SELF SERVICE RESET PASSWORD MANAGEMENT

CREATING CUSTOM REPORTS GUIDE

TOOLS4EVER

IDENTITY GOVERNANCE & ADMINISTRATION

Contents

1.   Introduction

SSRPM is shipped with several default reports. It is however also possible to edit these reports or to create completely different reports.

This document describes how these custom reports can be created using SSRPM. The chapter 'Creating a Custom Report' provides a step by step method of creating a custom report.

2.   Report Structure

This chapter describes how a report is build in SSRPM using report components in a report template.

2.1.   Report Components

A report component is an object that can be placed in a report template. When a report is generated, the report component is evaluated and replaced by the result from for instance a database query. The result of every report component is a table in HTML containing the result data. The class name of the table is '*ssrpmreporttable*'.
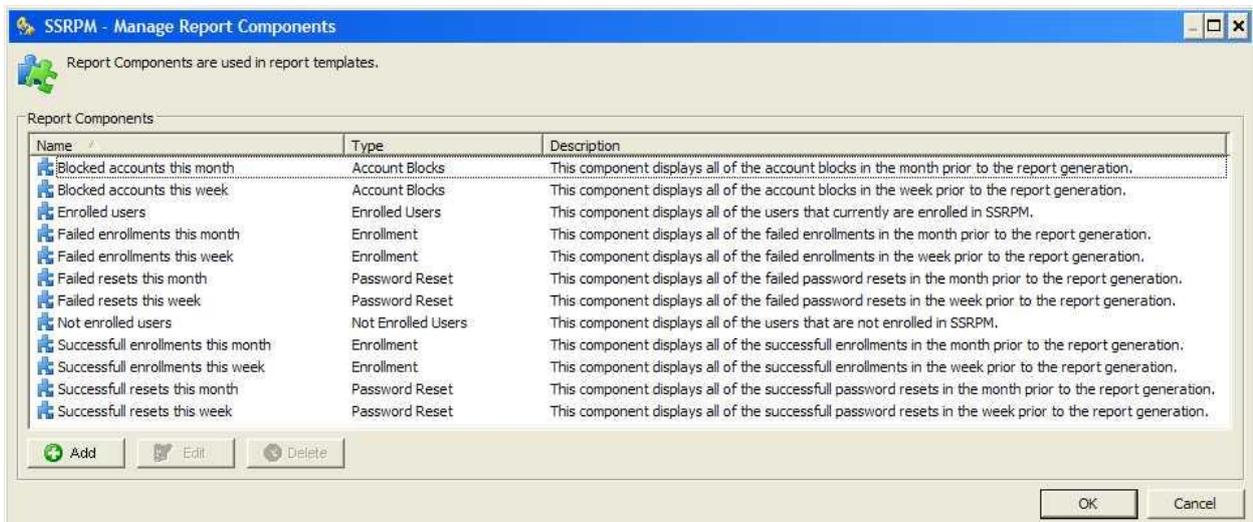
Report Component Configuration in SSRPM

The report component itself has a unique name in SSRPM. This name is used to identify the component in a report template*. The correct syntax of a report component in a report template is: <SSRPMCOMP:Report Component Name>
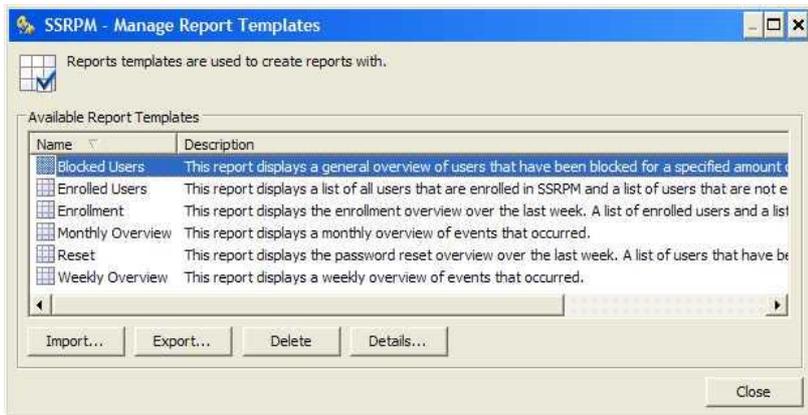
Example:
The 'Manage Report Components' screenshot shows that a report component named 'Enrolled users' has been configured. This component can be added to a report template with the following syntax: <SSRPMCOMP:Enrolled users>

*Please note that the report component name is case sensitive.

