



# Cizer.Net Reporting

Version 4.0  
Enterprise Edition

## System Administrator's Guide



## **PUBLISHED BY**

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## 1 Introduction

As the administrator of Cizer.Net Reporting 4.0 Enterprise Edition, not only is an understanding of the Company Administrator role required, but more importantly, being familiar with the system rules and following the good practices outlined in the following chapters.

This document details the specific responsibilities of the System Admin, a role that exists only in Enterprise installations. Company Administrators follow the same role as an admin in Standard installations, with a few exceptions. Please refer to the Cizer.Net Reporting 4.0 Admin Guide for information on installation and Company / Standard Administrator roles.

## 2 Getting Started

### 2.1 Basic Responsibilities

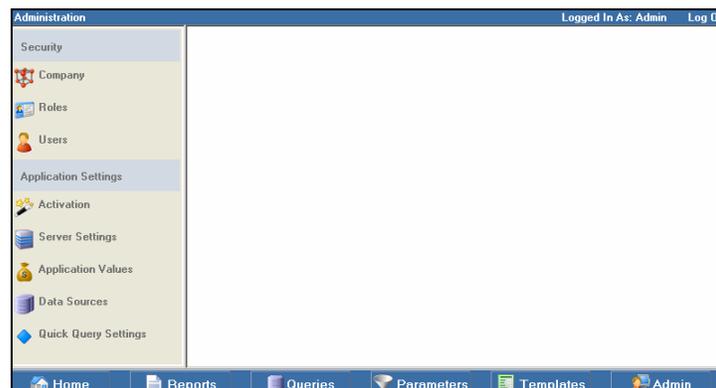
In a hosted environment the top level administrator is called the System Admin. There is only one System Admin per installation. This administrator has complete access to, and control of, the Cizer.Net application. The basic responsibilities for this administrator are:

- 1) Creating Companies
- 2) Creating Company Administrators
- 3) Creating Global Data Sources
- 4) Creating and/or sharing reports that use Global Data Sources

### 2.2 Open the Administrator Interface

To Open the Cizer.Net Reporting application, follow these steps:

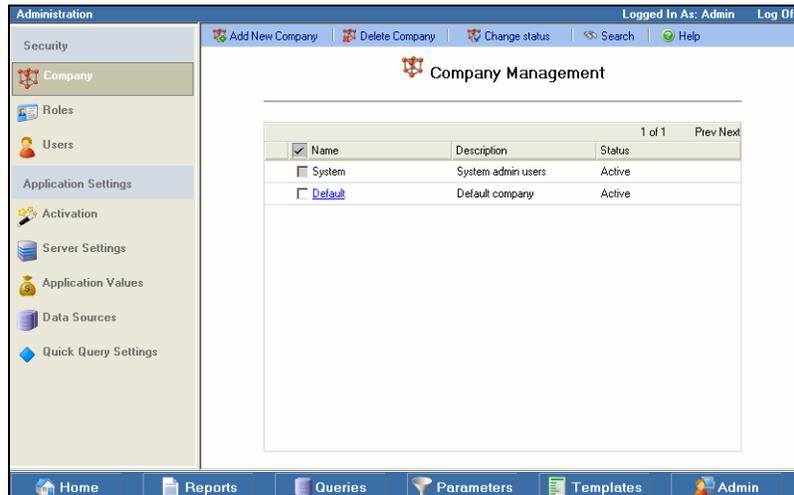
1. Open Internet Explorer.
2. Enter the URL as the machine name/CNR or the Virtual Directory Name you specified during install (ex. [http://machine\\_name/CNR](http://machine_name/CNR)) and press Enter.
3. Enter "Admin" (password is case sensitive) for both User ID and Password. You will be asked to change the password when you log in for the first time.
4. Once you login, you will see the "Home" page, Cizer.Net's Portal interface. Access the Administrative interface by selecting "Admin" under "Settings" in the control panel on the left. From the Admin interface (pictured below), you can access the Global Libraries from the bottom menu bar, as well as return to the Portal page by selecting "Home".



## 3 Company Management



The Company Management screen is available by clicking on the “Company” link in the Administration panel on the left.



A default company is created upon installation of the Cizer.Net application. During the installation, a name can be entered, otherwise the company is called “Default”. You can change the name and description of any company by clicking on the company name and editing the existing information in the text boxes.

