# ReportIt: Security

## Simplify security maintenance and troubleshooting

Object Reporting Types

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# Business Rule Security

The Business Rule Security report shows who can access or edit which business rules and which ones are encrypted:

| Business Rule Name ▼ | Is Encrypted ▼ | Access Group ▼ | Maintenance Group ▼ | |
|---|---|---|---|---|
| XFR_Conditional_Source | ☐ | Everyone | Everyone | |
| XFR_Conditional_Target | ☐ | Everyone | Everyone | |
| CPP_CapitalPlanningData | ☐ | Everyone | Everyone | |
| CPP_CapitalPlanningData_EntityTin | ☐ | Everyone | Everyone | |
| CPP_CapitalPlanningData_EntityTout | ☐ | Everyone | Everyone | |
| CSP_CashPlanningData | ☐ | Everyone | Everyone | |

# Certification Questions Security

The Certification Questions Security report has two tabs:  The first one shows who can access or edit Certification Question **Groups** and with which Scenario Type they are associated.

| | Certification Question Group Name ▼ | Description ▼ | Scenario Type ▼ | Access Group ▼ | Maintenance Group ▼ | |
|---|---|---|---|---|---|---|
| ▶ | (Quick Certify) | Is the workflow complete? | (All) | Everyone | Everyone | |
| | SOX AP Manager | SOX Accounts Payable Mgr | (All) | Everyone | Everyone | |
| | SOX Group Controller | SOX Group Controller | (All) | Everyone | Everyone | |
| | SOX AR Manager | SOX Accounts Receivable Mgr | (All) | Everyone | Everyone | |
| | SOX Plant Controller | SOX Plant Controller | (All) | Everyone | Everyone | |

*Tabs: Certification Questions Group Security | Certification Questions Profile Security*
*Header: Certification Questions Group Security*
*Drag a column header and drop it here to group by that column*

The second tab shows who can access or edit Certification Question **Profiles**, and with which Scenario Type and Cube they are associated.

*Tabs: Certification Questions Group Security | Certification Questions Profile Security*
*Header: Certification Questions Profile Security*
*Drag a column header and drop it here to group by that column*

| | Certification Question Profile Name ▼ | Description ▼ | Cube ▼ | Scenario Type ▼ | Access Group ▼ | Maintenance Group ▼ | |
|---|---|---|---|---|---|---|---|
| ▶ | Group Certification | Group Certification | (All) | (All) | Everyone | Everyone | |
| | Plant Certification | Plant Certification | (All) | (All) | Everyone | Everyone | |
| | (Quick Certify) | Workflow Complete | (All) | (All) | Everyone | Everyone | |

# Confirmation Rules Security

The Confirmation Rules Security report has two tabs:  The first one shows who can access or edit Confirmation Rules **Groups** and with which Scenario Type they are associated.

| | Confirmation Rules Group Name | Description | Scenario Type | Access Group | Maintenance Group | |
|---|---|---|---|---|---|---|
| ▸ | Budget OperExp Constraints | Operating Expense Budget Constraints | (All) | Everyone | Everyone | |
| | Form Validation | Form Validation | (All) | Everyone | Everyone | |
| | Headcount Data | Headcount Data | (All) | Everyone | Everyone | |
| | Key Data Review | Key Data Review | (All) | Everyone | Everyone | |
| | Budget Revenue Constraints (Clubs) | Revenue Budget Constraints | (All) | Everyone | Everyone | |
| | US Supplemental (Houston) | US Supplemental (Houston) | Actual | Everyone | Everyone | |

The second tab shows who can access or edit Confirmation Rule **Profiles**, and with which Scenario Type and Cube they are associated.

| | Confirmation Rules Profile Name | Description | Cube | Scenario Type | Access Group | Maintenance Group | |
|---|---|---|---|---|---|---|---|
| ▸ | Key Data Rules | Review Key Data | GolfStream | (All) | Everyone | Everyone | |
| | EBITDA Variance Rules | Variance EBITDA | (All) | (All) | Everyone | Everyone | |
| | Forecast Oper Exp Constraints | Operating Expense Forecast Constraints | (All) | (All) | Everyone | Everyone | |
| | Simple Form Rules | Simple Form Validation | GolfStream | (All) | Everyone | Everyone | |
| | Budget Rev Constraints (Course Mgmt) | Revenue Budget Constraints | (All) | (All) | Everyone | Everyone | |
| | Forecast Rev Contraints (Clubs) | Revenue Forecast Contraints (Clubs) | (All) | (All) | Everyone | Everyone | |

