc.
- Alphabetical
 - "A-F"
 - "G-L"
 - "M-R"
 - "S-Z"
- Etc.

STEP 2 - Set Appropriate Deletion Policies for the Personal Folders

Users are often not disciplined about deleting report documents that they no longer need. Even if they are good about deleting old documents, the standard ReportCast templates only allow one document to be deleted at a time, which can be very cumbersome for the user. As a result of these two issues, report documents often accumulate very quickly in the Report Encyclopedia and start to eat up your available disk space. To avoid this problem, it is a good idea to set deletion policies for your users' personal folders. Since a folder inherits the deletion policies set for its enclosing folders, I usually set the primary deletion policy on the "Personal Folders" folder that I create in the Report Encyclopedia root. Right click on the folder and select "Properties..." from the context menu to bring up the "Properties" dialog box. Select the "Auto Archive" tab to set the deletion policies.



I usually set a policy to delete Report Documents (.roi files) after 7 days. Set this time period (document age) so that it is appropriate for the majority of your users. You can then override this policy in subfolders to customize this setting for particular users. For example, some users may require that their documents be kept around for 30 days.

STEP 3 - Make Sure you have Created Appropriate Roles

It is much easier to manage the user permissions for Report Encyclopedia objects if you create and make use of security Roles. This can be done after you create new user accounts, but your life will be much easier if you give some thought ahead of time to the roles you will need, and then create them before you start creating user accounts. See pp. 21-25 in “Administering the Report Encyclopedia” (Actuate 5.0 SP1) for suggestions on how to organize your security Roles. When you assign permissions for Report Encyclopedia objects, use the roles you have created instead of individual user accounts. You can then easily give users access to the appropriate objects by assigning them to the corresponding Roles.

STEP 4 - New User Settings

When you create new user accounts, be sure to make the settings outlined in this section.

Step 4a

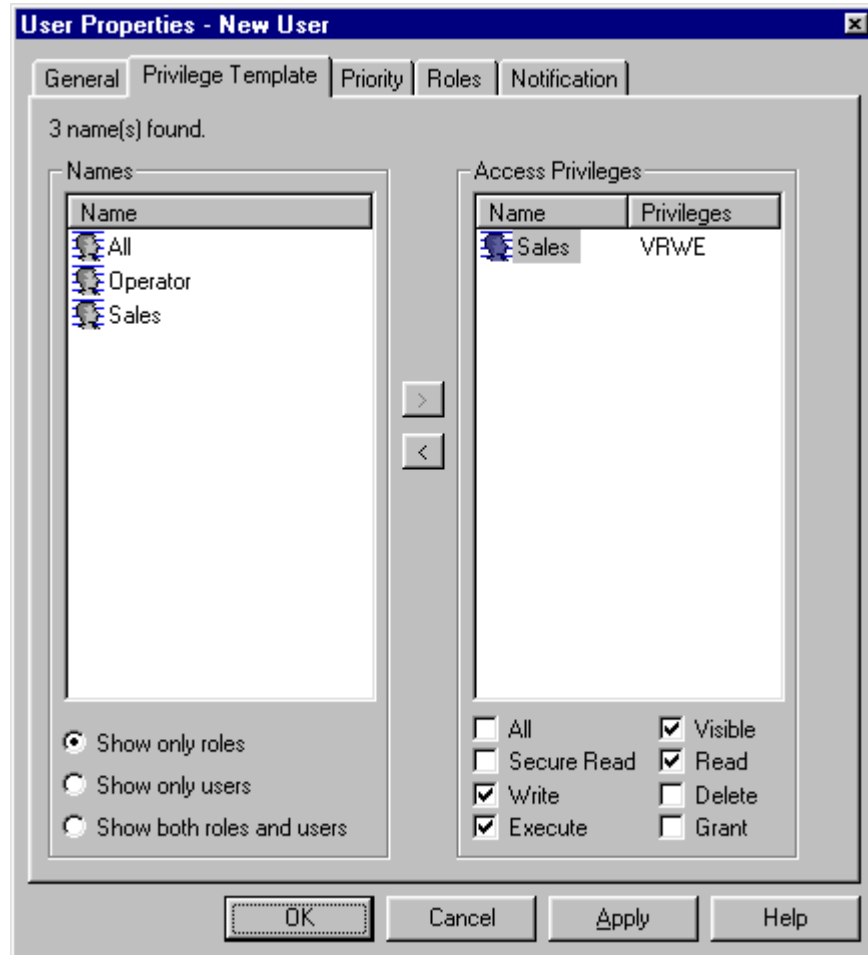
The screen shot below shows that the User name, Password and Personal folder have been set. Locate the user’s personal folder in the appropriate subfolder and use the new user’s “User name” as the name for their personal folder.

