A Hands-on Guide for

"OBIEE 11G Analytics Creating Users and Groups" Part I

This is our another document for BI Publisher Hands-on guide, This document briefs you the step by step approach to Creating User and setting up permission. Join our professional training program to learn from industry experts.

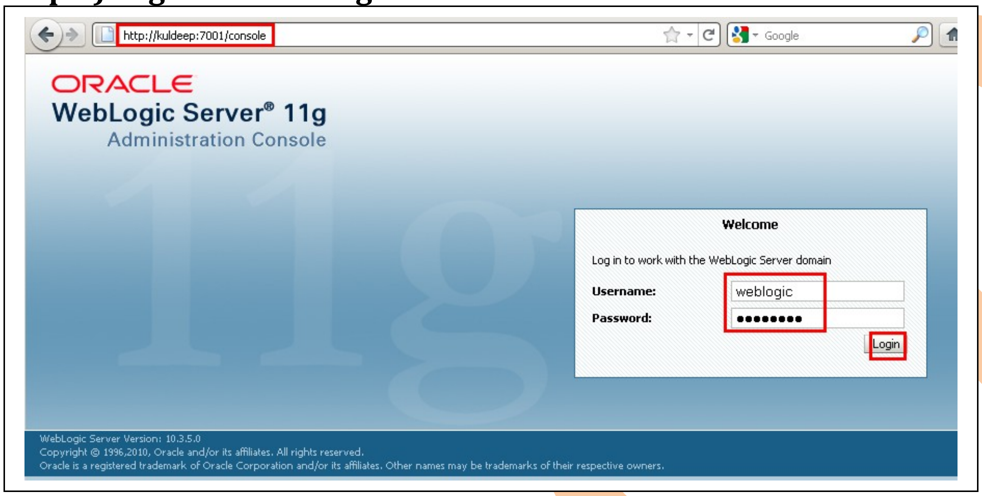
History:

Version	Description Change	Author	Publish Date
0.1	Initial Draft	Hitesh Mankar	1st Feb 2011
0.1	1st Review	Amit Sharma	1st Feb 2011

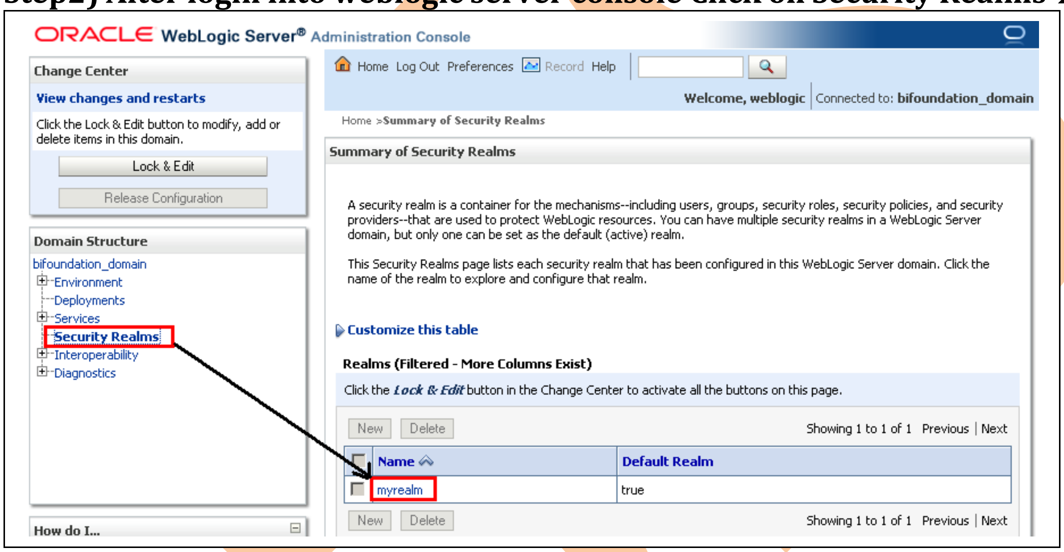
Creating User

Creating new OBI groups and users

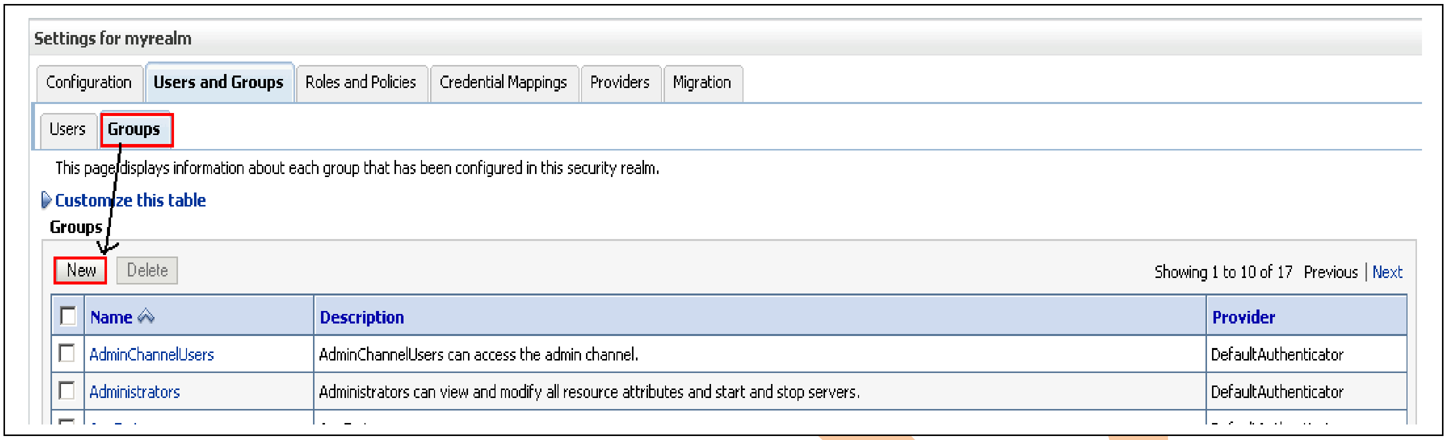
Step 1) Login into weblogic server console.



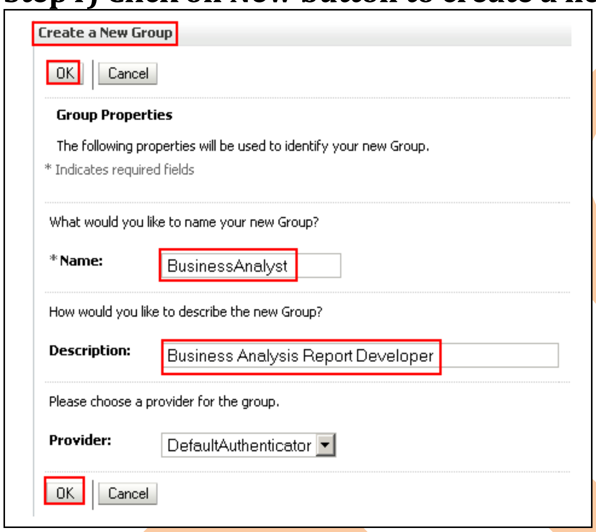
Step2) After login into weblogic server console Click on Security Realms→ myrealm.



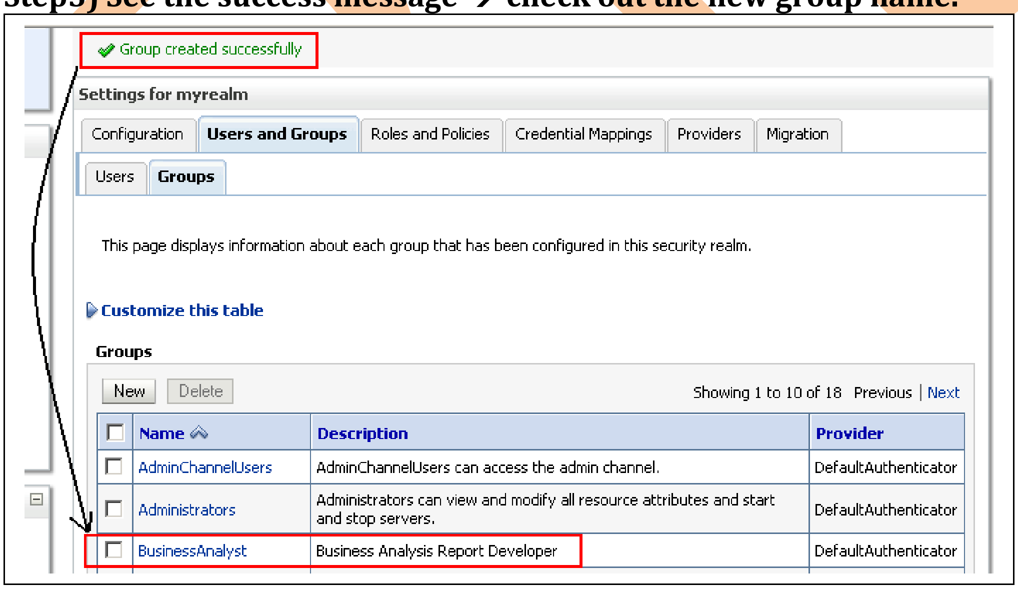
Step3)Under Security `myrealm` settings Click on Users and Groups→ Groups→ New.



