trueChart User Management v2021.2.0 +

Introduction

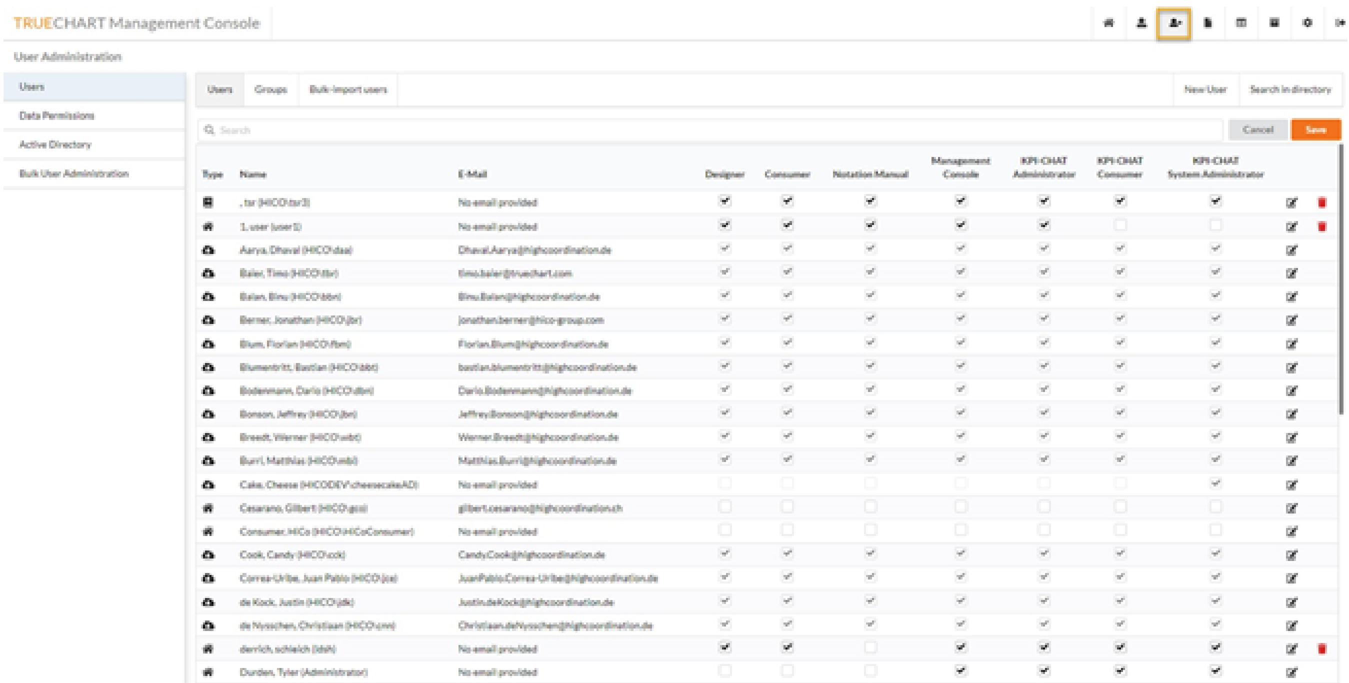
From v2021.2.0 onwards, users will find that the User Permissions screens have been updated with new functionality as well as an enhanced user interface. This was done in order to have a centralised space where they can manage their user's permissions.

Users can now manager their trueChart users, KPI Chat Data Permissions, Active Directory Integration as well as applying Bulk User changes in one centralised space.

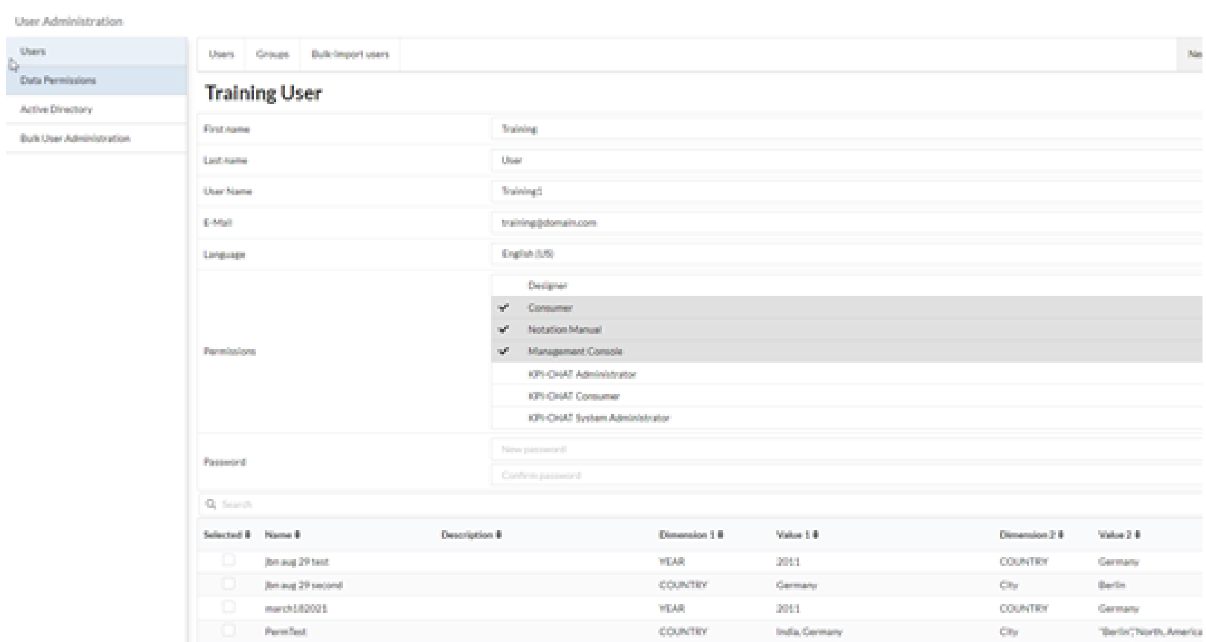
User Management

- Log into trueChart Management Console click on **“User Administration”**  and you will a view of trueChart's new user management screen.
    - trueChart has 3 user types:
        -  Active Directory User. This user does not belong to an Active Directory Group
        -  Active Directory User. This user belongs to an Active Directory Group
        -  Local user. This user does not exist within the Active Directory and was manually created

You have a view of the user type, and the privileges are assigned to each user.

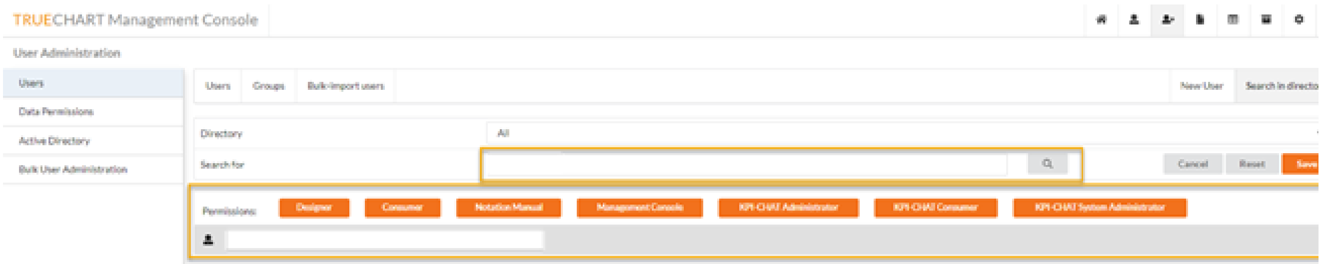


- Active Directory users not belonging to a group and Local users can be edited in line. Allowing for quick permission management
- To add a new User:
  - Click on **New User**.
  - In the **New User** dialog, enter **First name**, **Last name**, **Username**, **Language,** and capture the required permissions
  - Should you have a valid KPI Chat Licence and have KPI Chat Administrator privileges you will see the option to link this user to a Data Permission Role as well
  - Click on **Save** to create the new user.