The screenshot shows the 'User Properties - New User' dialog box. The 'User name' field is set to 'new_user' and is circled in red. The 'Personal folder' field is set to '/Personal Folders/Clients/new_user' and is also circled in red. A double-headed arrow connects the two circles. The dialog has tabs for 'General', 'Privilege Template', 'Priority', 'Roles', and 'Notification'. At the bottom are buttons for 'OK', 'Cancel', 'Apply', and 'Help'.

If the personal folder you specify does not already exist, Actuate will create it for you and give the user full privileges to it. Provide an email address for the user if completion notices are being sent by email.

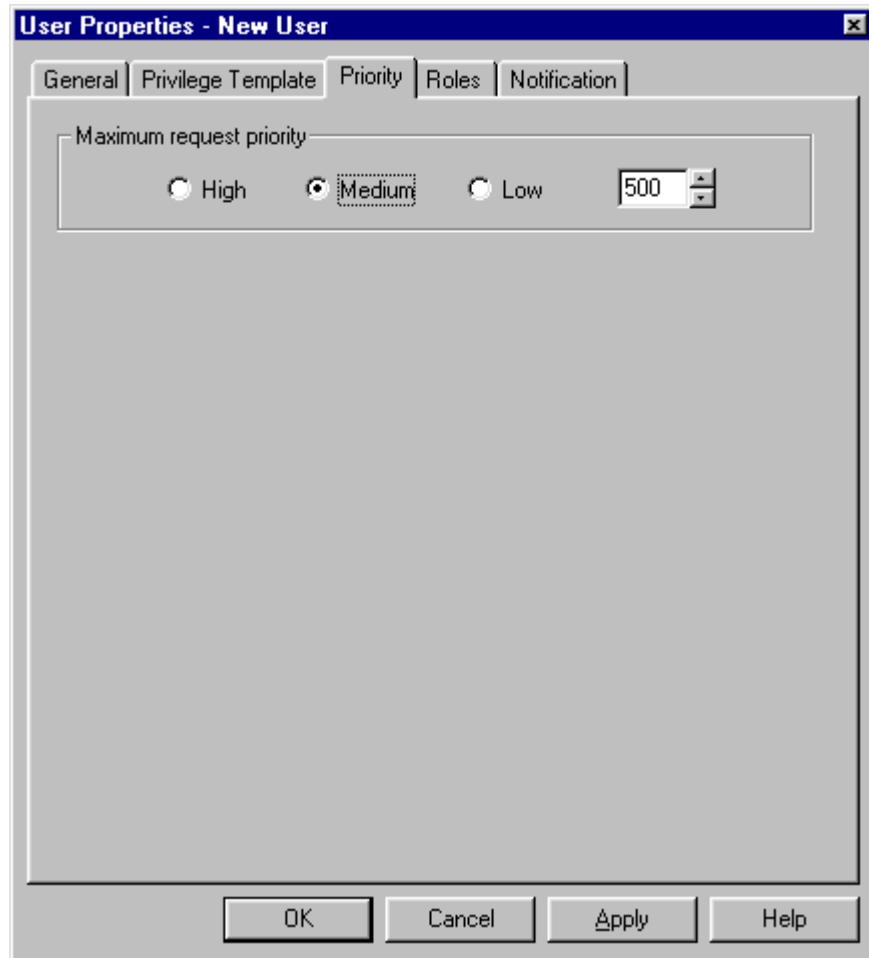
Step 4b

Use the “Privilege Template” tab to specify the privileges that other users and roles should receive for the objects created by this user. Note, that these privileges will apply to ALL objects that are created by this user. Under most circumstances, you do not need to specify any privilege template settings for the user.