# Cube Security

The Cube Security report shows who can access or edit each Cube:

| Cube Name | Description | Access Group Name | Maintenance Group Name |
|---|---|---|---|
| Houston | Houston Clubs | Everyone | Everyone |
| Ottawa | Ottawa Golf Balls | Everyone | Everyone |
| NewYork | New York Services & Course Design | Everyone | Everyone |
| Atlanta | Atlanta Apparel | Everyone | Everyone |
| Austin | Austin Apparel | Everyone | Everyone |
| GolfStream | Corporate | Everyone | Everyone |
| Drivers | Cost and Revenue Factors to Drive Values in Budget, Plan and Forecast | Everyone | Everyone |

# Cube View Security

The Cube View Security report has two tabs:  The first one shows who can access or edit Cube View **Groups**.



The second tab shows who can access or edit Cube View **Profiles**, and where in OneStream those Profiles are visible.

# Dashboard Security

The Dashboard Security report has three tabs:  The first one shows who can access or edit Dashboard **Maintenance Units**.

| Dashboard Maintenance Unit Name | Description | Access Group Name | Maintenance Group Name |
|---|---|---|---|
| Add Dimension Member (ADM) | | Everyone | Everyone |
| CFModel_DB | | Everyone | Everyone |
| Demo_Exec_Overview | | Everyone | Everyone |
| Driver Based Planning (DBP) | | Everyone | Everyone |
| Dynamic Rates Comparison (DRC) | | Everyone | Everyone |
| External System (Revenue Mgmt Houston) | Houston Revenue Mgmt System | (Not Found) | Administrators |
| FIN_SecurityReporting | Finit Security Reporting | Everyone | Everyone |
| Finit Consulting Toolkit (FCTK) | | Everyone | Everyone |
| Finit ReportIt (FREP) | | Everyone | Everyone |

The second tab shows who can access Dashboard **Groups**.

| Dashboard Group Name | Description | Access Group Name |
|---|---|---|
| Settings (AWSe1) | | Everyone |
| Shared WFStatusBU (AWSe2) | | Everyone |
| Request Content (FRIT) | | Everyone |
| OnePlace (AWSe2) | | Everyone |
| Workflow Analysis (CPP) | | Everyone |
| WF_DataEntryDetail | Data Entry Detail Reports | Everyone |
| Train Me Admin (TRM) | | Everyone |
| FlashReview | Flash Review | Everyone |

The last tab shows who can access or edit Dashboard **Profiles**, and where in OneStream those Profiles are visible.

| Dashboard Maintenance Unit Security | Dashboard Group Security | Dashboard Profile Security |

**Dashboard Profile Security**

Drag a column header and drop it here to group by that column

| Dashboard Profile Name ▼ | Description ▼ | Visibility ▼ | Access Group Name ▼ | Maintenance Group Name ▼ |
|---|---|---|---|---|
| ▸ XFW Reconciliation Manager (RCM) | | OnePlace | Everyone | Everyone |
| World Review | | Workflow | Everyone | Everyone |
| WF_Certification_GC | Certification Group Controllers | Workflow | Everyone | Everyone |
| XFW Cash Planning (CSP) | Cash Planning (CSP) | OnePlace | Everyone | Administrators |
| WF_Certification_PC | Certification Plant Controllers | Workflow | Everyone | Everyone |
| XFS WF Data Entry | Data Entry | OnePlace | Everyone | Everyone |

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# Data Management Security

The Data Management Security report has two tabs:  The first one shows who can access or edit Data Management **Groups**.

| Data Management Group Security | Data Management Profile Security |
|---|---|

**Data Management Group Security**

Drag a column header and drop it here to group by that column

| Data Management Group Name ▼ | Description ▼ | Access Group Name ▼ | Maintenance Group Name ▼ | |
|---|---|---|---|---|
| ▸ Profitability | | Everyone | Everyone | |
| Reconciliation Manager (RCM) | | Everyone | Administrators | |
| Metadata Migration (FRIT) | | Administrators | Administrators | |
| System Consolidation | | Everyone | Everyone | |

