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Identity Intelligence User Guide

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About This Book

This *User Guide* provides concepts, use cases, and instructions for configuring and enabling Identity Intelligence.

Intended Audience

This book provides information for Identity Intelligence. Report users must meet the following criteria:

- ◆ Have the required permissions to access reports
- ◆ Have experience with Identity Governance activities, such as evaluating user permissions and ensuring that access rights get assigned according to organizational procedures
- ◆ Users of Identity Governance application

1 Introduction to Identity Intelligence

NetIQ Identity Intelligence enables you to analyze and monitor identity governance and administration activities using predefined and custom dashboards and reports. You can use the interactive dashboards and a wide range of reporting capabilities by Identity Intelligence, including:

- ♦ View data in the form of visuals and tabular details to support audits of identity governance processes
- ♦ View, analyze governance activity and event details and take the appropriate action if any abnormalities found
- ♦ Report to management and other stakeholders on adherence to policies such as compliance officers or resource administrator
- ♦ Evaluate request and approval processes to determine their efficiency and adherence to enterprise standards, such as service level agreements (SLAs)

The following sections describe Identity Intelligence in detail:

- ♦ [“Identity Intelligence Licensing Models” on page 7](#)
- ♦ [“The Identity Intelligence Architecture” on page 8](#)
- ♦ [“How Identity Intelligence Works?” on page 9](#)
- ♦ [“Browser Specifications” on page 10](#)

Identity Intelligence Licensing Models

At a high level, Identity Intelligence comprises of the following two licensing models:

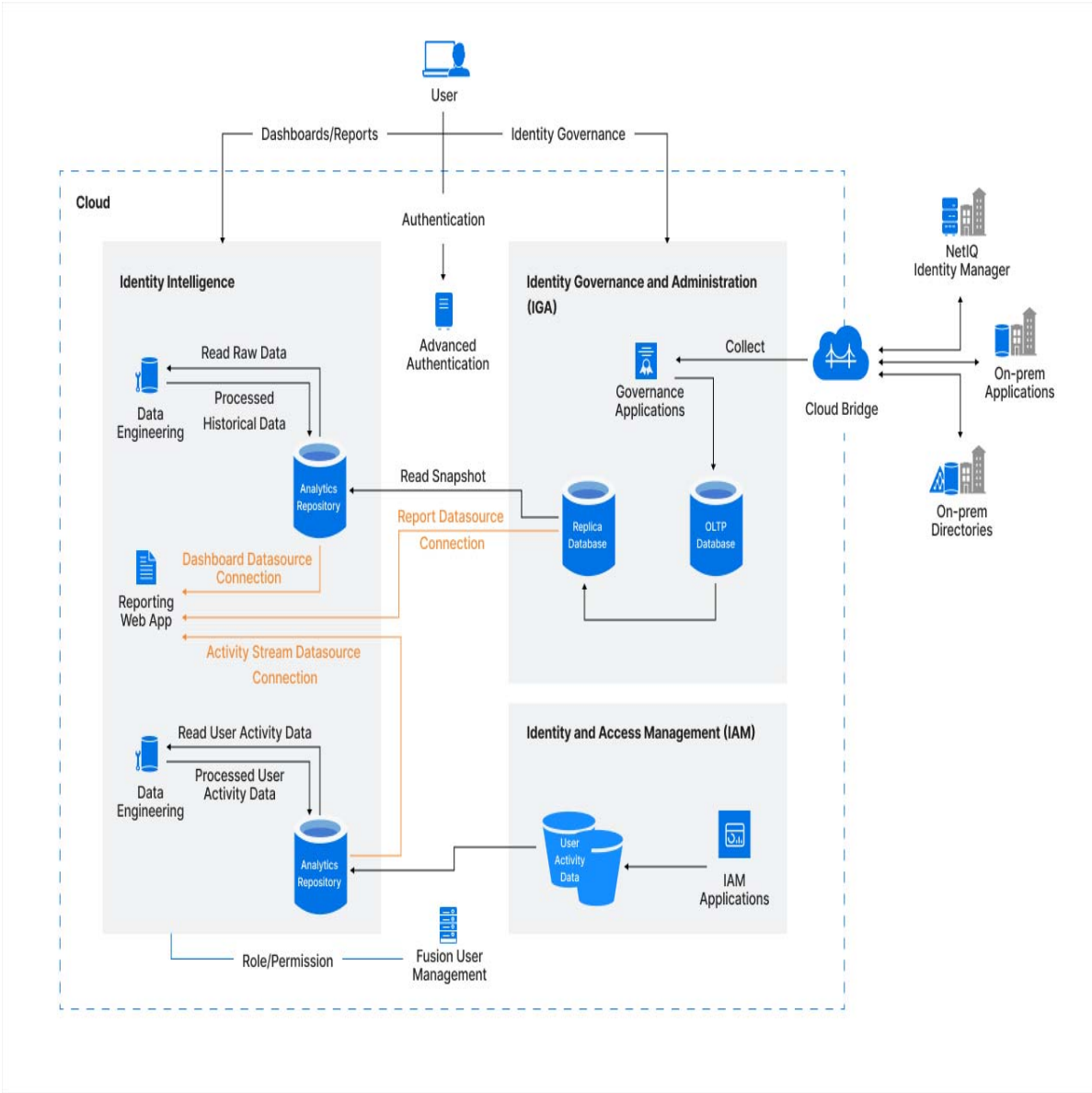
- ♦ **Identity Intelligence Basic**
Provides read-only permissions for the report users in the Identity Intelligence portal.
- ♦ **Identity Intelligence**
Provides read, write, edit, and delete operations to users based on assigned report permissions.

