



# 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.

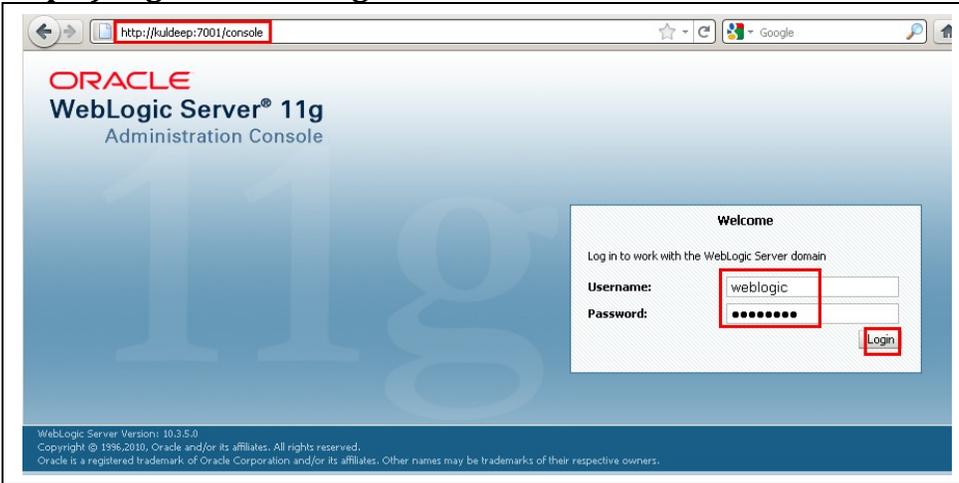
## History:

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

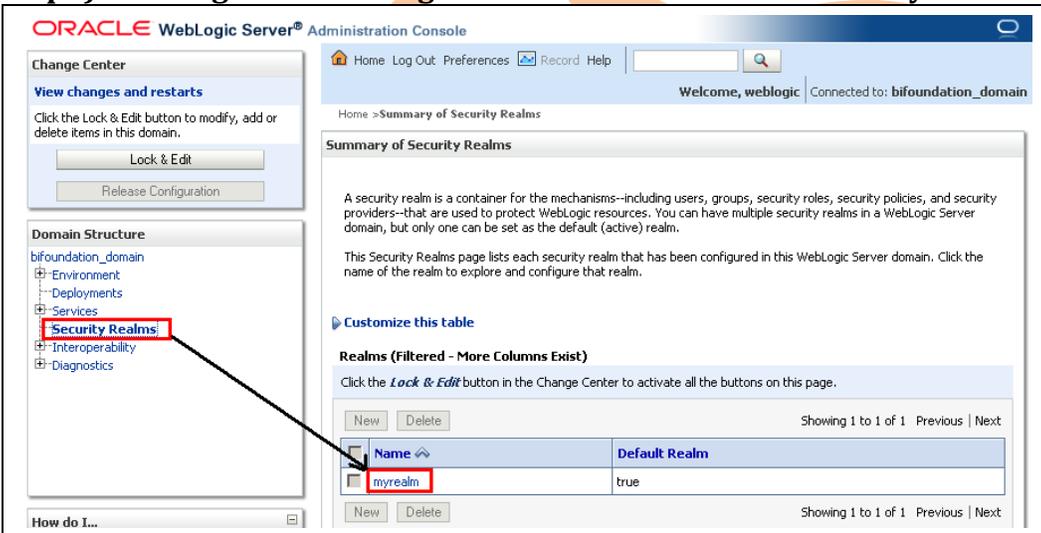
## Creating User

### 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.

Settings for myrealm

Configuration **Users and Groups** Roles and Policies Credential Mappings Providers Migration

Users **Groups**

This page displays information about each group that has been configured in this security realm.

Customize this table

Groups

**New** Delete

Showing 1 to 10 of 17 Previous Next

<input type="checkbox"/>	Name	Description	Provider
<input type="checkbox"/>	AdminChannelUsers	AdminChannelUsers can access the admin channel.	DefaultAuthenticator
<input type="checkbox"/>	Administrators	Administrators can view and modify all resource attributes and start and stop servers.	DefaultAuthenticator

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

**Create a New Group**

**OK** Cancel

**Group Properties**

The following properties will be used to identify your new Group.

\* Indicates required fields

What would you like to name your new Group?

\* Name:

How would you like to describe the new Group?

Description:

Please choose a provider for the group.

Provider:

**OK** Cancel

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

✔ Group created successfully

Settings for myrealm

Configuration **Users and Groups** Roles and Policies Credential Mappings Providers Migration

Users **Groups**

This page displays information about each group that has been configured in this security realm.

Customize this table

Groups

**New** Delete

Showing 1 to 10 of 18 Previous Next

<input type="checkbox"/>	Name	Description	Provider
<input type="checkbox"/>	AdminChannelUsers	AdminChannelUsers can access the admin channel.	DefaultAuthenticator
<input type="checkbox"/>	Administrators	Administrators can view and modify all resource attributes and start and stop servers.	DefaultAuthenticator
<input type="checkbox"/>	<b>BusinessAnalyst</b>	<b>Business Analysis Report Developer</b>	DefaultAuthenticator

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

**Settings for myrealm**

Configuration **Users and Groups** Roles and Policies Credential Mappings Providers Migration

**Users** Groups

This page displays information about each user that has been configured in this security realm.

[Customize this table](#)

**Users**

Previous | Next

<input type="checkbox"/>	Name	Description	Provider
<input type="checkbox"/>	BISystemUser	BI System User	DefaultAuthenticator
<input type="checkbox"/>	OracleSystemUser	Oracle application software system user.	DefaultAuthenticator
<input type="checkbox"/>	weblogic		DefaultAuthenticator

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

Create a New User

**User Properties**

The following properties will be used to identify your new User.

\* Indicates required fields

What would you like to name your new User?

\* Name:

How would you like to describe the new User?

Description:

Please choose a provider for the user.

Provider:

The password is associated with the login name for the new User.

\* Password:

\* Confirm Password:

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

Home > Summary of Security Realms > myrealm > Users and Groups > myrealm > Users and Groups

Messages

✔ User created successfully

Settings for myrealm

Configuration **Users and Groups** Roles and Policies Credential Mappings Providers Migration

Users Groups

This page displays information about each user that has been configured in this security realm.

▶ Customize this table

Users

New Delete Previous Next

<input type="checkbox"/>	Name	Description	Provider
<input type="checkbox"/>	bispanalyst	BI Report Developer	DefaultAuthenticator
<input type="checkbox"/>	BISystemUser	BI System User	DefaultAuthenticator
<input type="checkbox"/>	OracleSystemUser	Oracle application software system user.	DefaultAuthenticator
<input type="checkbox"/>	weblogic		DefaultAuthenticator

**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.**

Home Log Out Preferences Record Help

Home > Summary of Security Realms > myrealm > Users and Groups > myrealm > Users and Groups > bispanalyst > Users and Groups > bispanalyst

Settings for bispanalyst

General Passwords Attributes **Groups**

Save

Use this page to configure group membership for this user.