2.2.   Report Templates

A report template is a HTML document containing the layout of the report and the report components that must be included in the final report. New report templates can be created and existing report templates can be added. Report templates can be created with a normal HTML editor*. When the Report Template is complete, it can be added to the SSRPM service via the 'Import' button in the 'Manage Report Templates' dialog in the SSRPM Admin Console.

Report Template Configuration in SSRPM

Example Report Template:

```
<html>
  <head>
    <title>Self Service Reset Password Management Report</title>
  </head>
<body>

<SSRPMDESC:This is an example report template>

This table contains the currently enrolled users:
<SSRPMCOMP:Enrolled users>

Generated at: <SSRPMTIME>

</body>
</html>
```

*Please note that pictures and css sheets can be added to the report template. They must be in the same directory as the report template.

3.   Creating a Custom Report

This chapter describes step by step how to create a new and fully customized report. In this chapter a custom report will be created that displays all users that are enrolled in SSRPM and the users that are not (yet) enrolled.

3.1.   Creating the Report Components

A report must contain report component to display events that occurred in SSRPM. It is also the first step of creating a new report. In this chapter we will create two report components: All users that have been enrolled into SSRPM and the users that are not enrolled in SSRPM.

1.   Open the SSRPM Admin Console

2.   Go to 'Reporting --> Manage --> Components...' in the menu. The following dialog will be displayed:
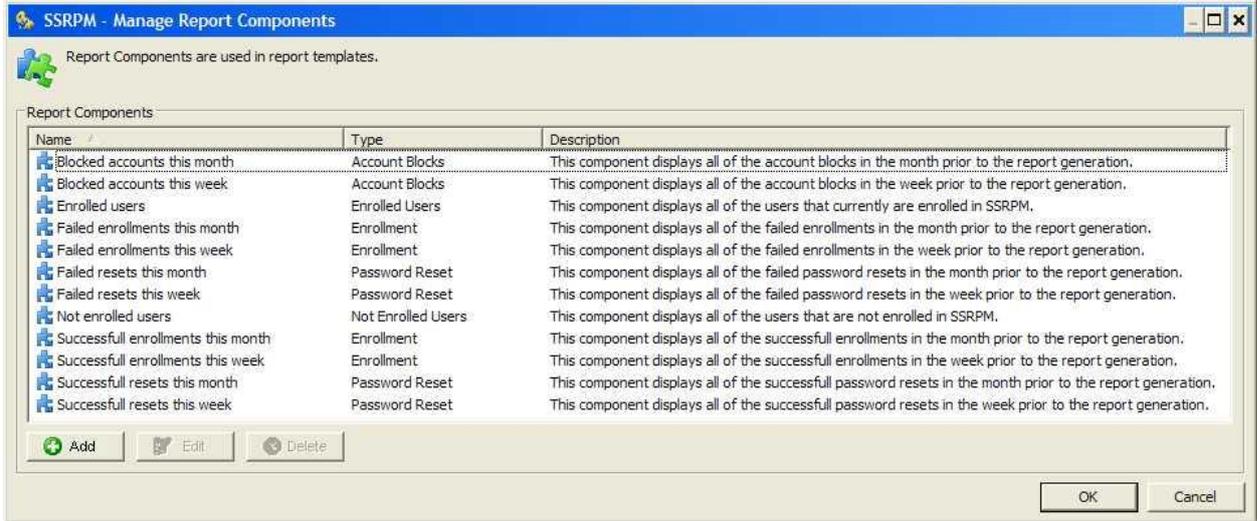
3.   Click on 'Add...'. You will be presented with the following dialog:
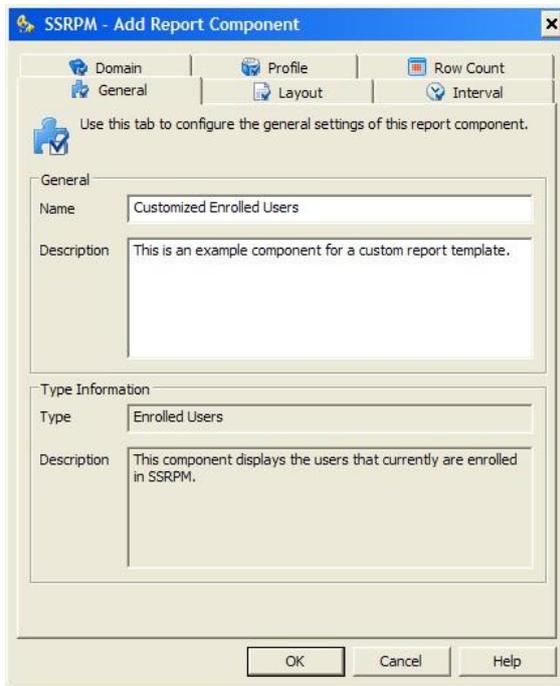
4. Select 'Enrolled Users' in the Component Type list and click on 'OK'. The following dialog will be displayed:

5. Enter the new name ('Customized Enrolled Users') for the report component in the 'name' edit box. **Please note that this name must be unique and is case sensitive.**

6. Optionally enter a description.

7. Click on 'OK'. *The first Custom Report Component has now been created.*

8. Click on 'Add...' to create the second component.

9. Select 'Not Enrolled Users' in the Component Type list and click on 'OK'.

10. Enter the new name ('Customized Not Enrolled Users') for the report component in the 'name' edit box.

11. Optionally enter a description.

12. Click on 'OK'. *The second Custom Report Component has now been created.*

13. Click on 'OK' to close the 'Manage Report Components' dialog.

3.2. Creating a Report Template

In the previous subchapter 'Creating the Report Components', we created two new reports components. 'Customized Enrolled Users' and 'Customized Not Enrolled Users'. In this subchapter we will create a new custom report template and import it into SSRPM.

1. Open the Windows Explorer.

2. Browse to a directory in which you want to create the new custom template. In this tutorial we will create the report template in a directory called: 'C:\SSRPM\Report Templates'.

3. Create a new text document in this folder. (Right Click, Select 'New --> Text Document')

4. Name the new file 'Custom Report Template.html'.

5. Open the file in notepad. *Please note that report templates can be created/edited in any HTML editor.*

6. Copy/Paste the following text to the file:

```
<html>
<head>
<title>Self Service Reset Password Management Custom Report</title>
</head>
<body>

<SSRPMDESC:This is an custom report template>
<br>
This table contains the currently enrolled users:<br><br>
<SSRPMCOMP:Customized Enrolled Users>
<br><br>
This table contains the not enrolled users:<br><br>
<SSRPMCOMP:Customized Not Enrolled Users>
<br><br>
Generated at: <SSRPMTIME><br>

</body>
</html>
```

7. Save the file and close notepad.

8. Open the SSRPM Admin Console.

9. Go to 'Reporting --> Manage --> Templates...'. The following dialog will be displayed:


10. Click on 'Import...'

11. Browse to the location where the new report template was created (In our case 'C:\SSRPM\Report Templates') and select the custom report template.

12. Click on 'Open'. The Customized Report Template has now been added to the SSRPM Service.

13. Click on 'Close'.

3.3.   Creating the Report

In the previous subchapters we created new report components and a new report template that uses the new report components. In this subchapter we will create a report based on that custom report template.