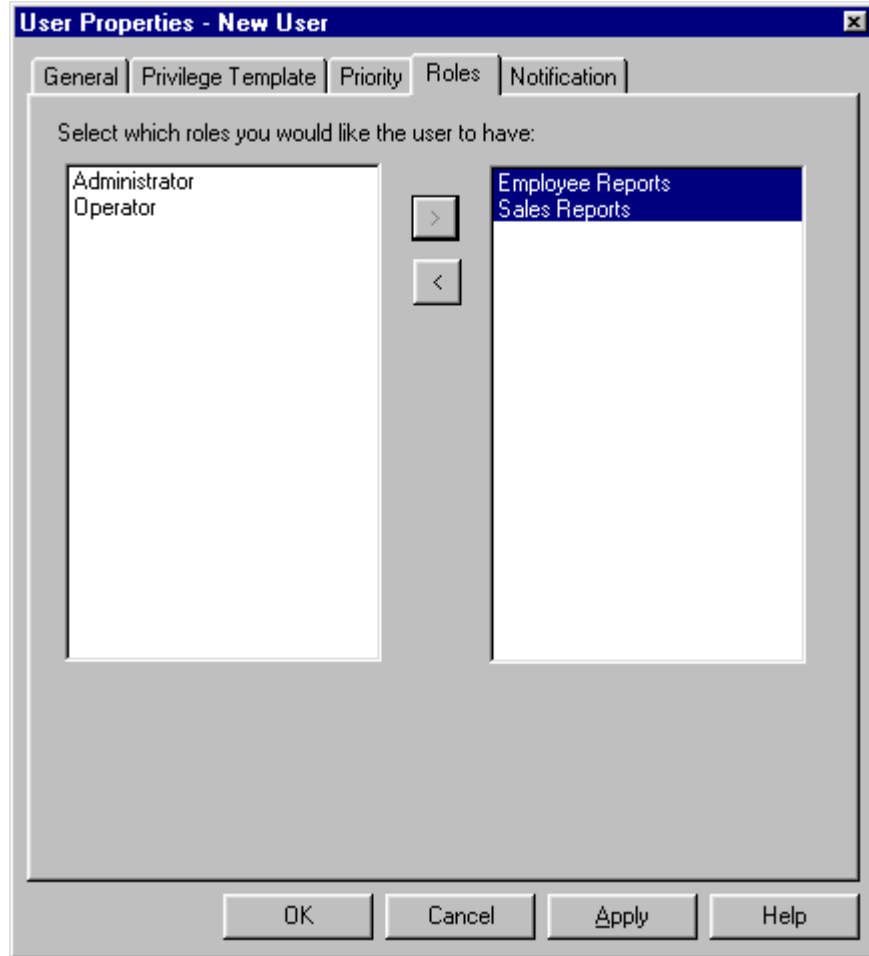
Step 4c

Use the “Priority” tab to specify the “Maximum request priority” setting for the user. Under most circumstances, you can leave the default setting.



Step 4d

Use the “Roles” tab to assign the appropriate roles to the user. As a general rule, you should grant object privileges to Roles, and then assign users to the appropriate Roles to give them the desired access to Report Encyclopedia objects.



Step 4e

Use the “Notification” tab to make the appropriate request notice settings for the user. If you are setting up the user account to receive notifications for successful and/or failed requests, make sure to set a reasonable policy for deleting their notices. 2 days usually allows sufficient time for the user to refer back to completed jobs, but also prevents having large numbers of completion notices accumulate in the Report Encyclopedia.

The screenshot shows the 'User Properties - New User' dialog box with the 'Notification' tab selected. The dialog is divided into two main sections: 'For Requests That Succeed' and 'For Requests That Fail'. In the 'For Requests That Succeed' section, the 'Generate completed request notice' checkbox is checked, and the 'Automatically delete notification after' radio button is selected with a value of 2 days and 0 hours. The number '2' is circled in red. In the 'For Requests That Fail' section, the 'Generate completed request notice' checkbox is checked, and the 'Automatically delete notification after' radio button is selected with a value of 2 days and 0 hours. The number '2' is also circled in red. At the bottom of the dialog are buttons for 'OK', 'Cancel', 'Apply', and 'Help'.

Quick Overview/Checklist

Here is a quick overview of the steps to follow when creating a new user account. This is a simple summary of the steps covered above and serves as a convenient checklist:

- Create user account
- Assign a personal folder for the user
- Set the privilege template for the user if applicable
- Change default priority setting if appropriate
- Assign the user to the appropriate roles
- Enable/disable completion notices for the user as appropriate; provide email address if completion notices are being sent by email
- If completion notices are enabled, set an appropriate deletion policy
- Adjust the deletion policy for the user's personal folder if appropriate
- Give the user privileges to any additional folders or objects as appropriate (this should be done through roles whenever possible)

Automating User Account Creation

It is worth mentioning that there are a couple of techniques for automatically generating user accounts in the Report Encyclopedia. A detailed discussion of these techniques is beyond the scope of this article, but they are all listed here so you can research them further.

- Use the egclient sample application that ships with the Actuate SDK in batch files or command scripts. Egclient demonstrates how to use the Report Server API (RSAPI) to build custom applications that manage the Report Encyclopedia. Even though it is a sample application, it is also a useful utility. Egclient is documented on pages 12-19 of “Integrating Actuate e.Reporting Server” (Actuate 5 SP1).
- Use the Acpimprt command line utility to load user account definitions from a text file. This utility is documented on pages 138-146 of the “e.Reporting Server Guide” (Actuate 5 SP1).
- Build a custom RSAPI application. See the “Integrating Actuate e.Reporting Server” manual for details.