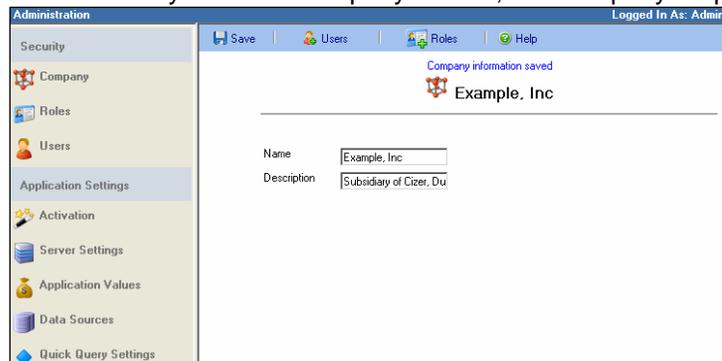
The hosting company will need to have a Company created for its use of Cizer.Net. Typically, the default company belongs to the host. The System Admin can also be the hosting company’s Company Administrator; however, it may be more effective to assign another employee or employees to be the Company level administrator to prevent confusion of what is permitted at the different administrative levels.

If the application is installed as part of an upgrade to a previous Standard version, all users, roles and items that belonged to the previous version are automatically loaded into the default company.

### 3.1 Creating a Company

Click on the “Add New Company” link in the top toolbar. The New Company screen displays text boxes to enter a name and description for the new company. After entering the information, click “Save”. The “Users” and “Roles” links now appear in the top toolbar. Clicking on either of these opens their management screens, also accessible from the Administration panel on the left. When selecting either of these management screens directly from the Company toolbar, the Company drop-down menu will automatically select the appropriate company.

*Note: If your company names consist of Region, Branch or Division numbers, a zero should be placed in front of single digits in order for the companies to sort in a correct numerical order when they appear in the company list on the Company Management screen.*



### **3.2 Change a Company's Status**

Companies may be deactivated indefinitely by selecting the checkbox next to the company and then clicking the "Change Status" link in the top toolbar. The Status column will read "Disabled" for those companies that have been deactivated. Users that belong to a deactivated company will receive a "Company Disabled" error message when attempting to logon. Use the same process described above to reactivate a company.

### **3.3 Delete a Company**

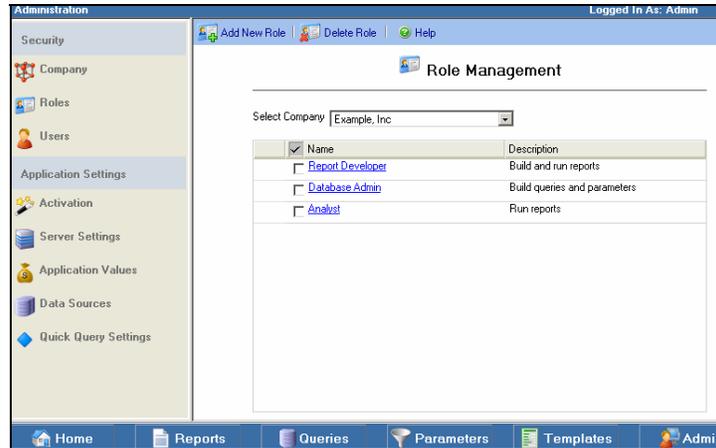
A company may be deleted once all users belonging to it have been removed. Select the checkbox next to the company you wish to delete and click the "Delete Company" link in the top toolbar.

## 4 Role Management



Open the Role Management screen by clicking on the “Roles” link in the Administration panel on the left.

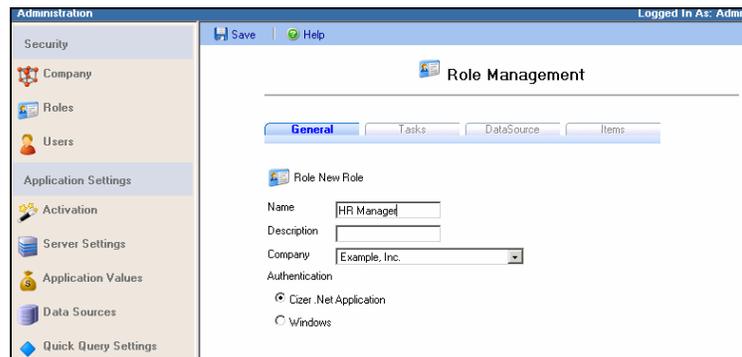
Three roles are provided for each company as the basic default roles; Report Developer, Database Admin and Analyst. Click on each role to view the rights assigned to each.



### 4.1 Creating Roles

Select the “Add New Role” link from the top toolbar. Enter the role name and other necessary details of the General tab. Each new role created must be assigned to a single company; they cannot belong to multiple companies. Click “Save”. After saving the new role, the Tasks, DataSource and Items tabs become available. Follow the instructions for configuring and editing roles as detailed in the Cizer.Net Admin Guide.

Company Administrators are able to view, edit and delete all roles listed in their Role Management screen, including roles created by the System Admin. The Company Administrator role cannot be edited or deleted and is therefore only accessible when assigning roles to users.



### 4.2 Deleting Roles

Roles may be deleted by selecting the checkbox next to the appropriate Role and clicking the “Delete Role” link in the top toolbar.

