Deltek.

Costpoint BI Best Practices for Custom Permissions

Cloud Setup Guide

October 6, 202

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Introduction.

This guide is for Costpoint BI best practices when you setup of Custom Permissions for CER. This will eliminate the tedious task of going into each individual objects and re-assigning custom groups after Promoting to Production or after Database Refresh.

# Best Practice 1: Assigning Custom Groups (Cognos) to object permissions.

When providing access permissions to Folders, reports, packages and other objects for custom groups created in Costpoint create the same groups under Cognos Namespace.

Steps:

1. Login to Cognos.

2. Go to Cognos Administration console.

3. In the Security tab go to **Directory > Cognos > Tenants > CustomerFolder > Security Groups.**
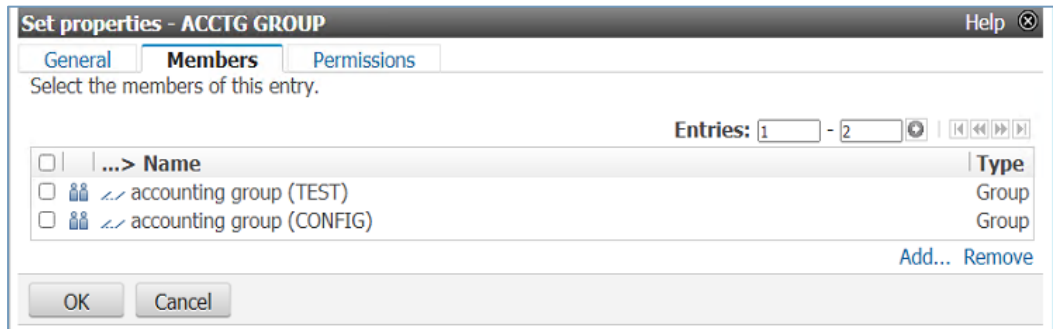
4. Create the same group.
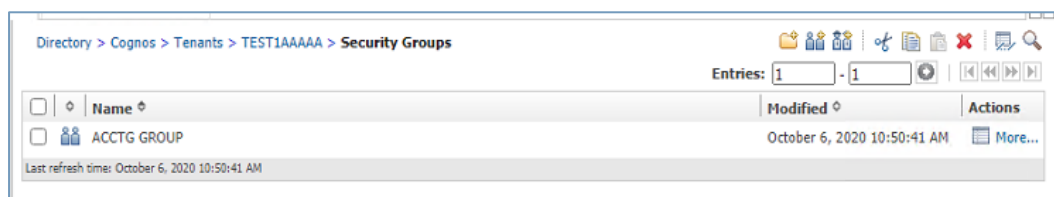
5. Add the Costpoint custom groups as member from **CAP>Customer-12345-TEST**
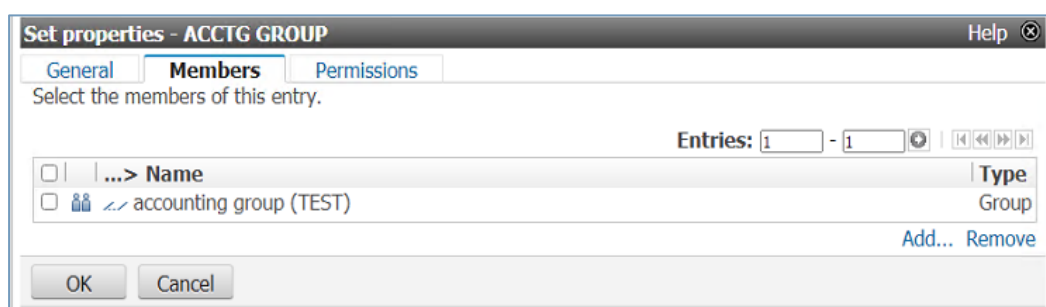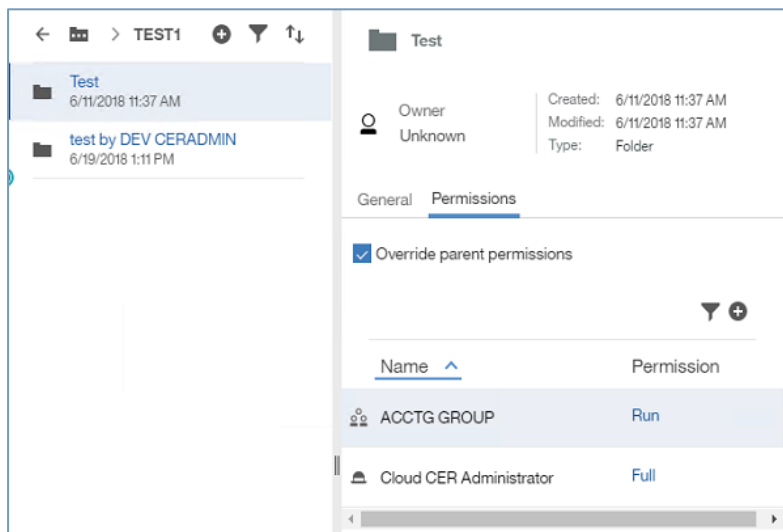
6. If you have the same group in other system, you need to login to that system and add the same group as member of this newly created Custom Group under Cognos Namespace.

e.g. **CAP>Customer-12345-CONFIG**

7. Members of this group can be Users/Groups/Roles.

8. Use this group when assigning permissions to objects in Cognos.

## Advantages of Assigning Custom Groups (Cognos) to object permissions:

1. **ACCTG GROUP** from Cognos>Tenants>CustomerFolder>Security Group was given permissions to the Test folder. This means all users that are members of accounting group (TEST) and accounting group (CONFIG) have access to the Test folder.