Parent Groups: This user can be a member of any of these parent groups. [More Info..](#)

Available:

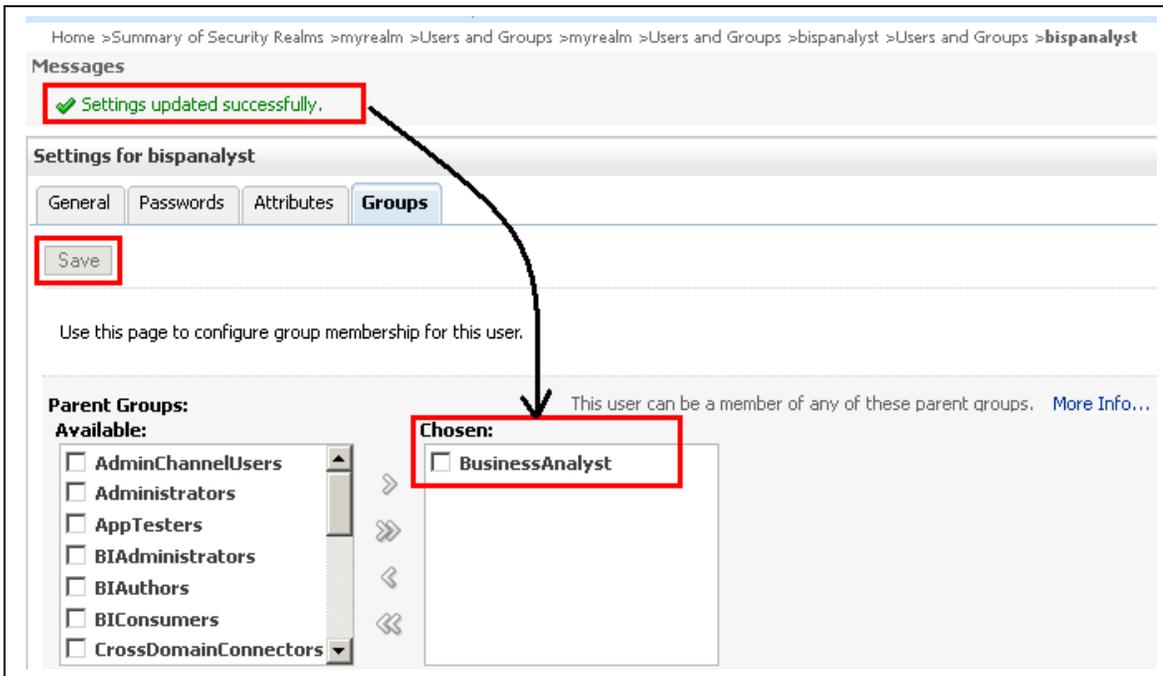
- BIAdministrators
- BIAuthors
- BIConsumers
- BusinessAnalyst
- CrossDomainConnectors
- Deployers
- Monitors

Chosen:

- BusinessAnalyst

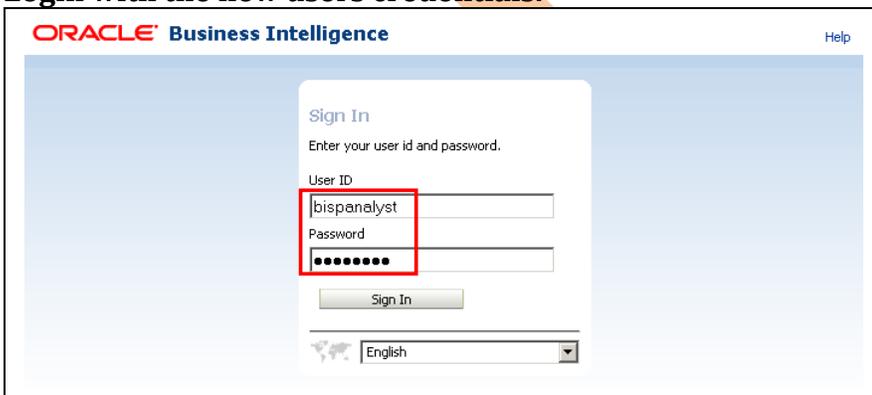
Save

**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.**

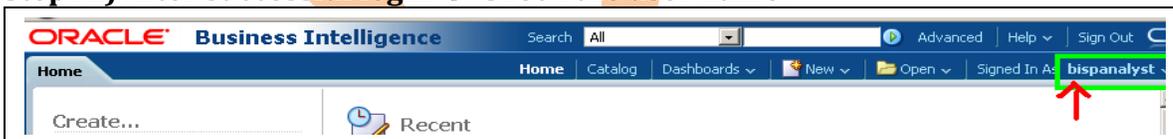


**Creating Group and user will help to define permissions and setup authentication roles. Once after creating users and group no need to restart or stop/start BI Services.**

**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.**



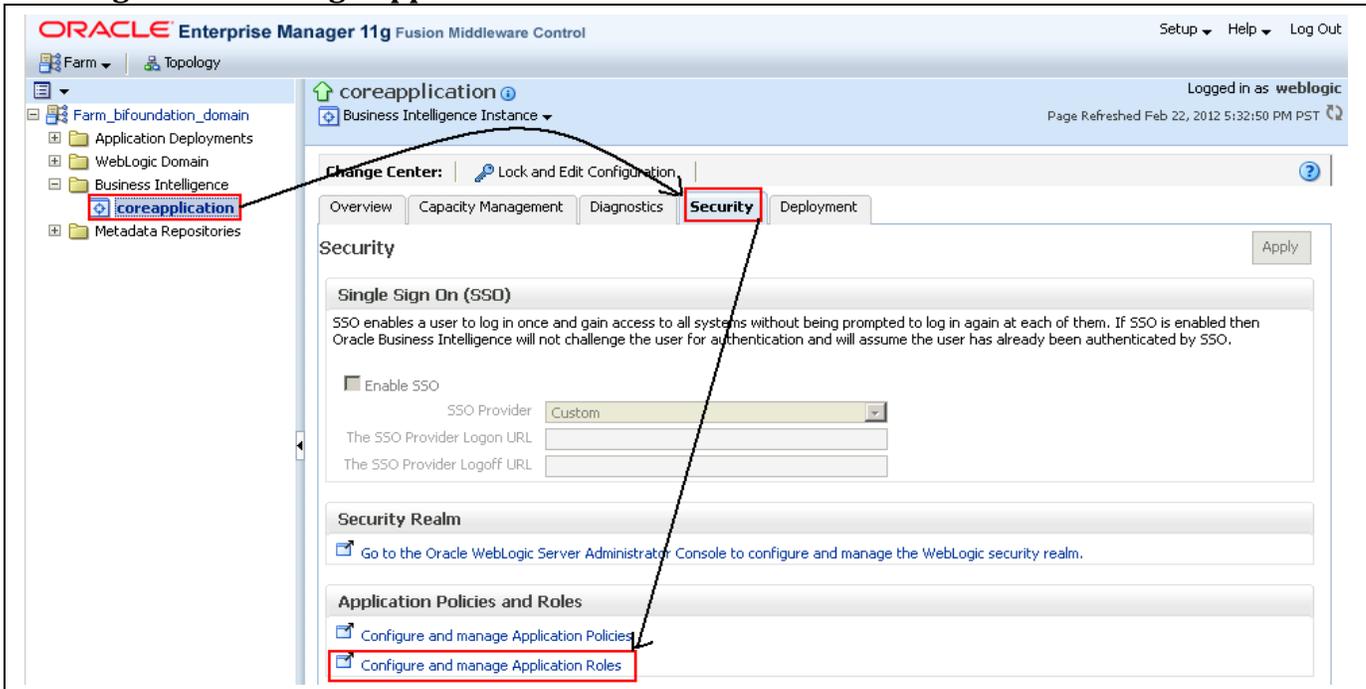
**Now the new user can create reports and access the all Reporting Properties.**

