

Request Access to Boiler Insight Data Marts

Steps for the User:

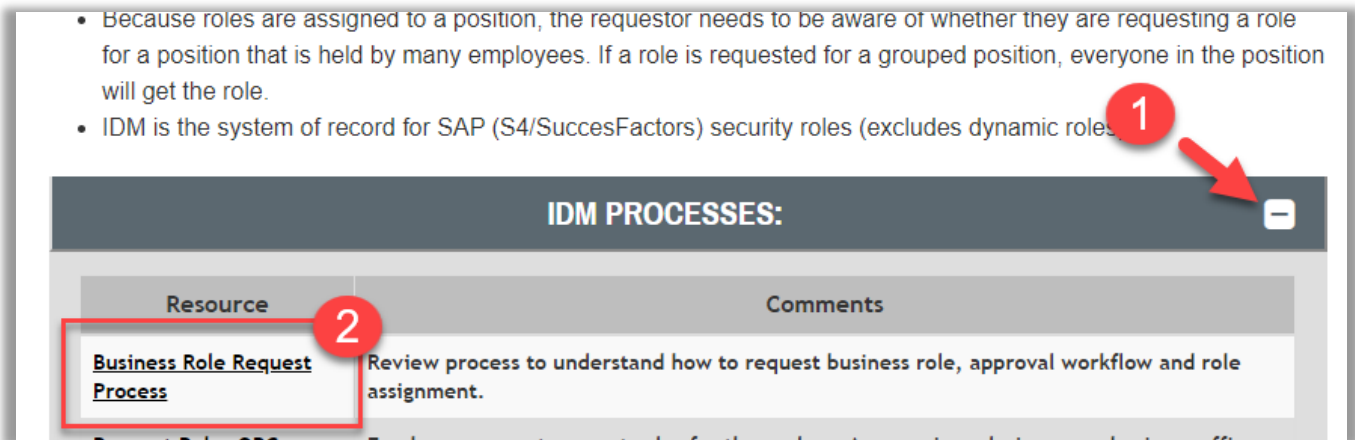
After discussing business need with supervisor or business office:

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** or **Business Office**:

1. Navigate to the **SAP Identity Management (IDM) – Roles and Privileges webpage** and open the **Business Role Request Process** QRG. Note – You will need to expand the “IDM Processes” section in order to see the QRG.



2. Follow the steps in the QRG to submit a role request. If you need BI role information before submitting the request, see the **BI Role Information** section below.

BI Role Information:

Content Roles (both are optional)			
Content Role	BI Role Name	BI Role Description	Used By
Optional	S4 - BI BI220_000_CONTENT_STD_AUTHOR	Add reports to the Standard Folder	Limited to Standard Report folder admins
Optional	S4 - BI BI230_000_CONTENT_DEPT_ADMIN	Able to create and manage folders and reports for department	Identified by department

HR Data Roles			
HR Data	BI Role Name	BI Role Description	Used By
<p><u>One</u> of these three data roles are REQUIRED for HR access</p>	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) <ul style="list-style-type: none"> career account email address 	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: <ul style="list-style-type: none"> 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
<p>OPTIONAL HR data roles</p>	S4 - BI Dta BI130_000_IAMO_DATA_LEVEL_3	Provides access to: <ul style="list-style-type: none"> career account email address 	
	S4 - BI Dta BI115_000_OIE_DATA_LEVEL_1	<u>Race/ethnicity</u> and <u>minority</u> data. Note: Include business need in Comments section. Also include in the Comments the responses to: <ul style="list-style-type: none"> 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	<u>Disability</u> and <u>veteran</u> data.	Office of Institutional Equity ONLY

Finance Data Roles			
FINANCE Data	BI Role Name	BI Role Description	Used By
<i>REQUIRED for FI Data access</i>	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
<i>REQUIRED for EAM Data access</i>	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
<i>One of these three data roles are REQUIRED for GM access</i>	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 Visa Code Citizenship Degree Visa Renewal Date Education Level Visa Type Year Graduated Date of Birth	Used by Sponsored Program Services only

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

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

Cognos Reporting Tool License (one is required to access HR/FI Data- unless has previously been assigned to the position)		
Type of Role	BI Role Name	BI Role Description
<i>Professional (Authoring)</i>	<p>S4 - BI Lic BI205_000_PROFESSIONAL (Authoring (formerly Report Studio))</p> <p><i>* Report creation, including standard reports</i> <i>* Technical aptitude needed: moderate-high</i> <i>* Data knowledge needed: high</i></p>	<p>Designed for the advanced user. Positions where one of main responsibilities is reporting.</p> <p>Includes the following tools: Business Insight, Business Insight Advanced, Authoring Hands-on tool training required.</p>
<i>Consumer</i>	<p>S4 - BI Lic BI215_000_ENH_CONSUMER (Consumer)</p> <p><i>* Report or query consumer</i> <i>* Uses managed reports</i> <i>* Ad-hoc ability limited to parameterized reports</i> <i>* Technical aptitude needed: low</i> <i>* Data knowledge needed: low</i></p>	<p>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.</p> <p>Training includes hands-on to cover basic navigation and to review available reports.</p>

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:
 - Finance: treasreporting@purdue.edu
 - GM: spsrept@groups.purdue.edu
 - SPS: [SPS Research Data Request Form](#)
 - HR: Submit a [HR Data Request Form](#)
 - Administrative Operations: AOLntegratedAnalytics@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.