

ReportIt: Security

Simplify security maintenance and troubleshooting

ReportIt: Security is a free tool by Finit. There is no configuration or customization necessary – simply install and use immediately.

Finit's ReportIt: Security helps you answer questions, such as,

- What is a user's effective access, and how was it inherited?
- Do any objects have "everyone" as the maintenance group?
- Are there users holding OneStream licenses that can be deactivated?

See the following sample screens to learn more.

Securable object reporting

Today, if a user wants to review security in OneStream, they would need to look at items one-by-one. For example, if a user wanted to review all their workflows in OneStream, they would need to navigate to the workflows and click on each one to see what security groups were assigned to it. ReportIt: Security provides OneStream securable object reporting, which allows users to review the security assignments for all object items in a clear format. This allows users to quickly audit and review their security to ensure that it is up-to-date and accurate.

All security groups associated with the object appear as columns on the report.

The grid view allows users to sort and filter the report.

Profile Name	Scenario	Active	Profile Type	Access Group Name	Maintenance Group Name	Workflow Execution Group Name	Certification Signoff Group Name	Join
Houston.Engineering	(Default)	<input type="checkbox"/>	InputFormsChild	HOU_ENG	Administrators	HOU_ENG_Load	HOU_ENG_Cert	N/A
Houston.Engineering	Forecast	<input checked="" type="checkbox"/>	InputFormsChild	HOU_ENG	Administrators	(Use Default)	(Use Default)	N/A
Houston.Expenses	(Default)	<input checked="" type="checkbox"/>	InputFormsChild	HOU_EXP	Administrators	HOU_EXP_Load	HOU_EXP_Cert	N/A
Houston.Expenses	Budget	<input checked="" type="checkbox"/>	InputFormsChild	HOU_EXP	Administrators	(Use Default)	(Use Default)	N/A
Houston.Expenses	Forecast	<input checked="" type="checkbox"/>	InputFormsChild	HOU_EXP	Administrators	(Use Default)	(Use Default)	N/A
Houston.Flash Input	(Default)	<input type="checkbox"/>	InputFormsChild	HOU_FLASH	Administrators	HOU_FLASH_Load	HOU_FLASH_Cert	N/A
Houston.Flash Input	Flash	<input checked="" type="checkbox"/>	InputFormsChild	HOU_FLASH	Administrators	(Use Default)	(Use Default)	N/A
Houston.Flash Input	FXModel	<input checked="" type="checkbox"/>	InputFormsChild	HOU_FLASH	Administrators	(Use Default)	(Use Default)	N/A
Houston.Flash Input	History	<input checked="" type="checkbox"/>	InputFormsChild	HOU_FLASH	Administrators	(Use Default)	(Use Default)	N/A
Houston.Forms	(Default)	<input checked="" type="checkbox"/>	InputFormsChild	HOU_FORMS	Administrators	HOU_FORMS_Load	HOU_FORMS_Cert	N/A
Houston.Forms	Actual	<input checked="" type="checkbox"/>	InputFormsChild	HOU_FORMS	Administrators	(Use Default)	(Use Default)	N/A
Houston.Forms	FXModel	<input checked="" type="checkbox"/>	InputFormsChild	HOU_FORMS	Administrators	(Use Default)	(Use Default)	N/A
Houston.Forms	History	<input checked="" type="checkbox"/>	InputFormsChild	HOU_FORMS	Administrators	(Use Default)	(Use Default)	N/A
Houston.Import	(Default)	<input checked="" type="checkbox"/>	InputImportChild	HOU_IMPORT	Administrators	HOU_IMPORT_Load	HOU_IMPORT_Cert	N/A
Houston.Import	Actual	<input checked="" type="checkbox"/>	InputImportChild	HOU_IMPORT	Administrators	(Use Default)	(Use Default)	N/A
Houston.Import	FXModel	<input checked="" type="checkbox"/>	InputImportChild	HOU_IMPORT	Administrators	(Use Default)	(Use Default)	N/A
Houston.Import	History	<input checked="" type="checkbox"/>	InputImportChild	HOU_IMPORT	Administrators	(Use Default)	(Use Default)	N/A
Houston.IT	(Default)	<input checked="" type="checkbox"/>	InputFormsChild	HOU_IT	Administrators	HOU_IT_Load	HOU_IT_Cert	N/A
Houston.IT	Forecast	<input checked="" type="checkbox"/>	InputFormsChild	HOU_IT	Administrators	(Use Default)	(Use Default)	N/A
Houston.Journals	(Default)	<input checked="" type="checkbox"/>	InputAdjChild	HOU_JOURNALS	Administrators	HOU_JOURNALS_Load	HOU_JOURNALS_Cert	HOU
Houston.Journals	Actual	<input checked="" type="checkbox"/>	InputAdjChild	HOU_JOURNALS	Administrators	(Use Default)	(Use Default)	(Use
Houston.Journals	FXModel	<input checked="" type="checkbox"/>	InputAdjChild	HOU_JOURNALS	Administrators	(Use Default)	(Use Default)	(Use
Houston.Journals	History	<input checked="" type="checkbox"/>	InputAdjChild	HOU_JOURNALS	Administrators	(Use Default)	(Use Default)	(Use
Houston.Logistics	(Default)	<input type="checkbox"/>	InputFormsChild	HOU_LOG	Administrators	HOU_LOG_Load	HOU_LOG_Cert	N/A
Houston.Logistics	Forecast	<input checked="" type="checkbox"/>	InputFormsChild	HOU_LOG	Administrators	(Use Default)	(Use Default)	N/A