The second tab shows who can access or edit Data Management **Profiles**.

| Data Management Group Security | Data Management Profile Security |
|---|---|

**Data Management Profile Security**

Drag a column header and drop it here to group by that column

| Data Management Profile Name ▼ | Description ▼ | Access Group Name ▼ | Maintenance Group Name ▼ | |
|---|---|---|---|---|
| ▸ dm_CopyData | | Everyone | Everyone | |

# Data Source Security

The Data Source Security report shows who can access or edit Data Source **Groups** and with which Scenario Type and Cube they are associated.

# Dimension Security

The Dimension Security report shows who can access or edit Dimensions and which type of dimensions they are:

## Dimension Security

| | Dimension Security | | | |
|---|---|---|---|---|
| **Dimension Security** | | | | |

Drag a column header and drop it here to group by that column

| Dimension Type ▼ | Dimension Name ▼ | Description ▼ | Access Group Name ▼ | Maintenance Group Name ▼ |
|---|---|---|---|---|
| Entity | AtlantaEntities | | Everyone | Everyone |
| Entity | AustinEntities | | Everyone | Everyone |
| UD2 | AustinProducts | | Everyone | Everyone |
| UD4 | AustinSalesChannel | | Everyone | Everyone |
| Account | CAPEX | | Everyone | Everyone |

# Form Template Security

The Form Template Security report has two tabs:  The first one shows who can access or edit Form Template **Groups**.

| Form Template Group Security | Form Template Profile Security |
|---|---|

**Form Template Group Security**

Drag a column header and drop it here to group by that column

| Form Template Group Name ▼ | Description ▼ | Access Group Name ▼ | Maintenance Group Name ▼ |
|---|---|---|---|
| Specialty Planning Drivers | | Everyone | Everyone |
| Forecast Rev (Clubs NA) | Forecast Revenue Input Forms NA Cllubs | Everyone | Everyone |
| Budget Drivers | Budget Drivers | Everyone | Everyone |
| Profitability Data | | Everyone | Everyone |
| Flash | | Everyone | Everyone |
| People Planning Drivers | People Planning Drivers | Everyone | Everyone |

The second tab shows who can access or edit Form Template **Profiles**.

| Form Template Group Security | Form Template Profile Security |
|---|---|

**Form Template Profile Security**

Drag a column header and drop it here to group by that column

| Form Template Profile Name ▼ | Description ▼ | Access Group Name ▼ | Maintenance Group Name ▼ |
|---|---|---|---|
| Profitability Data | | Everyone | Everyone |
| Detail Entry | | Everyone | Everyone |
| Profitability Drivers | | Everyone | Everyone |
| Budget Revenue (Course Mgmt NA) | Revenue Input for Service Type and Region | Everyone | Everyone |
| MultiCurrency | | Everyone | Everyone |
| Budget Drivers | Budget Drivers | Everyone | Everyone |
| Capital Planning Drivers | | Everyone | Everyone |

# Journal Template Security

The Journal Template Security report has two tabs:  The first one shows who can access or edit Journal Template **Groups**.

| | Journal Template Group Security | Journal Template Profile Security |
|---|---|---|

**Journal Template Group Security**

Drag a column header and drop it here to group by that column

| | Journal Template Group Name ▼ | Description ▼ | Access Group Name ▼ | Maintenance Group Name ▼ | |
|---|---|---|---|---|---|
| ▸ | Top Side Adj US | | Everyone | Everyone | |
| | Accruals | | Everyone | Everyone | |
| | Top Side Adj | | Everyone | Everyone | |
| | Houston Allocations | | Everyone | Everyone | |
| | IFRS Adjustments | | Everyone | Everyone | |
| | Other Accruals | | Everyone | Everyone | |

The second tab shows who can access or edit Journal Template **Profiles**.

| | Journal Template Group Security | Journal Template Profile Security |
|---|---|---|