### **Creating and Setting up Roles**

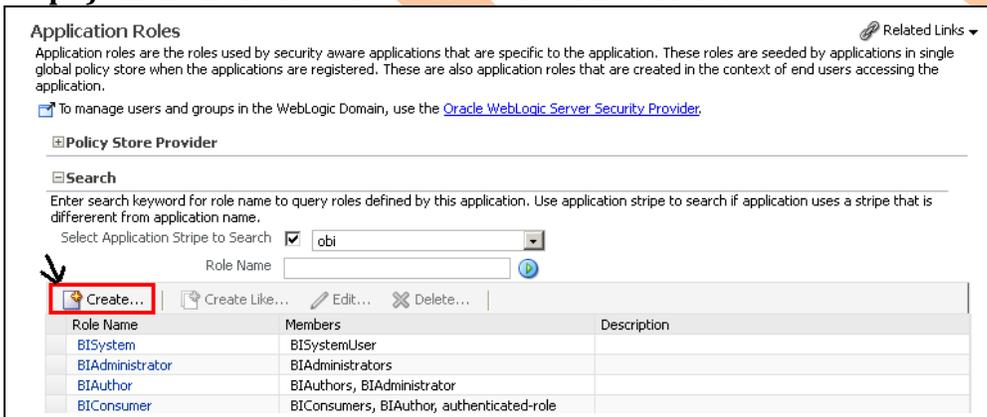
**A role is used to define authentication further and will visible at Rand Presentation catalog levels also to control security on dashboard and reports.**

**Step1). Login into Enterprise Manager with weblogic credentials.**

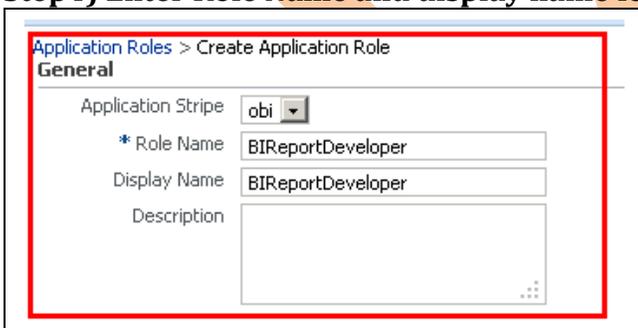
**Step2) Expand the Business intelligence after login and Click on Coreapplication → Security → Configure and manage Application Roles from the bottom of current window.**



**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.**

**Members**

An application role may need to be mapped to users or groups defined in enterprise LDAP server, or the role can be mapped to other application roles.

**Roles**

Name	Type
No groups or application roles added.	

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

**Add Group**

Specify criteria to search and select the enterprise groups that you want to grant permissions to.

Search

Group Name

Select groups

Available Groups	Selected Groups
<input type="checkbox"/> Monitors <input type="checkbox"/> Administrators <input type="checkbox"/> BIConsumers <input type="checkbox"/> XMLP_ADMIN <input checked="" type="checkbox"/> BusinessAnalyst <input type="checkbox"/> XMLP_TEMPLATE_DESIGNER <input type="checkbox"/> CrossDomainConnectors <input type="checkbox"/> BIAuthors <input type="checkbox"/> XMLP_DEVELOPER <input type="checkbox"/> AppTesters	<input type="checkbox"/> BusinessAnalyst

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

**Add User**

Specify criteria to search and select WebLogic users that you want to grant permissions to.

Search

User Name

Select users

Available Users	Selected Users
<input type="checkbox"/> weblogic <input type="checkbox"/> OracleSystemUser <input type="checkbox"/> BISystemUser <input type="checkbox"/> Administrator <input checked="" type="checkbox"/> bispanalyst <input type="checkbox"/> bisplocal	<input type="checkbox"/> bispanalyst