### 4.3 System Roles

There are five System Roles that cannot be edited or deleted; therefore they are not viewable in the Role Management screen; System Admin, System Users, Company Administrators, Company Everyone and Global Everyone.

System Roles	
<b>System Admin:</b>	Belongs to the "Admin" logon ID, granting complete access to, and control of, the Cizer.Net application. There is only one System Admin per installation.
<b>System Users:</b>	A User may be added to the System through the User Management screen. A System User is limited to Administrative tasks such as managing users, roles, data sources, server settings and application settings, but does not have access to Company folders or reporting components.
<b>Company Administrators:</b>	A User within a company can be assigned the Company Administrator role by either the System Admin or another Company Administrator. Company Administrators manage their company's Users, Roles and Data Sources. They do not have access to other Companies. By default, a Company Administrator can view all of their Company's User folders and items contained in them, unless the User sets their folder or item permissions denying access to the Company Administrator. While the Company Administrator Role automatically grants rights to all Tasks and Data Sources, it does not grant rights to any Items. A User belonging to the Company Administrator role will need to belong to another role that has rights to Data Sources and Items in order to build or edit queries, parameters or reports.
<b>Company Everyone:</b>	Exists at the "Permissions" level of items and folders. Selecting Company Everyone from the Roles menu grants the chosen rights to all users within that particular company to which the item or folder belongs.
<b>Global Everyone:</b>	Exists at the "Permissions" level of items and folders. Selecting Global Everyone from the Roles menu grants the chosen rights to all users in all companies.

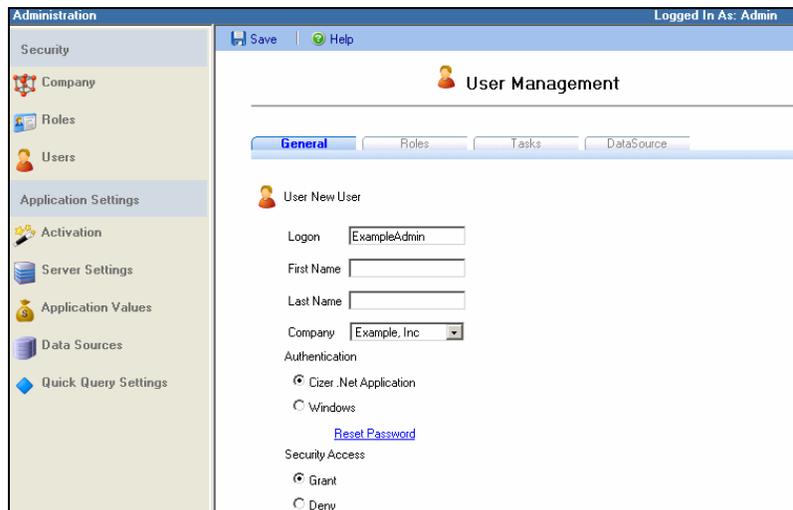
## 5 User Management



As a System Admin, the process of managing users is the same as if you are a Company Admin or Standard Admin (see Cizer.Net Admin Guide). The only exception is the need to assign the user to a company or to the System. A user cannot belong to the System and a Company, nor can they be assigned to multiple companies. You must save the new user before you will be able to assign it any roles.

### 5.1 Adding and Editing a User

In general, the only user a System Admin should add to a company is the Company Admin. After creating a Company Admin, notify them of their logon information. Remember that the password is the same as the logon ID; the Company Admin will be prompted to change the password after their first successful logon. The Company Admin should then have the primary responsibility of adding and managing the rest of their company's user accounts. A Company Admin has access to all users that belong to his or her company and no other.



### 5.2 Creating a System User

While there is only one System Admin role, another user may be granted Admin rights to assist the System Admin with tasks such as adding and managing Users and Application Settings. However, the Admin rights for additional users do not allow access to the Company folders. This prevents anyone other than the System Admin from being able to view companies' reports and sensitive data.

## 6 Data Sources

The System Admin has access to all Application Settings while Company Administrators have access only to the Data Sources and Quick Query Settings that apply to their specific company. Please refer to the Admin User Guide for information about all Application Settings other than Data Sources.