For the feature comparison of these models, see [“Report Permissions” on page 10](#).

The Identity Intelligence Architecture

The following diagram helps you understand the Identity Intelligence product architecture:

Figure 1-1 The Architecture of Identity Intelligence



The following table describes the components involved in the Identity Intelligence architecture:

Component	Description
Identity Governance and Administration	
<ul style="list-style-type: none"> Governance Applications and OLTP database 	<ul style="list-style-type: none"> The data from the sources is collected through governance applications and is stored in the Identity Governance and Administration database.

Component	Description
<ul style="list-style-type: none"> ◆ Replica database is displayed as <code>identity_datalake</code> in the Identity Intelligence portal. 	<ul style="list-style-type: none"> ◆ A read replica is created and maintained from the Identity Governance source database.
Identity and Access Management	
<ul style="list-style-type: none"> ◆ IAM Applications 	<ul style="list-style-type: none"> ◆ Identity Governance and Administration, Advanced Authentication, Password Management, and other IAM suite of applications generate user activity data, which gets stored in the S3 bucket. <p>NOTE: The user activity data gets stored in the customer specific S3 bucket or in the shared S3 bucket based on product deployment and configuration.</p>
<ul style="list-style-type: none"> ◆ User Activity Data and S3 Buckets 	<ul style="list-style-type: none"> ◆ The user activity data that is stored in the S3 bucket is collected and processed using data engineering methods. The processed data gets stored in to the Analytics Repository schema.
Identity Intelligence	
<p>Analytics Repository is displayed as <code>analytics_database</code> in the Identity Intelligence reports portal.</p>	<ul style="list-style-type: none"> ◆ The data from replica database is processed and stored in the Analytics Repository database. Reporting Service dashboards fetch this processed data and represent this data using the specific use case widgets. <p>NOTE: The data collection from the replica database to the Analytics Repository is scheduled to occur every 24 hours.</p> <ul style="list-style-type: none"> ◆ The Identity Intelligence reports use the read replica to fetch data and generate the reports. ◆ The Identity Intelligence reporting service displays the processed user activity data through the available reports.

How Identity Intelligence Works?

The data is collected from different sources to the identity governance database through Identity Governance and Administration application. Identity Intelligence uses a read replica to avoid any modifications to the source data. Identity Intelligence Reports use this replica database and display

the information based on the queries and report filters applied. Whereas, Identity Intelligence dashboards use processed, historical data that gets stored in the Analytics Repository. Dashboards display data from for the specified time period and filters.

Individuals who can log in to Identity Intelligence are created in User Management system and with assigned report permissions. To understand more about report permissions, see [Report Permissions](#). You must perform the following:

- ♦ [Configuring Identity Intelligence in Identity Governance Administration Application](#)
- ♦ [Creating Users in User Management Portal](#)

Configuring Identity Intelligence in Identity Governance Administration

Perform the following one-time configuration to enable accessing Identity Intelligence from Identity Governance Administration application:

- 1 Log in to Identity Governance as a customer administrator.
- 2 Click **Configuration > General Settings**.
- 3 Specify the value for **Analytics Dashboards URL** in the format: `https://<tenant-id>.mp.<domain-name>.com/mgmt/reports`.
- 4 Specify the value for **Analytics Dashboard Label** as **Identity Intelligence** and save the settings.

Accessing Identity Intelligence

After you log in to reports portal as a report user, log in to Identity Governance and Administration, click the home icon in the top right corner of Identity Governance Administration application. Click **Identity Intelligence** from the list. You will be navigated to the Identity Intelligence reports portal.

Click any of the following options to access the Identity Intelligence reports portal:

- ♦ **Portal** to access the predefined dashboards and reports. For information on predefined dashboards, see [Chapter 3, “Understanding Predefined Governance Dashboards,” on page 17](#).
For information on predefined reports, see [Chapter 4, “Understanding Predefined Reports,” on page 25](#).
- ♦ **Dashboard Designer** to create custom dashboards. For information, see [“Creating Custom Reports and Dashboards” on page 29](#).
- ♦ **Report Designer** to create reports. For information, see [“Creating Custom Reports and Dashboards” on page 29](#).
- ♦ **Scheduler** to create and manage a scheduled report. For information, see [“Creating Custom Reports and Dashboards” on page 29](#).

Browser Specifications

You can access Identity Intelligence from one of the following browsers:

- ♦ Google Chrome 111.0.x.x or higher

- ◆ Microsoft Edge Browser 111.0.x.x or higher
- ◆ Mozilla Firefox 110.0 or higher

IMPORTANT: The browser must have cookies enabled. If cookies are disabled, the product does not work.

2 Managing Users

To use the Identity Intelligence portal, the customer administrator must create users and assign permissions in User Management system. The customer administrator can add users; create roles; and assign permissions to the roles to use Identity Intelligence. If you have the **Manage Roles** permission, you can change the permissions of any role assigned to your account except for those of the **System Admin**.

- ♦ [“Create a Role with Permissions” on page 13](#)
- ♦ [“Report Permissions” on page 15](#)

Create a Role with Permissions

You can group multiple [report permissions](#) into a role and assign the relevant role to users. A user must have at least one role.

You can assign only the permissions and roles that you have yourself.

- 1 Click **ADMIN > Roles and Permissions > Create Role**.
- 2 In the prompt, specify a name for the role. For example, Report Designer.
- 3 Click **Create**.
- 4 Select the [report permissions](#) that you want to apply to the new role. For example, Design Reports and View Reports.