Adding Named Users from Active Directory

- Click on **"Search in directory"** and search for the user/group.
- If more than 1 Active Directory is enabled, you may select a specific AD to search on
- Enter the username of the user as it would appear in the Active Directory and select 
- Select your user and enable the required permissions
- Then click **Save**



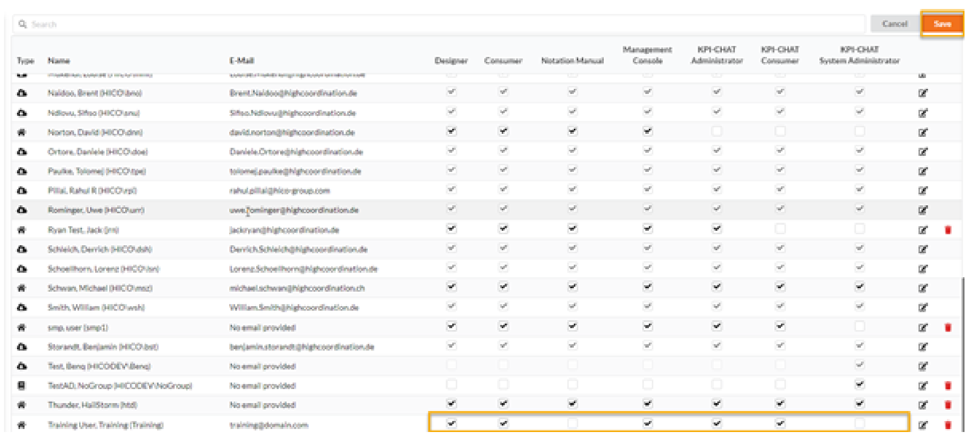
NOTE: If this user is already part of a group, the group they belong to must be used in order to allocate the permissions

Changing existing users

- Should a user require changes other than permissions, these can be updated by selecting edit on the corresponding line
- Click on **Save** to apply the changes.

Changing existing user's permissions on the user management screen

- Search or scroll to the user.
- Check or uncheck on a permission you would like to remove or add.



- And click on **Save**.

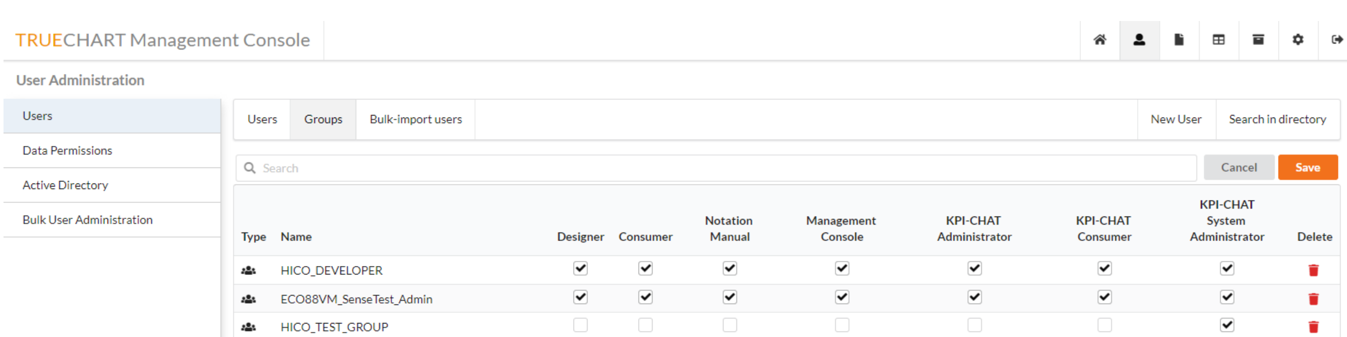
NOTE: Only Local Users and Non Group AD Users can be edited on this screen. Should you require to change a Group's permissions, please edit the Group permissions under the Group Tab

Group Permissions

Active Directory groups and their permissions can be managed on the Groups Tab.

Records are in line editable for faster adjustments

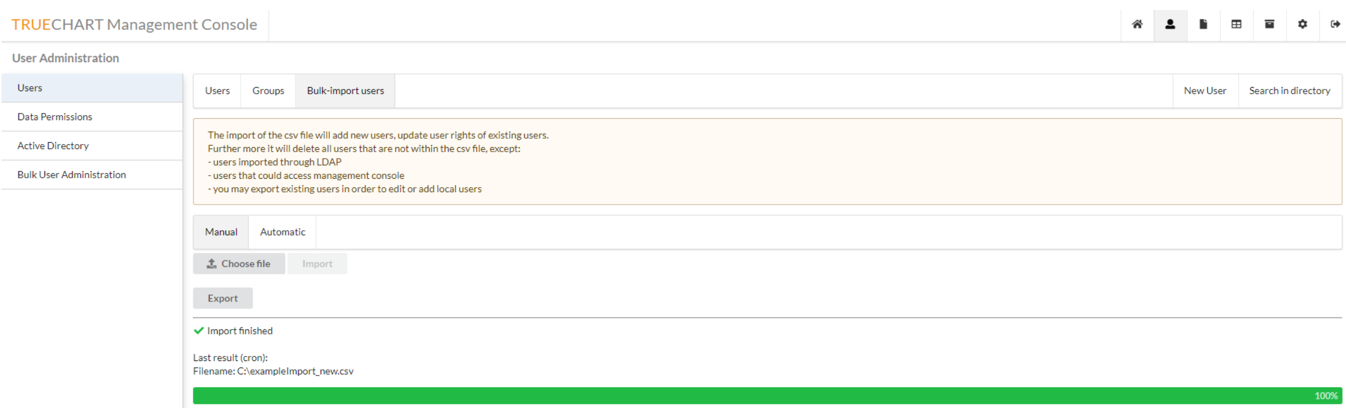
To add a new AD group, search for the group name on the "Search in Directory" screeen



Bulk-import users

Manual import

Users can also import local user permissions in bulk



At the bottom of the screen, you see the status of the current or last import procedure.

There are 2 ways for importing users through CSV import:

> ⚠ Users that have access to the TRUECHART Management Console will be skipped during the bulk import.

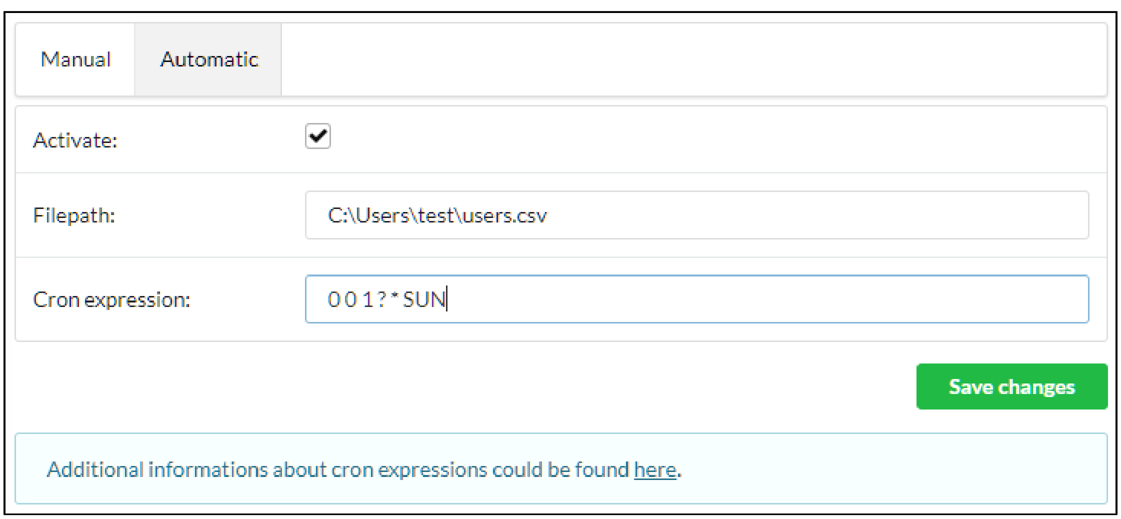
First, choose a file. The format of the file should match the following example.

```
username,firstname,lastname,language,email,consumer,designer,nm,kpichat_admin,kpichat_consumer
domain\ahf,Achim,Höffner,en_US,achim@domain.com,,1,1,,
domain\cml,Christian,Müller,de_DE,christian@domain.com,1,,,,
```

The content of the file will be displayed for manual validation of the user. Now you could start the import

- uploading the file
- starting a background job that runs the import
- Where imports fail, users will be able to download the log file to view errors on the failed import

Automated import



You could activate and deactivate automatic CSV import at any time you want. You only need to place a file at the server, input its file path, and enter a Cron expression.

