Request Access to Boiler Insight Data Marts

Steps for the User:

After discussing the business need with your supervisor, business office, or role requester:

1. Complete Certification(s) – **Data Handling** and others depending upon access requested.
2. Register for and complete Data and Tool Training as recommended for your position.
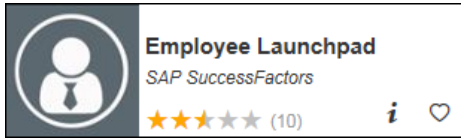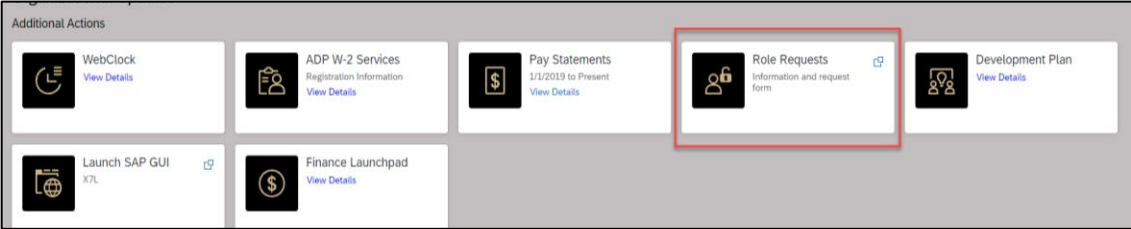
See last page of manual for instructions on these steps and how to submit a request for support.

Steps for the Supervisor, Business Office or Role Requester:

The steps to view assigned roles and/or request new roles for a position are outlined below.

Navigate to the Business Data Access Page to view these steps as well as additional information.

Access Role Request via SuccessFactors
From the **OneCampus** portal (https://one.purdue.edu/), launch **Employee Launchpad – SuccessFactors**. Log in using Career Account and BoilerKey.
Under **Organizational Updates** on the SuccessFactors Home screen, click the **Role Requests** tile, and then click the blue **IDM Role Request Form** hyperlink.

The request is displayed.

1. Click **Select** (next to **Position)** to search for employee's position.

   To find an employee's position number, click here.

2. Enter position number in the **Find** text entry.

   When searching, use an asterisk (*) before and after the term to perform a more accurate search.

3. Click **Search**

Click to select the desired position and click **Add**. If the position does not highlight, click the gray box to the left.

To view roles already assigned to the position, click the **Position** link. A new window will open.
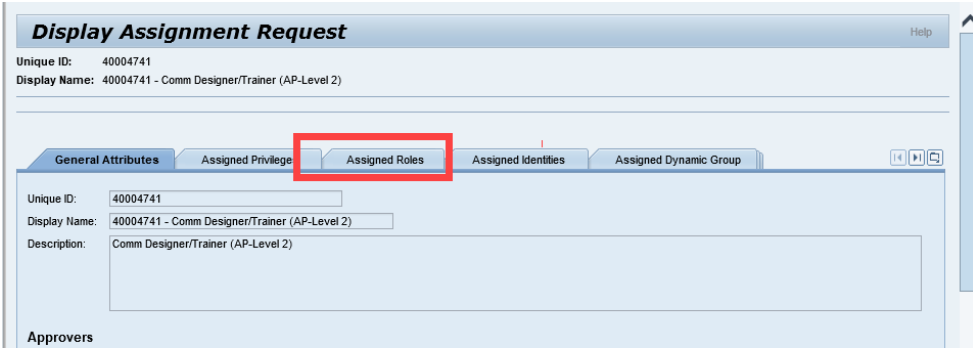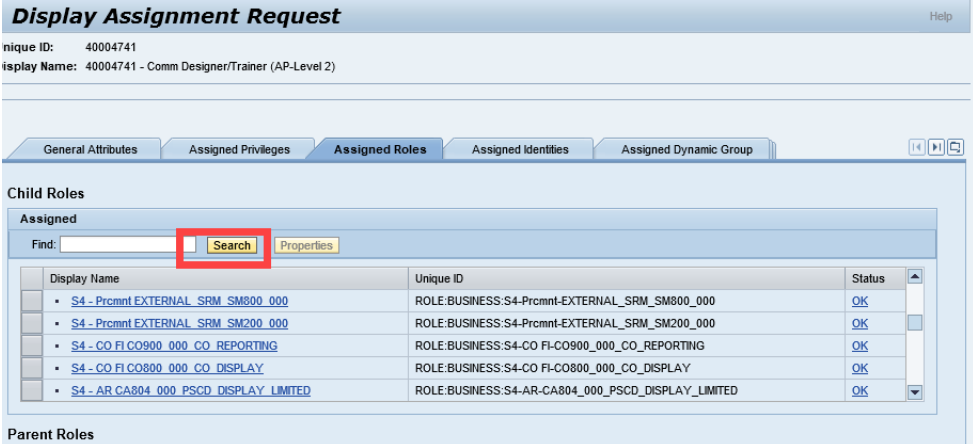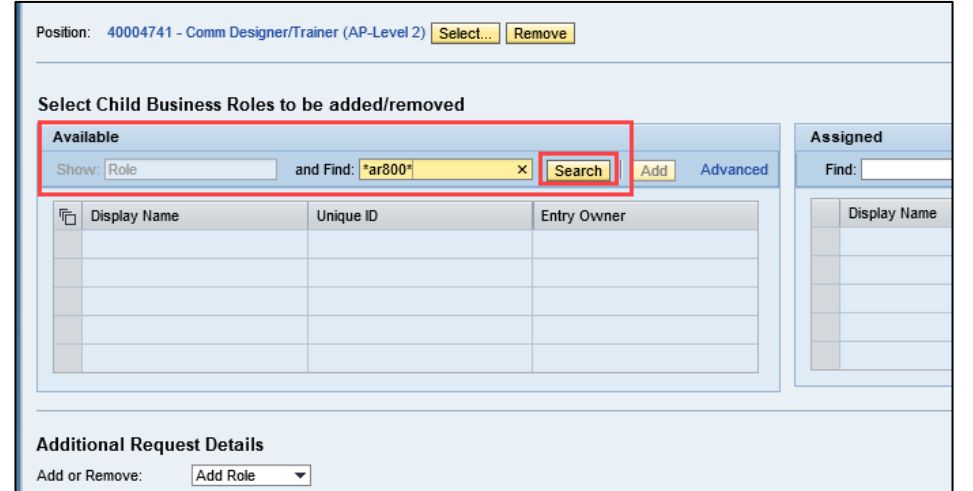
The Display Assignment Request window opens. Click the **Assigned Roles** tab to view assigned roles.

