

# Configuring Custom User Properties in MITS Report

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# Why Implement User Properties

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There are two primary reasons for implementing User Properties:

- Quick shortcuts for commonly used column filters
- User security enhancement

Both of these uses are described in the *Example Scenario*, starting on page 4.

## Create a User Property

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To create a new User Property:

1. Click the **Administration** tab.
2. Navigate to the **Customization Menu** configuration page.
3. Click **Create New User Property**.
4. Provide a **Property Name**.
5. Provide a **Type**.
6. Provide a **Default Value**.
7. Click **Save** to finish.

## Assign a value to a User Property

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Unless a default value was specified when the User Property was created, the *User Property value* will need to be set individually for each MITS Report user that will have this User Property associated with their user account.

To assign a value to a User Property:

1. Click the **Administration** tab.
2. Navigate to the **Customization Menu** configuration page.
3. In the **Property Name** column, click on the name of the User Property that you want to assign values for. The Assign User Values dialog box will appear, which lists all of the MITS Report users and the current value(s) for the selected User Property.



You can also modify all of the User Property values for a single user. From the Administration tab, on the Manage Users configuration page, select User Properties from the Modify menu in the Actions column for the user you want to modify.

4. Enter a User Property Value for each user. To add additional values for a user, click the Additional Value link in the Values column for that user.



If a value has not been set on a User Property for a user and that user attempts to utilize that User Property in a report filter, the resulting report will be empty, since the User Property Value is effectively *null*. Be aware that this also applies to the use of User Properties in security administration!

5. When you have added the necessary User Property values, click Save Changes to finish.

## What has taken place?

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Now that the User Property values have been assigned for this User Property, those values will be substituted any time the User Property is referenced in a column filter while that MITS Report user is logged in. These values will also be used if this User Property has been referenced as a part of a row restriction within MITS Report user security.

# Example Scenario

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## The Report Source

The Report Source that will be used in this example scenario is named "Sales History." It uses a file named INVOICES as its source file. When a report is created from that Report Source, each row represents one sales order.

The available columns in this Report Source include:

- Customer Name (the customer name on the order)
- Customer Number
- Order Total \$
- Product Name
- Product Number
- Sales Rep Name
- Sales Rep ID

## The MITS Report Users

You have five MITS Report users:

- Bob Donis: Sales Manager (sales rep ID = "BOD")
- Susan Overcast: Sales Rep Team Leader for Bob's sales team (sales rep ID = "SRO")
- Drew Logan: Sales Rep, reports to Bob (sales rep ID = "DRL")
- John Brinkman: Sales Rep, reports to Bob (sales rep ID = "JPB")
- Deborah Sims: Sales Rep, reports to Bob (sales rep ID = "DGS")

Each of these users have unique requirements, as outlined below.

## The Requirements

1. As a sales manager, Bob has full access to all of the information in this Report Source. While having access to all of this information is quite useful, he needs a quick way to filter the report view so that it shows only the orders for the sales reps on his sales team.
2. In addition, since he still closes orders on occasion, it would be nice if he could quickly view the orders that he has closed himself.
3. As a team leader on Bob's sales team, Susan should only be able to view the information in this Report Source that relates to the orders that were closed by the sales reps who are a part of Bob's sales team.
4. Since she is also an active contributor on her sales team, she needs an easy way to filter the report view so that it only shows the orders that she closed herself.
5. Drew, John, and Deborah are only sales reps, so their access in this Report Source should be restricted so that they can only view their own orders.

## Fulfillment Requirements

The creation of two User Properties will be required to meet the needs outlined in these three scenarios.

- Sales Team (Required for Susan's security restrictions and will also be used by Bob for his team-based filtering need.)
- Sales Rep ID (Required for the sales rep security restrictions for Drew, John, and Deborah and will also be used by Bob and Susan for their individual filtering needs.)

## User Property Creation and Configuration

1. Create the "Sales Team" User Property
2. Set the values for the "Sales Team" User Property
  - For Bob: all sales reps on his team (BOD, SRO, DRL, JPB, DGS)
  - For Susan: all sales reps on Bob's team (BOD, SRO, DRL, JPB, DGS)
  - For Drew, John, and Deborah: no value
3. Create the "My Sales Data" User Property
4. Set the values for the "My Sales Data" User Property
  - For Bob: BOD
  - For Susan: SRO
  - For Drew: DRL
  - For John: JPB
  - For Deborah: DGS

# Security Configuration

## 1. Configure Susan's security restrictions.

As outlined above, Susan should only be able to view the information in this Report Source that relates to the orders that were closed by the sales reps on Bob's sales team. To accomplish this, we will need to configure Susan's MITS Report user account with a row restriction on this Report Source that will only allow her to view the rows where the sales rep ID for that row appears in her **Sales Team** User Property values list.

- a. Log in to MITS Report with a user account that is a member of the *System Administrator* group.
- b. On the Administration tab, navigate to the Manage Users configuration page by clicking Manage Users on the left.

	Username	First Name	Last Name	Email	Groups	Actions	Enabled
Manage Users	Administrator			mradmin@mits.com	<ul style="list-style-type: none"> <li>System Administrator</li> <li>Library Administrator</li> <li>Source Administrator</li> <li>Source Column Customizer</li> <li>Email Scheduler</li> <li>Email Sender</li> </ul>	Modify	✓
Manage Groups							
Customization Menu							
Configure Email Settings							
Database Connections							
	bdonis	Bob	Donis	bdonis@mits.com	<ul style="list-style-type: none"> <li>Manager</li> </ul>	Modify	✓
	dlogan	Drew	Logan	dlogan@mits.com	<ul style="list-style-type: none"> <li>Sales Rep</li> </ul>	Modify	✓
	dsims	Deborah	Sims	dsims@mits.com	<ul style="list-style-type: none"> <li>Sales Rep</li> </ul>	Modify	✓
	jbrinkman	John	Brinkman	jbrinkman@mits.com	<ul style="list-style-type: none"> <li>Sales Rep</li> </ul>	Modify	✓
	sovercast	Susan	Overcast	sovercast@mits.com	<ul style="list-style-type: none"> <li>Sales Rep</li> </ul>	Modify	✓

- c. In the Actions column for Susan's user account, click Modify and select Sources.
- d. Locate the *Sales History* Report Source and click Configure Row Restrictions. (In this example, notice that Susan already has the *Access* permission for this Report Source.)