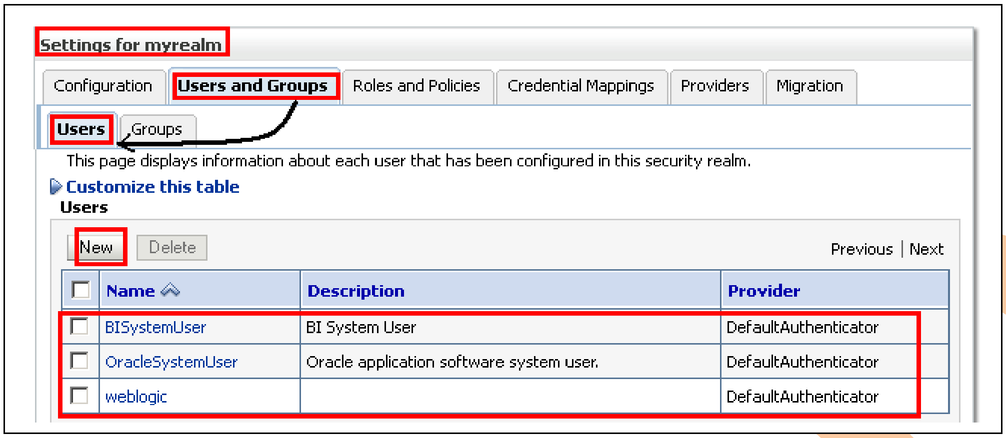
Step4) Click on New button to create a new group→ give a new user group name and click ok.



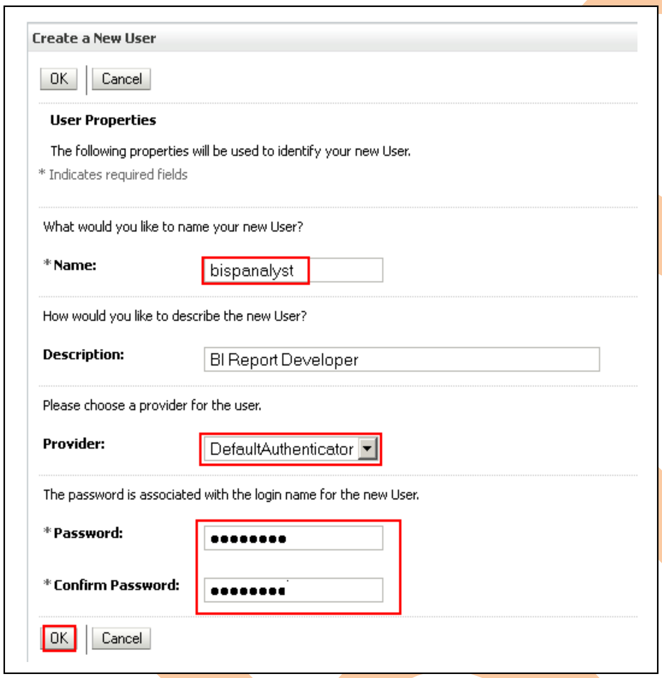
Step5) See the success message → check out the new group name.



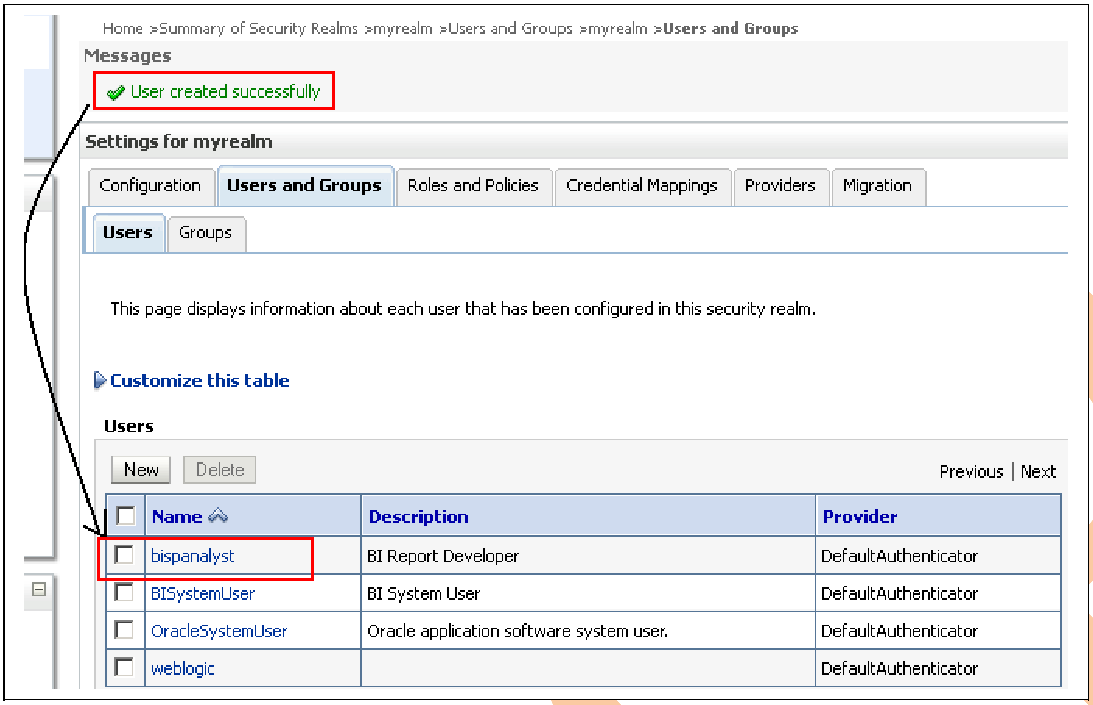
Step6) now Click on the users tab→ Click on New button.



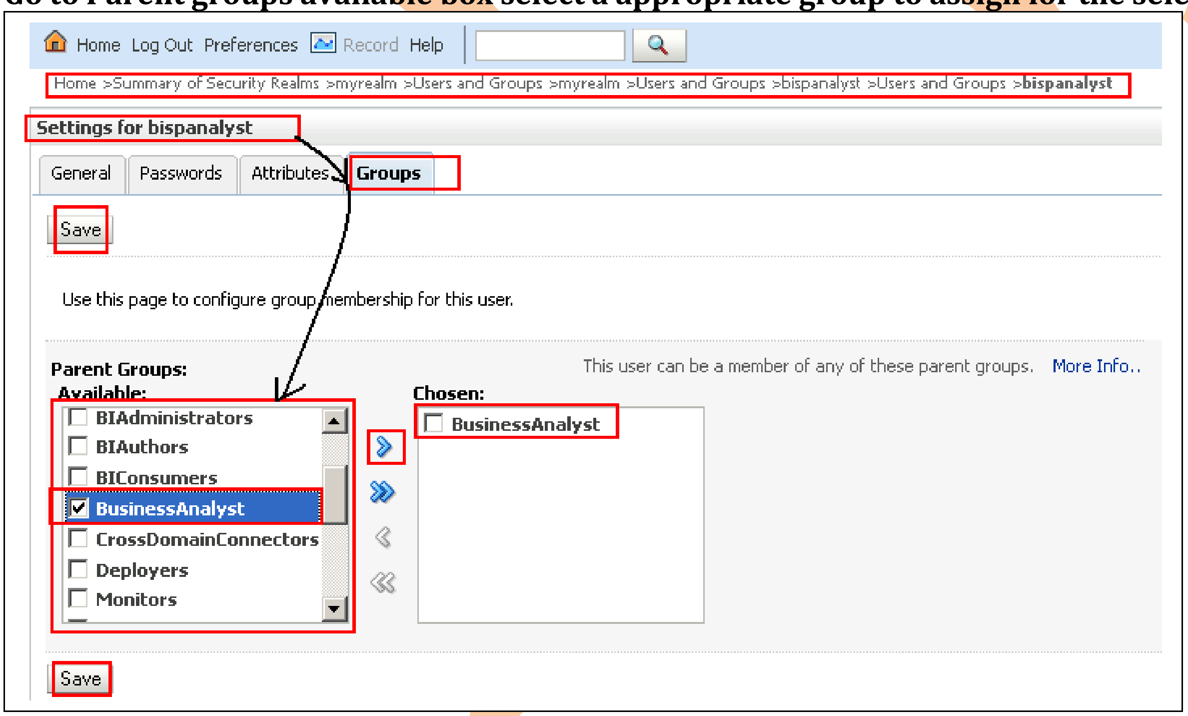
Step7). Now type the new user name→ enter description if wish → associate the password and click ok.