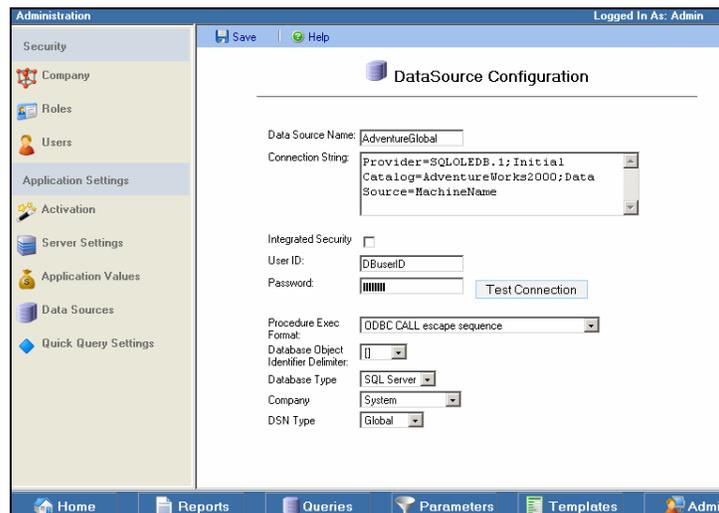


Three types of data sources are utilized in the Enterprise edition of Cizer.Net Reporting:

### 6.1 Global Data Sources

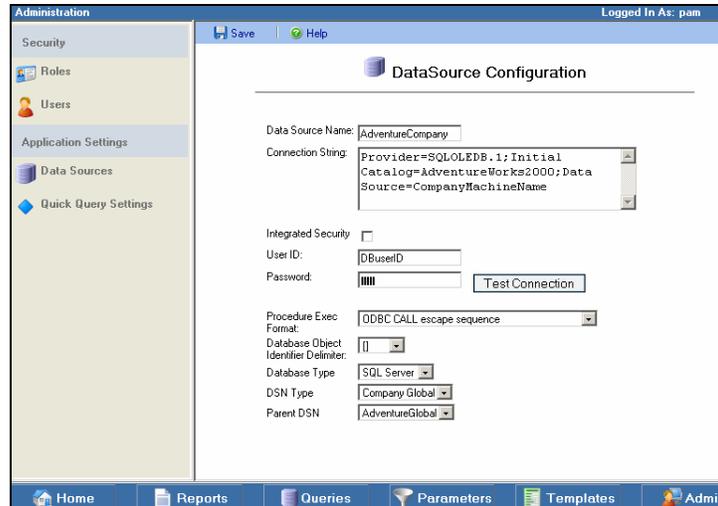
Global Data Sources are created for sharing reports across companies, as long as the companies all have the same database schema. If one or more companies do not use the same database schema, the permissions of the shared report should exclude those companies.

To add a Global Data Source, enter the appropriate information in the text boxes of the “Data Source Configuration” screen. “System” must be selected as the Company, and “Global” as the DSN Type. The data source should bear an obvious name, making it easy for the Company Admins to know which of their databases to connect this data source to. Refer to the Cizer.Net Admin Guide for more information on the Data Source Configuration screen.



## 6.2 Company Global Data Sources

When a report has been shared across Companies, the Company Admin must create a data source that points to the Global Data Source in order to run the report. A System Admin or a Company Admin may create a Company Global Data Source by choosing “Company Global” as the DSN Type. Once selected, the Parent DSN drop down box appears with a list of Global Data Sources created by the System Admin. Choose the correct Global Data Source and click “Save”.



## 6.3 Company Data Sources

A Company Data Source is a standard data source connection between a company’s report and the company’s database. A user must be assigned to a role that has rights to the data source.

## 7 Sharing Reports and other Items with Global Data Sources

In our fast-paced world of continuously changing data, it is especially important for large organizations to utilize standardized reports. Standardized reporting ensures a common set of data representation and terminology.

With the Enterprise edition of Cizer.Net Reporting 4.0, a standardized report as well as the queries and parameters attached to it are created and shared through the Global Folder or its sub-folders. Permissions must be granted to the folder(s) in order for Company Roles to gain access to the items stored in them. Because they are utilized by multiple companies, rights to these items are restricted to Read Only. Securely sharing queries, parameters and reports in this fashion is possible by using Global and Company Global Data Sources.

As an example, assume you are the System Admin for a banking organization with five hundred branches. Each branch has its own database, but is required to use the organization's standard database schema. Each branch is required to submit a daily cash flow report to the main office. Rather than receive five hundred reports that are constructed five hundred different ways, the main office has developed a standardized report, created against a database with the standard schema and using a Global Data Source named "GlobalCashFlow".

As the System Admin, you've copied the report to the Global Sub-Folder named "Cash Flow". This sub-folder was created because you need to set its permissions so that only certain roles or users in each branch have access to it. You know that there is one branch that is in the process of modifying their database to meet company standards. Until that process is finished, the report will fail if that branch tries to run it, so you must exclude that branch from having rights to the "Cash Flow" folder until their modifications are complete.

Now, each Company Administrator must create a Company Global Data Source that points to the Global Data Source, using "GlobalCashFlow" as the parent DSN. By using the Company Global Data Source, each branch is redirecting the "GlobalCashFlow" DSN to populate the report with their own data. Because all reports in the Global Folder and sub-folders have Read Only access, editing of items stored in these folders can only be performed by the System Admin. This eliminates each branch from saving the report as its own and subsequently having to edit five hundred separately saved reports.