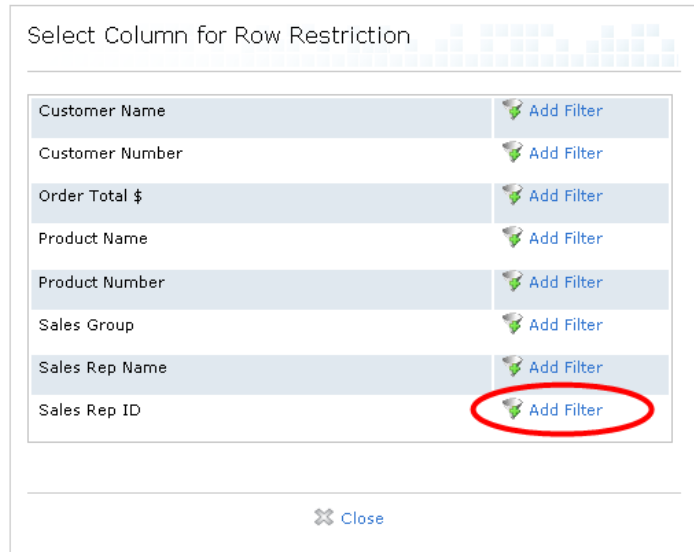
	Report Sources	Access	Configure	Update Data	Restrictions
<input type="checkbox"/>	Customer Info from CRM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Configure Row Restrictions   Configure Column Restrictions
<input type="checkbox"/>	Customer Information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Configure Row Restrictions   Configure Column Restrictions
<input checked="" type="checkbox"/>	Sales History	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Configure Row Restrictions   Configure Column Restrictions
<input type="checkbox"/>	Unfilled Orders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Configure Row Restrictions   Configure Column Restrictions

Note: Changes made to a Report User will not take effect until their next login.

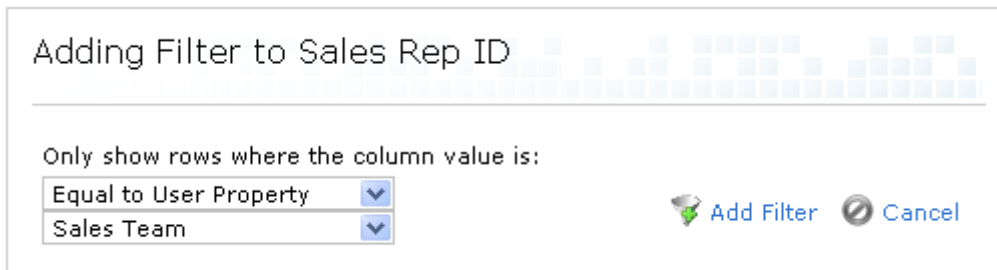
Save Changes | Reset | Cancel

- e. Click Add Restriction to a Row. The Select Column for Row Restriction dialog box will appear.

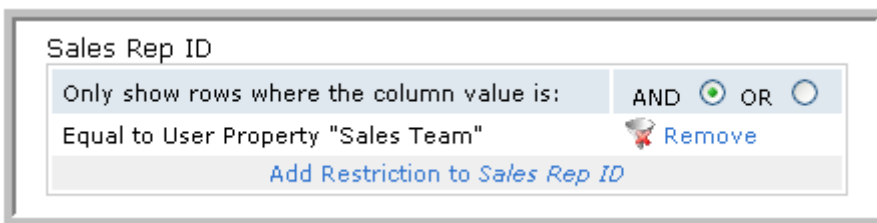
- f. Locate the Sales Rep ID column in the list and click Add Filter. The Adding Filter to Sales Rep ID dialog box will appear.



- g. In the Equal To drop-down menu, select Equal to User Property.



- h. Select Sales Team from the new drop-down menu that appears and click Add Filter.



The restriction has now been added, and the next time Susan views a report from the Sales History Report Source she will only be able to see the orders for the sales reps on Bob's sales team (as defined for her user account in the Sales Team User Property).

2. Create a custom security group, which will be used to apply the security restrictions for Drew, John, and Deborah.

As outlined above, Drew, John, and Deborah should only be able to see their own orders when viewing reports that are run against the Sales History Report Source. To accomplish this, we will create a custom security group, set the required User Property-based restriction on that group, then add Drew, John, and Deborah to this new security group.

- a. Log in to MITS Report with a user account that is a member of the *System Administrator* group.
- b. On the Administration tab, click New in the toolbar and select Create Group.

- c. Enter a group title and (optionally) a description. The title should be unique and descriptive, but not too verbose. The description should give enough information about the group that future administrators will be able to determine what the group is intended to do, but not so much detail that you limit the ability to add functionality to the group in the future. In this example, we have named the group "Sales Rep Restrictions" and used the following description: "This security group is used to apply restrictions to sales reps."

Title:  22/100

Description:  64/1000

Save Changes Reset Cancel

- d. Click Save Changes to create the new group. You will be taken to the Manage Groups configuration page, and your new custom group will be included in the list.
- e. To add the necessary restrictions to the new Sales Rep Restrictions group, click Modify in the Actions column for this group and select Sources.

	Title	Description	System	Actions
Manage Users	System Administrator	Create, Modify, and Delete Users and system wide settings	✓	
Manage Groups	Source Administrator	Create, Modify, and Delete Report Sources		
Customization Menu	Source Updater	Schedule and Trigger Report Source Updates for any Report Source	✓	
Configure Email Settings	Source Viewer	View Source details and access Source data	✓	
Database Connections	Library Administrator	Create, Modify and Delete Report Libraries	✓	
	Library Viewer	Access a Report Library and view the contained Reports	✓	
	Source Column Customizer	Create, Modify and Delete Operations (for both Initialization and Dictionary Items), Custom Columns, and Custom Commands	✓	
	Library Creator	Create new Report Libraries. They will have access to view and add Reports to the libraries they create	✓	
	Source Creator	Create Report Sources	✓	
	Email Sender	Send emails from the system. For example, able to email Reports.	✓	
	Email Scheduler	Schedule Automatic Report Emails	✓	
	Sales Rep Restrictions	This security group is used to apply restrictions to sales reps.		

- f. Add the Access permission for the Sales History Report Source by selecting the check box in the Access column for the Sales History Report Source.

	Report Sources	Access	Configure	Update Data	Restrictions
<input type="checkbox"/>	Customer Info from CRM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Configure Row Restrictions  Configure Column Restrictions
<input type="checkbox"/>	Customer Information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Configure Row Restrictions  Configure Column Restrictions
<input type="checkbox"/>	Sales History	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Configure Row Restrictions  Configure Column Restrictions
<input type="checkbox"/>	Unfilled Orders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Configure Row Restrictions  Configure Column Restrictions

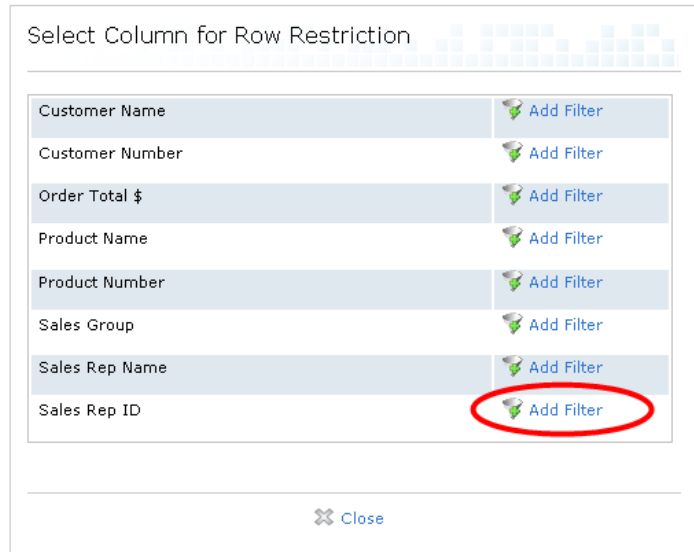
**Note:** Changes made to a Report User will not take effect until their next login.