Create a New User

You must create users with the same email ID from the source. Perform the following steps to create users and map them using the email ID from your source system to the User Management system:

- 1 Click **ADMIN > Users and Groups > Create User**.
- 2 Specify the email ID and name of the user.
- 3 Select the roles that you want to grant to the user.
- 4 Click **Save**.

Assigning Roles to the Users

To add users to the role, complete the following steps:

- 1 Select the **USERS** tab.
- 2 Select **Assign role to users**.
- 3 Choose the users you want to add to the role.
- 4 Click **Save**.

View Details of a Role

You can also modify the role's settings and permissions.

- 1 Click **ADMIN > Roles and Permissions > role_name**.
- 2 (Optional) Modify the role in one of the following ways:
 - ♦ [Change the set of permissions](#)
You can assign only the permissions and roles that you have yourself.
 - ♦ [Add or remove users for the Role](#)

Change Permissions for the Role

You can assign only those permissions that you have yourself.

- 1 While viewing a role, select **Permissions**.
- 2 In the **Permissions** tab, select the permissions that you want to add or remove.
You might need to scroll the page to see the full set of available permissions.

Add or Remove Users for a Role

You can add or remove multiple users in a role.

- 1 Select **Users**.
- 2 In the **Users** tab, select [Assign role to users](#).
- 3 Select the users that you want to assign to or remove from the role.

Example for Creating Users and Assigning Roles

John Doe is a report designer and wants to use the Identity Intelligence reports portal to create a new dashboard. The customer administrator Adam Mandari performs the following steps:

1. Adam Mandari logs in to User Management Portal as a Customer Administrator.
2. Clicks **ADMIN > Roles and Permissions > Create Role**.
3. In the prompt, specifies a name for the role as Report Designer.
4. Selects the report permissions **Design Reports** and **Schedule Reports** to apply to the new role.
5. To create the user John Doe, clicks **ADMIN > User and Groups > Create User**.
6. Specifies the email ID as john.doe@abc.com and name of the user as John Doe and saves.
7. To grant the role, selects the role **Report Designer** for John Doe.
8. Selects **Users** tab.
9. Selects [Assign role to users](#) and adds John Doe to the role and Saves.

Report Permissions

The following table lists the permissions available for the Reports feature:

Permission name	Identity Intelligence Basic	Identity Intelligence
View Reports	<ul style="list-style-type: none"> View dashboards and reports 	<ul style="list-style-type: none"> View dashboards and reports
Schedule Reports	<ul style="list-style-type: none"> View dashboards and reports Schedule reports 	<ul style="list-style-type: none"> View dashboards and reports Schedule reports
Design Reports	<ul style="list-style-type: none"> View dashboards and reports Schedule reports 	<ul style="list-style-type: none"> View dashboards and reports Schedule reports Create dashboards and reports
Report Admin	<ul style="list-style-type: none"> View dashboards and reports Schedule reports 	<ul style="list-style-type: none"> View dashboards and reports Schedule reports Create dashboards and reports View dashboard details

Understanding Directory Access Permissions

The report users, based on the assigned report permissions, gets read, edit, delete, and share rights to the directories in the reports portal.

NOTE: User permissions in the **Identity Intelligence Basic** licensing model are limited to **Read** access to the **Controlled directory**. Advanced and Custom directories listed in the table are not applicable to Identity Intelligence basic users.

The following table lists the access permissions of the **Identity Intelligence** licensing model that allows to store, share dashboards and reports, create custom content, and folders:

Directory Name	Directory Description	Permission	Access Permissions			
			Read	Write	Share	Delete
Custom Content	Allows you to create, place the custom content such as dashboards and reports. Allows you to creating sub directories at the root level.	Report Admin	✓	✓	✓	✓
		Design Reports	✓	✓	✓	✓
		Schedule Reports	✓	✗	✗	✗
		View Reports	✓	✗	✗	✗
Advanced	This is applicable for Identity Intelligence licensing model	All report users	✓	✗	✗	✗

Directory Name	Directory Description	Permission	Access Permissions			
Advanced/Detailed Content	Only report admin can view the details of the dashboards (drill-down)	Report Admin	✓	✗	✗	✗
Controlled	Allows you to manage role based content	All report users	✓	✗	✗	✗
Controlled/Admin	Only report administrators can create/manage the content	Report Admin	✓	✓	✓	✓
Controlled/Designer	Report administrators and designers can create/manage the content	Report Admin	✓	✓	✓	✓
		Design Reports	✓	✓	✓	✓
Controlled/Restricted	Report administrators can create/manage the content and designers can manage the content	Report Admin	✓	✓	✓	✓
		Design Reports	✓	✗	✗	✗

3 Understanding Predefined Governance Dashboards

Select [Reports](#) > [Portal](#) > [Repository](#) > [Dashboards](#).

The predefined dashboards enable you to track the changes in entities such as Identities, Groups, Applications, Accounts, Permissions, Technical Roles, Requests, Reviews, Data Policies, and Assignments. You can use elements in the dashboard to visualize, identify, and assess Governance health.

- ◆ [“Viewing Governance Activities Using Predefined Dashboards”](#) on page 17
- ◆ [“Understanding Predefined Widgets”](#) on page 20
- ◆ [“Viewing Dashboards in the Reports Portal”](#) on page 24

Viewing Governance Activities Using Predefined Dashboards

The following table lists the predefined composite dashboards and their widgets:

NOTE: The Identity Intelligence Dashboards display time in Greenwich Mean Time (GMT) and display data collected up until the most recent data collection time, which is scheduled for 2 a.m. every day on a 24-hour frequency.