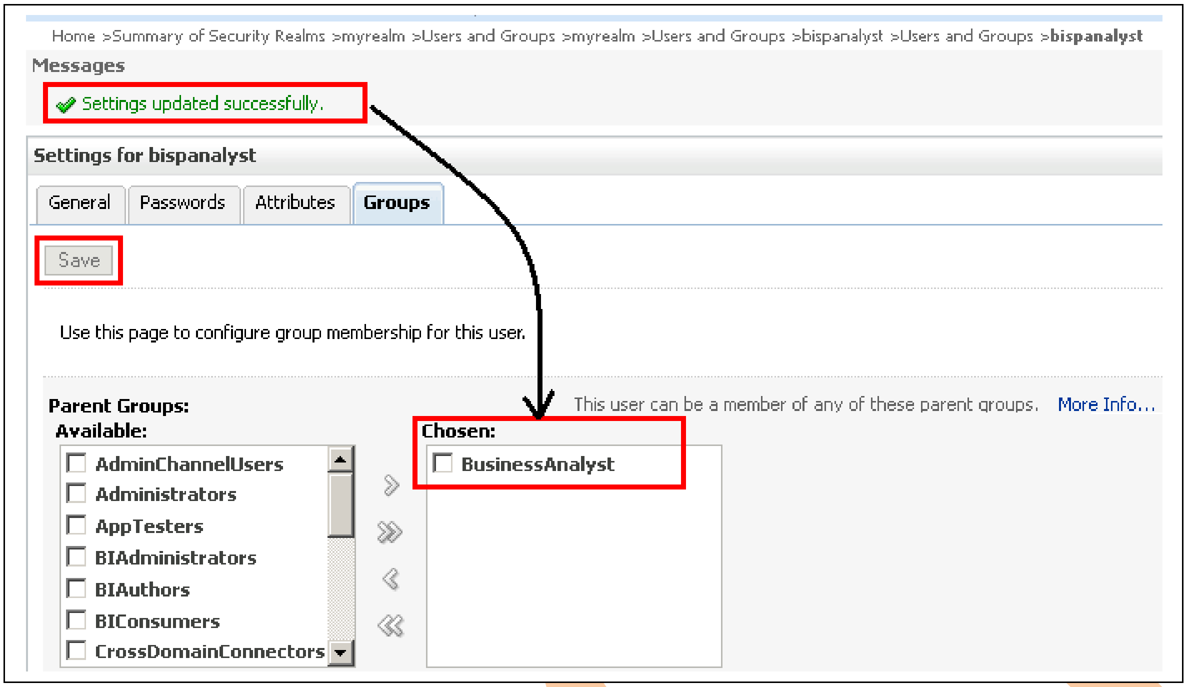
Step8) Check the new user name → This user can login into obi analytics whether belongs to any group or not.



Step9) Click on new user name to open the User Settings → Click on Groups Tab.
Go to Parent groups available box select a appropriate group to assign for the selected user.



Step10) after clicking on save button will show a message Settings updated successfully on the same window and save button will get disable. See the new group in chosen box.



Creating Group and user will help to define permissions and setup authentication roles. Once after creating users and group no need to restart or stop/start BI Services.

Step 11) Go to analytics to test and validate user's login→ http://<localhost>:7001/analytics Login with the new users credentials.

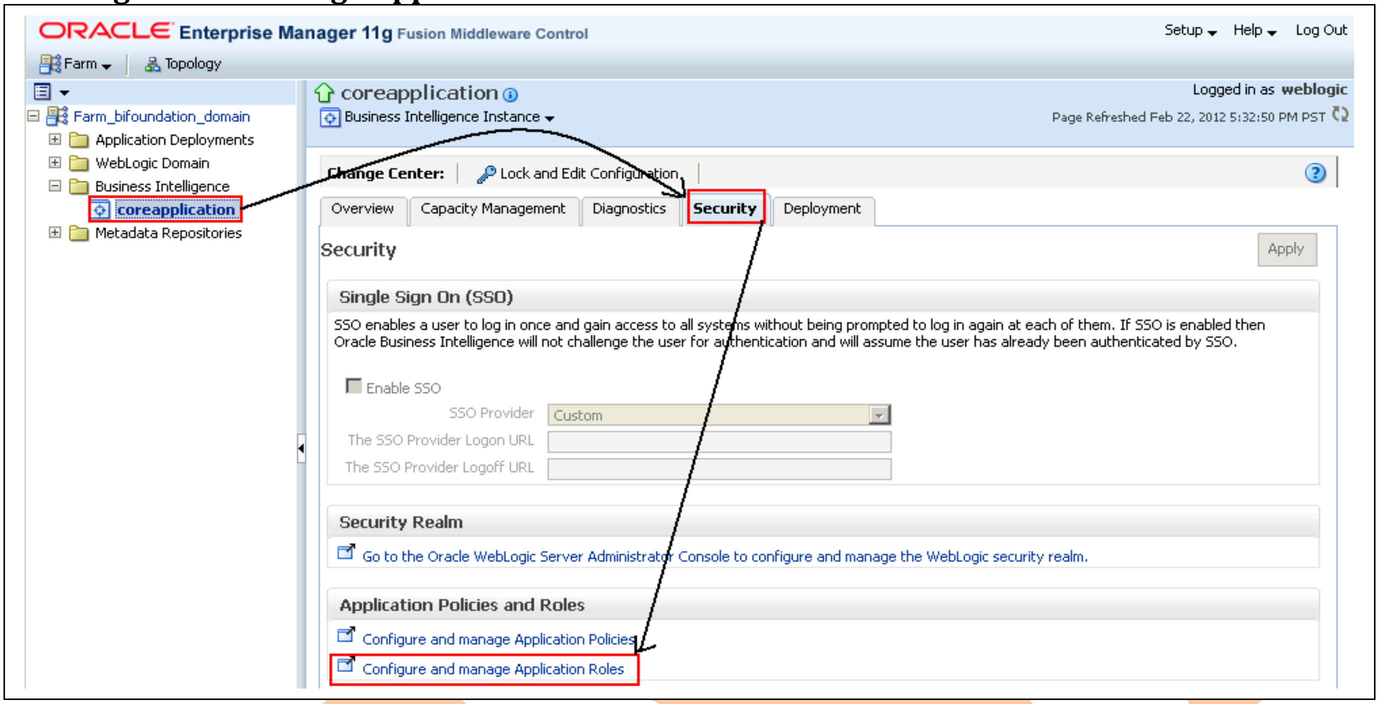
Step12) After successful login → Check the user name.

Now the new user can create reports and access the all Reporting Properties.

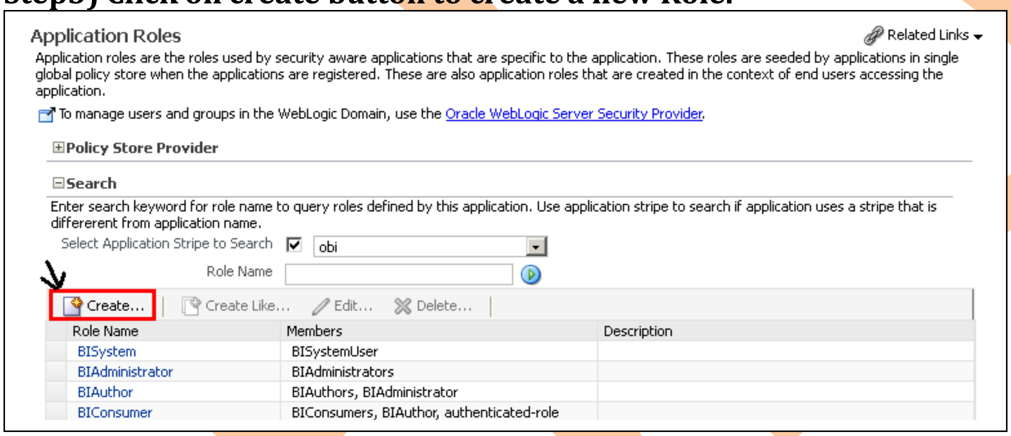
Creating and Setting up Roles

A role is used to define authentication further and will visible at Rand Presentation catalog levels also to control security on dashboard and reports.