Save Changes Reset Cancel

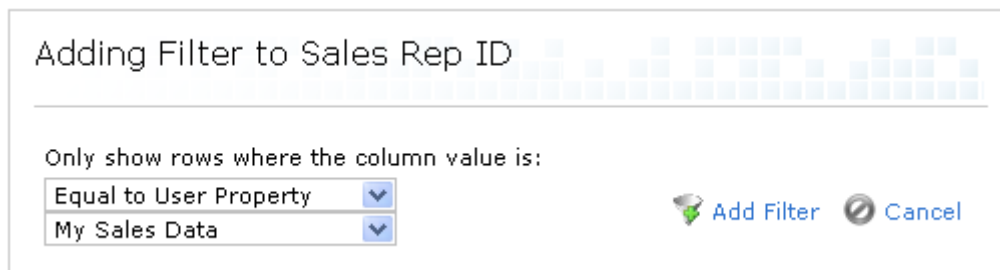
Click Save Changes. You will be returned to the Manage Groups configuration page.

- g. Navigate back to the Manage Source Permissions page by clicking Modify in the Actions column for the Sales Rep Restrictions group and selecting Sources.
- h. Locate the *Sales History* Report Source and click Configure Row Restrictions.
- i. Click Add Restriction to a Row. The Select Column for Row Restriction dialog box will appear.

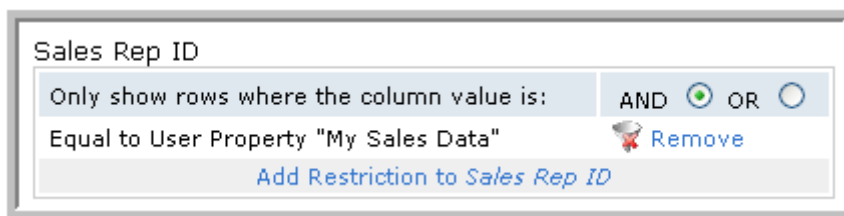
- j.** Locate the Sales Rep ID column in the list and click Add Filter. The Adding Filter to Sales Rep ID dialog box will appear.



- 11.** In the Equal To drop-down menu, select Equal to User Property.



- l.** Select My Sales Data from the new drop-down menu that appears and click Add Filter.



The restriction has now been added for this group.

- 3.** Add Drew, John, and Deborah to the new Sales Rep Restrictions group.

Now that the new security group has been created and configured to utilize the My Sales Data User Property, we just need to add the three sales reps to this new group and User Properties will do the rest - as each user logs in to MITS Report, the My Sales Data User Property variable will be set equal to the User Property Value that was defined for them, and if everything was configured properly, MITS Report user security will ensure that they can only see their own orders in the Sales History Report Source.

- a.** Log in to MITS Report with a user account that is a member of the *System Administrator* group.

- b. On the Administration tab, navigate to the Manage Users configuration page by clicking Manage Users on the left.

The screenshot shows the mitsreport Administration interface. The top navigation bar includes 'Admin User' and 'Log out'. The main navigation tabs are 'Reports', 'Sources', and 'Administration'. Below the navigation bar, there is a sidebar with options: 'New', 'Source File Filters', 'Product Activation', 'Support Console', 'Getting Started', and 'Version: 2.0.0 Build: 5157.0'. The main content area displays a table of users with columns for Username, First Name, Last Name, Email, Groups, Actions, and Enabled.

Manage Users	Username	First Name	Last Name	Email	Groups	Actions	Enabled
Manage Groups	Administrator			mradmin@mits.com	<ul style="list-style-type: none"> <li>System Administrator</li> <li>Library Administrator</li> <li>Source Administrator</li> <li>Source Column Customizer</li> <li>Email Scheduler</li> <li>Email Sender</li> </ul>	Modify	✓
Customization Menu	bdonis	Bob	Donis	bdonis@mits.com	<ul style="list-style-type: none"> <li>Manager</li> </ul>	Modify	✓
Configure Email Settings	dlogan	Drew	Logan	dlogan@mits.com	<ul style="list-style-type: none"> <li>Sales Rep</li> </ul>	Modify	✓
Database Connections	dsims	Deborah	Sims	dsims@mits.com	<ul style="list-style-type: none"> <li>Sales Rep</li> </ul>	Modify	✓
	jbrinkman	John	Brinkman	jbrinkman@mits.com	<ul style="list-style-type: none"> <li>Sales Rep</li> </ul>	Modify	✓
	sovercast	Susan	Overcast	sovercast@mits.com	<ul style="list-style-type: none"> <li>Sales Rep</li> </ul>	Modify	✓

- c. In the Actions column for Drew Logan's user account, click Modify and select Groups.  
d. Select the check box next to the Sales Rep Restrictions security group and click Save Changes.

The screenshot shows the Security Groups configuration page. It features a table with columns for a checkbox, the group name, a description, and a status icon. The 'Sales Rep Restrictions' group is selected. Below the table, there is a note and three buttons: 'Save Changes', 'Reset', and 'Cancel'.

<input type="checkbox"/>	Source Column Customizer	Create, Modify and Delete Operations (for both Initialization and Dictionary Items), Custom Columns, and Custom Commands	✓
<input type="checkbox"/>	Source Viewer	View Source details and access Source data	✓
<input type="checkbox"/>	Source Updater	Schedule and Trigger Report Source Updates for any Report Source	✓
<input type="checkbox"/>	Email Scheduler	Schedule Automatic Report Emails	✓
<input type="checkbox"/>	Email Sender	Send emails from the system. For example, able to email Reports.	✓
<input checked="" type="checkbox"/>	Sales Rep Restrictions	This security group is used to apply restrictions to sales reps.	

Note: Changes made to a Report User will not take effect until their next login.

Save Changes Reset Cancel

- e. Repeat from step 3c to add John and Deborah to the Sales Rep Restrictions security group.