Some examples:
"0 0 * * * ?" - will run a hourly job
"0 0 1 ? * SUN" - will run a job every Sunday at 1 o’clock am

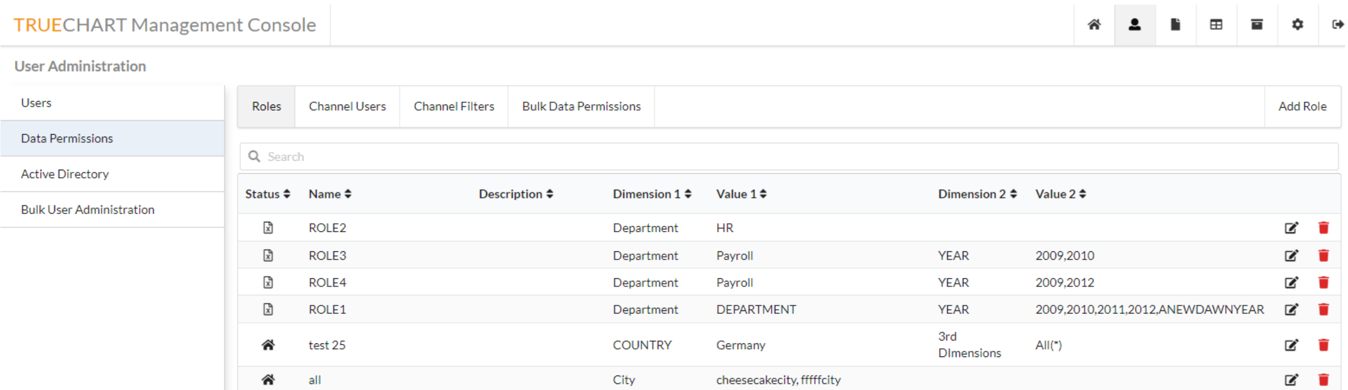
Further examples and the full syntax specification could be found at www.quartz-scheduler.org.

Data Permission Administration

- Data Security Rule
- How to import file using File import and Active Directory
- Permissions on Filters in a Channel :
- Channel Filters in trueChart Management Console

Data Permission Roles in TCMC

Following the update in v2021.2.0, Data Permission Roles can now also be managed from within TCMC



Source - Specifies the source from which the Role is added. It can imported from an Excel file , Active Directory or Manually added

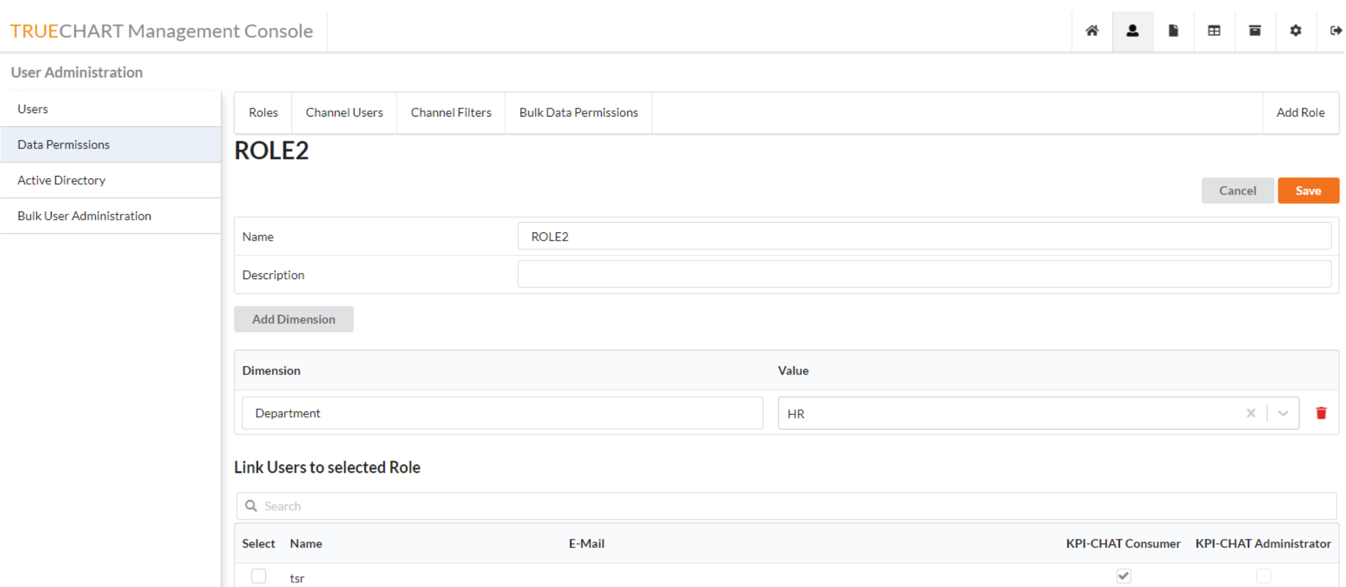
Role - Set of security Roles which is identified as a role.

Description - A short description of the role for ease of reference

Dimension 1+/Value 1+ - The first 2 Dimensions of the Role and their values

Data Security Roles Add/Edit

Roles can be edited or deleted . When editing a role, users will be presented with the below screen



User - For which user the Role is created

Description - A short description of the role for ease of reference

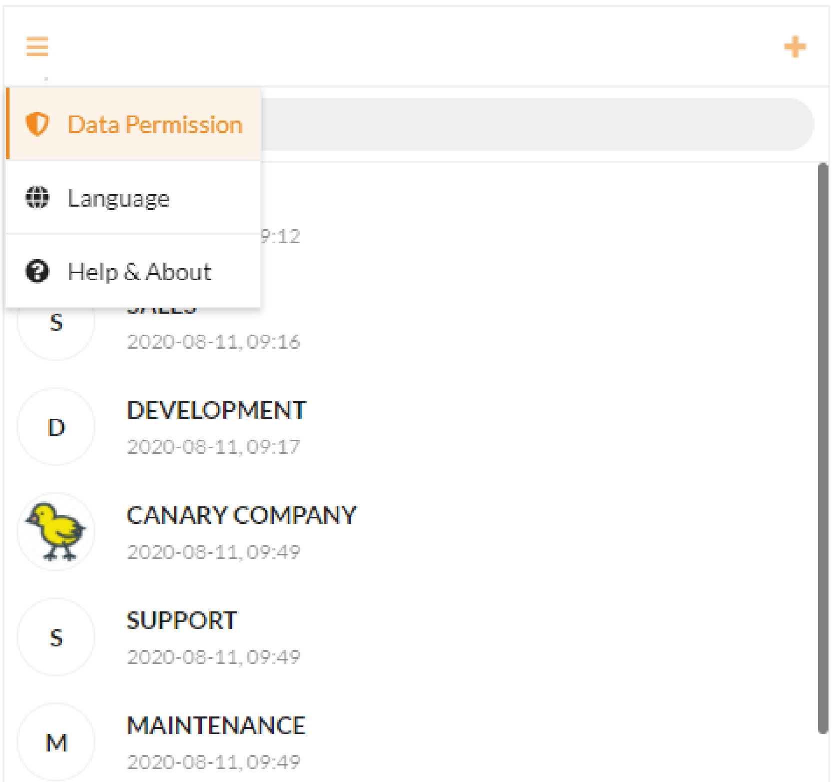
Add Dimension - Add a new Dimension to restrict access for the selected Role

Dimension Value - The Dimension Name and it's values. Separated by a semicolon where multiple values are specified