Click **Search** to populate **Roles**. The roles assigned to the position will be displayed.

To add new roles, navigate back to the previous window and follow the steps below

To add new roles, navigate back to the previous window and follow the steps below

Locate business role by entering all or a portion of the business role display name in the search information in the **Find** text entry field.

When searching, use an asterisk (*) before and after the term to perform a more accurate search.

Click **Search**.

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Requesting Data and Reporting
Tool Roles for Data Marts

1. Click to select desired role from search results within the **Available table**.
2. Click **Add** to move to **Assigned table**.
3. Click **Submit for Approval**.

	A message appears confirming the **Child Role Assignment Request** was **Submitted**.	

BI Role Information:

<table>
<tr>
<td colspan="3">Cognos Reporting Tool License
(one is required to access Cognos – unless it was previously assigned to the position)</td>
</tr>
<tr>
<th>Type of Role</th>
<th>BI Role Name</th>
<th>BI Role Description</th>
</tr>
<tr>
<td><i>Consumer</i></td>
<td>S4 - BI Lic BI215_000_ENH_CONSUMER
(PWL Cognos License)

<i>* Report or query consumer
* Uses managed reports
* Ad-hoc ability limited to parameterized reports
* Technical aptitude needed: low
* Data knowledge needed: low</i></td>
<td>Designed for those needing to run 'standard content' i.e. reports and/or dashboards. Parameters built within the reports can be changed to meet differing needs.

COG 101 is a hands-on training to cover basic navigation and to review available reports.</td>
</tr>
<tr>
<td><i>Professional (Authoring)</i></td>
<td>S4 - BI Lic BI205_000_PROFESSIONAL
(PWL Cognos Author Capability)

You must request the <u>above</u> PWL Cognos License <u>and</u> the PWL Cognos Author Capability role in order to access Cognos with authoring capabilities

<i>* Report creation, including standard   reports
* Technical aptitude needed: moderate-high
* Data knowledge needed: high</i></td>
<td>Designed for the advanced user. Positions where one of main responsibilities is reporting.

Includes the following tools: Business Insight, Business Insight Advanced, Authoring
COG 401 hands-on tool training required.</td>
</tr>
</table>

<table>
<tr>
<td colspan="4">Content Roles (both are optional)</td>
</tr>
<tr>
<th>Content Role</th>
<th>BI Role Name</th>
<th>BI Role Description</th>
<th>Used By</th>
</tr>
<tr>
<td><i>Optional</i></td>
<td>S4 - BI BI220_000_CONTENT_STD_AUTHOR</td>
<td>Add reports to the Standard Folder</td>
<td>Limited to Standard Report folder admins</td>
</tr>
<tr>
<td><i>Optional</i></td>
<td>S4 - BI BI230_000_CONTENT_DEPT_ADMIN</td>
<td>Able to create and manage folders and reports for department</td>
<td>Identified by department</td>
</tr>
</table>