## Scenario Completion

Now that these User Properties have been implemented, the initial requirements have all been met.

### Requirement #1

As a sales manager, Bob has full access to all of the information in this Report Source. While having access to all of this information is quite useful, he needs a quick way to filter the report view so that it shows only the orders for the sales reps on his sales team.

Solution: Any time Bob is viewing a report that runs against the Sales History Report Source, he can filter the results to see only the sales reps on his sales team as follows:

1. Click the column heading for the Sales Rep ID column and select Add Filter.

Customer Name	Customer Number	Order Total \$	Product Name	Product Number	Sales Rep Name	Sales Rep ID
HOMESTATE INSURANCE COMPANY	15937	2,485.44	ULTRA STARLITE 2.5/CASE	15309	DREW LOGAN	DRL
LAKE SAWYER RESORT	18656	2,484.60	#485 TOWEL WHITE ECOSOFT MULTIFOLD	4339	DREW LOGAN	DRL
A & S ENTERPRISES	17352	4,311.28	JAMES RIVER DISPENSER KEYS	14399	BOB DONIS	BOD
WA STATE TROOPERS	17411	2,757.72	44 GALLON CAN LID	18932	DREW LOGAN	DRL
BUILDING SERVICES	15260	5,945.42	#485 TOWEL WHITE ECOSOFT MULTIFOLD	4339	BOB DONIS	BOD
A-1 BLDG MAINTENANCE	82431	6,912.10	#203 ROLL TOWEL BLEACHED PROPRIETARY	4341	JEFF SHEPPARD	JSS
BORDERS BOOKS & MUSIC	15225	2,464.26	MOTOR SWITCH	11231	TOM JUDGE	TJJ
AIRPORT THEATRE	14901	2,497.00	POWER MELT ICE MELTER 100# DRUM	8039	DEBORAH SIMS	DGS
LAKE & JONES ENTERPRISES	18653	5,218.64	FLOOR SQUEEGEE STRAIGHT 18"	6804	DREW LOGAN	DRL
A & S ENTERPRISES	17352	2,473.86	LEMON QUAT CLEANER 5 GALLON BOX	5462	DEBORAH SIMS	DGS
A I C CLINIC	87441	9,850.82	SEAT COVER 1000/CASE	7382	TIM BROWN	TGB
STATE ACCOUNTING & FINANCE OFFICE	82452	2,499.52	DUST CLOTH TREATED 18X18	8083	TOM JUDGE	TJJ
21 CSG/SSF	82416	2,497.00	BAG-FILTER (LV30)	14933	BOB DONIS	BOD
EL TORO II RESTAURANT INC	15631	2,468.48	FREIGHT AND HANDLING	1000	TOM JUDGE	TJJ
HOMESTATE INSURANCE COMPANY	15937	2,465.00	FREIGHT AND HANDLING	1000	BRIAN JACKSON	BEJ
21 CSG/SSF	82416	27,118.92	#315 6/CS ROLL TOWEL NATURAL PROPRIETARY	13333	JOHN BRINKMAN	JPB

2. Select Equal to User Property from the drop-down menu.
3. Select the Sales Team User Property from the second drop-down menu.

Adding Filter to Sales Rep ID

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Only show rows where the column value is:

4. Click Add Filter. The report will now be filtered based on the values that have been assigned to Bob's MITS Report user account for the Sales Team User Property.

The screenshot shows the 'mitsreport' web application interface. At the top, the user 'Bob Donis' is logged in. The navigation bar includes 'Reports' and 'Sources' tabs. Below the navigation bar, there are utility icons for Modify, Save, Print, Export, and Menu, along with the text 'Last Successful Update: 12-04-08 at 11:19 AM'. The main content area displays a report titled 'Sales Numbers' with a 'Show Report Details' link. The report is presented as a table with the following columns: Customer Name, Customer Number, Order Total \$, Product Name, Product Number, Sales Rep Name, and Sales Rep ID. The table contains 20 rows of data, each representing a sales transaction with details on customer, product, and sales representative.

Customer Name	Customer Number	Order Total \$	Product Name	Product Number	Sales Rep Name	Sales Rep ID
A1 CARPET CLEANING	12356	2,495.36	LAB LIQUID ALIVE BACTERIA GALLON	7407	SUSAN OVERCAST	SRO
A1 CARPET CLEANING	12356	8,277.00	ULTRABRUTE DEGREASER 2-2.5GAL/CASE #328-225	11458	SUSAN OVERCAST	SRO
AIRPORT THEATRE	14901	2,493.98	WHEEL 8.00DIA .750BORE	14251	SUSAN OVERCAST	SRO
CLEANER JANITORIAL	87417	2,498.40	QUINTET PAL #208-0696 WAREWASH DETERGENT	11473	SUSAN OVERCAST	SRO
CLEANER JANITORIAL	87417	5,506.80	FREIGHT AND HANDLING	1000	SUSAN OVERCAST	SRO
A1 CARPET CLEANING	12356	2,500.00	FREIGHT AND HANDLING	1000	SUSAN OVERCAST	SRO
CLEANER JANITORIAL	87417	2,485.38	2.5 GALLON HOPPER FOR SP PRODUCT #700-820	11514	SUSAN OVERCAST	SRO
A1 CARPET CLEANING	12356	4,350.48	HARDWEAR FLOOR FINISH 5 GALLON	6643	SUSAN OVERCAST	SRO
CLEANER JANITORIAL	87417	2,493.98	WHEEL 8.00DIA .750BORE	14251	SUSAN OVERCAST	SRO
A1 CARPET CLEANING	12356	3,758.60	#315 6/CS ROLL TOWEL NATURAL PROPRIETARY	13333	SUSAN OVERCAST	SRO
Z1 CSG/SSF	82416	4,916.80	FREIGHT AND HANDLING	1000	SUSAN OVERCAST	SRO
A1 CARPET CLEANING	12356	2,499.20	ABSORBANT DEODORIZER	8096	SUSAN OVERCAST	SRO
BORDERS BOOKS & MUSIC	15225	2,485.26	44 GALLON GRAY RECEPTACLE	5636	SUSAN OVERCAST	SRO
A1 CARPET CLEANING	12356	2,474.06	POCKET CADDY FOR X CART 18010	6782	SUSAN OVERCAST	SRO
STATE ACCOUNTING & FINANCE OFFICE	82452	2,466.40	MMG56 DEEP BLUE 5X6 MAT	16001	SUSAN OVERCAST	SRO
A1 CARPET CLEANING	12356	2,500.00	FREIGHT AND HANDLING	1000	SUSAN OVERCAST	SRO
HOMESTATE INSURANCE COMPANY	15937	8,277.00	ULTRABRUTE DEGREASER 2-2.5GAL/CASE #328-225	11458	SUSAN OVERCAST	SRO
A1 CARPET CLEANING	12356	2,469.35	BLAZER BLOCK WHITENER AND DESTAINER	11468	SUSAN OVERCAST	SRO
AFTER HOURS CARPET CLEANING	82475	2,313.00	NSS OUTLAW 14" VACUUM DUAL MOTOR	5071	SUSAN OVERCAST	SRO
CLEANER JANITORIAL	87417	2,485.26	44 GALLON GRAY RECEPTACLE	5636	SUSAN OVERCAST	SRO
A1 CARPET CLEANING	12356	4,916.80	FREIGHT AND HANDLING	1000	SUSAN OVERCAST	SRO
CLEANER JANITORIAL	87417	2,498.39	CHALK BOARD ERASER S/O ONLY	8337	SUSAN OVERCAST	SRO

## Requirement #2

In addition, since he still closes orders on occasion, it would be nice if he could quickly view the orders that he has closed himself.