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

**Roles**

Name	Type
BusinessAnalyst	Group

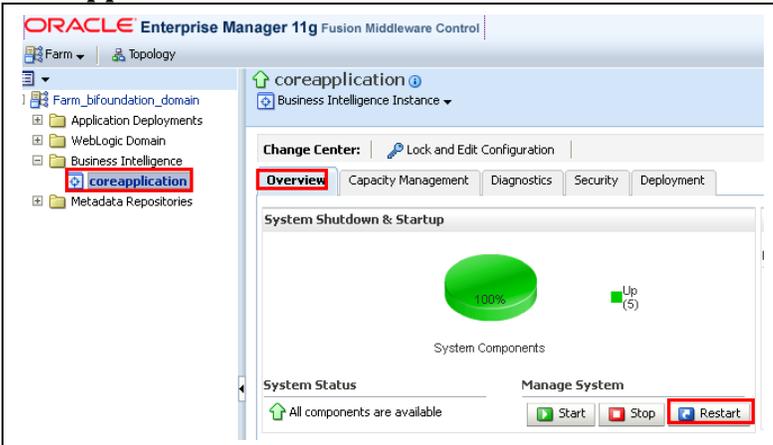
**Users**

Name
bispanalyst

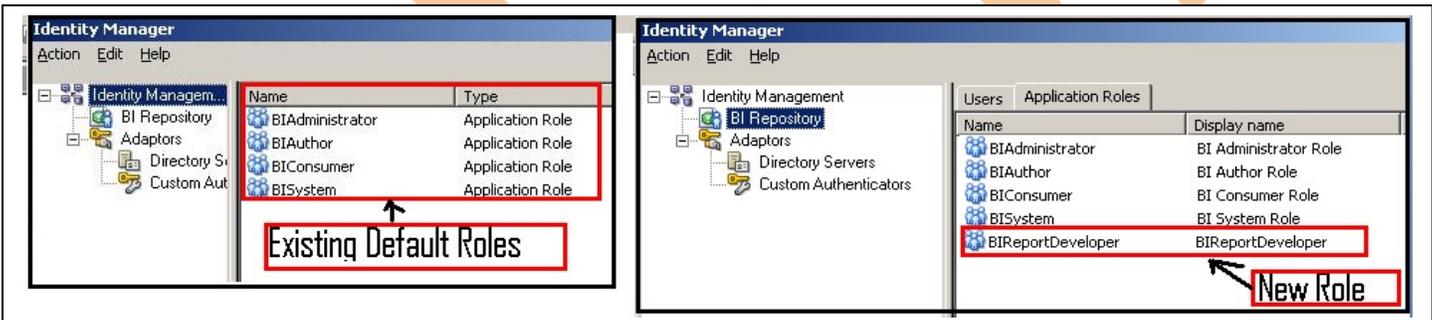
**Step10) Click ok from the top of create application role window → Check the new Role below.**

Role Name	Members
BISystem	BISystemUser
BIAdministrator	BIAdministrators
BIAuthor	BIAuthors, BIAdministrator
<b>BIReportDeveloper</b>	<b>BusinessAnalyst, bispanalyst</b>

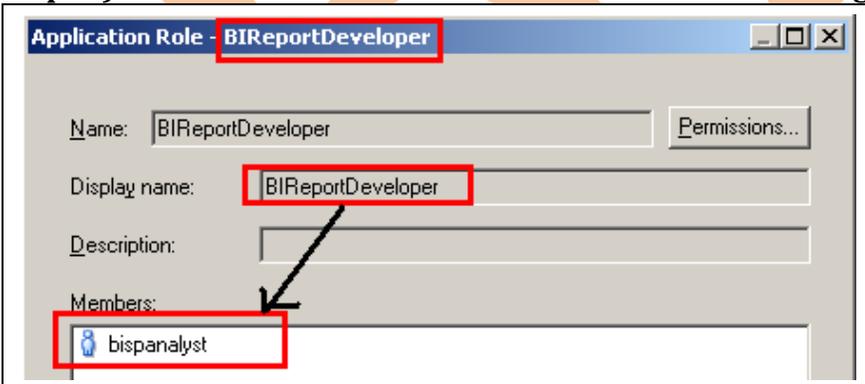
**Step11) Now Restart the BI Services to make the changes in effect from Enterprise Manager → Coreapplication → Overview.**



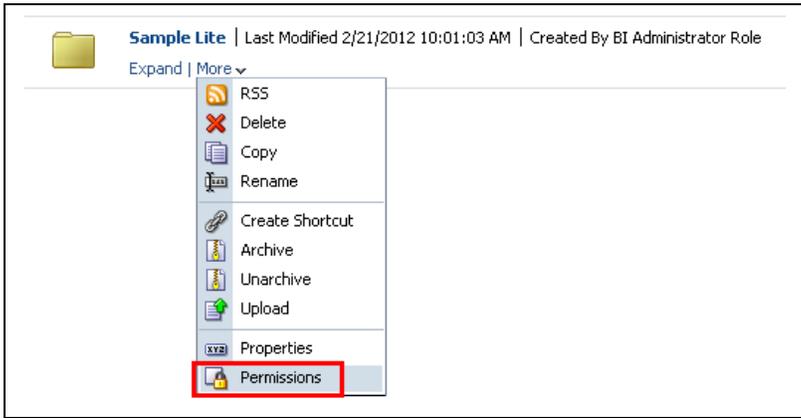
**Step12) After successful Restart Open the rpd in Online Mode and compare with previous roles.**



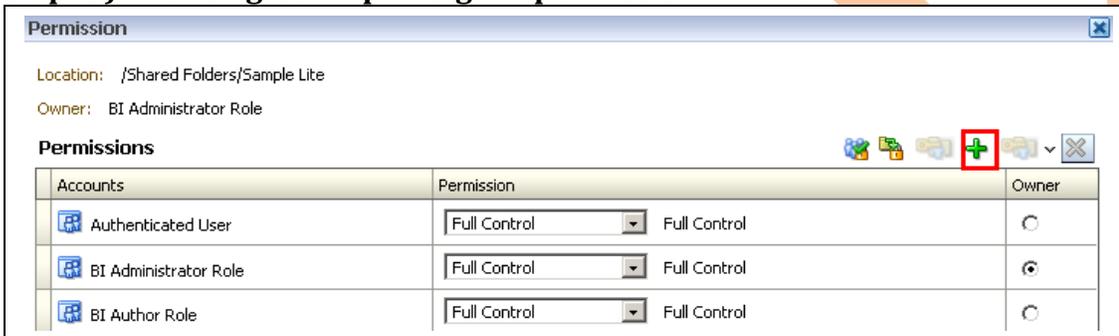
**Step13) Double click on the new role to see the users belongs to it,**



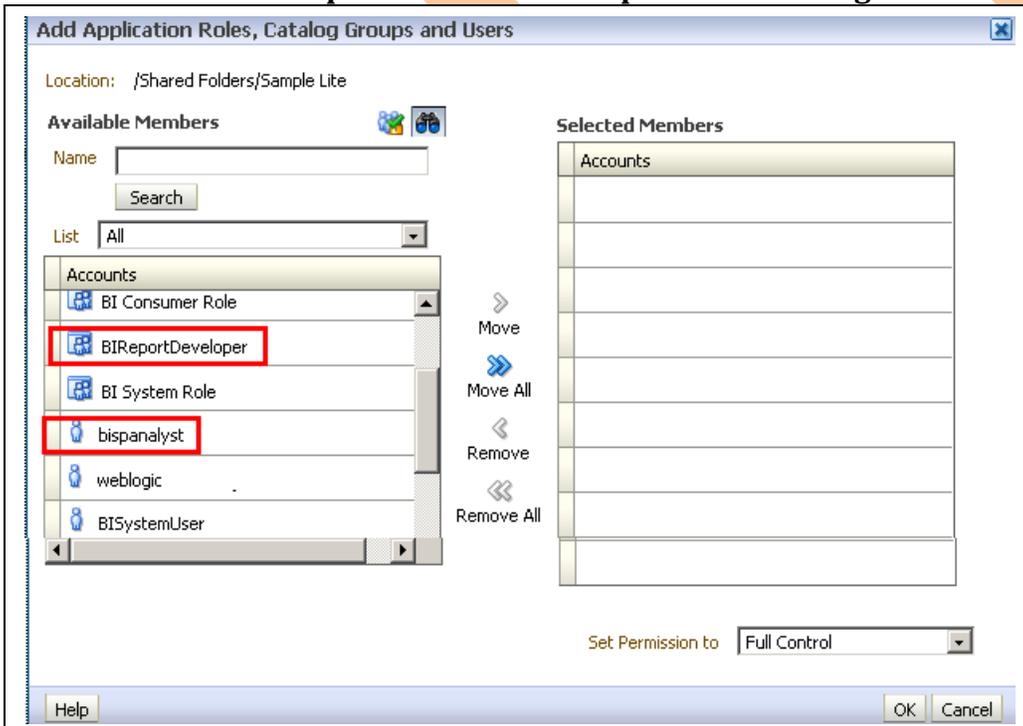
**Step14) Now login into Analytics with default user's credentials → Click on Catalog → Select a catalog → Click on more go to Permissions.**