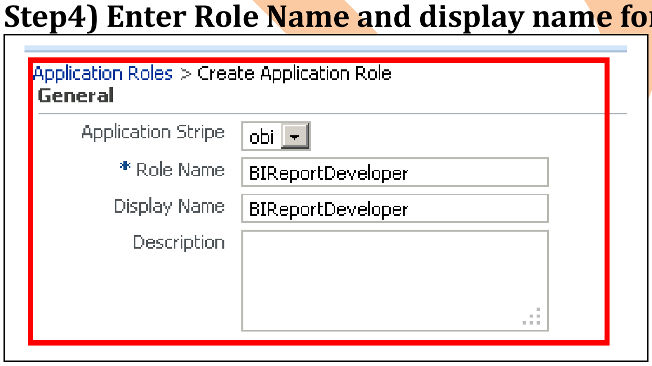
Step1). Login into Enterprise Manager with weblogic credentials.
Step2) Expand the Business intelligence after login and Click on Coreapplication → Security →Configure and manage Application Roles from the bottom of current window.



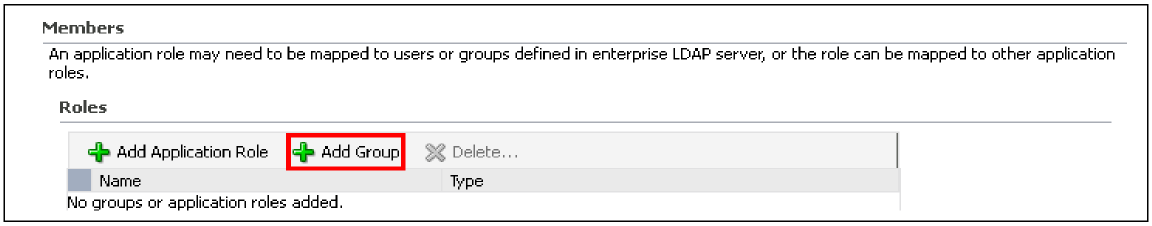
Step3) Click on create button to create a new Role.



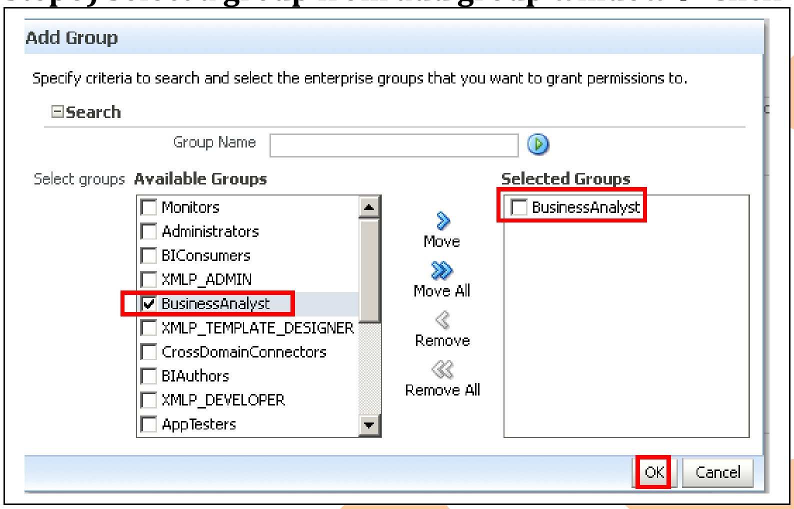
Step4) Enter Role Name and display name for role.



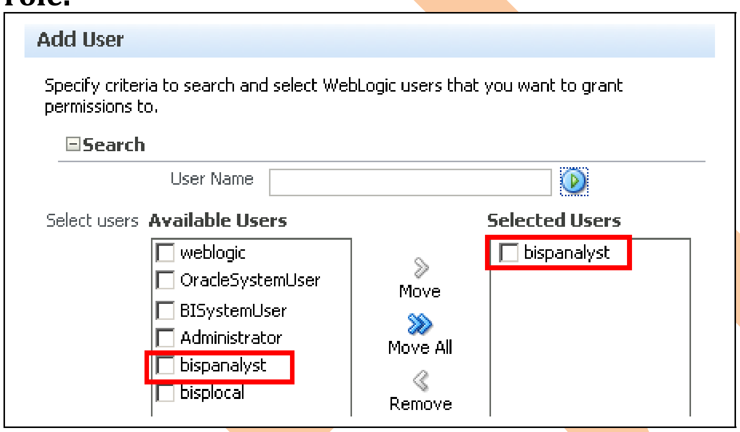
Step5) Click on the Add Group to add a group to this Role from below member property.



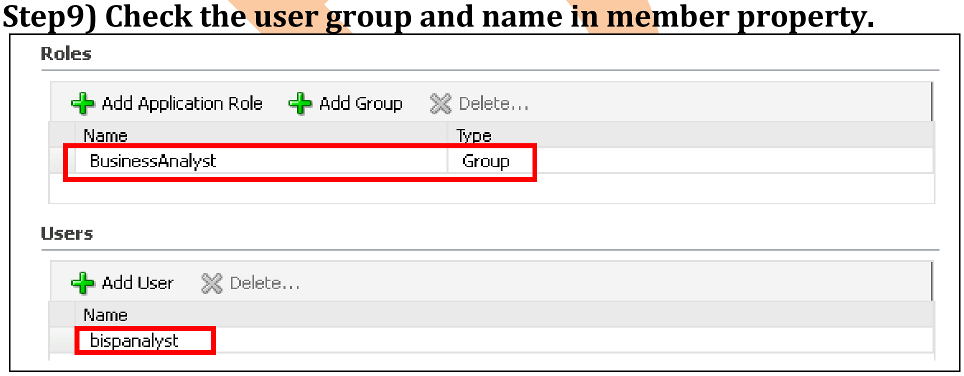
Step6) Select a group from add group window→ Click ok.



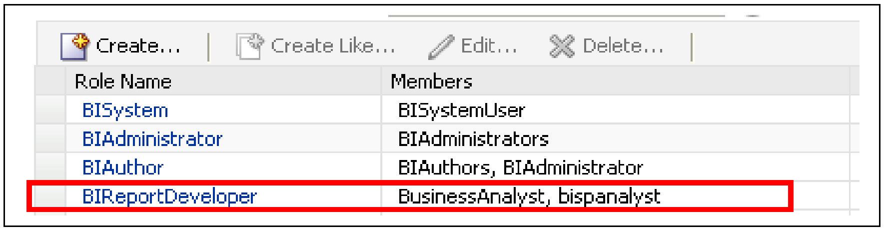
Step7). In the same way add a user to role → Click on Add User button ->Select a user to add to this role.



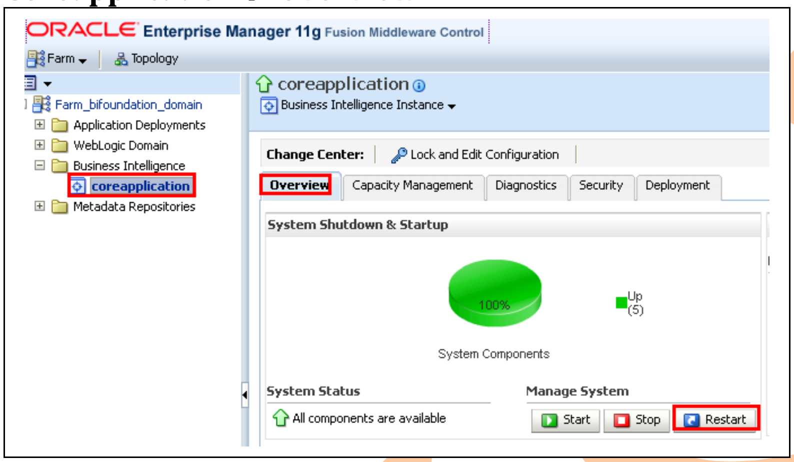
Step9) Check the user group and name in member property.