Solution: As above, any time Bob is viewing a report that runs against the Sales History Report Source, he can filter the results to see only his own sales as follows:

1. Click the column heading for the Sales Rep ID column and select Add Filter.

Customer Name	Customer Number	Order Total \$	Product Name	Product Number	Sales Rep Name	Sales Rep ID
A1 CARPET CLEANING	12356	2,495.36	LAB LIQUID ALIVE BACTERIA GALLON	7407	SUSAN OVERCAST	SRO
A1 CARPET CLEANING	12356	8,277.00	ULTRABRUTE DEGREASER 2-2.5GAL/CASE #328-225	11458	SUSAN OVERCAST	SRO
AIRPORT THEATRE	14901	2,493.98	WHEEL 8.00DIA .750BORE	14251	SUSAN OVERCAST	SRO
CLEANER JANITORIAL	87417	2,498.40	QUINTET PAL #208-0696 WAREWASH DETERGENT	11473	SUSAN OVERCAST	SRO
CLEANER JANITORIAL	87417	5,506.80	FREIGHT AND HANDLING	1000	SUSAN OVERCAST	SRO
A1 CARPET CLEANING	12356	2,500.00	FREIGHT AND HANDLING	1000	SUSAN OVERCAST	SRO
CLEANER JANITORIAL	87417	2,485.38	2.5 GALLON HOPPER FOR SP PRODUCT #700-820	11514	SUSAN OVERCAST	SRO
A1 CARPET CLEANING	12356	4,350.48	HARDWEAR FLOOR FINISH 5 GALLON	6643	SUSAN OVERCAST	SRO
CLEANER JANITORIAL	87417	2,493.98	WHEEL 8.00DIA .750BORE	14251	SUSAN OVERCAST	SRO
A1 CARPET CLEANING	12356	3,758.60	#315 6/CS ROLL TOWEL NATURAL PROPRIETARY	13333	SUSAN OVERCAST	SRO
21 CSG/SSF	82416	4,916.80	FREIGHT AND HANDLING	1000	SUSAN OVERCAST	SRO
A1 CARPET CLEANING	12356	2,499.20	ABSORBANT DEODORIZER	8096	SUSAN OVERCAST	SRO
BORDERS BOOKS & MUSIC	15225	2,485.26	44 GALLON GRAY RECEPTACLE	5636	SUSAN OVERCAST	SRO
A1 CARPET CLEANING	12356	2,474.06	POCKET CADDY FOR X CART 18010	6782	SUSAN OVERCAST	SRO
STATE ACCOUNTING \$ FINANCE OFFICE	82452	2,466.40	MMG56 DEEP BLUE 5X6 MAT	16001	SUSAN OVERCAST	SRO
A1 CARPET CLEANING	12356	2,500.00	FREIGHT AND HANDLING	1000	SUSAN OVERCAST	SRO
HOMESTATE INSURANCE COMPANY	15937	8,277.00	ULTRABRUTE DEGREASER 2-2.5GAL/CASE #328-225	11458	SUSAN OVERCAST	SRO
A1 CARPET CLEANING	12356	2,469.35	BLAZER BLOCK WHITENER AND DESTAINER	11468	SUSAN OVERCAST	SRO
AFTER HOURS CARPET CLEANING	82475	2,313.00	NSS OUTLAW 14" VACUUM DUAL MOTOR	5071	SUSAN OVERCAST	SRO
CLEANER JANITORIAL	87417	2,485.26	44 GALLON GRAY RECEPTACLE	5636	SUSAN OVERCAST	SRO
A1 CARPET CLEANING	12356	4,916.80	FREIGHT AND HANDLING	1000	SUSAN OVERCAST	SRO
CLEANER JANITORIAL	87417	2,498.39	CHALK BOARD ERASER S/O ONLY	8337	SUSAN OVERCAST	SRO

2. Select Equal to User Property from the drop-down menu.

3. Select the My Sales Data User Property from the second drop-down menu

Adding Filter to Sales Rep ID

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Only show rows where the column value is:

Equal to User Property	▼
My Sales Data	▼

Add Filter ⊘ Cancel

4. Click Add Filter. The report will now be filtered based on the value that has been assigned to Bob's MITS Report user account for the My Sales Data User Property.