User analysis report

It can be difficult in OneStream to understand a user's effective access. The user analysis report in ReportIt: Security provides an intuitive dashboard that allows administrators to select a user, see that user's direct group assignments, and more importantly, see their effective access. The administrator can also see *how* users inherit access, which means they can troubleshoot and update security quickly and easily.

Clicking on a user allows an administrator to see what groups the user is assigned to, and what their effective access is.

The inherited access panel shows all security group that a user has access to, and how they get that access through inheritance.

ONESTREAM XF
bholaday, OneStream_GoFStream (http://onestream50001/OneStreamWeb)

Dashboard - ReportIt (FREP) (1.0.0)

REPORTS

- Security Report Set
- Business Rule Security
- Information Questions Security
- Information Rules Security
- Job View Security
- Dashboard Security
- Meta Management Security
- Meta Source Security
- Dimension Metadata Security
- Dimension Security
- Form Template Security
- Journal Template Security
- Other Security Reports
- Security Group Analysis
- Security Hierarchy
- Transformation Rule Security
- User Analysis
- Workflow Security

User List

User Name	Is Enabled	User Type
Administrator	<input checked="" type="checkbox"/>	Native
bholaday	<input checked="" type="checkbox"/>	Native
Darryl Whitefeather	<input checked="" type="checkbox"/>	Native
Greg Serrano	<input checked="" type="checkbox"/>	Native
Heather Davis	<input checked="" type="checkbox"/>	Native
Josh Chan	<input checked="" type="checkbox"/>	Native
Josh Wilson	<input checked="" type="checkbox"/>	Native
Nathaniel Plimpton	<input checked="" type="checkbox"/>	Native
Paula Proctor	<input checked="" type="checkbox"/>	Native
Rebecca Bunch	<input checked="" type="checkbox"/>	Native
Valencia Perez	<input checked="" type="checkbox"/>	Native