1. After Promote to Production, customer admins should only need to review and remap the members of these custom groups in the Cognos namespace making sure all necessary Costpoint Groups from Prod/Sbox are added as members.

2. This will eliminate the tedious task of going into each individual objects (reports/folders/packages) and re-assigning custom groups after Promote to Production. Should you assign groups directly from the CAP namespace.

Recommendation: Assign Custom Groups from all systems. (Enterprise)

If customers decide to assign custom groups directly from CAP namespace to object permissions (instead of Best Practice 1), it is best to add the same groups from all systems to the same object permission. Making sure same groups from all systems have been assigned to the same objects.

Steps:

1. Login to cognos and go to the object's properties

   e.g. Test folder properties

2. Assign permission to Custom groups directly from CAP>Customer-12345-CONFIG

Costpoint BI Best Practices for Custom Permissions
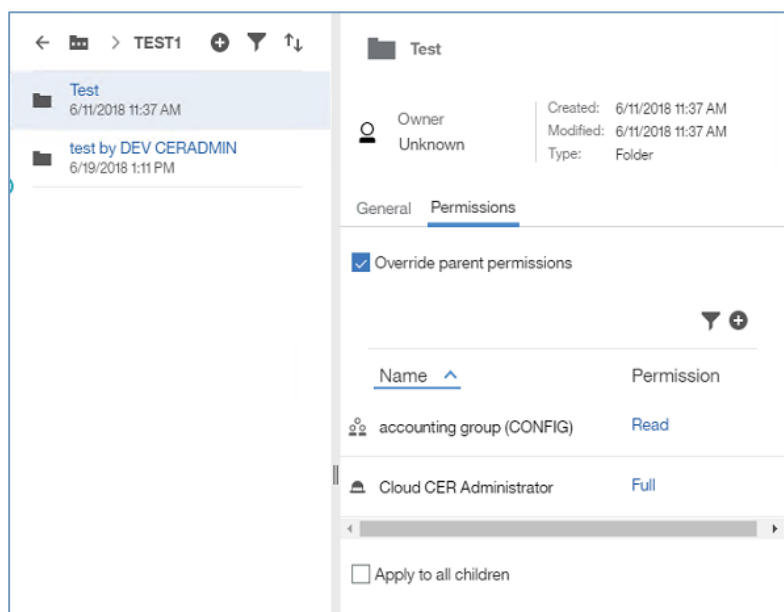
3. Should the same group exist in PROD, SBOX, or other systems, those should be added explicitly as well.

4. Log in to the other systems and go to the Test folder properties and add the custom group directly from CAP>Customer-12345-TEST.
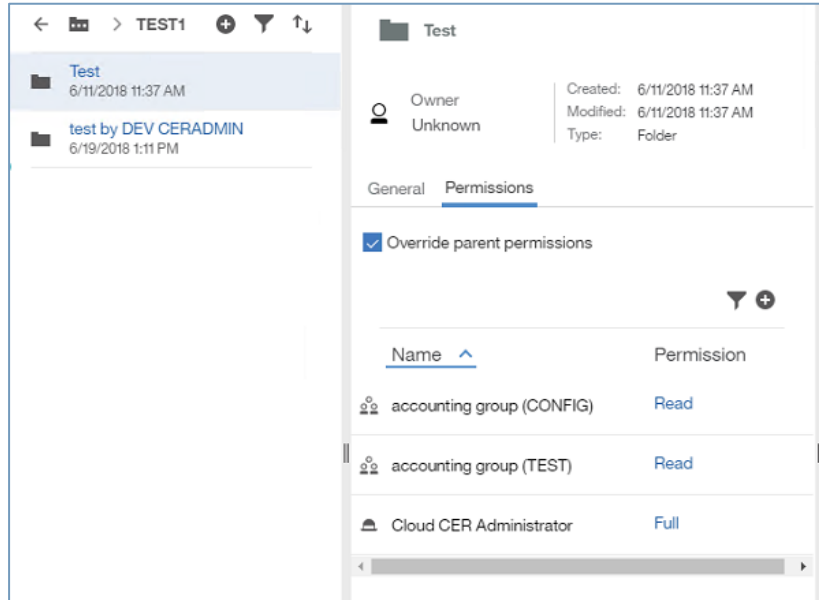
5. The same should be applied if you assign Individual Users directly from CAP namespace.

Advantage of assigning Custom Groups from all systems (Enterprise)

1. This will make sure the permission levels balance across all systems. Which means that whichever system a user logs in to, the same security level will exist on the objects.

2. After Promote to Production, there is no need to re-assign the objects permissions.

Conclusion:

We still recommend creating Custom Groups in the Cognos namespace as Best Practice 1. Therefore, there will only be single point of administering the groups and permissions compared to assigning Users/groups directly from the CAP namespace.

After Promote to Production, all permissions will be carried over and administrators will just need to check the members of the custom groups in Cognos namespace to make sure members are complete.