Dashboard Name	Associated Widgets
Access Request and Approval Activity: Enables you to view the requests and identify any unusual increase or decrease in the access requests activity.	<ul style="list-style-type: none">◆ “Requests Overview” on page 20◆ “Requests Activity” on page 20◆ “Pending Requests Timeline” on page 20◆ “Access Review” on page 21
Access Review and Certification Activity: Enables you to view the number of items, the percentage of work completed, number of approved, completed, and rejected items.	<ul style="list-style-type: none">◆ “In-Flight Reviews Overview” on page 21◆ “Reviews Completed” on page 21◆ “Top 10 In-Flight Reviews by Pending Items” on page 21◆ “Pending In-Flight Review Details by Review Time” on page 21
Data Control and Remediation Activity: Enables you to monitor the collection and publication policies. Allows you to track the number of detected items and remediation activities for the policies.	<ul style="list-style-type: none">◆ “Data Policies and Controls” on page 22◆ “Reviews Completed” on page 21◆ “Catalog Information” on page 21

Selecting Preset Time in Dashboards

Most of the widgets in a dashboard display data according to either a specified time range or an As of now setting, which displays data based on the last time that you refreshed the browser. You can select the time range using the presets **This Month** or **This Quarter** or **This Year**.

If you select a preset time, the Dashboard displays data starting from 12:00:00 a.m. of the first date in the range to 11:59:59 p.m. of the last date in the range. If the last date is the current date, then the Dashboard defaults to the current time or time of the last browser refresh. For example, if you have selected This Month, the data is displayed from 12:00:00 a.m. April 29 to 11:59:59 p.m. May 29.

Access Request and Approval Activity

You can view all access request information. For each access request, the dashboard includes the following details:

- ◆ Number of total access requests in the system as of now
- ◆ Number of requests as of now with percentage of increase or decrease in requests that are pending for approval, completion, and denied
- ◆ Requests Activity and Pending time lines widgets displaying requests trend for the selected preset time range
- ◆ Request Processing Time for the request approval, fulfillment, and verification based on the expected time for approval selected.

To determine the owner received requests, click the pie charts to view the details.

Access Review and Certification Activity

Select the options in the **Filter by review started** section to filter and see the review items created by On Demand, Micro Certification, and Schedule. The following information in the dashboard gets refreshed for the filter you selected:

- ◆ In-flight reviews overview that are in one of the status: in-audit, in-progress, and owner approval required
- ◆ Reviews completed above and below the specified expected approval rate
- ◆ Top in-flight reviews that displays both completed and pending items by review items.
- ◆ Pending in-flight review details by review time with review details displayed in the tabular form. The table displays overdue and review days left for each review item.

Click the detail links in widget charts to view more details. Hover over the line graph chart to view more details of pending items.

Data Control and Remediation Activity

NOTE: The Data Control and Remediation Activity dashboard displays data policies that were run at least once to calculate the detected items.

You can view the policy details using the widgets of this dashboard. Displays the total detected items in the system.

The following details gets displayed for the preset selected:

- ◆ The circular charts display both collection and publication policies and the chart detail links gives more details of each of the publication and collection policies
- ◆ Review items that are complete and error state for remediation actions micro certification, change request
- ◆ Top 10 detected items for both publication and collection policies

The following summary details gets displayed irrespective of the preset selected:

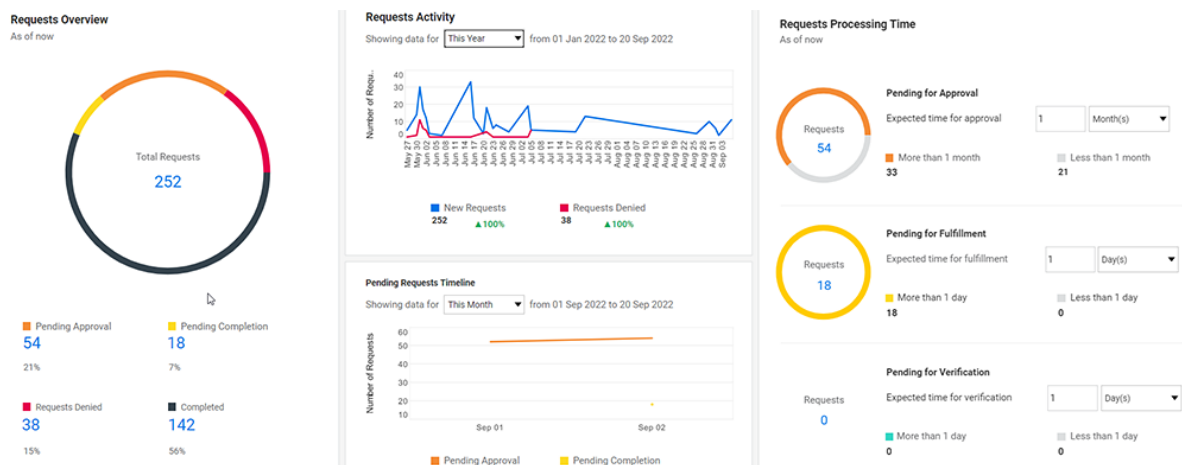
- ◆ Data policies by remediation actions are displayed for each remediation action.
- ◆ Number of pending and reviewed items of micro certification and change request.
- ◆ In-progress reviews of micro certification and remediation action
- ◆ Detected items and email notifications for those detected items, detected items that have no remediation

The displayed details enables you to determine the appropriate remediation action for the policies with violations.

Viewing Dashboards Example

Select the time period to view the data for **This Month/This Quarter/This Year**. The dashboard charts display the requests information and their status for the selected period. Few of the charts with 'as of now' label display the total requests information irrespective of the selected time period. These charts help you to get an overview of the governance activities till date. Also, you can click the charts to navigate and view the specific status details.