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



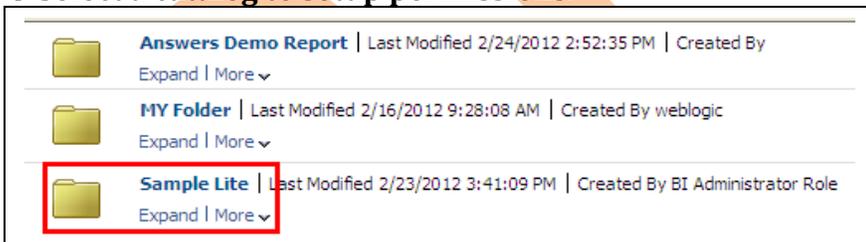
**Step16) Select All from List dropdown and see the newly created user and role → now the user and role is available to set permissions from reports and catalog also.**



## **Setting up Permissions for roles and users on presentation catalogs**

### **Setting up Permissions for users only**

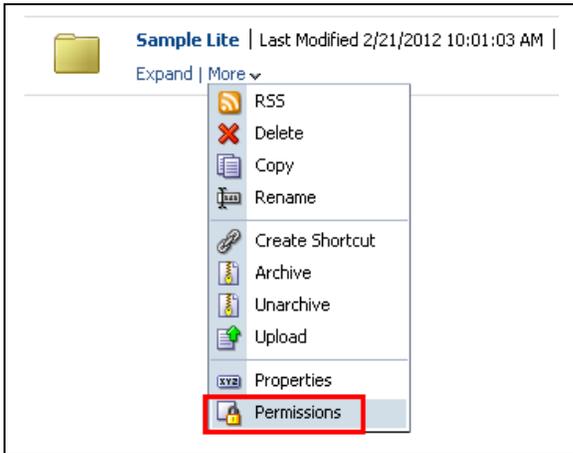
**Step1) Login into analytics with weblogic or administrators redentials → Click on catalog button  
→ Select a catalog to setup permissions.**



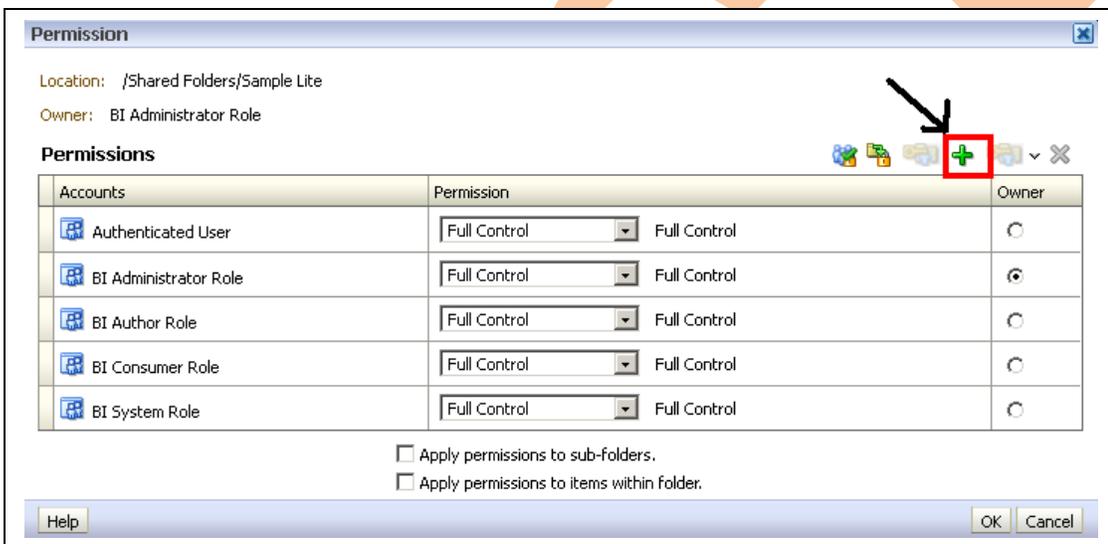
A screenshot of a web application interface showing a list of three folders. Each folder entry includes a folder icon, a name, a 'Last Modified' timestamp, and a 'Created By' field. The 'Sample Lite' folder is highlighted with a red rectangular box. Below each folder name are the options 'Expand' and 'More' with a dropdown arrow.

	<b>Answers Demo Report</b>   Last Modified 2/24/2012 2:52:35 PM   Created By
	Expand   More ▾
	<b>MY Folder</b>   Last Modified 2/16/2012 9:28:08 AM   Created By weblogic
	Expand   More ▾
	<b>Sample Lite</b>   Last Modified 2/23/2012 3:41:09 PM   Created By BI Administrator Role
	Expand   More ▾

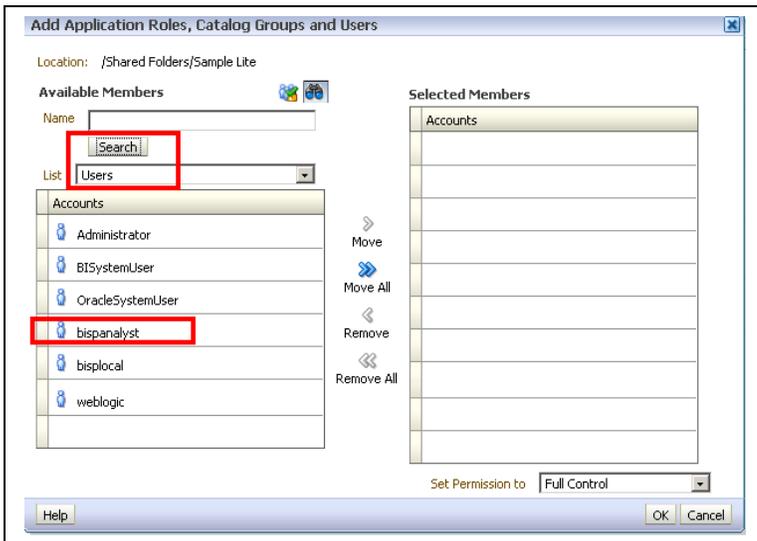
**Step2) Click on More option and select permissions button.**



