



How Security Rights are migrated between 3.x and 4.0.3 Whitepaper

SAP® [BusinessObjects Web Intelligence]

Components

- SAP® BusinessObjects Web Intelligence 4.0.3
- SAP® BusinessObjects Web Intelligence Rich Client 4.0.3

Target Audience

- SAP Consultants
- SAP Hardware Partners
- SAP Customers: Administrators, Report Creators, Document migrators

RTC
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SAP AG
Neurottstraße 16
69190 Walldorf
Germany
T +49/18 05/34 34 24
F +49/18 05/34 34 20
www.sap.com

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About this White Paper

This document provides an overview of the changes made to security settings for Web Intelligence and Web Intelligence Rich Client version 4.x.

Who should read this white paper

SAP BusinessObjects administrators and report creators.

The information you will find here

This document describes security settings as they correspond to the new interface and functions. The structure of the interface has been redesigned and security settings rationalized in certain cases. This means that some 3.x security settings are not directly compatible with the new interface or new documents. Where equivalents exist, these are used. This document describes new, deprecated and changed security settings.

How this information will help you manage the migration of documents from 3.x to 4.x

This document will guide you in the changes you might need to make when migrating reports and documents from 3.x to 4.x. Certain rights have been renamed, others are unaffected, and some rights are not supported in 4.x, and will require unsetting before resaving and migrating those reports.

What kind of changes have taken place?

- Some rights no longer exist in 4.x due to the redesign of the interface. For example, the toolbar could be disabled (not visible) in 3.x. In 4.x, the toolbar is replaced by toolboxes that are always visible, but specific functions are disabled depending on the logged user's rights.
- Certain rights in the CMC are not located in the same place. Refer to the Administrators Guide for more information.

About the document structure

Typography – old rights names and the new rights names

Old security rights typeface

Throughout this document, the style of old security rights names is in italics, as follows: *View SQL*.

New security rights typeface

Throughout this document, the style of new security rights names is in italics, underlined, as follows: *Query Script – Enable Viewing*.

Example

View SQL is now called *Query Script – Enable Viewing*

Nomenclature

For ease of reading, throughout this document, the three interfaces of Web Intelligence are referred to as:

- The **Rich Internet Application** interface. The Web Intelligence Rich Internet Application interface has also been referred to in the past as the 'Applet', or the 'Java applet' in the past.
- The **Web** interface. The Web Intelligence Web interface has also been referred to in the past as the 'DHTML interface' in the past.
- The **Rich Client** interface. The Web Intelligence Rich Client interface is a desktop application and has also been referred to as the 'Desktop application' in the past.

Security rights – removed or missing rights in 4.x

Removed rights

Removed rights in all interfaces

Modes are enabled, all tools and panels are visible, but their use depends on the actual user's rights. Removed from all clients:

Security right	Status when a document is migrated to 4.x
Queries: <i>Enable Drill Mode and Extend scope of analysis</i>	These rights are no longer managed.
Interface: Ability to hide / show toolbars	The toolbar is replaced by toolboxes which are always visible.
Interface: Enable toolbox and menu items	Entire toolboxes cannot be deactivated. All menu items are always visible. Menus are controlled by security right linked to the actions offered. Menu items are grayed when the user does not have sufficient privileges to use those items.
Interface: Left pane - Enable available objects, tables and charts	The left pane items are always available to interact with the UI.
Interface: Left pane - Enable data summary	The data summary is always available

Removed right in 4.x Web Intelligence Web interface

Removed Security right	Status when a document is migrated to 4.x
Enable HTML Report panel	This viewer is removed, and the security rights which go with it.

Removed right in 4.x Web Intelligence Rich Client

The following application-level specific rights are no longer applied in 4.x

Removed Security right	Status when a document is migrated to 4.x
Desktop Intelligence (Web Intelligence Rich Client) : Create a document	This creation of a document in Web Intelligence Rich Client is now managed by the Document – Enable creation. All Web Intelligence clients are now controlled by this right. (No more Web Intelligence Rich Client

	specific rights)
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Missing application security rights

- Import from BI On Demand
- Export to BI On Demand

These rights were added to XI3 SP4, but without notice. They are not included in 4.0.3.

Note: If either of these rights were used in your 3.x-environment then you will need to check the security attached to your users resulting from Migration.

We advise to not migrate from XI3.4 or later to BI 4.0.3.x or a previous release.