Users Table - Select the users that will be linked to this Role

Data Permission Roles in KPI CHAT

Data Permission roles can be added from within the KPI Chat interface



Users will be presented with the below screen

+ Add Edit Delete Settings Search dimensions Search values

Source	Role	User	Dimension 1	Value 1	Dimension 2	Value 2
MANUAL	all	HICO\akr	City	All(*)		
MANUAL	allstar-bbn	HICO\bbn	COUNTRY	Germany	City	All(*)
MANUAL	allstar-single-bbn	HICO\bbn	COUNTRY	All(*)		
MANUAL	Apr072021	HICO\bbn	YEAR	2020-2022	COUNTRY	Germany
MANUAL	aug 25 data security	HICO\gre	YEAR	2011	COUNTRY	Germany
MANUAL	aug 25 data security	HICO\rar	YEAR	2011	COUNTRY	Germany
MANUAL	aug 25 data security	HICO\dmk	YEAR	2011	COUNTRY	Germany
MANUAL	aug 25 data security	HICO\mhy	YEAR	2011	COUNTRY	Germany
MANUAL	aug 25 data security	HICO\daa	YEAR	2011	COUNTRY	Germany
MANUAL	aug 25 data security	HICO\msz	YEAR	2011	COUNTRY	Germany
MANUAL	aug 25 data security	HICO\mmn	YEAR	2011	COUNTRY	Germany
MANUAL	aug 25 data security	HICO\pel	YEAR	2011	COUNTRY	Germany
MANUAL	aug 25 data security	HICO\lfn	YEAR	2011	COUNTRY	Germany

Source - Specifies the source from which the rule is added. It can imported from an Excel file , Active Directory or Manually added

Role - Set of security rules which is identified as a role.

User - For which user the Rule is created

Dimension 1+/Value 1+ - The columns here are dynamically created by the Dimensions the user has selected for the roles

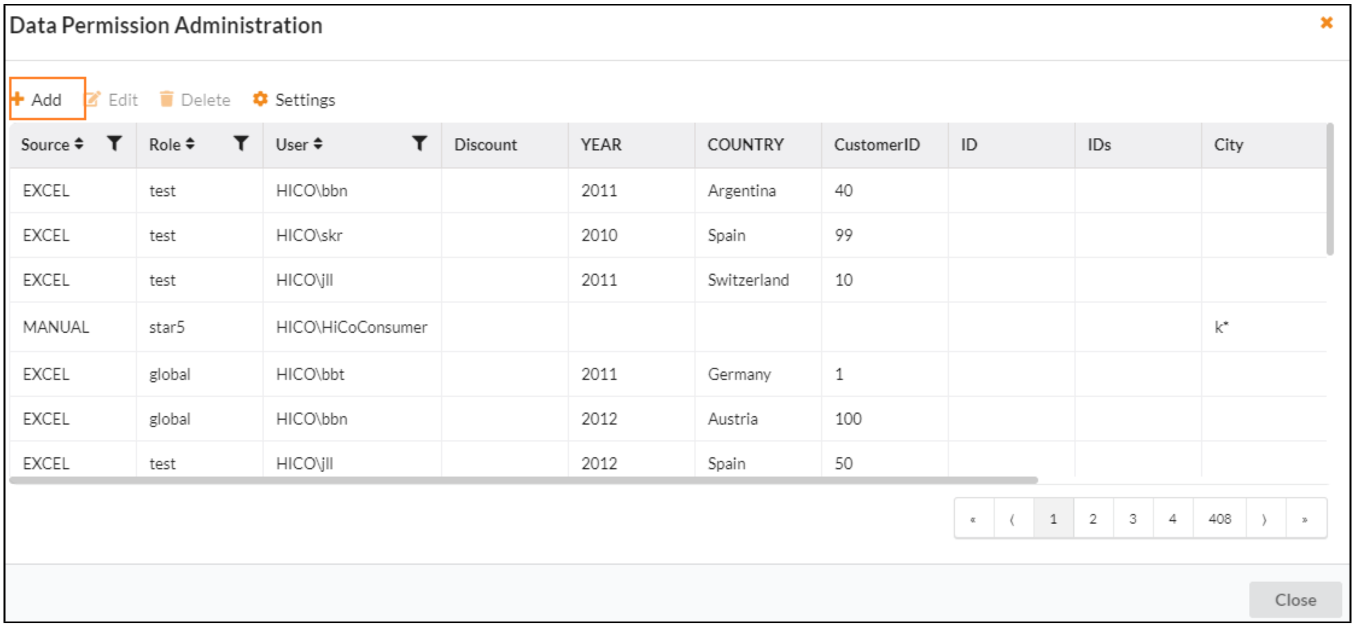
Data Security Rules Add/Edit

Added rules can be edited or deleted - Select a rule and Edit/Delete button will be enabled .

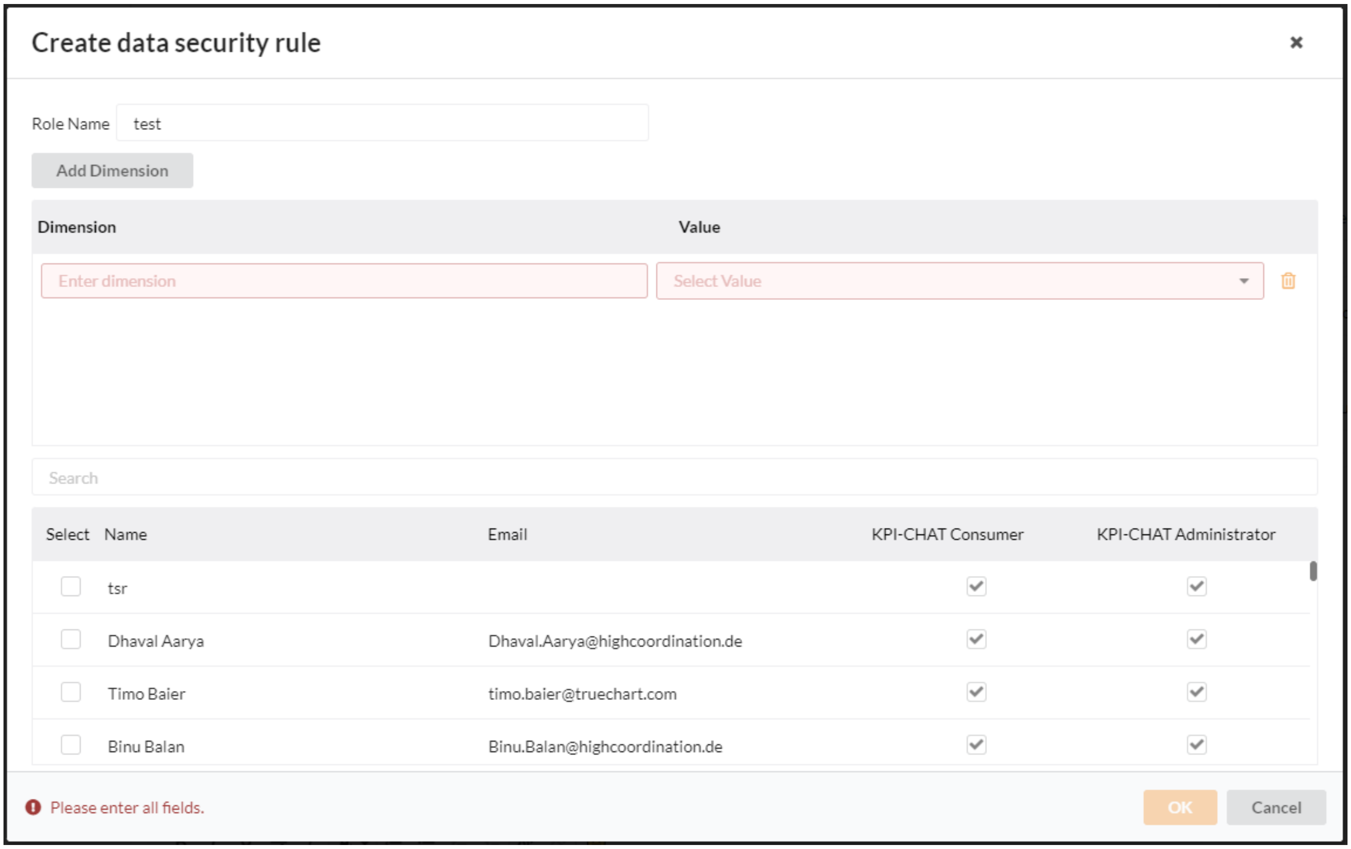
Settings - Will open up the data permission in TRUECHART Management Console for importing the rule through modes File Import or Active Directory Import . **See more on how to import file below**

Create a Data Security Rule :

1. Click on the +Add Button which opens the create data security rule page



The user will be presented with the below:



1. Enter the role name
2. Click on +Add button to add a Dimension and its value
3. Select Dimension and Enter the Value for the selected dimension .
4. Select the user from the table

When creating a rule outside a BI Platform the user will be required to enter the Dimension name and not select it

Where multiple Dimensions are added, the permissions will be applied in an "AND" method . e.g. :

User "Bob" is only allowed to view and collaborate on his own client data.