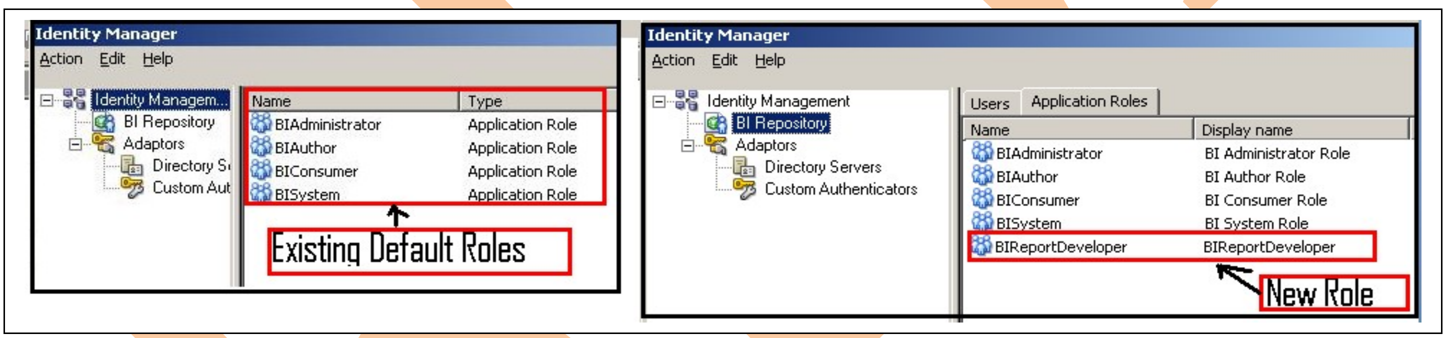
Step10) Click ok from the top of create application role window→ Check the new Role below.



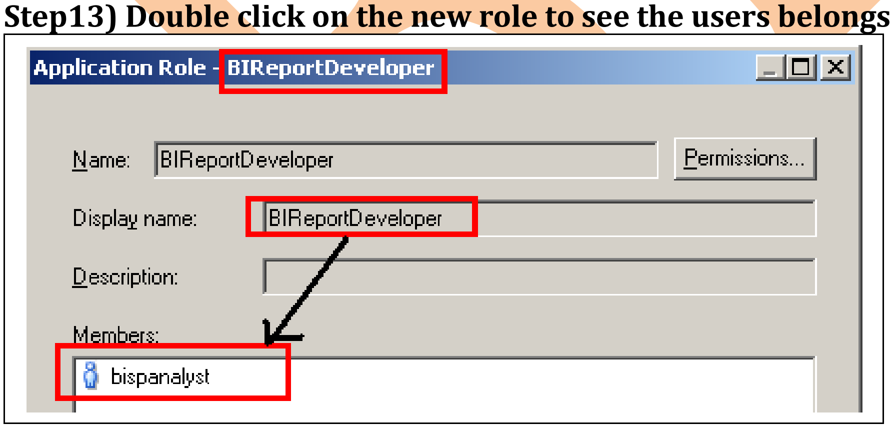
Step11) Now Restart the BI Services to make the changes in effect from Enterprise Manager → Coreapplication→ Overview.



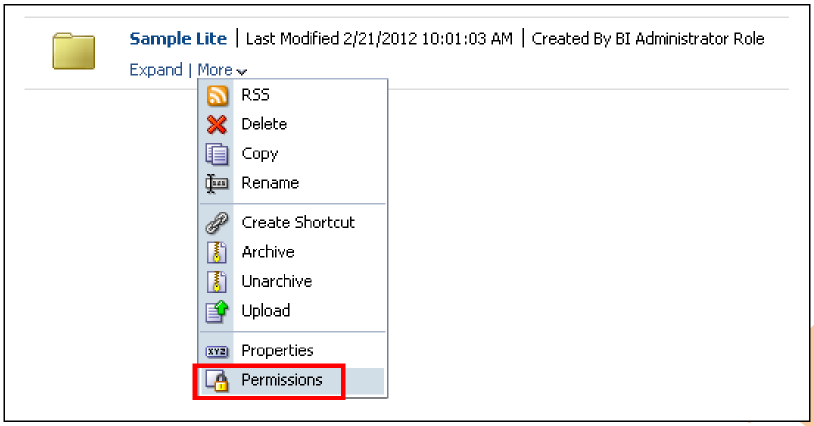
Step12) After successful Restart Open the rpd in Online Mode and compare with previous roles.



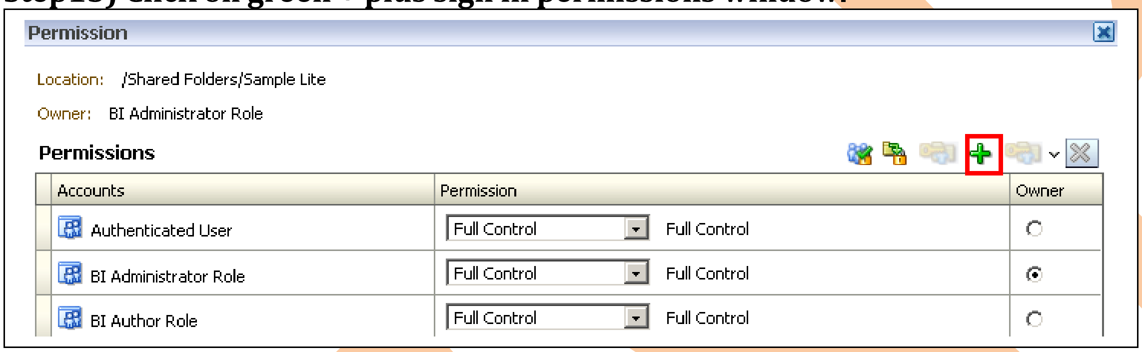
Step13) Double click on the new role to see the users belongs to it,



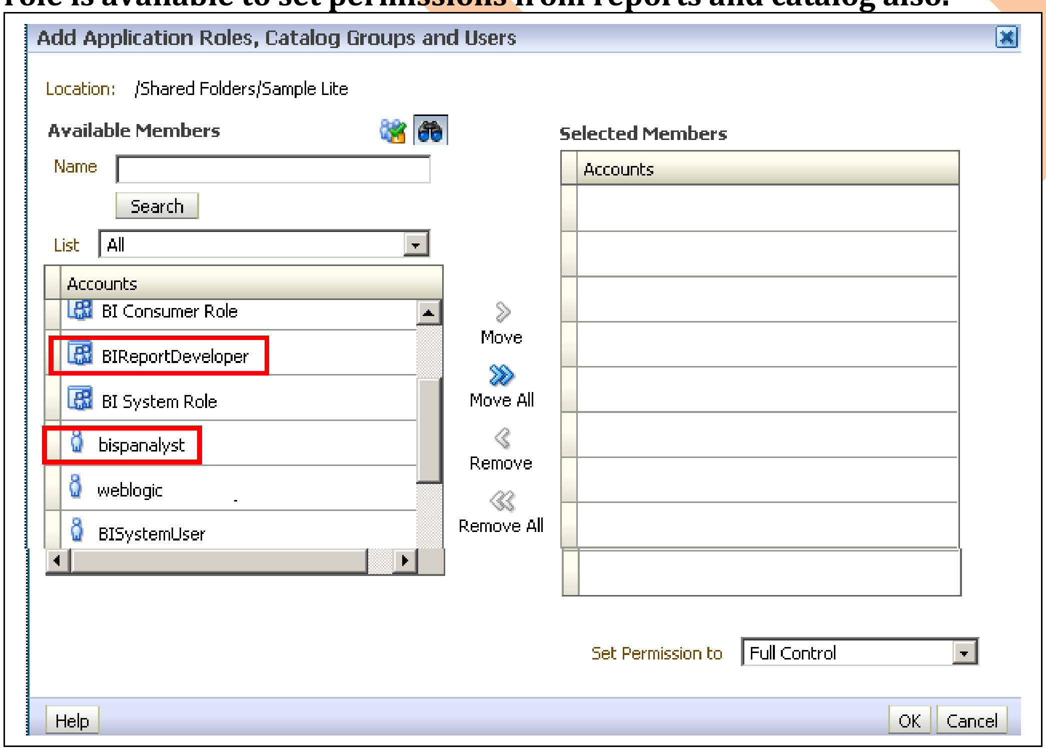
Step14) Now login into Analytics with default user's credentials →Click on Catalog→Select a catalog→ Click on more go to Permissions.



Step15) Click on green + plus sign in permissions window.



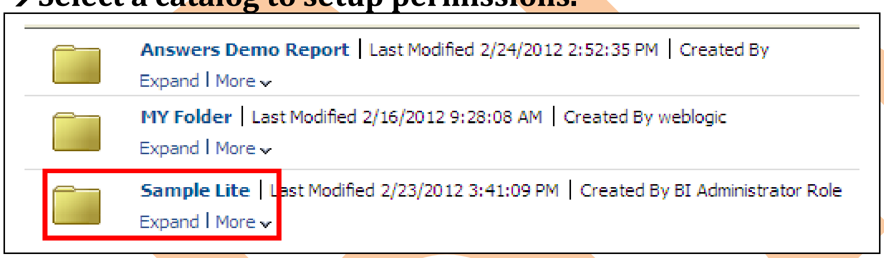
Step16) Select All from List dropdown and see the newly created user and role→ now the user and role is available to set permissions from reports and catalog also.