1. Open the Admin Console

2. Go to the 'Reports' tab in the main overview window.

3. Go to 'Reporting --> Add Report...' in the main menu. The 'Create Report Wizard' will be displayed.

4.   Click on 'Next'. The following wizard page will be displayed:
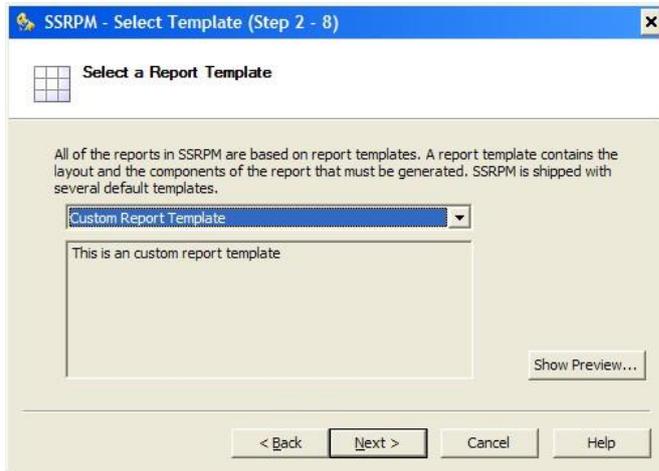
5.   Select 'Custom Report Template' from the list and click on 'Next'.

6.   Select a schedule from the list. In this tutorial we will select 'Every Week'. Click on 'Next'.

7.   Configure the schedule. In this tutorial we will select 'Sunday' at 02:00. Click on 'Next'. The following wizard page will be displayed:

8.   Select 'Send the generated report to the following email address(es):'.

9. Enter the email address to which the generated report must be send and click on 'Next' twice. The following wizard page will be displayed:

10. Enter the name of the new report. In this tutorial we used 'Custom Report'.

11. Optionally enter a description.

12. Click on 'Next' and then on 'Finish'. This will create the report.

The report has no been created and is scheduled to be generated on Sunday 02:00 AM. Follow the steps below to generate the created report immediately:

1. Open the SSRPM Admin Console.

2. Go to the 'Reports' tab in the main overview window.

3. Select the 'Custom Report' from the report list.

4. Right click on the 'Custom Report'.

5. Select 'Generate Now' to generate the report now. It will be send to the specified email address.

6. Select 'Generate and View' to generate the report now. The report will be displayed in your browser.

3.4. Report Template Keywords

A report template can contain several custom keywords used by SSRPM:

Keyword: <SSRPMDESC:*Description*>
Purpose: This keyword can be used to add a description to the Report Template. The description is displayed in the SSRPM Admin console. The keyword is removed in generated reports.
Example: <SSRPMDESC:This is an example description>

Keyword: <SSRPMCOMP:*Component Name*>
Purpose: This keyword can be used to add report components to the Report Template. When a report is generated, the keyword is replaced by a table containing the result data. **Please note that report component names are case sensitive.**
Example: <SSRPMCOMP:Customized Enrolled Users>

Keyword: <SSRPMTIME>
Purpose: This keyword can be used to add the generation time to the report. When a report is generated the keyword is replaced by the time it was generated.
Example: <SSRPMTIME>

4.   Example Template

This chapter contains an example template which is also used in the tutorial:

```
<html>
  <head>
    <title>Self Service Reset Password Management Custom Report</title>
  </head>
<body>

<SSRPMDESC:This is an example report template>

This table contains the currently enrolled users:<br><br>
<SSRPMCOMP:Customized Enrolled users>

This table contains the currently not enrolled users:<br><br>
<SSRPMCOMP:Customized Not Enrolled users>
<br>
Generated at: <SSRPMTIME>

</body>
</html>
```

5.   HTML Restrictions

Report templates support almost all HTML standards. There are however a few restrictions. This chapter describes these restrictions.

- Pictures, CSS sheets and so on can be used in a HTML file. They must however be located in the same directory as the report template. Full or relative paths may not be used. A link may only contain the name of the file.
- CSS sheets can be used in Report Templates. When reports are generated for use in for instance IIS, this is not a problem. However most email clients do not support CSS files or support is limited. If reports are created for HTML email, it is best to embed the CSS into the HTML file.

6.   Index