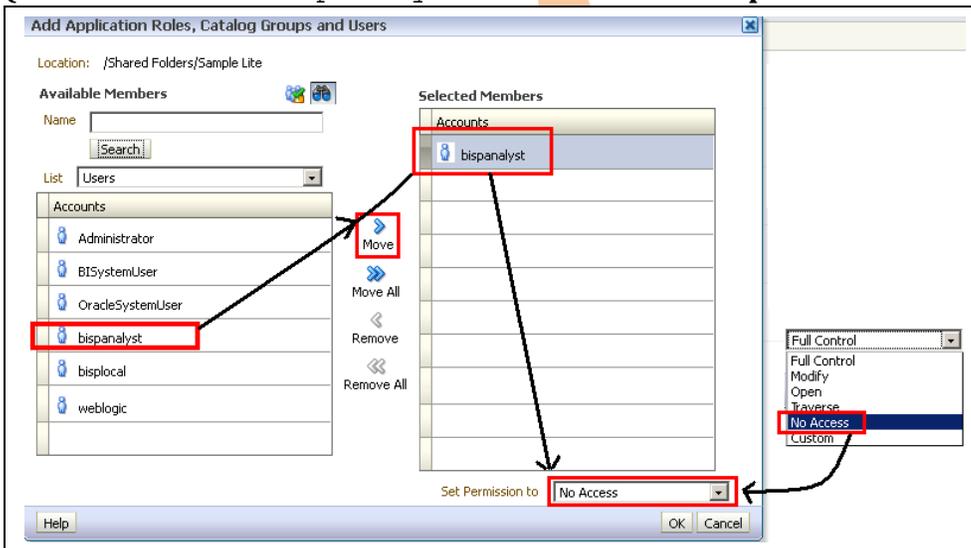
**Step3) Click on green plus sign  in the permissions window.**



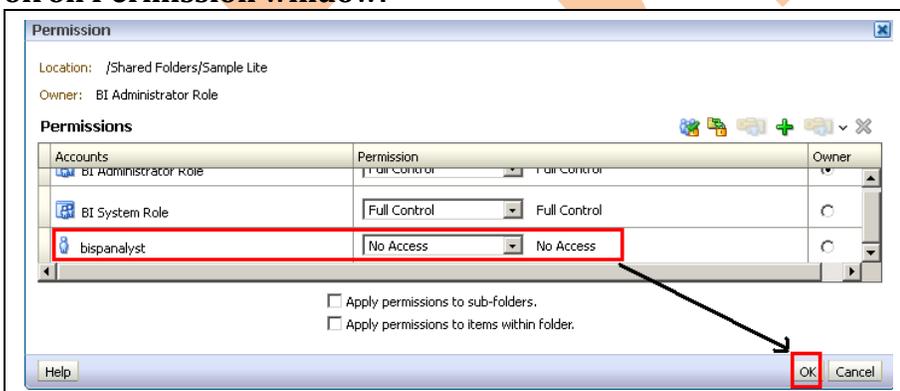
**Step4) Select Users from list → click on search button.**



**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.)**



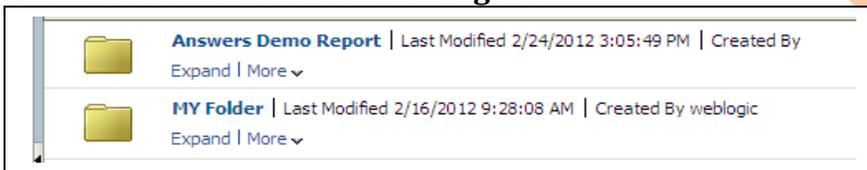
**Step6) Click ok in Add Roles window → Check the new username and assigned permissions → click ok on Permission window.**



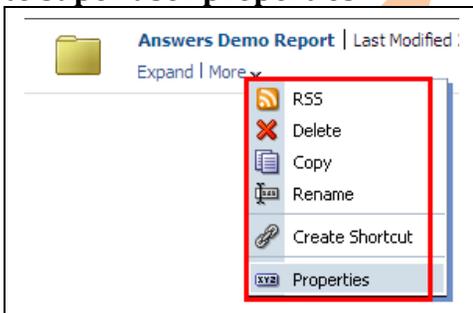
**Step7) Now logout and login with new user's credentials.**



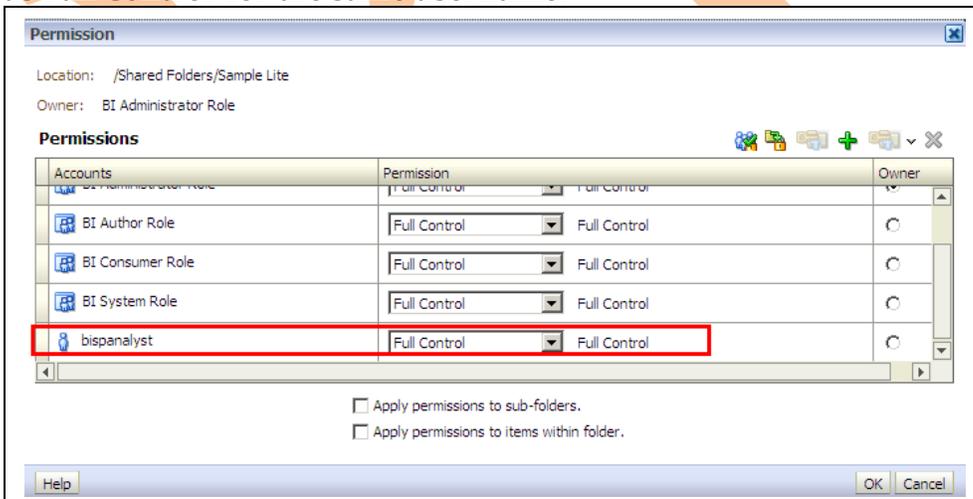
**Step8) Click on Catalog→ Shared folder. The catalog on which the permission is assigned as No Access is not visible in the catalog list**