**Journal Template Profile Security**

Drag a column header and drop it here to group by that column

| | Journal Template Profile Name ▼ | Description ▼ | Access Group Name ▼ | Maintenance Group Name ▼ | |
|---|---|---|---|---|---|
| ▸ | Top Side Adj US | | Everyone | Everyone | |
| | Typical Adjusting Entries | | Everyone | Everyone | |
| | Adjusting Entries | | Everyone | Everyone | |
| | Top Side Adj | | Everyone | Everyone | |
| | Houston Journals | Houston Journals | Everyone | Everyone | |

# Transformation Rule Security

The Transformation Rule Security report has two tabs:  The first one shows who can access or edit Transformation Rule **Groups**, and with which dimension and dimension type they are associated.

| | Cube Dimension Name | Dimension Name | Rule Group Name | Rule Group Description | Access Group Name | Maintenance Group Name |
|---|---|---|---|---|---|---|
| ▸ | (Derivative) | (Derivative) | CapEx_AccumDep | CapEx_AccumDep | Everyone | Everyone |
| | (Derivative) | (Derivative) | BudgetV1_Houston_RegionAlloc | Houston Actual Region Allocation | Everyone | Everyone |
| | (Derivative) | (Derivative) | HoustonSalesDetailOffset | Balance Entry Offset | Everyone | Everyone |
| | (Derivative) | (Derivative) | CapEx_AssetPurchase | CapEx_AssetPurchase | Everyone | Everyone |
| | (Derivative) | (Derivative) | XFR_Derivatives | Derivative Rules | Everyone | Everyone |

The second tab shows who can access or edit Transformation Rule **Profiles**, and with which Scenario Type and Cube they are associated.

| | Rule Profile Name | Rule Profile Description | Cube Name | Scenario Type | Access Group Name | Maintenance Group Name |
|---|---|---|---|---|---|---|
| ▸ | BudgetVx | Budget Vx to Budget Vy | GolfStream | (Default) | Everyone | Everyone |
| | HoustonRules | HoustonRules | Houston | (Default) | Everyone | Everyone |
| | FRIT_ImportMetadata | FRIT_ImportMetadata | FRIT_MetadataImport | (Default) | Administrators | Administrators |
| | CapEx_Deprec | CapEx_Deprec | CapEX | (Default) | Everyone | Everyone |
| | CorpRules | CorpRules | GolfStream | (Default) | Everyone | Everyone |

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# Workflow Security

The Workflow Security report shows every Workflow and who can access, edit, execute or certify it by Scenario Type and Workflow Type.



Workflow Security

| Profile Name | Scenario | Active | Profile Type | Access Group Name | Maintenance Group Name | Workflow Execution Group Name | Certification Signoff Group Name | Journal Process Group Name | Journal Approval Group Name | Journa |
|---|---|---|---|---|---|---|---|---|---|---|
| (Default) | (Default) | ■ | Template | (Not Found) | (Not Found) | (Not Found) | (Not Found) | N/A | N/A | N/A |
| (Default).Adj | (Default) | ■ | TemplateAdjChild | (Not Found) | (Not Found) | (Not Found) | (Not Found) | Everyone | Everyone | Everyo |
| (Default).Adj | Actual | ☐ | TemplateAdjChild | (Not Found) | (Not Found) | (Use Default) | (Use Default) | Everyone | Everyone | Everyo |
| (Default).Adj | Budget | ☐ | TemplateAdjChild | (Not Found) | (Not Found) | (Use Default) | (Use Default) | Everyone | Everyone | Everyo |
| (Default).Adj | Flash | ☐ | TemplateAdjChild | (Not Found) | (Not Found) | (Use Default) | (Use Default) | Everyone | Everyone | Everyo |
| (Default).Adj | Forecast | ☐ | TemplateAdjChild | (Not Found) | (Not Found) | (Use Default) | (Use Default) | Everyone | Everyone | Everyo |
| (Default).Adj | FXModel | ☐ | TemplateAdjChild | (Not Found) | (Not Found) | (Use Default) | (Use Default) | Everyone | Everyone | Everyo |
| (Default).Adj | History | ☐ | TemplateAdjChild | (Not Found) | (Not Found) | (Use Default) | (Use Default) | Everyone | Everyone | Everyo |