Greg Serrano

Assigned Groups

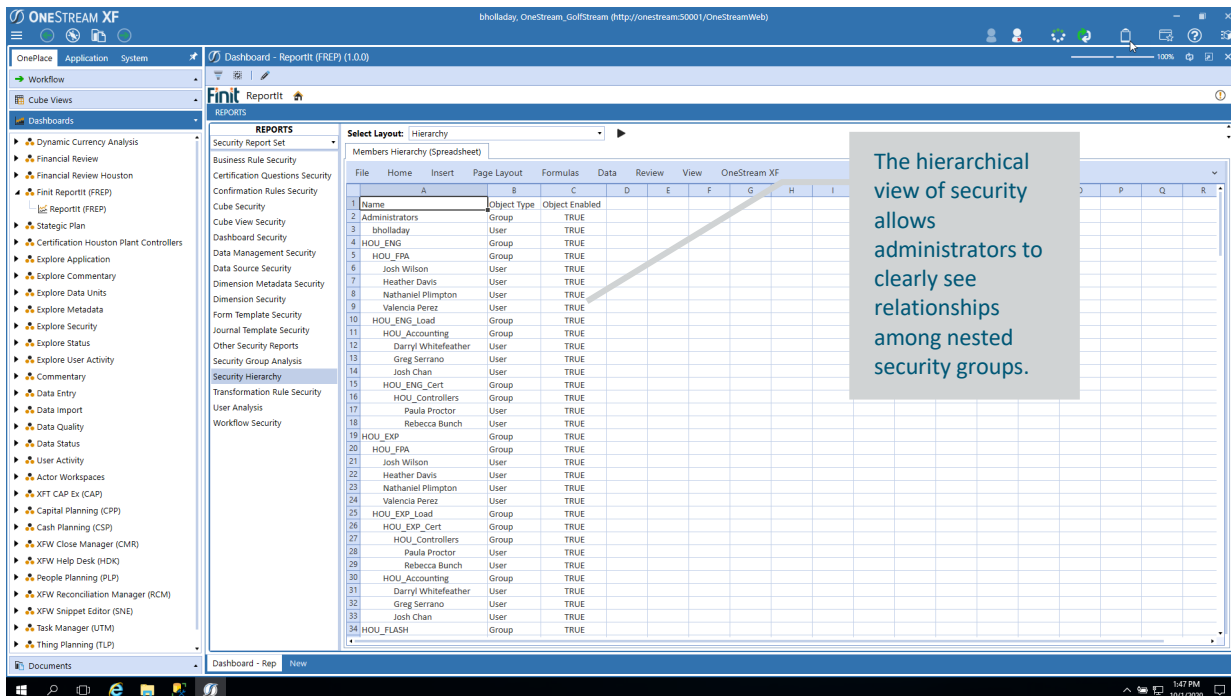
Group Name	Group Description
HOU_Accounting	Accounting team

Inherited Access

Group Name	Group Description	Assignment Type	Inheritance Path
HOU_JOURNALS	Houston Journals	Inherited	HOU_Accounting HOU_JOURNALS_Load HOU_JOURNALS_Post HOU_JOURNALS
HOU_EXP	Houston Expenses	Inherited	HOU_Accounting HOU_EXP_Load HOU_EXP
HOU_ENG	Houston Engineering	Inherited	HOU_Accounting HOU_ENG_Load HOU_ENG
HOU_PUR	Houston Purchasing	Inherited	HOU_Accounting HOU_PUR_Load HOU_PUR
HOU_LOG	Houston Logistics	Inherited	HOU_Accounting HOU_LOG_Load HOU_LOG
HOU_PROD	Houston Production Mgt	Inherited	HOU_Accounting HOU_PROD_Load HOU_PROD
HOU_FLASH	Houston Flash	Inherited	HOU_Accounting HOU_FLASH_Load HOU_FLASH
HOU_IT	Houston IT	Inherited	HOU_Accounting HOU_IT_Load HOU_IT
HOU_SM	Houston Sales and Mkt	Inherited	HOU_Accounting HOU_SM_Load HOU_SM
HOU_VAR	Houston Variance Input	Inherited	HOU_Accounting HOU_VAR_Load HOU_VAR
HOU_FORMS	Houston Forms	Inherited	HOU_Accounting HOU_FORMS_Load HOU_FORMS
HOU_IMPORT	Houston Import	Inherited	HOU_Accounting HOU_IMPORT_Load HOU_IMPORT
HOU_SALES	Houston Sales Detail	Inherited	HOU_Accounting HOU_SALES_Load HOU_SALES
HOU_REV	Houston Revenue	Inherited	HOU_Accounting HOU_REV_Load HOU_REV