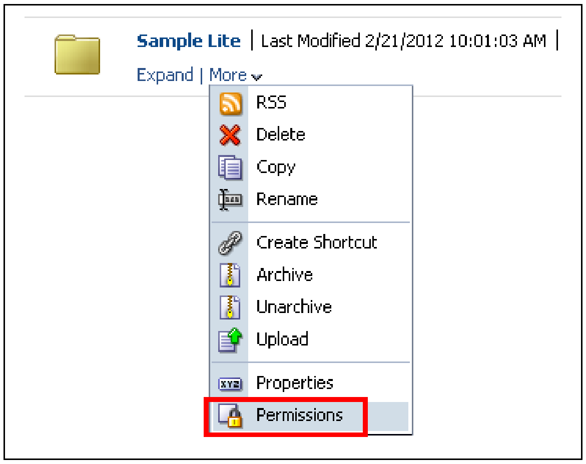
Setting up Permissions for roles and users on presentation catalogs

Setting up Permissions for users only

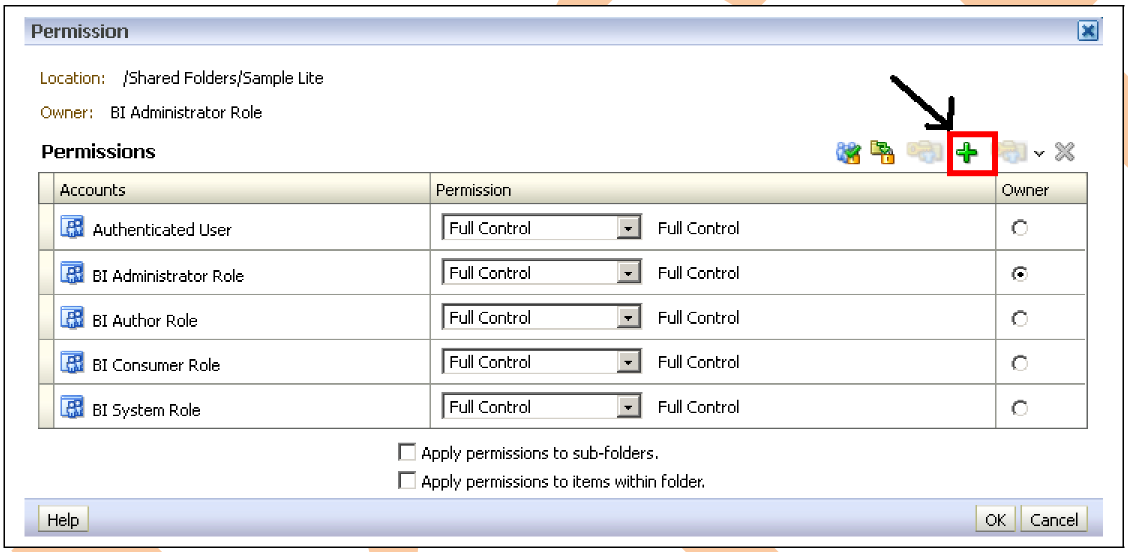
Step1) Login into analytics with weblogic or administrators redentials→ Click on catalog button →Select a catalog to setup permissions.



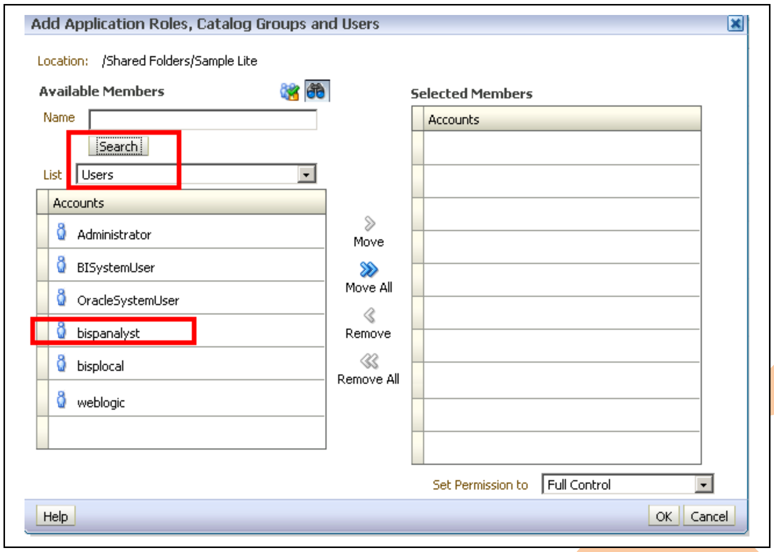
Step2) Click on More option and select permissions button.



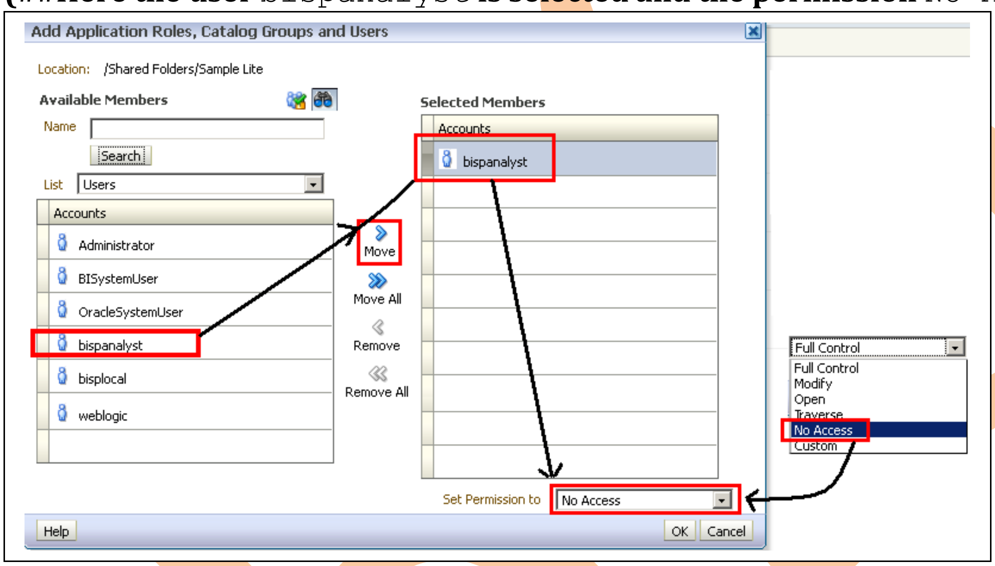
Step3) Click on green plus sign in the permissions window.



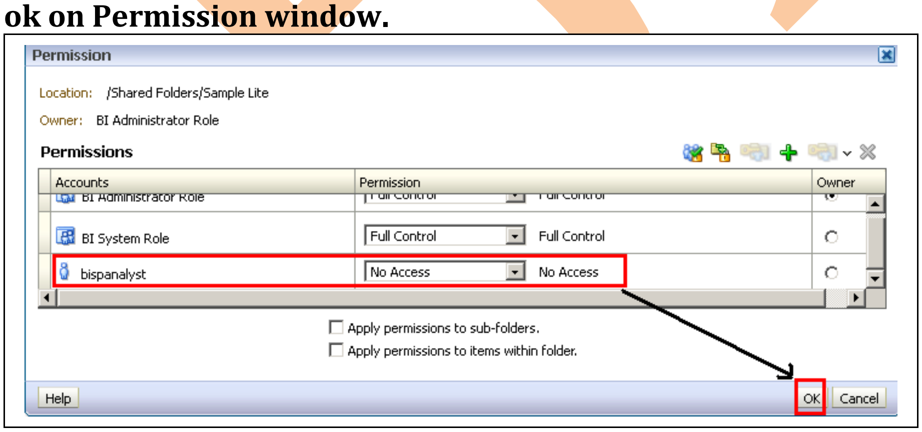
Step4) Select Users from list → click on search button.



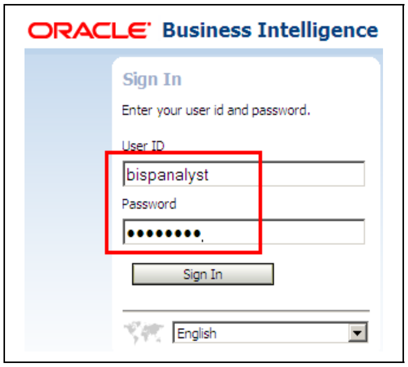
Step5) Select your user to add, click on move → check the username below selected members (Accounts) is added or not → Set permission from below dropdown list to this selected user. (##Here the user `bispanalyst` is selected and the permission `No Access` assigned.)



