Securing Your Package in the Information Warehouse

As a package custodian, you have the ability to manage access to your own individual package, but only in the production instance of the Information Warehouse. To control access to your package, use the **Automated Cognos Security Form**, which is a Cognos Report.

Logging On

To log onto the Information Warehouse

1. Start your browser and enter the following URL in the address bar: **www.princeton.edu/iw**.

2. Click on **Enter the Information Warehouse (IW)**.

3. Enter your LDAP userid and password.

4. If the Cognos 8 Welcome page is displayed, click on the My home link to display the Public Folders tab.

Using the Automated Cognos Security Form

1. In the Information Warehouse, navigate to **Public Folders > Package Access - Reports > AUTOMATED Cognos Security Form**.

2. Click on AUTOMATED Cognos Security Form. The first prompt page is displayed.

3. Search for a person by their LDAP ID:

   a) Enter the person's ID, or their first and last name. If necessary, click the Options link to change the search criteria.

   b) Click [Search]. Any LDAP IDs that match your criteria will be listed in the results box.

   c) Locate the name you want, and click on it to select it.

   d) Click [Insert] to move the name into the Choices box.

4. You can repeat the search if you need to set the same security for additional people.

Select the person in the results list

Click Insert to add the person to the Choices box

5. When you have selected all the names, click [Next to Prompt Page 2] to continue to the next prompt page. The selected IDs will appear in the upper left corner of prompt page 2.

6. If you need to see the packages to which these people already have access, click the What Access do these IDs already have? link.

Click to see their current access

This opens a new window displaying a report that includes a page for each user, showing all the packages to which the person has access, with the type of access they have. If the person also has access to a secured folder, that will be displayed on the right.

To close the report and return to the form, simply close the window.

7. Select the package to which you want to grant access from the **2. Select one Package** drop-down list. Only packages for which you are a custodian will appear in this list.

Click to see who already has access

Tip! To see who already has access to the package, click the Current *packagename* Package Members link below the package field. The report opens in a new window, which you can close when you're done.

8. Select the type of access you want to allow from the **3. Select a Capability** drop-down list:

Report Viewer	Can only view reports; cannot write reports.
Query Studio	Can view reports and use the Query Studio report writing tool.
Report Studio	Can view reports, use the Query Studio report writing tool, and the advanced report writing tool, Report Studio.
Package Custodian	Can view reports, use Query Studio and Report Studio, and can edit all objects, reports, and secured folders within the package.

Select the type of access in the *Select a Capability* field

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9. If your package includes secured folders, you may assign access to the secured folders on this page.

> **Note:** When assigning Package Custodian access, you do not need to assign access to secured folders, as that comes automatically with the Package Custodian access.

a) Click on the **4. Click here to select a Secured Folder(s) OPTIONAL** field. If your package contains secured folders, they will be listed, with a checkbox in front of each folder.

Click the checkbox to allow access
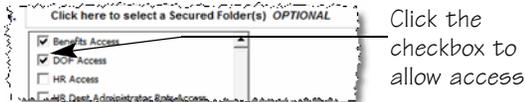
b) Click the checkbox in front of each folder to which you want to grant access.

Remember: You are assigning this access to all IDs listed at the top of the page.

Tip! If the package does not include secured folders, when you click the **4. Click here to select a Secured Folder(s) OPTIONAL** *field, a message is displayed below the field indicating that there are no secured folders for the package.*

This package has no secured folders

10. Select an action in the **5. Select one Action** field:

Add — Grants access to the package and any selected secured folders.

Tip! Adding people who already have access to the package will not affect anything.

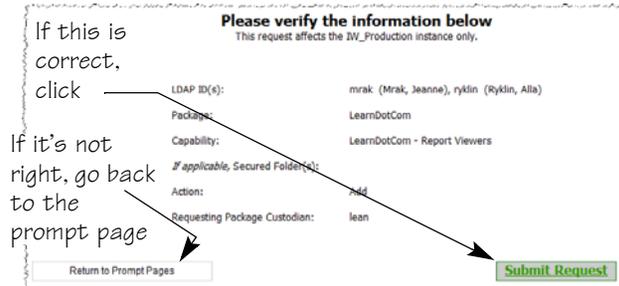**Revoke** — Removes access to the package and any selected secured folders.

Tip! Revoking people who are not members of the package will not affect anything.

Select Add or Revoke

11. Click the Next button.

12. On the report page, verify that the information is correct.

If this is correct, click

If it's not right, go back to the prompt page

- If the information displayed is not correct, you can go back to the prompt pages to change your selections. Click the Return to Prompt Pages button.

- If the information is correct, submit the request for access by clicking the Submit Request button. The following message is displayed as a report:

To add access for other IDs, click the Return to the Form link

To select another report, click Return to Public Folders

As the message indicates, the request for access will be processed the same night, and the specified IDs will have the requested Cognos security access the next day.

You can return to the form to process additional IDs with different access requirements, or return to Public Folders if you want to run another Information Warehouse report. If you are finished, click the Log Off link before closing your browser.

Important Notes!

- Package custodians can manage security only for their own packages, and only in the production instance of the Information Warehouse.
- A person's LDAP ID must be active to appear in this report.
- Each submitted security request requires overnight processing to be completed. The IDs will have the requested access the next day.
- Package custodians have complete access to all reports and secured folders.