HR Data Roles			
HR Data	**BI Role Name**	**BI Role Description**	**Used By**
One of these three data roles are REQUIRED for HR access	**S4 - BI Dta BI100_000_HR_DATA_LEVEL_1**	This role contains 120 + data elements related to an employee.	Starting point for non-business office staff
	S4 - BI Dta BI105_000_HR_DATA_LEVEL_2C	Composite role contains 120 (S4 - BI Dta BI100_000_HR_DATA_LEVEL_1) + data elements related to an employee + IAMO (S4 - BI Dta BI130_000_IAMO_DATA_LEVEL_3)	**Starting point for business office staff**
	S4 - BI Dta BI110_000_HR_DATA_LEVEL_3C	Inherits HR Data Level 1 and HR Data Level 2 roles + Additional fields of: Date of Birth Nationality Home Country Nationality Code I9 Expiration Date Visa Date Expiration I-9 ID Type Visa Date Issued I-9 ID Type Code Visa Flag I-9 Residence Status Visa Type I-9 Residence Status Code Visa Type Code	**For positions outside the Business Office, Payroll or HR, a business need is required in *Comments* field**
OPTIONAL HR data roles	**S4 - BI Dta BI130_000_IAMO_DATA_LEVEL_3**	Provides access to: • career account • email address	
	S4 - BI Dta BI115_000_OIE_DATA_LEVEL_1	Race/ethnicity and minority data. Note: Include business need in Comments section. Also include in the Comments the responses to: • For what kind of reporting will this data will be used? • What will be done with the output?	**Business need and data usage info required in *Comments* field**
	S4 - BI Dta BI125_000_OIE_DATA_LEVEL_3	Disability and veteran data.	Office of Institutional Equity ONLY

Finance Data Roles

FINANCE Data	BI Role Name	BI Role Description	Used By
REQUIRED for FI Data access	**S4 - BI Dta BI150_000_FI_DATA_LEVEL_1**	General finance level for all users needing FI access.	All with business need for Finance data

Enterprise Asset Management (EAM) Data Roles

EAM Data	BI Role Name	BI Role Description	Used By
REQUIRED for EAM Data access	**S4 - BI Dta BI340_EAM_DATA_LEVEL_1**	General enterprise asset management for all users needing capital project, maintenance, and inventory access.	All with business need for enterprise asset data

Grants Management Data Roles

GM Data	BI Role Name	BI Role Description	Used By
<mark>One</mark> *of these three data roles are REQUIRED for GM access*	**S4 - BI Dta BI170_GM_DATA_LEVEL_1**	Provides information on Grants Management data	All with a business need for GM AIMS reports

	S4 - BI Dta BI180_GM_DATA_LEVEL_3	Contains S4- BI Dta BI170_GM_DATA_LEVEL_1 data + COEUS Person level fields:
		
		Address Line 1 Gender
		Address Line 2 Has Visa
		Address Line 3 Is Veteran
		Age Major
		Age by Fiscal Year School
		Country of Citizenship Visa Code
		Degree Visa Renewal Date
		Education Level Visa Type
		   Year Graduated
		   Date of Birth
			Used by Sponsored Program Services only

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Student Data Roles			
Student Data	**BI Role Name**	**BI Role Description**	**Used By**
One of these three data roles are REQUIRED for Student access	**S4 - BI Dta BI270_000_STU_DATA_LEVEL1**	Access to student data, both academic and financial, combined with SAP general ledger financial transactions and Human Resources instructional activity information.	**Business need info required in *Comments* field.** **Also include staff member name in Comments field for verification of completed certifications.** **Additional certifications required:** **FERPA** **GLBA** **Protecting SSNs** **Data Handling**
	S4 - BI Dta BI280_000_STU_DATA_LEVEL3	Contains S4 – BI Dta BI270_000_STU_DATA_LEVEL1 + data + additional fields: Birth Data Inst Aid Recipient Ind	

Purdue IT Data Roles			
Purdue IT Data	**BI Role Name**	**BI Role Description**	**Used By**
One of these data roles are REQUIRED for Purdue IT access	**S4 - BI Dta BI265_000_IT_DATA_LEVEL_1**	General level for all users needing Cognos Usage access.	All with need for usage data
	S4 - BI Dta BI285_000_IT_DATA_LEVEL_2	General level for users needing FootPrint Data access.	Users with a need to access the FootPrints Tableau Dashboard

Steps for the User:

1. **Complete Certification(s)**

   If you are approved for any level of data access, you must complete data handling training.

   - Navigate to WebCert: https://www.purdue.edu/webcert
   - Login with your Career Account username and password
   - Complete the 'Data Handling' course under 'Enterprise Certifications'.

   - ❖ If **Student Data roles** are requested, these additional certifications must be completed prior to access being granted.
     - FERPA
     - GBLA
     - Protecting SSNs

2. **Complete Data and Tool Training**

   Review the recommended training and course offerings on the BICC Website and register for the appropriate courses:

   https://www.purdue.edu/bicc/tools/cognos/training/available-training.php

   Sessions reviewing Standard Reports are recommended as a starting point for all users.

To Submit Boiler Insight Support Request

To receive support for Boiler Insight, see the below options.

- If you need assistance with a **data or report** question, please email the appropriate group below:
    - o Finance: treasreporting@purdue.edu
    - o GM: spsrept@groups.purdue.edu
    - o SPS: SPS Research Data Request Form
    - o HR: Submit a HR Data Request Form
    - o Administrative Operations: AOIntegratedAnalytics@purdue.edu
- If your request is about the **Cognos reporting tool** or a general reporting question, please email the Business Intelligence Competency Center (BICC) at bicc@purdue.edu.