



OrgPublisher EChart Security

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EChart Security Overview

You can secure published charts when you publish as EChart rich or thin client charts. Security allows you to:

- Validate if a user has access to the chart
- Define where the user can open the chart
- Determine if the user should be allowed to navigate up and over from their original opening position in the chart
- Determine if a user can view a style
- Decide if a user can see a data field
- Determine if a user can create an organizational planning chart
- Define what functionality a viewer has in a published chart

EChart Rich and Thin Client Authentication

OrgPublisher provides several methods to authenticate users, offered in the Publishing Wizard.

Figure 1.

- **Unsecured – All users can view the entire chart**
 - No authentication
- **Active Directory® authentication**
 - The server automatically recognizes each user by the network login and password
- **System User ID/box linkage (not secure)**
 - The server recognizes the user by the local user account

- **Chart – User enters user ID and password; Can be used with portals for single signon**
 - The server prompts each user to type a User ID and password
 - The chart administrator identifies the field in the chart containing the password
- **Reverse proxy – User ID is supplied in HTTP header**
 - Allows OrgPublisher to retrieve the User ID from the HTTP header **Variable** and use it for authentication
- **User ID field**
 - The chart administrator identifies the field in the chart that contains the User ID
 - **Format of User ID field** – the chart administrator selects what is included in the ID, such as user ID only or domain name and user ID
- **Starting box in chart**
 - Provides control for where the user opens the chart, such as the top of the chart or the user's box
- **Allow users to drill up from starting box**
 - Do not select his check box if you want to prevent users from drilling to other areas of the chart

Securing Fields

You can control who can see a data field and which group can see

1. Select **Data** from the menu then **Custom field properties** from the options list. The Custom Field Properties dialog opens.
2. Select the field you want to secure.

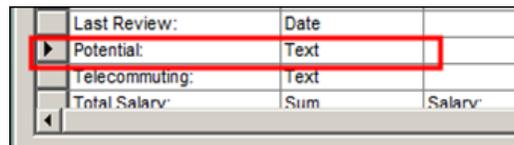


Figure 2.

3. Click the **Security** button at the bottom of the dialog.

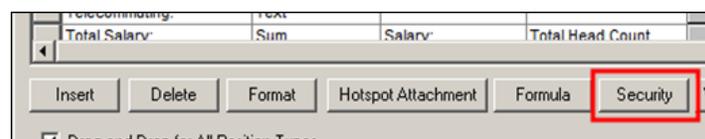


Figure 3.

The Custom Field Security dialog opens.

4. If you want the field to be searchable in the chart, select the check box **Allow this field** check box.

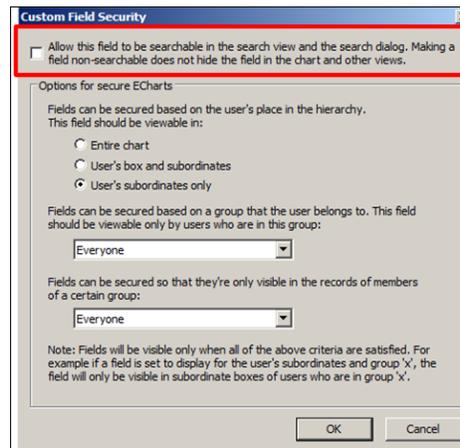


Figure 4.

5. If you are publishing the chart as a secure EChart, you can secure fields based on the user's place in the hierarchy.

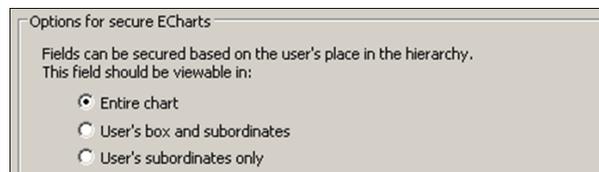


Figure 5.

- **Entire chart** – Allows users to see this field information in boxes in the entire chart.
- **User's box and subordinates** – Allows users to see this field information for themselves and any box in their span of control.
- **User's subordinates only** – Prevents users from seeing this field information for themselves, but allows them to see this data in other boxes within their span of control.

By default, everyone who has a box in the chart **can still see this field** in the chart (even though it is hierarchically limited in searches by the settings in Step 4 of this procedure). The administrator, however, can create a group to identify select records with authorization to see the data field.

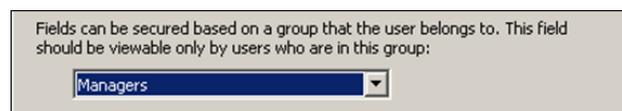


Figure 6.

6. You can set field security based on group membership.
7. Secure a data field for authorized viewing only by selecting a group from the drop-down list in the **Fields can be secured** section.

Style Security EChart Rich Client

1. Create a group identifying who can see a particular style.
2. Create a style containing all the information needed by the group.
3. Select **File** in the menu then **Styles** from the drop-down list. The Styles dialog opens.
4. Select the style (or add a new one based on an existing style) and choose a group using the drop-down list at the bottom of the dialog to allow viewing the style.



Figure 7.

Users working in published ECharts must be a member of the chosen group in order to view the secured style.

EChart Access for Multiple Reports

Users who appear in a published EChart more than once (multiple reports, for example) are prompted to select which of their chart boxes they want to access when opening the chart. The chart administrator selects the fields displayed in the chart box.

1. Select **Options** in the menu then **EChart security options** in the drop-down list. The EChart Multiple Instance User Configuration dialog opens.

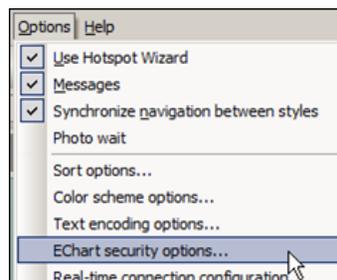


Figure 8.

2. Select the fields to appear in the chart for the multiple reporting relationship user and click **OK**.



Figure 9.

In the following example, Ki Wang has both a direct and indirect reporting relationship. When logging into the secured EChart, she is prompted to **Select User Instance**.

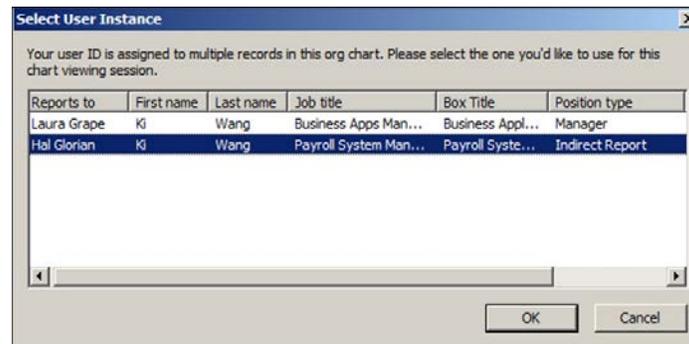


Figure 10.

Planning Access in OrgPublisher Premier

The chart administrator determines whether or not planning is enabled for users during the publishing process. Default settings allow everyone in the chart to create planning charts from all records to which they have access in the published chart.

The chart administrator can restrict access to planning charts with group membership. Two types of group restriction are available.

- A group where members can create a planning chart from their box in the hierarchy or below.
- A group where members can create a planning chart with or all records in the chart.

Toolbar Button Access in a Published Chart

Access to toolbar buttons can be restricted by group membership. Review the OrgPublisher Publishing document for detailed information.