His role will be defined as :

Dimension 1

Country UK

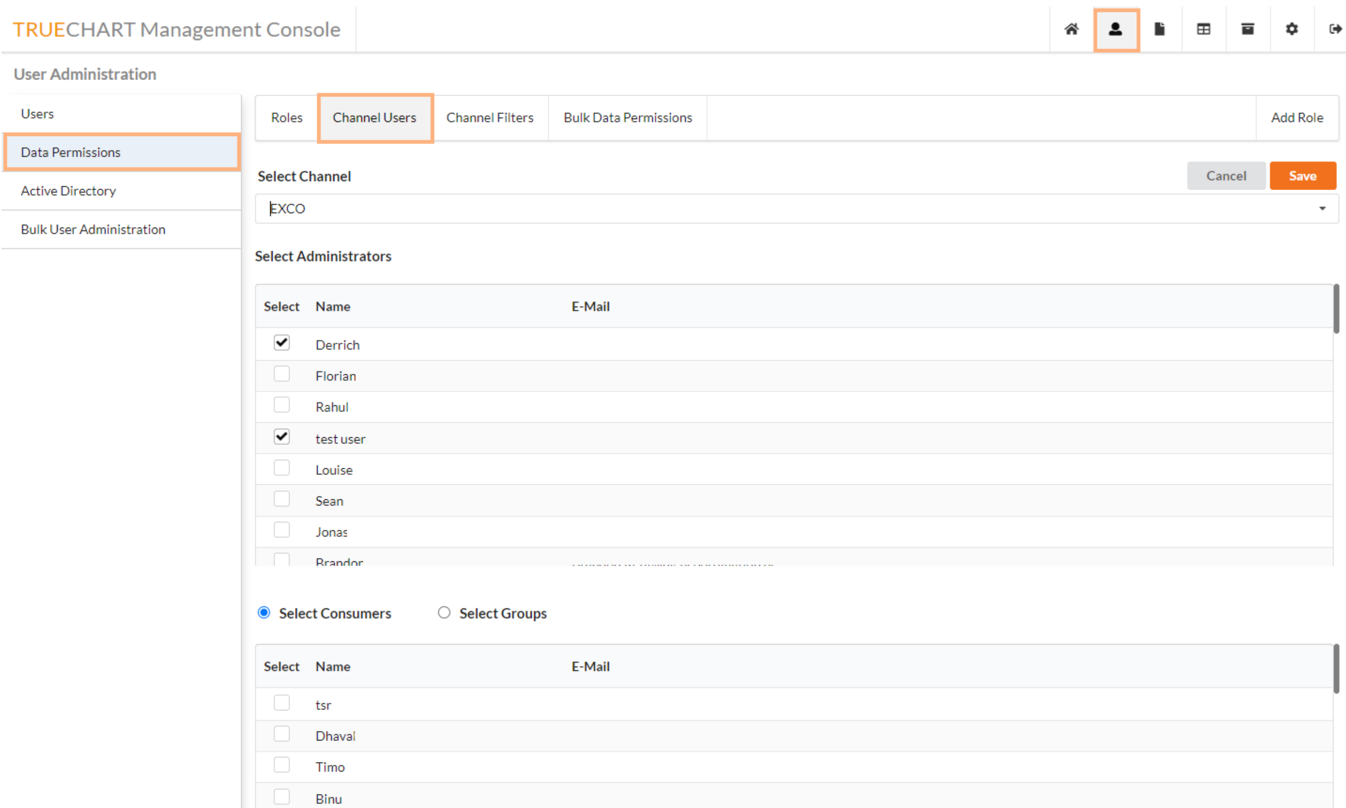
Dimension 2

Client Client XYZ, Client MNO

In order for Bob to utilize KPI-CHAT for his clients he must select both the **UK** AND any 1(or more) client before KPI-CHAT will allow him access

Channel Users

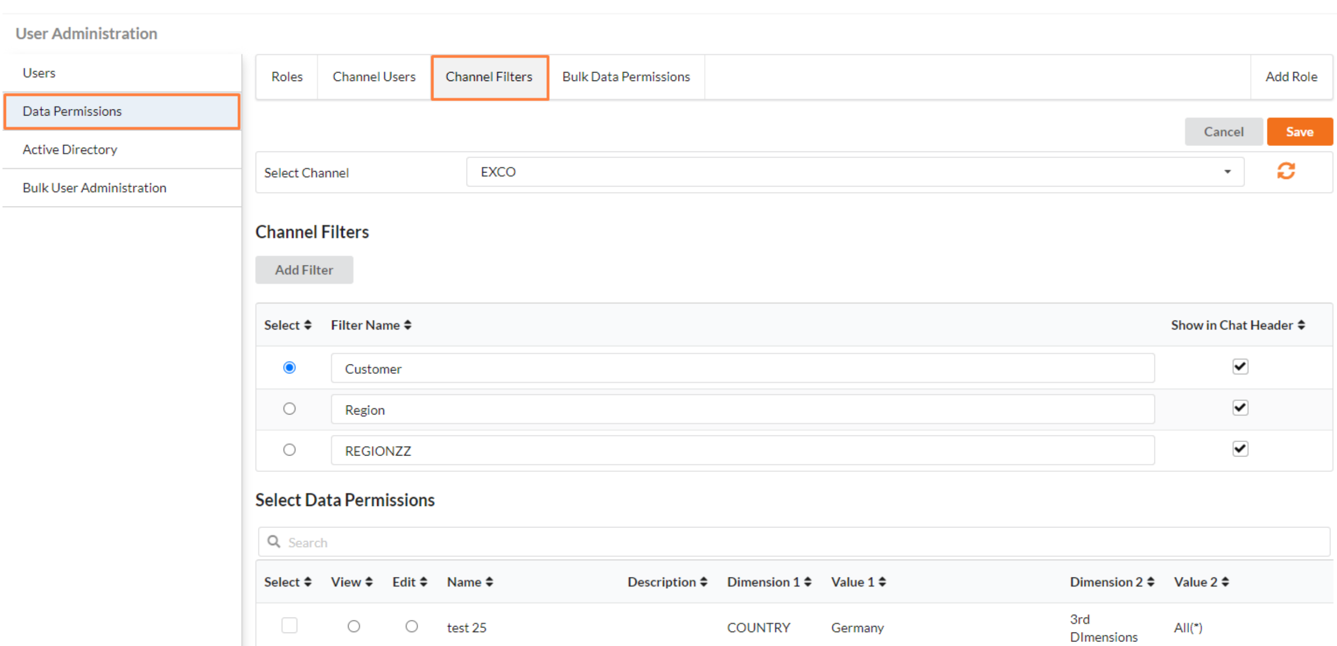
Following the update for v2021.2.0 , Channel users can be managed from TCMC:



- Select a Channel
- Select the administrator users for the channel
  - *NOTE: Only users with KPI CHAT Administrator rights will be shown here*
- Select the consumers or the channel either by specific users or by AD group
  - *NOTE: Only users with KPI CHAT Consumer rights will be shown here*
- Then select **Save**

Channel Filters

Users can manage Channel filters and their Data Permission Roles from within TCMC :

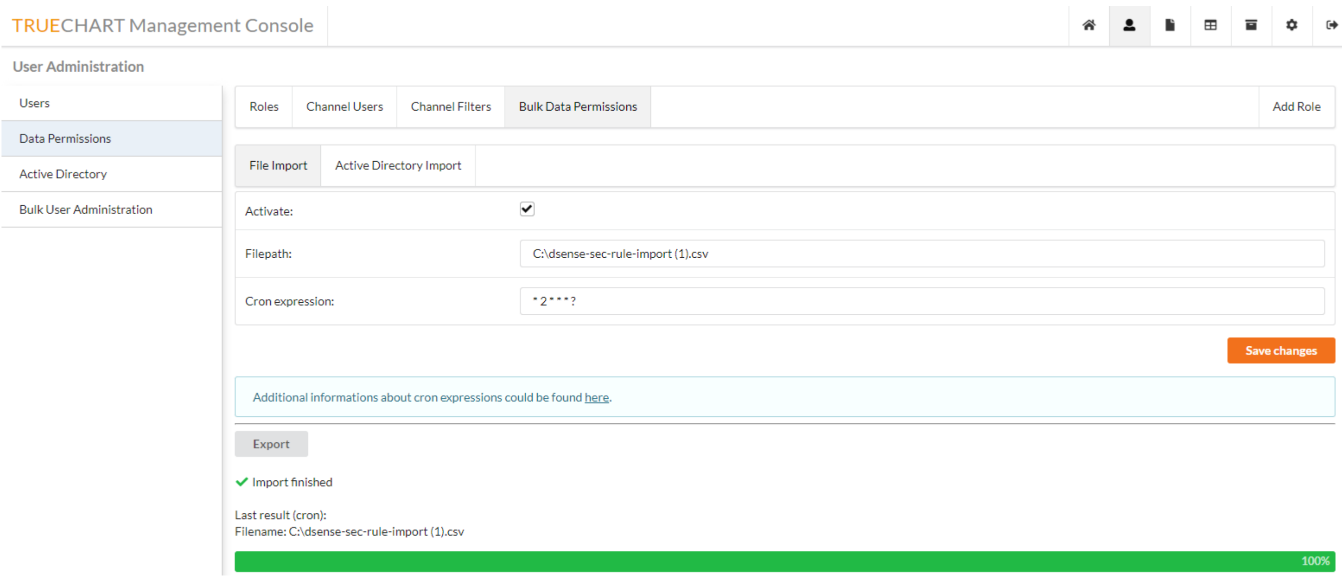


- Select a Channel
    - If the channel is new, users may **Refresh** to update the list of channels
- Select or Add a Filter Or Edit an existing Filter
    - Show in Chat Header will allow this Filter name to be shown in the Chat header of a KPI Chat window
- Selecting a Filter will allow users to enable the required Roles for a Filter
    - View will allow the users linked to this Role to only view content in this Filter
    - Edit will allow users to participate in the Filter's chat

Bulk Data Permissions

1. Open the *TRUECHART Management Console and Click on User Administration*
2. *Click on the Data Permission tab from the left side panel*
3. *Click on Bulk Data Permissions.*
4. *Click on File Import*

File Import



Import file (**csv format)** link can be given on *FilePath* . When the *Activate* check box is enabled. The file on the given path will be imported as per the Cron expression given .

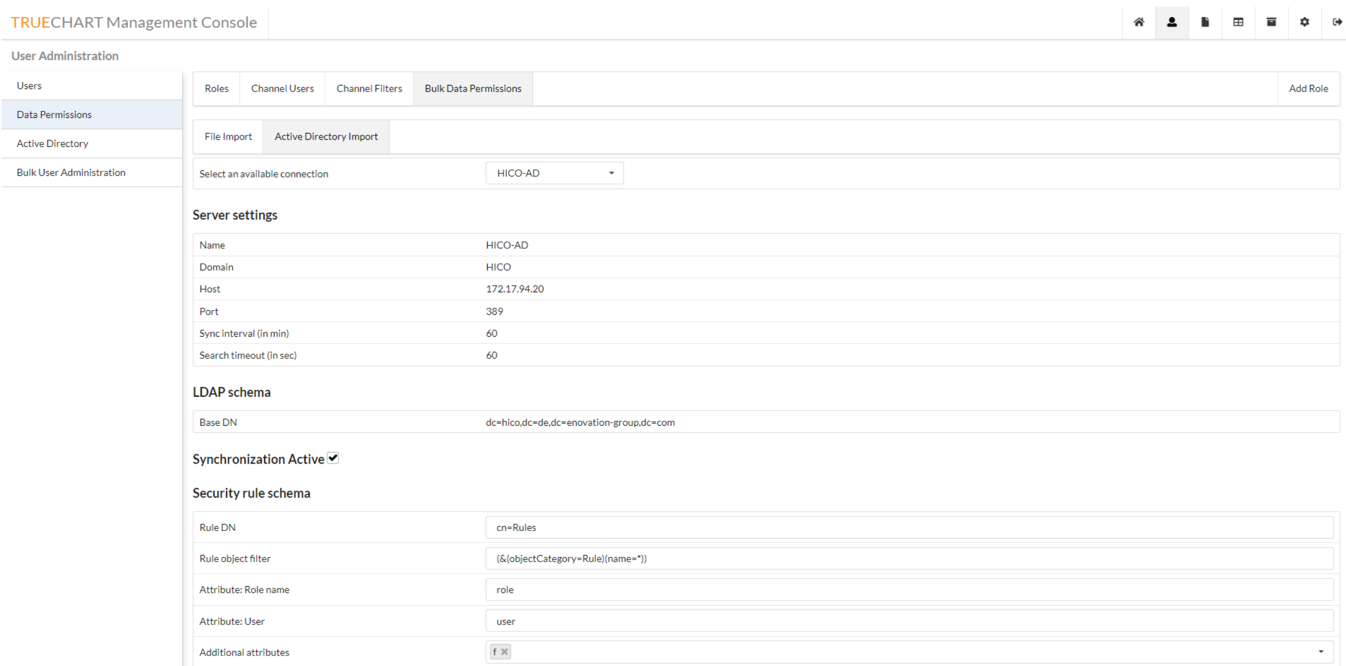
Save the Changes once all parameters are given and security rules will be imported to database with the next Cron timer.

Sample Format of a csv import file can be found here Data Permissions Import Sample.csv

- File is comma separated ,
- To separate values for Dimensions make use of a semicolon ;

Additional Information how to create a Cron expressions can be found ***here*** .

Active Directory Import



Available active directory connection that are added using the Active Directories panel from TCMC will be listed in available connections .

Here we need to set up the Security Schema Rule . The AD should have the same same schema that we mention here in order import rules successfully .

Rule DN - Distinguished Name . Eg cn=name , common name which is used to identity the security rule.

Rule object filter - expression used for search.

Attribute : Role name- identifying name role (Mandatory)

Attribute : User - identifying name of user (Mandatory)

Additional attributes - Additional attributes can be mentioned here as comma separated values.

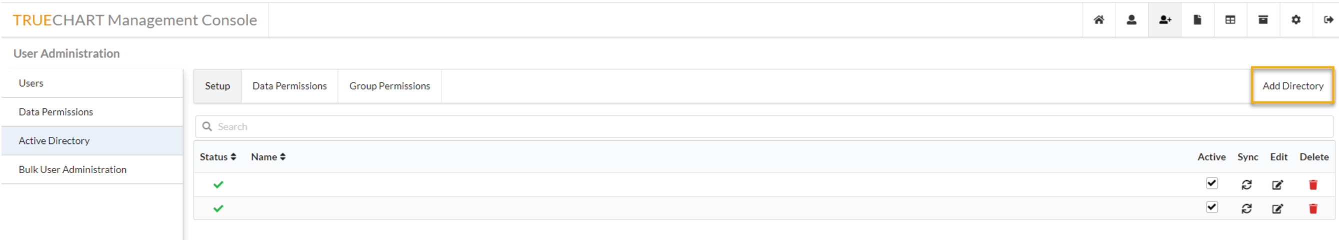
Sample Format files of a AD scheme definition (attributes and classes) cane be found here . This can be set up using AD handle tools (apache studio) in AD.