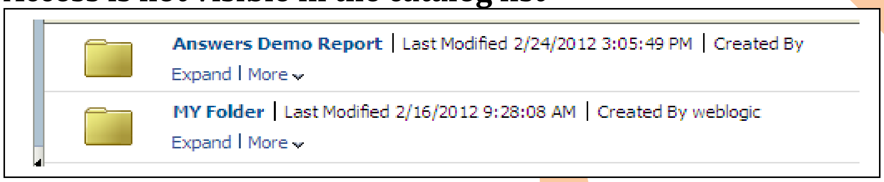
Step6) Click ok in Add Roles window → Check the new username and assigned permissions → click ok on Permission window.



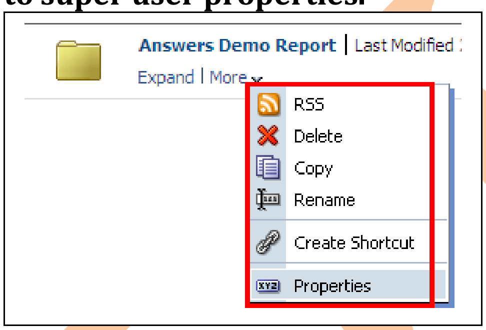
Step7) Now logout and login with new user's credentials.



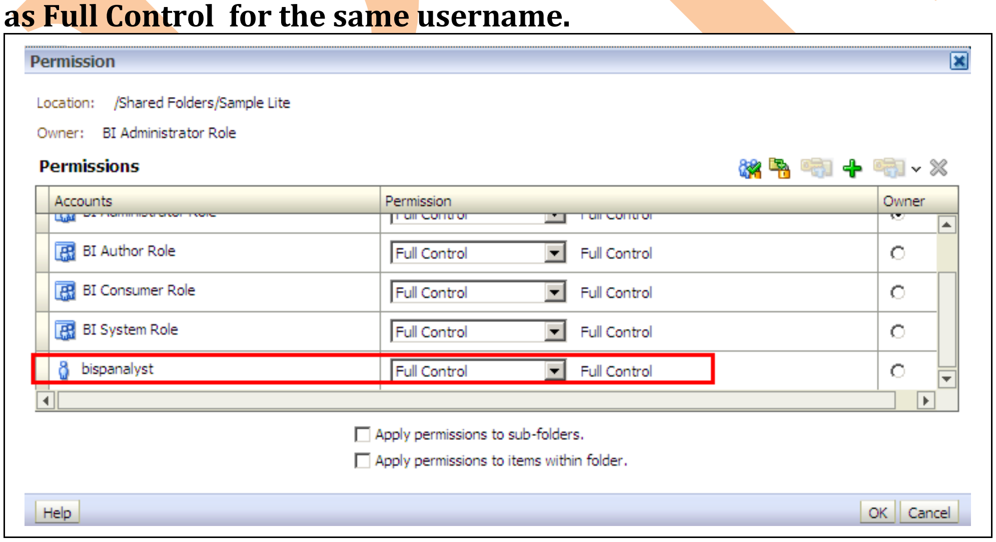
Step8) Click on Catalog→ Shared folder. The catalog on which the permission is assigned as No Access is not visible in the catalog list



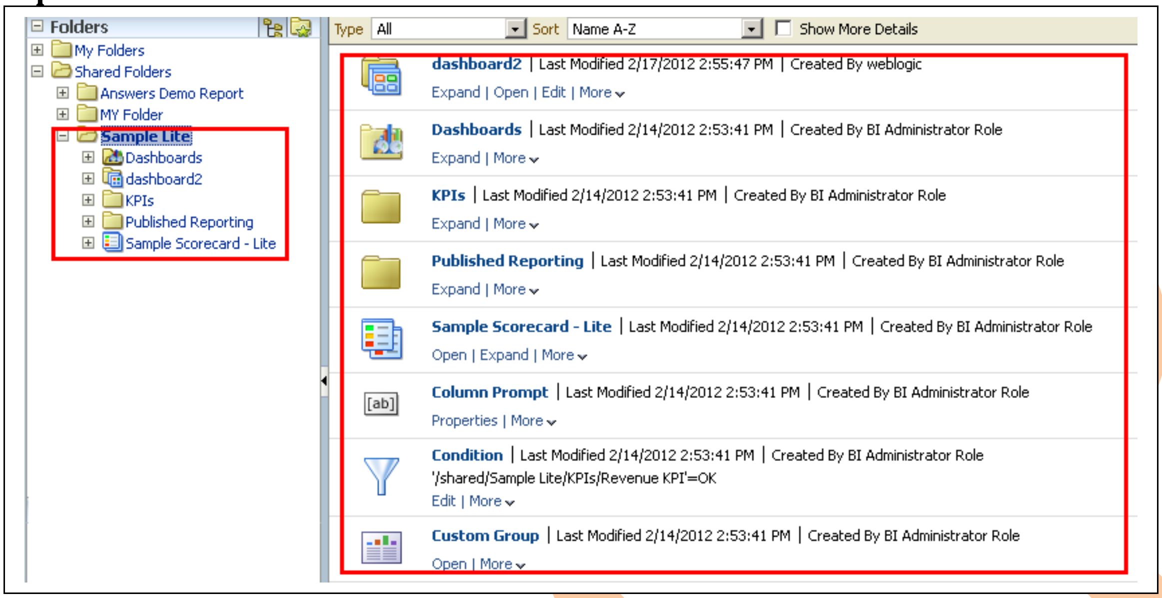
Step9) Click on the more option on any catalog the number of more properties are less as compare to super user properties.



Step10) now logout and login with as super user / administrator and set the permission once again as Full Control for the same username.



Step11) Now logout and login with the new user's credentials. (The user has all the possible access over the catalog.) The user can Traverse, Delete Modify, move etc to the catalogs and all inside reports.

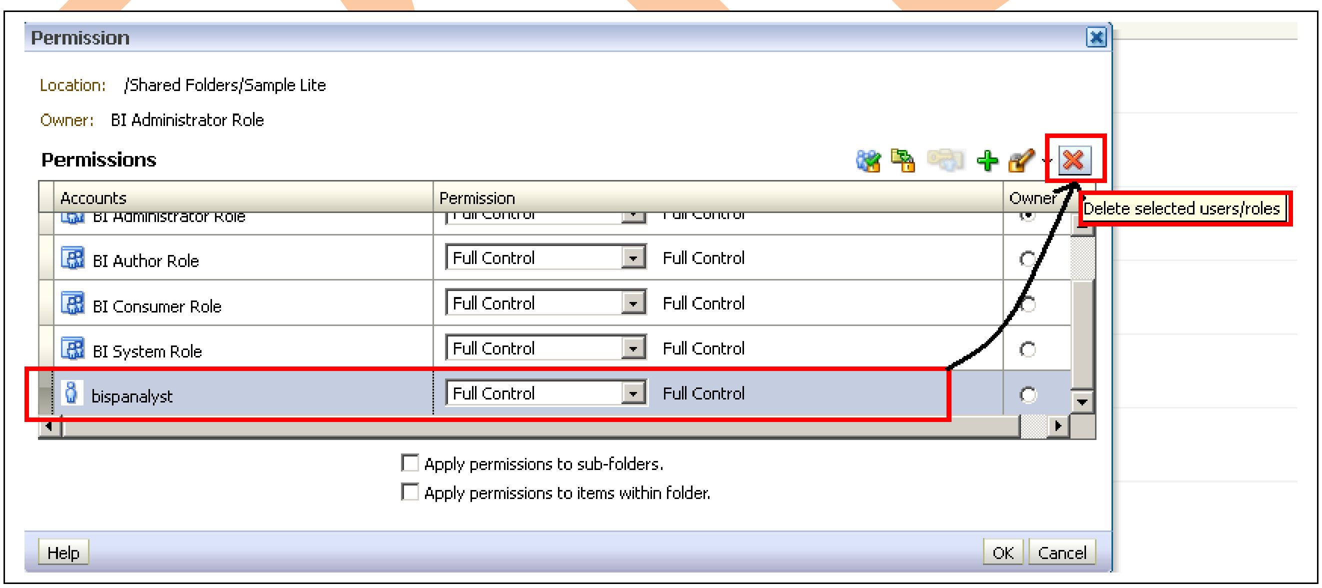


In the same way you can set the permissions for all other user with desired access.