**mitsreport** Bob Donis [Log out](#)

Reports Sources

Modify Save Print Export Menu Last Successful Update: 12-04-08 at 11:19 AM

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**Sales Numbers**

Show Report Details

Customer Name	Customer Number	Order Total \$	Product Name	Product Number	Sales Rep Name	Sales Rep ID
A & S ENTERPRISES	17352	4,311.28	JAMES RIVER DISPENSER KEYS	14399	BOB DONIS	BOD
BUILDING SERVICES	15260	5,945.42	#485 TOWEL WHITE ECOSOFT MULTIFOLD	4339	BOB DONIS	BOD
21 CSG/SSF	82416	2,497.00	BAG-FILTER (LV30)	14933	BOB DONIS	BOD
AIRPORT THEATRE	14901	2,499.76	SCENTURION ODOR COUNTERACTANT GALLON	5449	BOB DONIS	BOD
AIRPORT THEATRE	14901	2,500.00	FREIGHT AND HANDLING	1000	BOB DONIS	BOD
CULLIGAN	80567	4,864.50	RIFLE OVEN CLEANER CONCENTRATE	11475	BOB DONIS	BOD
LAKE & JONES ENTERPRISES	18653	2,487.79	44 GALLON GRAY GATOR	14729	BOB DONIS	BOD
ENTRE COMPUTER CENTER	88228	2,500.00	FREIGHT AND HANDLING	1000	BOB DONIS	BOD
CULLIGAN	80567	31,134.62	QUATRAMINE A SANITIZER 2-2.5GAL/CASE #141-225	11464	BOB DONIS	BOD
STATE ACCOUNTING \$ FINANCE OFFICE	82452	2,485.38	2.5 GALLON HOPPER FOR SP PRODUCT #700-820	11514	BOB DONIS	BOD
ALLIANCE JANITORIAL	82571	2,095.15	KT-12 WET DRY VACCUM	5978	BOB DONIS	BOD
INTERSTATE COMPANY	15998	22,775.80	RESTROOM TISSUE #616 2 PLY PROPRIETARY	4334	BOB DONIS	BOD
CHICOS JANITORIAL	10355	18,210.43	HEALTH GUARD LOTION SOAP #8593	12568	BOB DONIS	BOD
EASTSIDE JEEP EAGLE	15619	13,696.69	PST PORCELAIN CLEANER QUARTS	8284	BOB DONIS	BOD
STATE ACCOUNTING \$ FINANCE OFFICE	82452	4,864.50	RIFLE OVEN CLEANER CONCENTRATE	11475	BOB DONIS	BOD
AFTER HOURS CARPET CLEANING	82475	2,428.65	DISHMACHINE B2 SOAP	12619	BOB DONIS	BOD
STATE ACCOUNTING \$ FINANCE OFFICE	82452	2,495.05	NS17-009-1 BANDIT B/V BAGS	2238	BOB DONIS	BOD
STATE ACCOUNTING \$ FINANCE OFFICE	82452	2,497.00	BAG-FILTER (LV30)	14933	BOB DONIS	BOD
CONES & CREAM	88037	2,463.12	QUINTET CLORINE CLEANER 4/CASE	15905	BOB DONIS	BOD
AFTER HOURS CARPET CLEANING	82475	22,775.80	#495 TOWEL C-FOLD WHITE ECOSOFT	4370	BOB DONIS	BOD
A-1 BLDG MAINTENANCE	82431	2,100.00	KC-125E 12" UPRIGHT VACUUM	6039	BOB DONIS	BOD
A I C CLINIC	87441	2,499.99	12" PT100 FLOOR PADS	15321	BOB DONIS	BOD
STATE ACCOUNTING \$ FINANCE OFFICE	82452	18,210.43	CASTLEGUARD FLOOR FINISH GALLON	5508	BOB DONIS	BOD
CHINA LIGHTS	17868	2,492.80	NIFTY NABBER 36"	6768	BOB DONIS	BOD

### Requirement #3

As a team leader on Bob's sales team, Susan should only be able to view the information in this Report Source that relates to the orders that were closed by the sales reps who are a part of Bob's sales team.

Solution: This requirement is met automatically by the row restriction that was added to Susan's MITS Report user account which is based on the Sales Team User Property.

The screenshot shows the 'mitsreport' application interface. At the top, it displays 'Susan Overcast' and a 'Log out' button. Below this are tabs for 'Reports' and 'Sources'. A navigation bar includes 'Modify', 'Save', 'Print', 'Export', 'Menu', and 'Last Successful Update: 12-04-08 at 11:19 AM'. A pagination bar shows 'Page 1 of 6' and 'Showing Rows 1 to 100 of 559'. The main content area is titled 'Sales Numbers' and includes a link to 'Show Report Details'. The report itself is a table with the following columns: Customer Name, Customer Number, Order Total, Product Name, Product Number, Sales Rep Name, and Sales Rep ID. The table contains 55 rows of data, each representing a sales order.

Customer Name	Customer Number	Order Total \$	Product Name	Product Number	Sales Rep Name	Sales Rep ID
A & S ENTERPRISES	17352	4,311.28	JAMES RIVER DISPENSER KEYS	14399	BOB DONIS	BOD
BUILDING SERVICES	15260	5,945.42	#485 TOWEL WHITE ECOSOFT MULTIFOLD	4339	BOB DONIS	BOD
21 CSG/SSF	82416	2,497.00	BAG-FILTER (LV30)	14933	BOB DONIS	BOD
AIRPORT THEATRE	14901	2,499.76	SCENTURION ODOR COUNTERACTANT GALLON	5449	BOB DONIS	BOD
AIRPORT THEATRE	14901	2,500.00	FREIGHT AND HANDLING	1000	BOB DONIS	BOD
CULLIGAN	80567	4,864.50	RIFLE OVEN CLEANER CONCENTRATE	11475	BOB DONIS	BOD
LAKE & JONES ENTERPRISES	18653	2,487.79	44 GALLON GRAY GATOR	14729	BOB DONIS	BOD
ENTRE COMPUTER CENTER	88228	2,500.00	FREIGHT AND HANDLING	1000	BOB DONIS	BOD
CULLIGAN	80567	31,134.62	QUATRAMINE A SANITIZER 2-2.5GAL/CASE #141-225	11464	BOB DONIS	BOD
STATE ACCOUNTING \$ FINANCE OFFICE	82452	2,485.38	2.5 GALLON HOPPER FOR SP PRODUCT #700-820	11514	BOB DONIS	BOD
ALLIANCE JANITORIAL	82571	2,095.15	KT-12 WET DRY VACCUUM	5978	BOB DONIS	BOD
INTERSTATE COMPANY	15998	22,775.80	RESTROOM TISSUE #616 2 PLY PROPRIETARY	4334	BOB DONIS	BOD
CHICOS JANITORIAL	10355	18,210.43	HEALTH GUARD LOTION SOAP #8593	12568	BOB DONIS	BOD
EASTSIDE JEEP EAGLE	15619	13,696.69	PST PORCELAIN CLEANER QUARTS	8284	BOB DONIS	BOD
STATE ACCOUNTING \$ FINANCE OFFICE	82452	4,864.50	RIFLE OVEN CLEANER CONCENTRATE	11475	BOB DONIS	BOD
AFTER HOURS CARPET CLEANING	82475	2,428.65	DISHMACHINE B2 SOAP	12619	BOB DONIS	BOD
STATE ACCOUNTING \$ FINANCE OFFICE	82452	2,495.05	NS17-009-1 BANDIT B/V BAGS	2238	BOB DONIS	BOD
STATE ACCOUNTING \$ FINANCE OFFICE	82452	2,497.00	BAG-FILTER (LV30)	14933	BOB DONIS	BOD
CONES & CREAM	88037	2,463.12	QUINTET CLORINE CLEANER 4/CASE	15905	BOB DONIS	BOD
AFTER HOURS CARPET CLEANING	82475	22,775.80	#495 TOWEL C-FOLD WHITE ECOSOFT	4370	BOB DONIS	BOD
A-1 BLDG MAINTENANCE	82431	2,100.00	KC-125E 12" UPRIGHT VACUUM	6039	BOB DONIS	BOD
A I C CLINIC	87441	2,499.99	12" PT100 FLOOR PADS	15321	BOB DONIS	BOD
STATE ACCOUNTING \$ FINANCE OFFICE	82452	18,210.43	CASTLEGUARD FLOOR FINISH GALLON	5508	BOB DONIS	BOD
CHINA LIGHTS	17868	2,492.80	NIFTY NABBER 36"	6768	BOB DONIS	BOD
LAKE & JONES ENTERPRISES	18653	2,500.00	REPLACEMENT PLATE FOR DOWN PRESS COMBO	19021	BOB DONIS	BOD
AFTER HOURS CARPET CLEANING	82475	27,597.86	#470 TOWEL SINGLEFOLD NATURAL	4344	BOB DONIS	BOD
ALLIANCE JANITORIAL	82571	2,486.94	36X58 100/CASE 1.2MIL BROWN LINER	17842	BOB DONIS	BOD
STATE ACCOUNTING \$ FINANCE OFFICE	82452	6,495.00	MATTING 3' BROWN SCRAPER	4436	BOB DONIS	BOD
CLEANER JANITORIAL	87417	2,724.94	PINE QUAT CLEANER GALLON	5502	BOB DONIS	BOD
ACME SERVICES	17360	5,573.10	#665-15B TOWEL DISPENSER	4364	BOB DONIS	BOD
AIRPORT THEATRE	14901	2,499.99	12" PT100 FLOOR PADS	15321	BOB DONIS	BOD
AFTER HOURS CARPET CLEANING	82475	31,134.62	QUATRAMINE A SANITIZER 2-2.5GAL/CASE #141-225	11464	BOB DONIS	BOD
A & S ENTERPRISES	17352	30,812.95	#461 ROLL TOWEL UNIVERSAL NATURAL	4357	BOB DONIS	BOD
LAKE & JONES ENTERPRISES	18653	5,521.44	LINER 43X48 16 MICRON ROLL 200/CASE	17212	BOB DONIS	BOD