Security hierarchy report

The security hierarchy report shows all levels of the security structure in a nested format. This allows administrators to easily visualize the roll-up of security groups with users. A list view is also available in ReportIt: Security, which shows the full inheritance path for each parent-child relationship.



The screenshot displays the OneStream XF interface with the 'Security Hierarchy' report selected. The report is presented in a 'Hierarchy' layout, showing a nested structure of security groups and users. A callout box highlights the hierarchical view, stating: 'The hierarchical view of security allows administrators to clearly see relationships among nested security groups.'

Name	Object Type	Object Enabled
Administrators	Group	TRUE
bholladay	User	TRUE
HOU_ENG	Group	TRUE
HOU_FPA	Group	TRUE
Josh Wilson	User	TRUE
Heather Davis	User	TRUE
Nathaniel Plimpton	User	TRUE
Valencia Perez	User	TRUE
HOU_ENG_Load	Group	TRUE
HOU_Accounting	Group	TRUE
Darryl Whitefeather	User	TRUE
Greg Serrano	User	TRUE
Josh Chan	User	TRUE
HOU_ENG_Cert	Group	TRUE
HOU_Controller	Group	TRUE
Paula Proctor	User	TRUE
Rebecca Bunch	User	TRUE
HOU_EXP	Group	TRUE
HOU_FPA	Group	TRUE
Josh Wilson	User	TRUE
Heather Davis	User	TRUE
Nathaniel Plimpton	User	TRUE
Valencia Perez	User	TRUE
HOU_EXP_Load	Group	TRUE
HOU_EXP_Cert	Group	TRUE
HOU_Controller	Group	TRUE
Paula Proctor	User	TRUE
Rebecca Bunch	User	TRUE
HOU_Accounting	Group	TRUE
Darryl Whitefeather	User	TRUE
Greg Serrano	User	TRUE
Josh Chan	User	TRUE
HOU_FLASH	Group	TRUE

Active users and assigned groups report

With ReportIt: Security administrators can periodically monitor groups and users. For example, one valuable report shows a listing of active users along with their assigned groups. Users assigned to zero groups may be candidates for license deactivation, freeing up OneStream licenses. report is also available that shows the number of users by group, which may help clean up groups no longer in use.

The screenshot displays the OneStream XF web application interface. The top navigation bar shows the user 'bholladay' and the application 'OneStream'. The left sidebar contains a tree view of various reports, with 'ReportIt (FREP)' selected. The main content area shows the 'ReportIt' dashboard with a report titled 'Users with Group Count'. The report is displayed as a table with the following columns: 'User Name', 'Enabled', and 'Total Groups'. The table lists several users, including Maya Povitsky, Administrator, Trent Maddock, Greg Serrano, Josh Chan, Heather Davis, Nathaniel Plimpton, Valencia Perez, Rebecca Bunch, Paula Proctor, Darryl Whitefeather, bholladay, and Josh Wilson. A callout box points to the 'Total Groups' column, stating: 'Identify users who aren't assigned to groups, which may be taking up OneStream licenses.'

User Name	Enabled	Total Groups
Maya Povitsky	Yes	0
Administrator	Yes	0
Trent Maddock	Yes	0
Greg Serrano	Yes	1
Josh Chan	Yes	1
Heather Davis	Yes	1
Nathaniel Plimpton	Yes	1
Valencia Perez	Yes	1
Rebecca Bunch	Yes	1
Paula Proctor	Yes	1
Darryl Whitefeather	Yes	1
bholladay	Yes	1
Josh Wilson	Yes	1