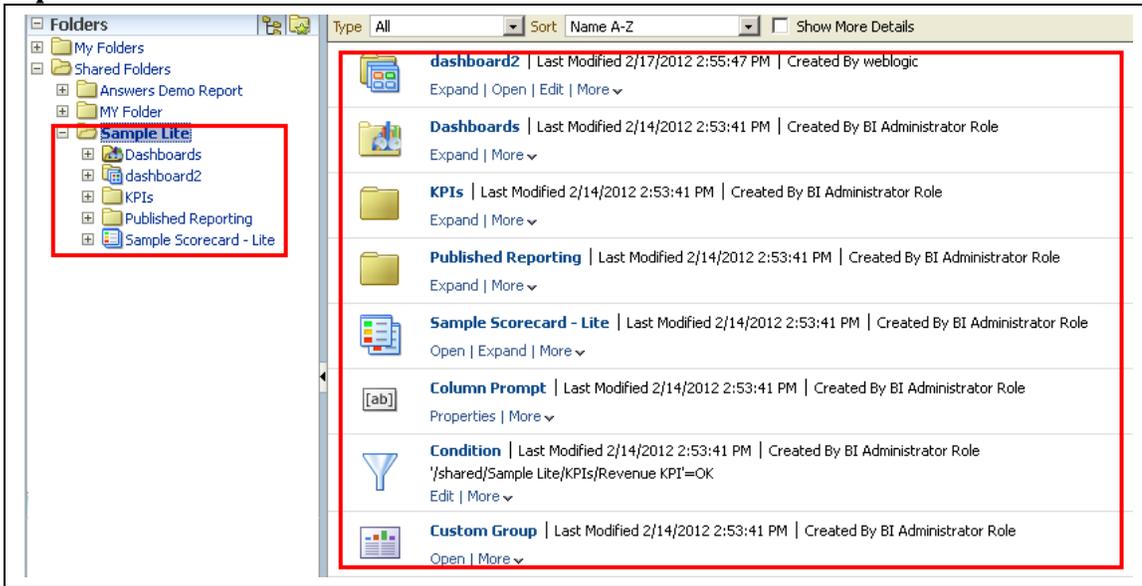
**Step9) Click on the more option on any catalog the number of more properties are less as compare to super user properties.**



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



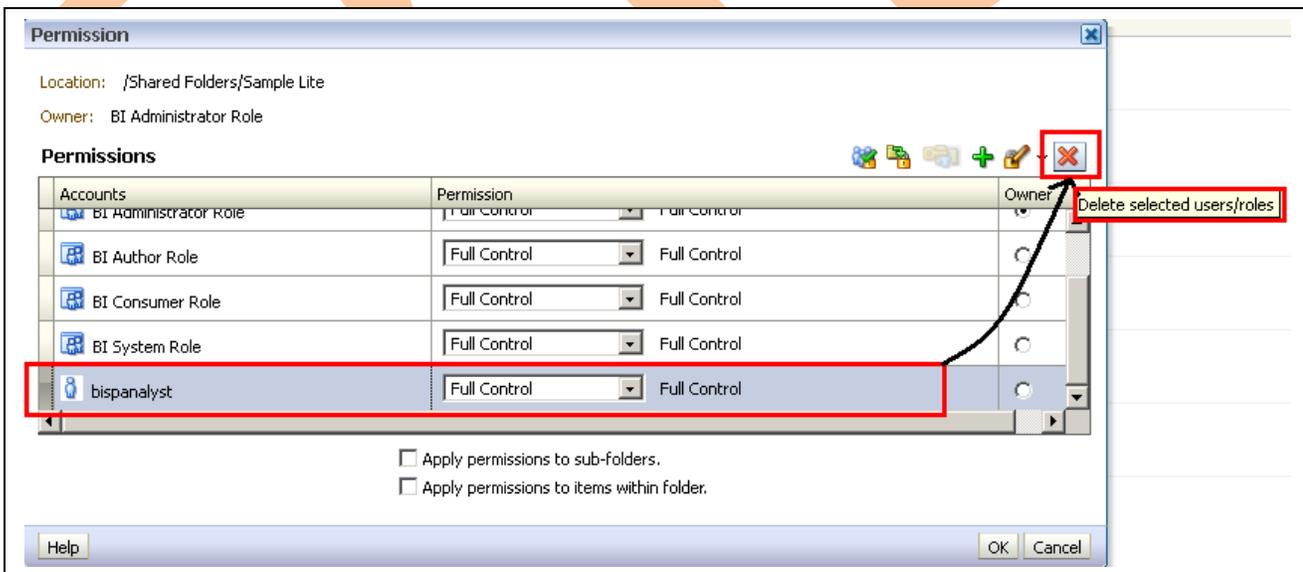
**Step11) Now logout and login with the new user's credentials. (The user has all the possible access over the catalog.) The user can Traverse, Delete Modify, move etc to the catalogs and all inside reports.**



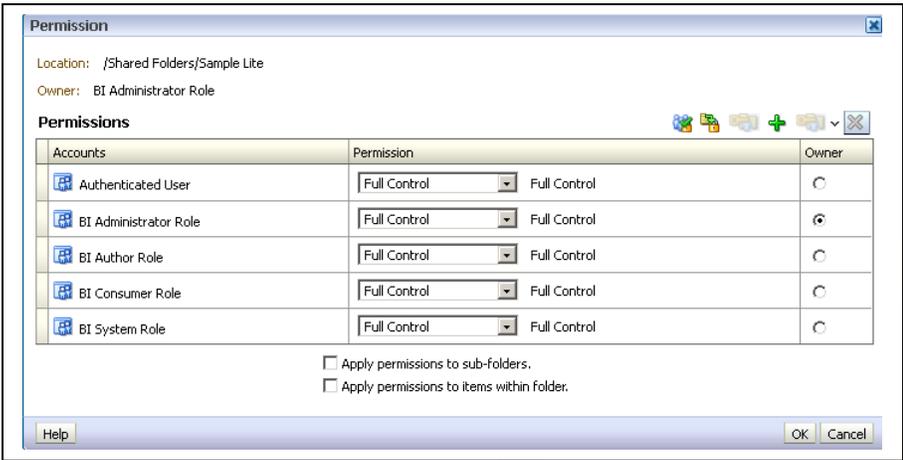
**In the same way you can set the permissions for all other user with desired access.**