## Requirement #4

Since she is also an active contributor on her sales team, she needs an easy way to filter the report view so that it only shows the orders that she closed herself.

Solution: As in the solution for requirement #2 above, any time Susan is viewing a report that runs against the Sales History Report Source, she can filter the results to see only her own sales as follows:

1. Click the column heading for the Sales Rep ID column and select Add Filter.

The screenshot shows the 'mitsreport' web application interface. At the top, it displays the user name 'Susan Overcast' and a 'Log out' link. Below the navigation tabs, there are options for 'Modify', 'Save', 'Print', 'Export', and 'Menu'. The 'Last Successful Update' is shown as '12-04-08 at 11:19 AM'. The report is titled 'Sales Numbers' and includes a 'Show Report Details' link. The main table contains the following data:

Customer Name	Customer Number	Order Total \$	Product Name	Product Number	Sales Rep Name	Sales Rep ID
A & S ENTERPRISES	17352	4,311.28	JAMES RIVER DISPENSER KEYS	14399	BOB DONIS	BOD
BUILDING SERVICES	15260	5,945.42	#485 TOWEL WHITE ECOSOFT MULTIFOLD	4339	BOB DONIS	BOD
21 CSG/SSF	82416	2,497.00	BAG-FILTER (LV30)	14933	BOB DONIS	BOD
AIRPORT THEATRE	14901	2,499.76	SCENTURION ODOR COUNTERACTANT GALLON	5449	BOB DONIS	BOD
AIRPORT THEATRE	14901	2,500.00	FREIGHT AND HANDLING	1000	BOB DONIS	BOD
CULLIGAN	80567	4,864.50	RIFLE OVEN CLEANER CONCENTRATE	11475	BOB DONIS	BOD
LAKE & JONES ENTERPRISES	18653	2,487.79	44 GALLON GRAY GATOR	14729	BOB DONIS	BOD
ENTRE COMPUTER CENTER	88228	2,500.00	FREIGHT AND HANDLING	1000	BOB DONIS	BOD
CULLIGAN	80567	31,134.62	QUATRAMINE A SANITIZER 2-2.5GAL/CASE #141-225	11464	BOB DONIS	BOD
STATE ACCOUNTING \$ FINANCE OFFICE	82452	2,485.38	2.5 GALLON HOPPER FOR SP PRODUCT #700-820	11514	BOB DONIS	BOD
ALLIANCE JANITORIAL	82571	2,095.15	KT-12 WET DRY VACUUM	5978	BOB DONIS	BOD
INTERSTATE COMPANY	15998	22,775.80	RESTROOM TISSUE #616 2 PLY PROPRIETARY	4334	BOB DONIS	BOD
CHICOS JANITORIAL	10355	18,210.43	HEALTH GUARD LOTION SOAP #8593	12568	BOB DONIS	BOD
EASTSIDE JEEP EAGLE	15619	13,696.69	PST PORCELAIN CLEANER QUARTS	8284	BOB DONIS	BOD
STATE ACCOUNTING \$ FINANCE OFFICE	82452	4,864.50	RIFLE OVEN CLEANER CONCENTRATE	11475	BOB DONIS	BOD
AFTER HOURS CARPET CLEANING	82475	2,428.65	DISHMACHINE B2 SOAP	12619	BOB DONIS	BOD
STATE ACCOUNTING \$ FINANCE OFFICE	82452	2,495.05	NS17-009-1 BANDIT B/V BAGS	2238	BOB DONIS	BOD
STATE ACCOUNTING \$ FINANCE OFFICE	82452	2,497.00	BAG-FILTER (LV30)	14933	BOB DONIS	BOD
CONES & CREAM	88037	2,463.12	QUINTET CLORINE CLEANER 4/CASE	15905	BOB DONIS	BOD
AFTER HOURS CARPET CLEANING	82475	22,775.80	#495 TOWEL C-FOLD WHITE ECOSOFT	4370	BOB DONIS	BOD
A-1 BLDG MAINTENANCE	82431	2,100.00	KC-125E 12" UPRIGHT VACUUM	6039	BOB DONIS	BOD
A I C CLINIC	87441	2,499.99	12" PT100 FLOOR PADS	15321	BOB DONIS	BOD
STATE ACCOUNTING \$ FINANCE OFFICE	82452	18,210.43	CASTLEGUARD FLOOR FINISH GALLON	5508	BOB DONIS	BOD
CHINA LIGHTS	17868	2,492.80	NIFTY NABBER 36"	6768	BOB DONIS	BOD
LAKE & JONES ENTERPRISES	18653	2,500.00	REPLACEMENT PLATE FOR DOWN PRESS COMBO	19021	BOB DONIS	BOD
AFTER HOURS CARPET CLEANING	82475	27,597.86	#470 TOWEL SINGLEFOLD NATURAL	4344	BOB DONIS	BOD
ALLIANCE JANITORIAL	82571	2,486.94	36X58 100/CASE 1.2MIL BROWN LINER	17842	BOB DONIS	BOD
STATE ACCOUNTING \$ FINANCE OFFICE	82452	6,495.00	MATTING 3' BROWN SCRAPER	4436	BOB DONIS	BOD
CLEANER JANITORIAL	87417	2,724.94	PINE QUAT CLEANER GALLON	5502	BOB DONIS	BOD
ACME SERVICES	17360	5,573.10	#665-15B TOWEL DISPENSER	4364	BOB DONIS	BOD
AIRPORT THEATRE	14901	2,499.99	12" PT100 FLOOR PADS	15321	BOB DONIS	BOD
AFTER HOURS CARPET CLEANING	82475	31,134.62	QUATRAMINE A SANITIZER 2-2.5GAL/CASE #141-225	11464	BOB DONIS	BOD
A & S ENTERPRISES	17352	30,812.95	#461 ROLL TOWEL UNIVERSAL NATURAL	4357	BOB DONIS	BOD
LAKE & JONES ENTERPRISES	18653	5,521.44	LINER 43X48 16 MICRON ROLL 200/CASE	17212	BOB DONIS	BOD