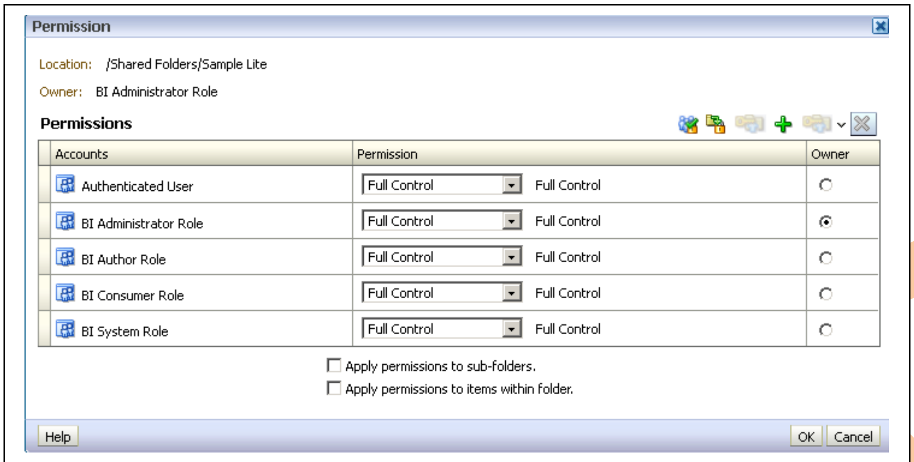
Setting up Permissions for roles on presentation catalogs

Step1) Login with the superuser and go back to set permissions once gain for the same catalog.

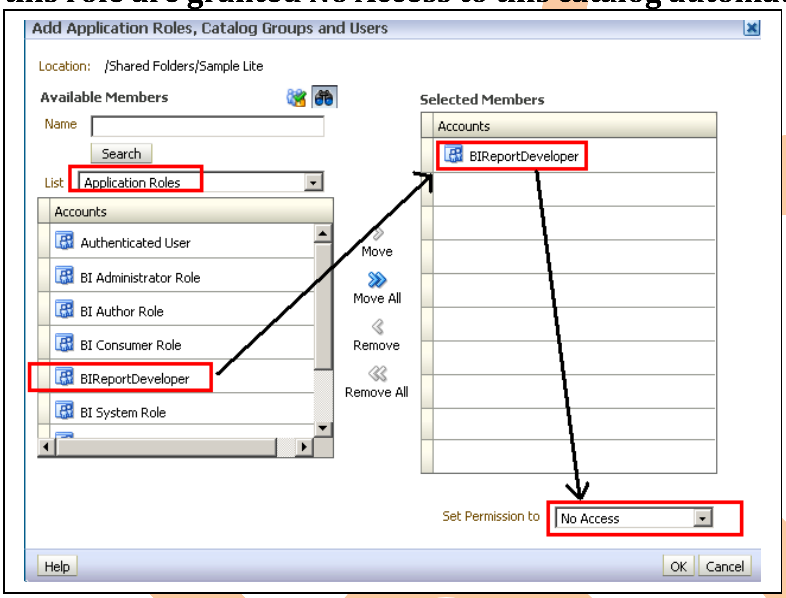
Step2) Select the existing user permission and click on the red delete button to remove the existing permissions settings.



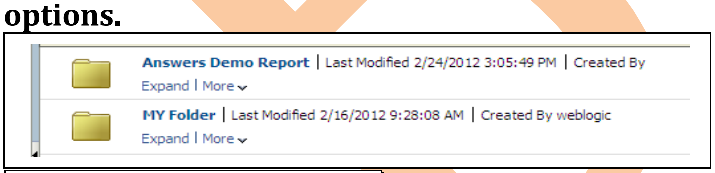
Step3).Check the user is removed from permission.

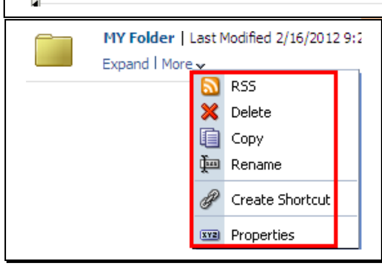


Step4). Click on green plus sign in the permissions window. Select Application Roles from List→ Click on Search→chose a role from list and set the desired permission.
Here BI Report Developer role is selected created in earlier practice; the all users who belongs to this role are granted No Access to this catalog automatically.

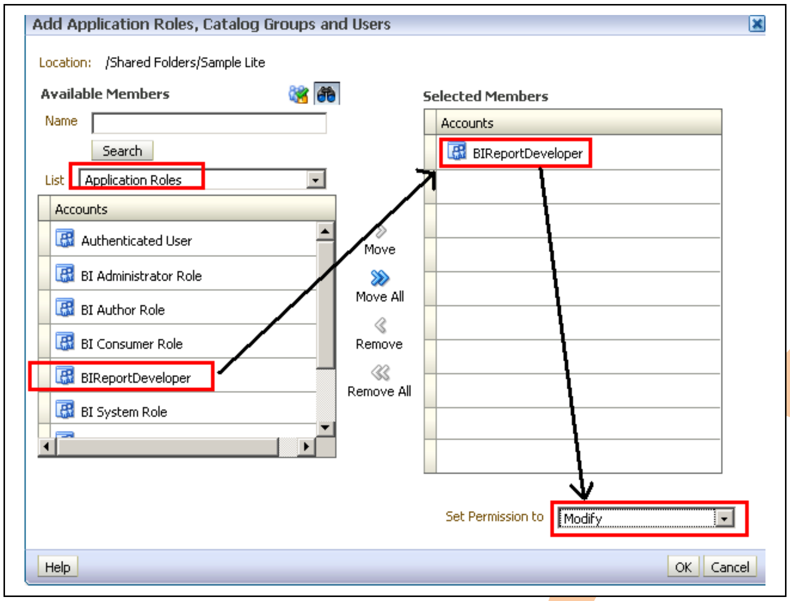


Step5). Now login with the user who belongs to this role and having less properties in more options.

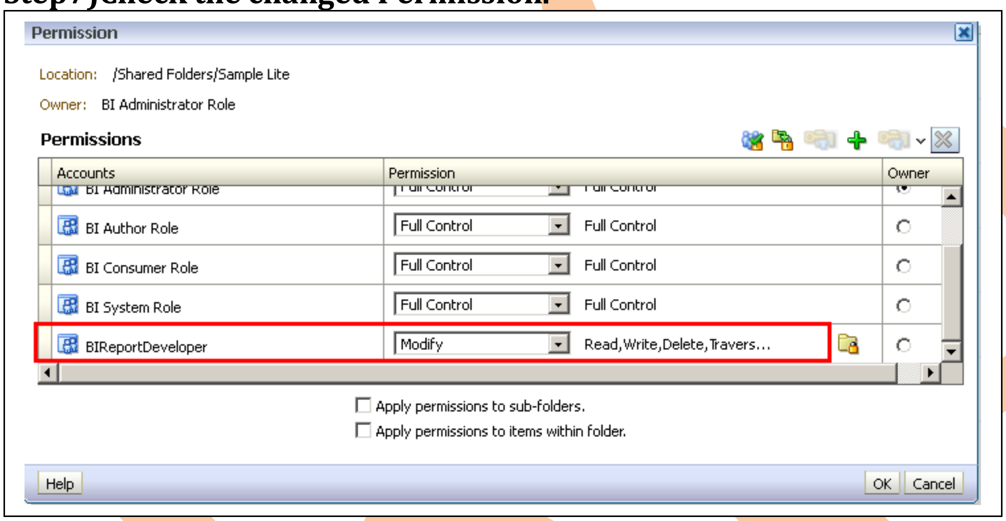




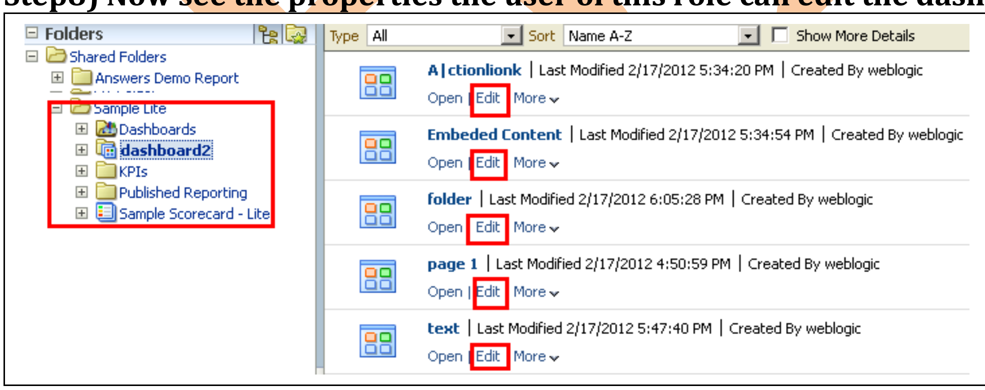
Step6) Now change the permission once again for this role in the same way.



Step7)Check the changed Permission.



Step8) Now see the properties the user of this role can edit the dashboard and reports also.



So following above steps you can assign permissions to all different roles also.