### **Setting up Permissions for roles on presentation catalogs**

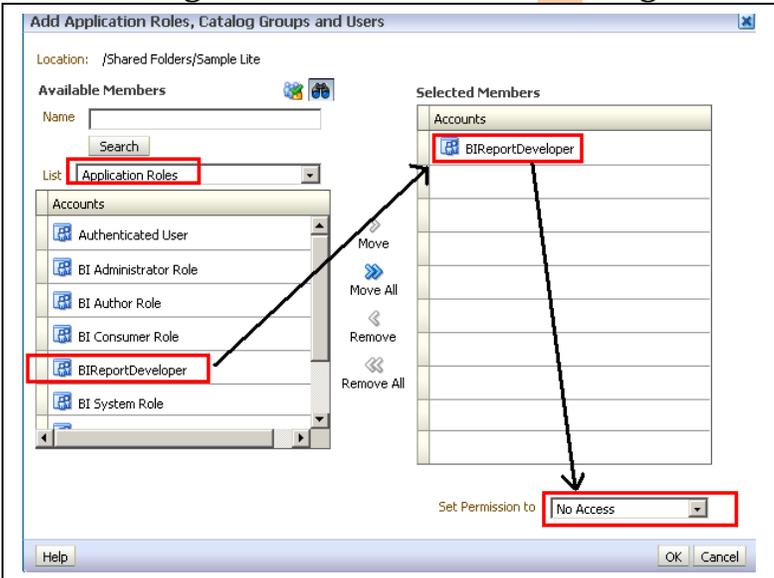
**Step1) Login with the superuser and go back to set permissions once gain for the same catalog.  
Step2) Select the existing user permission and click on the red  delete button to remove the existing permissions settings.**



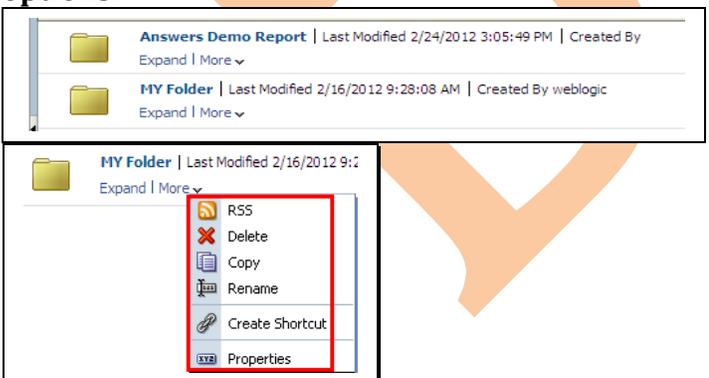
**Step3).Check the user is removed from permission.**



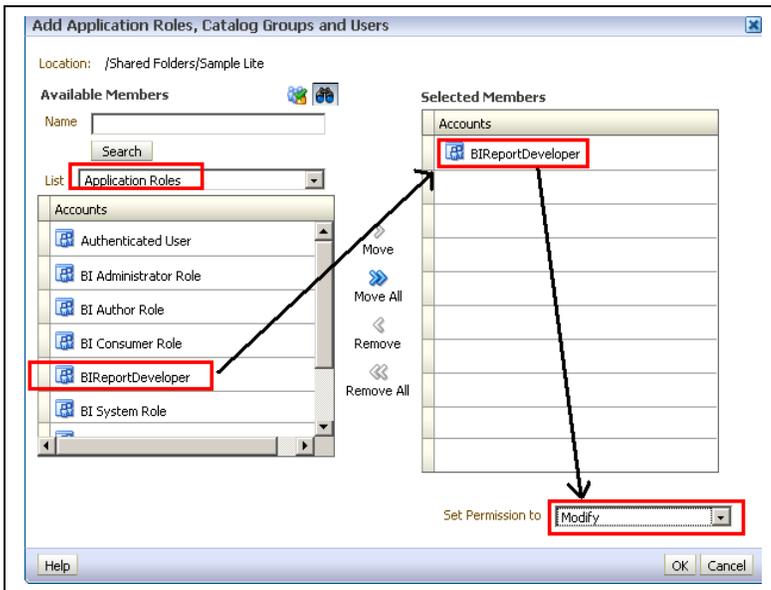
**Step4).** Click on green plus sign  in the permissions window. Select Application Roles from List → Click on Search → chose a role from list and set the desired permission. Here BI Report Developer role is selected created in earlier practice; the all users who belongs to this role are granted No Access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



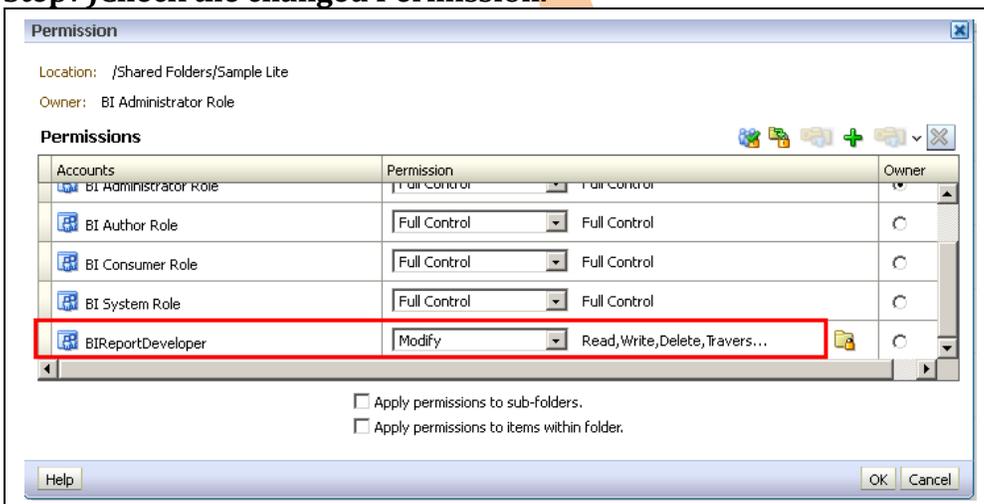
**Step5).** Now login with the user who belongs to this role and having less properties in more options.



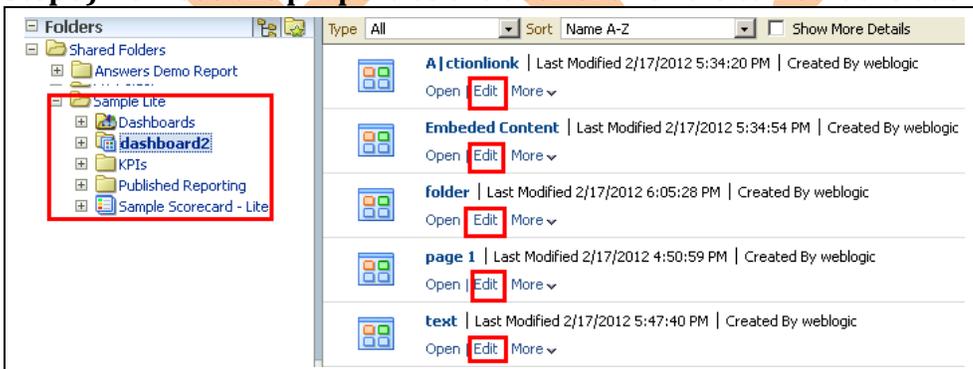
**Step6)** Now change the permission once again for this role in the same way.



**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.**