Figure 3-1 Viewing Access Request and Approval Activity Dashboard



Understanding Predefined Widgets

Widgets display data according to your specifications. You can filter the content using specific filters.

Identity Governance provides a set of widgets to offer re-usability and simplify the dashboard maintenance. You will need to configure the widgets to ensure the dashboards display data appropriately for your environment. The following widgets enable you to create a composite dashboard with the required functionality:

- ◆ [“Access Request” on page 20](#)
- ◆ [“Access Review” on page 21](#)
- ◆ [“Catalog Information” on page 21](#)
- ◆ [“Accounts by Review Status” on page 22](#)
- ◆ [“Data Policies and Controls” on page 22](#)
- ◆ [“Fulfillment” on page 23](#)
- ◆ [“Remediation: Data Policies and Controls” on page 23](#)

Access Request

The following elements are part of this widget:

- ◆ [“Pending Requests Timeline” on page 20](#)
- ◆ [“Requests Activity” on page 20](#)
- ◆ [“Requests Overview” on page 20](#)

Pending Requests Timeline

The timeline displays changes in the pending approval and completion items over the period for the selected preset to view and analyze the trend. Hover the mouse on the chart to see the request details.

Requests Activity

You can use this chart to determine the number of new and denied requests for the selected preset. Hover the mouse on the line graph to see the request count and status.

Requests Overview

The overview chart enables you to view the total number of requests and their status such as requests pending for approval, completion, and requests which are denied and completed.

Access Review

You can use the charts to track and investigate requests that need approval, requests that are approved but not fulfilled, requests that are fulfilled but are in one of the fulfillment states: retry, pending, verification pending.

- ◆ [“In-Flight Reviews Overview” on page 21](#)
- ◆ [“Pending In-Flight Review Details by Review Time” on page 21](#)
- ◆ [“Reviews Completed” on page 21](#)
- ◆ [“Top 10 In-Flight Reviews by Pending Items” on page 21](#)

In-Flight Reviews Overview

This chart gives you an overview of the reviews with the status. The details links in the donut chart enable you to view the review details.

Pending In-Flight Review Details by Review Time

This table enables you to view the overdue pending items or the days left to complete the items for the review.

Reviews Completed

The donut chart displays the reviews completed for the approval rate specified. If you have specified the approval rate as 8, the chart displays the reviews that are above and below the mentioned rate. You can click the details links in the donut chart to view the completed reviews details. Click the charts to view the details of reviews.

Top 10 In-Flight Reviews by Pending Items

You can use this chart to view the top ten in-flight reviews with the reviews ordered by the pending items percentage in descending order.

Catalog Information

Catalog widgets comes in two categories: **Accounts** and **Applications**. The following widgets track the number of applications, accounts, and their status details:

- ◆ [“Accounts Mapped Status” on page 22](#)
- ◆ [“Accounts Relationship with Categories” on page 22](#)
- ◆ [“Total Accounts” on page 22](#)
- ◆ [“Top Applications” on page 22](#)
- ◆ [“Total Applications” on page 22](#)

Accounts Mapped Status

The chart displays the total number of accounts by mapped status: mapped or unmapped. Click the number in the chart to view account details such as name of the application, account, account map status, and category.

Accounts Relationship with Categories

The sun burst chart displays total accounts within the system till date and illustrates how user accounts are distributed among different categories or groups. The widget displays if one or more users are mapped to a single or multiple accounts and if the account is shared among multiple users.

Click the chart to navigate to the details page for which you want to view the details. You can view the types of applications, or resources that the accounts in each category can access and the risk associated with each account.

Total Accounts

Displays the total number of accounts belonging to different applications. Click the number in the chart to view account details.

Top Applications

Displays the top twenty applications with highest number of accounts sorted in descending order. Click any application on the chart to view the account details such as name of the application, mapped users, account category, type, status, and reviewed date.

Total Applications

Displays the total number of applications. Click the numbers in the chart to view the details such as application name, associated number of accounts, creator, date created, number of permissions, and application risk.

Accounts by Review Status

Displays the number of unmapped accounts that are not assigned to any account category such as admin and system. You can view the number of unmapped accounts and the account relation to the user such as shared, singular, and unmapped.

Click the bar chart to view the details of the unmapped accounts.

Data Policies and Controls

Collection Policies

Displays top ten collection policies with the number of detected items in descending order.

Publication Policies

Displays top ten publication policies with the number of detected items in descending order.

Reviews

Completed Reviews

Displays the number of completed reviews in micro certification and change request activities.

In-progress Reviews

Displays the number of in-progress and in audit reviews in micro certification and change request activities.

Review Items Status

Displays the number of pending and reviewed items in micro certification and change request that has remediation.

Policies Overview

Displays total detected items with the increase or decrease for the selected period. The chart shows both the collection and publication policies and shows associated details on clicking details link.

Fulfillment

Displays the access requests pending for approval, fulfillment, and verification.

Access Request Processing Time

Displays requests pending more than and less than the specified expected time. If you have specified the expected time for approval as 10 days, the pie chart displays the requests more than and less than the expected time for approval.

Remediation: Data Policies and Controls

The charts in this part of the dashboard display the data till date. You can get an overview of the following:

Email Notifications

Displays the detected items and the number of email notifications sent for the detected items.

No Remediation

Displays the number of detected items with no remediation action.

Remediation Action

Displays the policies with remediation for the remediation actions: change request, micro certification, workflow, email notification, and no remediation.

Viewing Dashboards in the Reports Portal

You can view the data in dashboards using filters and can further navigate to view the details. You can perform the following actions on the dashboards:

NOTE: Only the users with **report admin** permission can view the dashboard page details.