2. Select Equal to User Property from the drop-down menu.

3. Select the My Sales Data User Property from the second drop-down menu

Adding Filter to Sales Rep ID

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Only show rows where the column value is:

Equal to User Property

My Sales Data

Add Filter
 Cancel

4. Click Add Filter. The report will now be filtered based on the value that has been assigned to Susan's MITS Report user account for the My Sales Data User Property.

Customer Name	Customer Number	Order Total \$	Product Name	Product Number	Sales Rep Name	Sales Rep ID
A1 CARPET CLEANING	12356	2,495.36	LAB LIQUID ALIVE BACTERIA GALLON	7407	SUSAN OVERCAST	SRO
A1 CARPET CLEANING	12356	8,277.00	ULTRABRUTE DEGREASER 2-2.5GAL/CASE #328-225	11458	SUSAN OVERCAST	SRO
AIRPORT THEATRE	14901	2,493.98	WHEEL 8.00DIA .750BORE	14251	SUSAN OVERCAST	SRO
CLEANER JANITORIAL	87417	2,498.40	QUINTET PAL #208-0696 WAREWASH DETERGENT	11473	SUSAN OVERCAST	SRO
CLEANER JANITORIAL	87417	5,506.80	FREIGHT AND HANDLING	1000	SUSAN OVERCAST	SRO
A1 CARPET CLEANING	12356	2,500.00	FREIGHT AND HANDLING	1000	SUSAN OVERCAST	SRO
CLEANER JANITORIAL	87417	2,485.38	2.5 GALLON HOPPER FOR SP PRODUCT #700-820	11514	SUSAN OVERCAST	SRO
A1 CARPET CLEANING	12356	4,350.48	HARDWEAR FLOOR FINISH 5 GALLON	6643	SUSAN OVERCAST	SRO
CLEANER JANITORIAL	87417	2,493.98	WHEEL 8.00DIA .750BORE	14251	SUSAN OVERCAST	SRO
A1 CARPET CLEANING	12356	3,758.60	#315 6/CS ROLL TOWEL NATURAL PROPRIETARY	13333	SUSAN OVERCAST	SRO
21 CSG/SSF	82416	4,916.80	FREIGHT AND HANDLING	1000	SUSAN OVERCAST	SRO
A1 CARPET CLEANING	12356	2,499.20	ABSORBANT DEODORIZER	8096	SUSAN OVERCAST	SRO
BORDERS BOOKS & MUSIC	15225	2,485.26	44 GALLON GRAY RECEPTACLE	5636	SUSAN OVERCAST	SRO
A1 CARPET CLEANING	12356	2,474.06	POCKET CADDY FOR X CART 18010	6782	SUSAN OVERCAST	SRO
STATE ACCOUNTING & FINANCE OFFICE	82452	2,466.40	MMG56 DEEP BLUE 5X6 MAT	16001	SUSAN OVERCAST	SRO
A1 CARPET CLEANING	12356	2,500.00	FREIGHT AND HANDLING	1000	SUSAN OVERCAST	SRO
HOMESTATE INSURANCE COMPANY	15937	8,277.00	ULTRABRUTE DEGREASER 2-2.5GAL/CASE #328-225	11458	SUSAN OVERCAST	SRO
A1 CARPET CLEANING	12356	2,469.35	BLAZER BLOCK WHITENER AND DESTAINER	11468	SUSAN OVERCAST	SRO
AFTER HOURS CARPET CLEANING	82475	2,313.00	NSS OUTLAW 14" VACUUM DUAL MOTOR	5071	SUSAN OVERCAST	SRO
CLEANER JANITORIAL	87417	2,485.26	44 GALLON GRAY RECEPTACLE	5636	SUSAN OVERCAST	SRO
A1 CARPET CLEANING	12356	4,916.80	FREIGHT AND HANDLING	1000	SUSAN OVERCAST	SRO
CLEANER JANITORIAL	87417	2,498.39	CHALK BOARD ERASER S/O ONLY	8337	SUSAN OVERCAST	SRO
A1 CARPET CLEANING	12356	3,325.00	GOLD DUST POLISH GALLON	6587	SUSAN OVERCAST	SRO
CLEANER JANITORIAL	87417	2,407.44	SINK POINT HOPPER KIT #55700953	12425	SUSAN OVERCAST	SRO
CLEANER JANITORIAL	87417	8,841.30	#315 6/CS ROLL TOWEL NATURAL PROPRIETARY	13333	SUSAN OVERCAST	SRO
AFTER HOURS CARPET CLEANING	82475	2,474.06	POCKET CADDY FOR X CART 18010	6782	SUSAN OVERCAST	SRO
BUILDING SERVICES	15260	2,428.65	DISHMACHINE B2 SOAP	12619	SUSAN OVERCAST	SRO

### Requirement #5

Drew, John, and Deborah are only sales reps, so their access in this Report Source should be restricted so that they can only view their own orders.

Solution: This requirement is met automatically by Drew's, John's, and Deborah's inclusion in the custom Sales Rep Restrictions security group as well as the fact that the group has a row restriction added to it which will be based on each user's settings for the My Sales Data User Property. For example, Drew will only be able to see rows where the Sales Rep ID is equal to DRL, John will only be able to see rows where the Sales Rep ID is equal to JPB, and Deborah will only be able to see rows where the Sales Rep ID is equal to DGS.

### Additional Notes

If Drew, John, or Deborah attempt to add a filter using the Sales Team User Property, the resulting report will be empty because they have no values associated with their MITS Report user account for that User Property.

To utilize User Property-based filtering (either within a report or as a part of MITS Report user security), the column that the filter will be based on must have *Enhanced Column Capabilities* enabled. For more information about Enhanced Column Capabilities, see the MITS Report Source Reference Guide.