SecurityRuleClassImportable.ldif

SecurityRuleAttributes.ldif

Active Directory

Apart from the manual (local) creation and management of users, the *TRUECHART Service* can be linked to an existing LDAP service (such as *OpenLDAP*, *Active Directory*, *eDirectory*, etc.) to control access to users already existing in your directory.

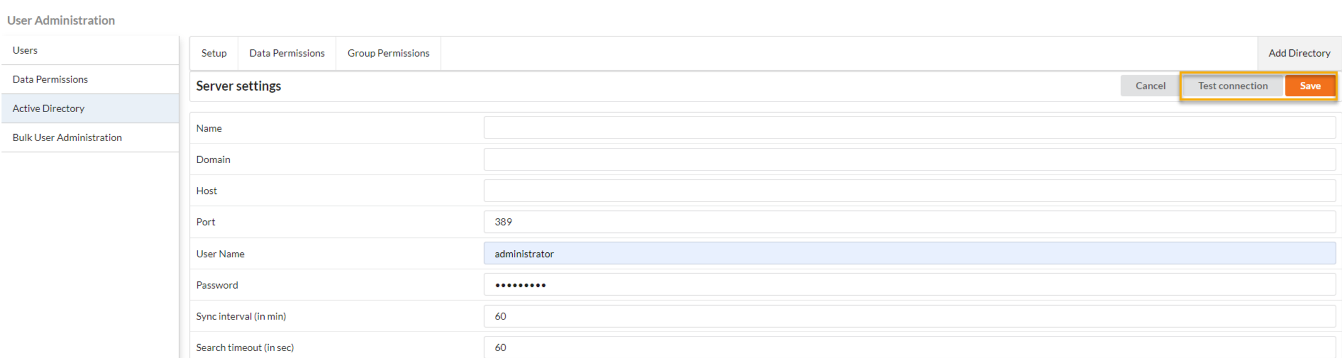


NOTE: For users running trueChart prior to v2021.2.0 , this screen will be found under "Settings". Further functionality remains the same

Connect to an LDAP server

Follow these steps to connect the TRUECHART service to your directory via LDAP:

1. Open the *TRUECHART Management Console* and go to the **User** page
2. Select the *Active Directory* menu entry on the left
3. Click on **Add Directory** in the upper right.
4. In the **New LDAP Connector** dialog enter the following information:
    a. **Name** and **Domain** name of the LDAP server
    b. **Host** and **Port** the LDAP service is listening on
    c. **Username** and **Password** to authenticate to the LDAP service
    d. **Sync interval** and **Search timeout**
5. Check to connection by clicking on button **Test Connection**
6. Click on **"Test connection",** then Save changes by clicking on button ***Save***



Connect to an LDAPS server

For using a secure connection to the LDAP server you need to follow the steps for connection to a LDAP server, except some adjustments:

Host: The Hostname must contain the protocol. So for a LDAPS connection the host must contain something like "LDAPS://ldap-host.com". The important thing is that it starts with "LDAPS://"

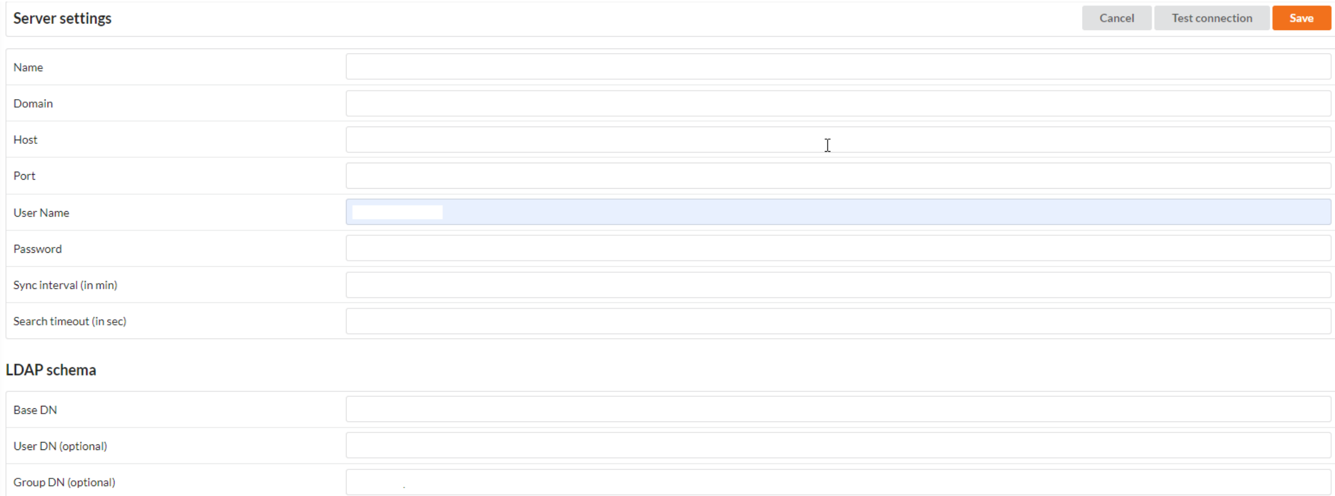
Port: Needs to be changed to the SSL port of the LDAP server . 636 (default - may differ)

In the LDAP(S) auth the checkbox for SSL must be checked and DC must have certificate also .

Edit the config

To edit the config of an already created LDAP directory connection follow these steps:

1. Open the *TRUECHART Management Console* and go to the **Settings** page
2. Select the *User Directories* menu entry on the left
3. Select the directory configuration to edit in the center



Advanced settings

Server settings

Here the general access parameters must be specified.

Property	Description
Name	The name of the current directory setting
Domain	The domain name to be sync with

Host	The hostname or IP address to access This should be your Domain Controller
Port	Enter 389 This is the default port. Enter this value unless you have some custom configuration for LDAP.
Username	Username to be used for access
Password	The password for given username to be used for access
Sync interval (in minutes)	Sync interval is the time period (in minutes) the TRUECHART Service syncs the users and groups between the directory and itself. The default value is 60 minutes.
Search timeout (in seconds)	Specify the timeout for search operation within the directory The default value is 60 seconds.

LDAP schema

Here the access names to the base directory and special user or user groups are specified.

Property	Description
Base DN	Base DN is the distinguished name of the directory. Example: dc=TRUECHART,dc=de,dc=com
User DN (optional)	Optional value to give for user domain names. The given OU "OU=TRUECHARTUsers" is the actual OU in the Active Directory that you chose to put your users in. Please note that this OU does not have to called "TRUECHARTUsers". It can be called anything you want or any OU that has the users you want to be in your TRUECHART Server instance. Please confirm the group is an OU and not a CN. If CN, you can use the designator CN=Users for example.
Group DN (optional)	Optional value to give for group domain names. The given OU "OU=TRUECHARTUserGroups" is the actual OU in the Active Directory that you chose to put your users from groups in. Please note that this OU does not have to called "TRUECHARTUsersGroups". It can be called anything you want or any OU that has the users you want to be in your TRUECHART Server instance. Please confirm the group is an OU and not a CN. If CN, you can use the designator CN=Users for example.

User schema

In the following section, the TRUECHART Service attributes must be mapped from directory values to TRUECHART Service values for the users to be imported.