NOTE: When non-administrative users click the bar graph or donut chart links to view the details, the dashboards intermittently display blank pages instead of Access Denied message. Click the main dashboard tab to continue using the dashboards.

1. Log in to Identity Governance as a Customer Administrator or report administrator.
2. Click the home icon in the top right corner and select **Identity Intelligence > Reports**.
3. Select **Repository > Dashboards**.
4. Select the dashboard you want to view.
5. Select the period for which you want to see the data.
6. Click the circular pack, donut charts details links in the dashboards to view the requests, reviews, and policies details. To know more about the details page, see [“Viewing Dashboard Details” on page 24](#).
7. Hover the mouse on the line graph, vertical bars, or, horizontal bars in the dashboard graphs to view the specific details.
8. (Optional) On the details page, click **Selection to Filter** to apply additional filters and see the data. To know more about using the filter, see [“Using Selection to Filter Option” on page 24](#).

Viewing Dashboard Details

The Identity Intelligence portal enables authorized administrators to view more data about specific elements for more extensive/comprehensive data reviews. The additional detail pages of the dashboard charts open in a new tab and include details such as requests, requested user, status, number of pending requests with the verifier name, and more details of the governance activities.

Using Selection to Filter Option

Right-click the filter beside each field label in the table to filter the details. The selected filters get displayed in the **Selection to Filter table**, including the default filters, and display the details of the access requests based on the additional filters applied. Adjust the time range in the **Request Date** to further filter the details for the specified time range.

4 Understanding Predefined Reports

In the Identity Intelligence portal, select **Repository > Reports**.

Available Reports

The following reports enable you to view the users permissions, risks, profile changes for users, and permission description changes:

NOTE: The Identity Intelligence Reports display time in Greenwich Mean Time (GMT).

NOTE: In the reports, **(No Name)** indicates the users with undefined usernames or display names, such as administrators and guests within the source system.

Report Name and Description	Details Displayed in the Report
<p><i>Permissions Definition Changes:</i></p> <p>Displays the collected and curated changes to permissions within a given date range.</p>	<ul style="list-style-type: none">◆ Displays the permission meta data of the selected permission◆ Lists multiple selected permission changes of both collected and curated for the given date range◆ Captures the permission attribute before and after changes such as permission description, type, and risk etc.
<p><i>User Permissions Snapshot:</i></p> <p>Displays all the permission information for a specified user on the selected date.</p>	<ul style="list-style-type: none">◆ Details about the permissions granted to the user sorted by the applications and displays permission attributes such as name, type, description, and risk.
<p><i>User Profile Reviews:</i></p> <p>Displays the list of user-profiles with the details of reviewers, review status, item status, and final decision for selected review.</p> <p>NOTE: In the case of multiple reviewer names for a review, a blank space shows up between the separator symbols for users with undefined display names or usernames.</p>	<ul style="list-style-type: none">◆ Details of user and current reviewer with the items status.◆ Identify user profile attributes such as supervisor, workforcelD, department, and email etc., that require review.◆ Reviewer can review the user profile review items and move them to appropriate state such as 'no profile changes' which is reflected in the final decision.◆ Review owner can select set of user review items and change the reviewer.
<p><i>User Profile Changes:</i></p> <p>Displays the list of changes made to the user profile attributes by collection and curation.</p>	<ul style="list-style-type: none">◆ The changes in user profile attributes such as supervisor, city, state and Geo location, etc.

Report Name and Description	Details Displayed in the Report
<p><i>Permissions Delta by User:</i></p> <p>Displays the changes in permissions for a selected user within the given date range.</p>	<ul style="list-style-type: none"> ◆ List of initial permissions that the user holds at the beginning of selected date range. ◆ List of user permission changes in the environment which are newly discovered, removed, and altered ◆ User permission changes by assignment ◆ Final permissions of the user

Using Reports

The predefined reports use time range and filters to display data. You can use the following filters to view reports for the information that you want.

NOTE: The available filters listed vary based on report you want to generate. Reports display time in Greenwich Mean Time (GMT).

For example, to generate Permissions Delta by Permission report, you need to select the mandatory fields **From date** and **To date**. You might select or skip selecting the other optional fields and submit to view the report.

- ◆ User name
- ◆ Snapshot date
- ◆ Risk
- ◆ Permission name
- ◆ From date
- ◆ To date
- ◆ Review name
- ◆ Reviewer name

Viewing Reports in the Reports Portal

1. Log in to Identity Governance as Customer Administrator or Report Administrator.
2. Click the home icon and select **Identity Intelligence**.
3. Select **Repository > Reports**.
4. Select the report you want to view.
5. Specify the mandatory attributes specific to the report.

NOTE: Individual filters in the reports list up to 2000 entities.

6. Select **Submit** to generate the report.

Understanding Active User Reports

In the Identity Intelligence portal, select [Repository](#) > [Advanced](#) > [Active Users](#).

The following are the active user reports that enable you to view the monthly activity of the users and service activity information:

Report Name	Description
Monthly Active Users	Displays the monthly active user's count for the selected period. This report displays Identity Governance data.
Service Activity Information	Displays monthly service activity information for the selected period. Using this report, you can view the service activity information of the Identity Governance and Administration, Advanced Authentication, Password Management, and other IAM suite of applications.

The user activity data from these reports helps in making decisions for Light and Unlimited subscriptions.

NOTE: The system automatically archives activity stream information that is more than thirteen months old, excluding the current month. The archived data in the S3 bucket is subject to a routine purge every two years.

How do the Active User Reports Work?

The active user reports view the user count in the **Light** and **Unlimited** categories. Light category represents the count of user activities such as login, performing events that are less than ten times in the application. While the Unlimited category represents the count of user's activities that are more than or equal to ten times. The Total Count is the cumulative number of user activities from both Light and Unlimited categories.

Selecting Preset Time for the Active User Reports

NOTE: The active user reports display data collected up until the most recent data collection time, which is scheduled for 2 a.m. every day on a 24-hour frequency.

You can select the time range using the presets [This Month](#) or [Last Month](#) or [Last Three Months](#) or [Last Six Months](#) or [Last Twelve Months](#).

When you select [This Month](#), the report displays data up until yesterday, which corresponds to the latest time of data collection. If you run the report on the first day of the month, no data will be displayed. If you run the report on any other selected date during the month, the data is displayed from the first day of the month until the previous day of the date selected. For example, as of June 21st 2023, the reports display the monthly summary between June 1st 2023 to June 20th 2023.

If you select the preset **Last Three Months**, as of June 1st the reports display the monthly summary between March 1st 2023 to May 31st 2023.

5 Creating Custom Reports and Dashboards

When using the Identity Intelligence portal, follow these best practices to improve your work flow to create reports and dashboards.

- ◆ “Understanding Data Sources” on page 29
- ◆ “Understanding Worksheets” on page 30
- ◆ “Creating a Simple Dashboard Using Worksheets” on page 32
- ◆ “Creating a Simple Report Using Worksheets” on page 33

Understanding Data Sources

IMPORTANT: Data sources must not be used to create dashboards and reports. You can use worksheets to create a dashboard or a report. For more information, see [Creating a Simple Dashboard Using Worksheets](#) and [Creating a Simple Report Using Worksheets](#).

A data source provides a persistent connection to your data. When you update, modify, and delete records, the records automatically gets reflected in all dashboards and reports that use the data source.

The following are the data sources in Identity Intelligence:

Data Source Name	Description
identity_datalake	<ul style="list-style-type: none">◆ identity_datalake database is the read replica of Identity Governance data that stores all the collected data.◆ The predefined reports fetch data from identity_datalake data source.◆ This database consists of real-time and current data.
analytics_database	<ul style="list-style-type: none">◆ Identity Intelligence processes subset of Identity Governance data to support business use case. The processed, historical data is stored in analytics_database and used to display the dashboards and widgets.◆ The database gets updated maximum of every 24 hours with the source data.

Understanding Worksheets

Worksheets contain predefined data queries to fetch the required data and allow creating your own dashboards and reports. When you select a worksheet to create a dashboard or report, the **Visual composer** or the **Visual recommender** displays the associated worksheet data blocks in the left panel. You can select or drag and drop these data blocks to create a dashboard or report. To understand more about Visualization composer and Visualization recommender, see [“Additional Help” on page 35](#). Identity Intelligence provides the following categories of worksheets:

Analytics Database Worksheets

The **Analytics Database Worksheets** query and fetch the data from the `analytics_database` (Analytics Repository) database. The worksheets are a combination of the predefined dashboard widgets. To understand the widgets information, see [“Understanding Predefined Widgets” on page 20](#).

The following two Catalog Information specific worksheets enable you to fetch:

Account

- ◆ Account details and total number of accounts
- ◆ Number of accounts per application, category, mapped status, and review status

Application

- ◆ Application details such as accounts, application name, application risk, create date, ID, permissions and application description
- ◆ Total applications till the date

The following access requests and policy specific worksheets enable you to fetch details of requests and policies:

Access Request Approvals

- ◆ Access requests overview and details
- ◆ Requests fulfillment details
- ◆ Fulfillments that are pending for verification and approval

Access Review Certification

- ◆ Overview of review and review items
- ◆ Review and review items that are in-progress and completed

Data Control Remediation

- ◆ Overview of policies
- ◆ In-progress and completed data policy reviews
- ◆ Policy remediation and violation details
- ◆ Status of the review items
- ◆ Detected items, email notifications sent for the detected items and no remediation

Identity Data Lake Worksheets

Identity Data Lake Worksheets fetch data from the `identity_datalake` database and are divided in to **Permissions** and **Profile**.

The following two are **Permissions** specific worksheets:

All Permissions

Delta Permissions

The Permissions reports fetch the following data:

- ◆ Name of the applications and permissions, permission types
- ◆ Permission Snapshot date
- ◆ Current cost, risk, and user count for the applications

The following **Profile** specific worksheets fetch:

List of Users: List of user details such as department, display name, first name, last name, email, job title, unique user id, source user id and job title

List of Profile changes: Both curated and publication user profile changes for the specific users

Reviewer Name: List of reviewer names and the reviewer details such as name, items reviewed, status, review comments, and date reviewed

Review Items: List of review item details such as name of the reviewer, review item, status, reviewer comments, reassigned details: date, reason of reassignment, and comments

Unique Review List: Lists all review names from the user profile

User Name: List of all user names from the user profile

User Profile Data: List of attributes, auditor, business role, description, duration, end date, expected end date, review name, review owner, review type, review count, start date, status, task count, valid for unit.

User List: Lists the user display name, email, department, first name, last name, supervisor name, and unique user ID.

User Permission: Drag and drop the following data blocks to create a dashboard based on your business use case requirement. This worksheet contains data blocks to fetch information on various entities such as permission details, resources, and application details.

Creating a Simple Dashboard Using Worksheets

When creating a simple dashboard using the worksheet in the report portal using Dashboard Designer, a window displays where you can select the worksheet for the Dashboard. Follow the prompts or close the window to continue to the main editor of the Dashboard.