Property	Description
Property	**Description**
User object	Example: *user*
User object filter	Example: *(&(objectCategory=Person)(sAMAccountName=*))*
Attribute: Username	Example: *sAMAccountName*
Attribute: Username RDN	Example: *cn*
Attribute: First name	Example: *givenName*
Attribute: Last name	Example: *sn*
Attribute: Display name	Example: *displayname*
Attribute: Principle name	Example: *userPrincipleName*
Attribute: Email	Example: *mail*
Attribute: Unique user ID	Example: *objectGUID*
Attribute: User groups	Example: memberOf

Group schema

In the following section, the TRUECHART Service attributes must be mapped from directory values to TRUECHART Service values for the user groups to be imported.

Property	Description
Group object	Example: *group*
Group object filter	Example: *(&(objectCategory=Group)(name=*))*
Attribute: Unique group ID	Example: *objectGUID*
Attribute: Group name	Example: *cn*
Attribute: Group description	Example: *description*
Attribute: Group members	Example: *member*
Fetch group members recursively	Checked/Uncheck to do so, also import users within sub or nested groups

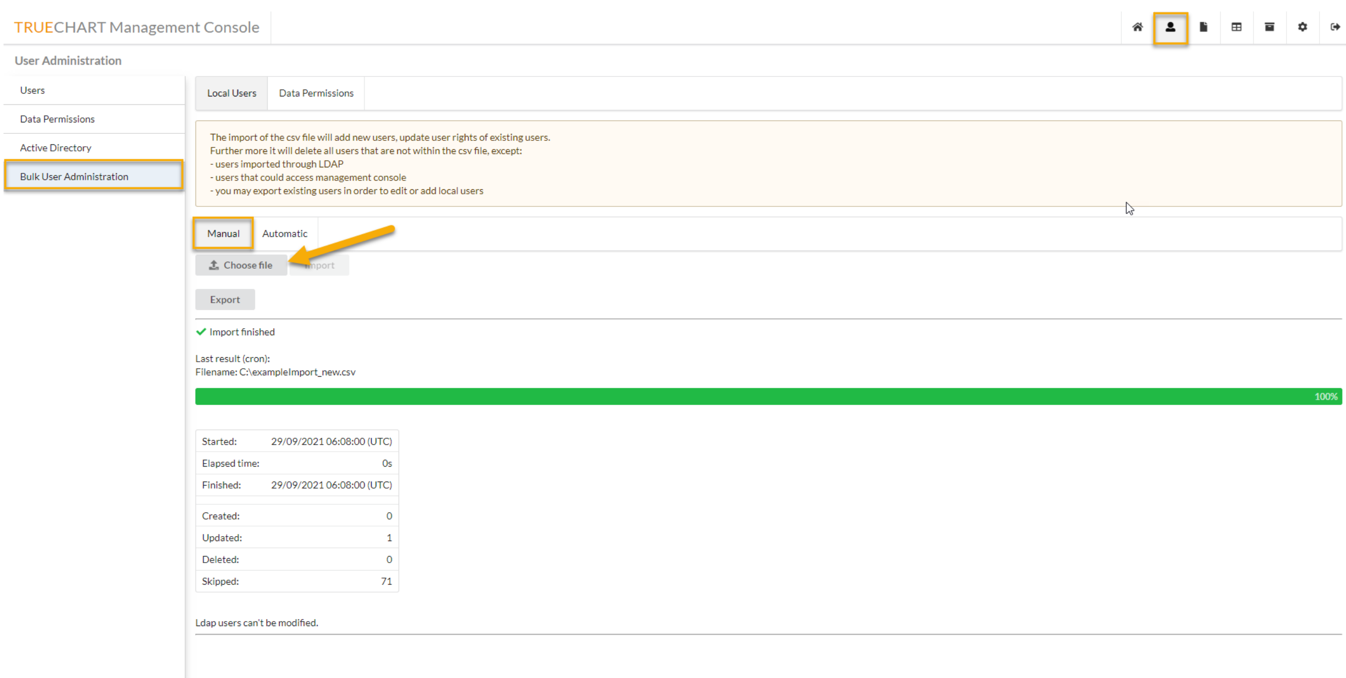
Bulk User Administration:

Bulk users can can be imported/exported from within TCMC:

- The import dialog could be accessed by selecting the User administration icon. After that select **Bulk User Administration** at the left navigation panel.
- At the bottom of the screen, you see the status of the current or last import procedure.

There are 2 ways for importing users through CSV import:

Manual import:



- First, create a file. ***The format of the file should match the following example***.

Example CSV Format:

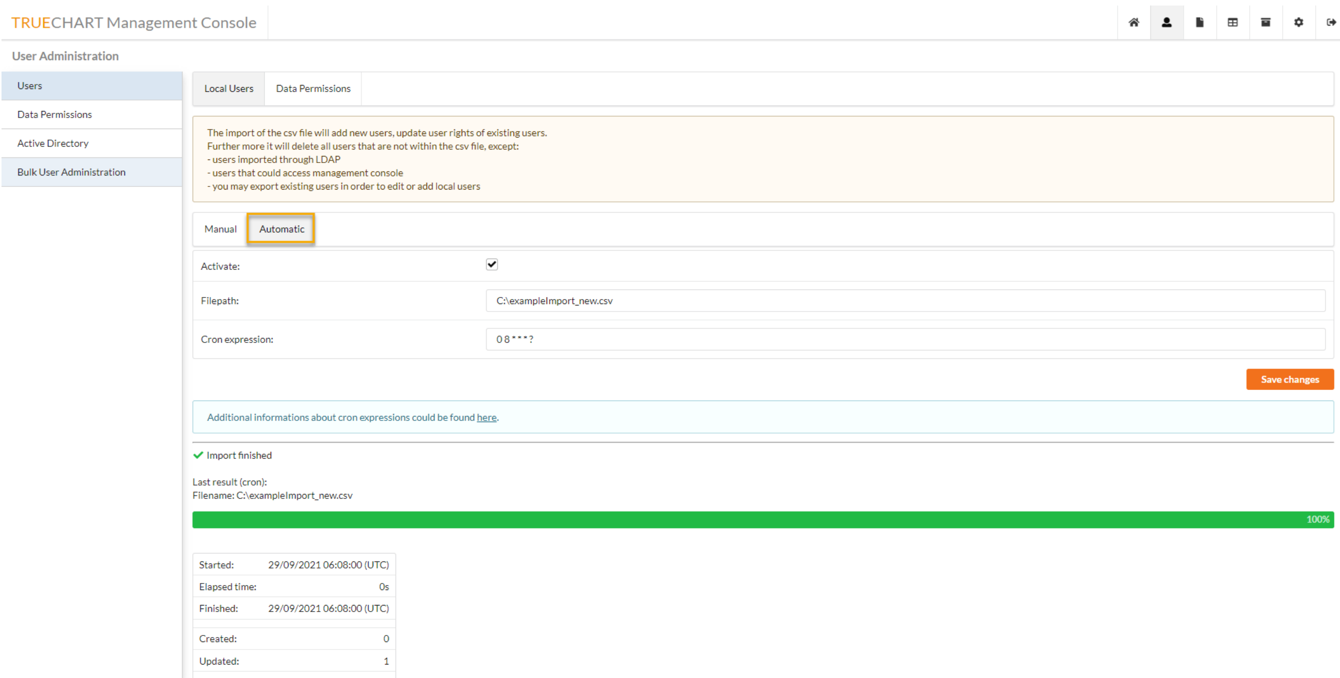
```
username,firstname,lastname,language,email,consumer,designer,nm,kpichat_admin,kpichat_consumer
domain\ahf,Achim,Höffner,en_US,achim@domain.com,,1,1,,
domain\cml,Christian,Müller,de_DE,christian@domain.com,1,,,,
```

- The content of the file will be displayed for manual validation of the user. Now you could start the import.

The import consist of 2 steps:

- Click on Choose File.
- Starting a background is a job that runs the import.
- If the import was successful, you will see the following status: Import finished.

Automatic import:



You could activate and deactivate automatic CSV import at any time you want. You only need to place a file at the server, input its file path, and enter a Cron expression.

Some examples:
"0 0 * * * ?" - will run a hourly job
"0 0 1 ? * SUN" - will run a job every Sunday at 1 o’clock am

Further examples and the full syntax specification could be found at www.quartz-scheduler.org.