From the Dashboard editor, you can create Tables and Charts in the canvas. From there, you can also convert to measure some fields that can provide numeric values and can be used in a chart. You can also convert to dimension the fields that can provide a string value.

First, use the system to create and save a data worksheet as the basis for your dashboard. Use one of the following to create a simple dashboard:

- ◆ [Use the Dashboard Wizard](#)
- ◆ [Use the Dashboard Editor](#)

Using the Dashboard Wizard

If you select the wizard, the Dashboard Designer displays the Wizard section of the Dashboard. From here, you can create the first component of the Dashboard.

- 1 Select **Reports > Dashboard Designer**.
- 2 Expand **Data Worksheet** in the **New Dashboard** prompt. Select a worksheet either from **Analytics Database Worksheets** or from **Identity Data Lake Worksheets** folder.
- 3 Select **Open Wizard**.
- 4 Select the fields to use in your dashboard.
- 5 (Conditional) Select the dashboard style:
 - Crosstab**
Groups the dashboard by row and column headers and displays the summary data at the intersections
 - Table**
Groups the dashboard and summarizes it or displays it in tabular layout
 - Chart**
Creates multiple charts using multiple fields
 - Full Editor**
Allows granular control view of your updates, such as format, color, and shape.
- 6 Once the editing is complete, set the position of the element in the dashboard canvas.
- 7 View the dashboard, and then select **Continue**.
- 8 Once the dashboard has been successfully edited, select **Finish**.
- 9 Click **Save as** to save your dashboard.

Using the Dashboard Editor

Using the Dashboard Designer, you can edit the elements and freely set their position in the Dashboard. The Dashboard Designer displays the Wizard section of the Dashboard.

- 1 Select **Reports > Dashboard Designer**.
- 2 Click **OK** to open empty dashboard editor in the Visual Composer tool in a new tab.
- 3 (Optional) If the Visual Composer displays the **Enter Parameters** prompt, click **Options** in the tool bar menu > deselect **Prompt for Parameters** > Click **OK**.
- 4 Click **Assets** tab located in left lower corner, select the elements of your preference from the left panel Toolbox.

You can create, and add multiple elements.

- 5 Click **Save** to save your dashboard in a **Custom Content** folder.

Creating a Simple Report Using Worksheets

Use the one of the following wizards to create a simple report:

- ♦ Use the Crosstab Wizard
- ♦ Use the Table Wizard
- ♦ Use the Chart Wizard
- ♦ Guidelines for Report Usage

Using the Crosstab Wizard

- 1 Select **Reports > Report Designer > Crosstab Wizard**.
- 2 Expand the data worksheets and select the data worksheet of your preference. Click **Next**.
- 3 Define the row and column groups (vertical and horizontal columns), and then click **Next**.
 - ♦ For **Row groups**, select the row headers.
 - ♦ For **Column groups**, select the column headers.
- 4 (Conditional) Define the summary columns that will display as summarized fields.
- 5 (Conditional) **Filter the conditions** that will define the original data.

After the design statement is filled, the options for insert, modify, and clear will be enabled.
- 6 (Conditional) For **table style**, use the default option.
- 7 To complete the editing, click **Finish Editing**.

Using the Table Wizard

From the **Reports Designer** menu, use the **Table Wizard** to create a report that displays data in tabular layout or grouped and summarized.

- 1 Select **Reports > Report Designer > Table Wizard**.
- 2 Expand the data worksheets and select the **data worksheet** of your preference. Click **Next**.

- 3 Select the columns to display in the report from the select **detail columns**.
- 4 Define the groups to display as column headers.
- 5 (Conditional) Define the summary columns that will display as summarized fields.
- 6 (Conditional) Filter the conditions to define the original data. Once the design statement is filled, the control options are enabled.
- 7 (Conditional) Retain the default table style for better formatting results.
- 8 (Conditional) Rank the groups to display as top or bottom groups.

Using the Chart Wizard

From the **Reports Designer** menu, use the **Chart Wizard** to create a chart-based report.


- 1 Select **Reports > Report Designer > Chart Wizard**.
- 2 Expand the data worksheet folders and select the data worksheet of your preference. Click **Next**.
- 3 By default, the auto option is selected. Use the chart style to style your report.
- 4 (Conditional) If required, select one of the following 2D and 3D images chart styles.
Your chart options include bar, line, area, point, pie, donut, radar, stock, candle, box plot, waterfall, pareto, map, treemap, and marimekko charts.
- 5 Define the X Axis that to display as columns.
- 6 Define the Y Axis to display as columns.
- 7 Define the visual properties (color, shape, size, text) of the columns by using the visual binding.
- 8 (Conditional) Filter the conditions to define the original data. Once the design statement is filled, the control options are enabled.
(Conditional) Rank the groups to display as top or bottom groups.
- 9 (Conditional) Additional steps might be required depending on the chart style selected:
 - Geographic binding**
Use if you select **Map Style** for your report. Choose different aspects about the map report that will be generated.
 - Tree Dimensions**
Use if you select Treemap, Sunburst, Circle Packing, or Icicle for your report. Select the fields the report will use for the Tree Mapping.
 - Marimekko category**
Use if you select Marimekko Style for your report. Select the field for the Marimekko Category Dimension.

Guidelines for Report Usage

- ◆ Check the meta data box for a faster pre-visualization of the report. Take into consideration that no real data is displayed with this option.
- ◆ Export the results in CSV format for faster results.

Additional Help

To navigate and access the additional help for reports portal:

In the Reports portal right-hand top corner, click  to access the help and search for the topic you want to view.

For example, specify the topic name **Schedule a Dashboard** to view the procedure to schedule a dashboard.