The Migration from XI3.4 to BI4 should be done on version 4.0.4 or a later release

Deprecated Security Rights

- Interfaces - enable web query panel: This right is available in BI 4.0.3, but will not be available in later releases. **Note that in BI4.0.x this right has no effect.**

Changes in 4.x rights

3.x Web interface rights that now apply to all interfaces

These security rights were specific to Web Intelligence Web interface only (DHTML interface) in 3.x, but now apply to all clients:

- Web Intelligence Rich Client
- Rich Internet Application interface
- Web interface

The security rights in the table below keep the same behavior but now apply to all clients. They have not been renamed.

- General - edit 'My Preferences'
- General - enable right-click menus
- Left pane - enable document structure and filters
- Left pane - enable document summary
- Reporting - create and edit conditional formatting rules
- Reporting - create and edit breaks
- Reporting - create and edit predefined calculations
- Reporting - create and edit report filters and consume input controls
- Reporting - create and edit sorts
- Reporting - insert and remove reports, tables, charts and cells

Note: Rights in BI 4.0 are not the same location in the CMC as they were for 3.x.

How the new rights are applied for migrated documents

If in the previous release the user had access to the Rich Internet Application, then the migration results in all rights "Enabled" in 4.x

Else if the specific right in the previous release was Enabled then it is Enabled in 4.x for all clients.

*If in the previous release the user did not have access to the Rich Internet Application, this right is **disabled** after migration.*

Enable Query – Web interface	Interfaces - enable web query panel (will be removed in 4.1)
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Application Level : GENERAL RIGHTS	Application Level : GENERAL RIGHTS
Log on to Web Intelligence and view this object in the CMC.	<i>Log on to Web Intelligence</i>

Rights that are renamed and now apply to all interfaces

The security rights in the table below have been renamed and now apply to all clients:

- Web Intelligence Rich Client
- Rich Internet Application interface
- Web interface

Application Level Specific rights in 3.x	Application Level Specific rights in 4.x
<i>Create document</i>	<i><u>Documents - enable creation</u></i>
<i>Data Tracking: Enable for users</i>	<i><u>Data - enable data tracking</u></i>
<i>Data Tracking: Enable format display changes by users</i>	<i><u>Data - enable formatting of changed data</u></i>
<i>Edit SQL</i>	<i><u>Query script - enable editing (SQL , MDX...)</u></i>
<i>Enable Autosave for this user</i>	<i><u>Documents - enable autosave</u></i>
<i>Enable formula and variable creation</i>	<i><u>Reporting - create formulas and variables</u></i>
<i>Enable interactive HTML viewing (if license permits)</i>	<i><u>Interfaces - enable web viewing interface</u></i>
<i>Enable Java Report Panel</i>	<i><u>Interfaces - enable Rich Internet Application</u></i>
<i>Enable Publish and Manage Document Content for this user (did not exist)</i>	<i><u>Documents - enable publish and manage content as web service</u></i>
<i>Merge dimensions for synchronization</i>	<i><u>Reporting - enable merged dimensions</u></i>
<i>View SQL</i>	<i><u>Query script - enable viewing (SQL , MDX...)</u></i>
<i>Web Intelligence Rich Client : Save a document locally on the file system</i>	<i><u>Desktop interface - save documents locally</u></i>
<i>Web Intelligence Rich Client: Allow local data providers</i>	<i><u>Desktop Interface - enable local data providers</u></i>
<i>Web Intelligence Rich Client: Enable a client to use it</i>	<i><u>Desktop interface - enable Interactive Analysis Desktop</u></i>
<i>Web Intelligence Rich Client: Export a document</i>	<i><u>Desktop interface - export documents</u></i>
<i>Web Intelligence Rich Client: Import a document</i>	<i><u>Desktop interface - import documents</u></i>
<i>Web Intelligence Rich Client: Install from InfoView</i>	<i><u>Desktop interface - install from BI launch pad</u></i>
<i>Web Intelligence Rich Client: Print a document</i>	<i><u>Desktop interface - print documents</u></i>
<i>Web Intelligence Rich Client: Remove document security</i>	<i><u>Desktop interface - remove document security</u></i>



Web Intelligence Rich Client: Save a document for all users	Desktop interface - save document for all users
Web Intelligence Rich Client: Send by mail	Desktop interface - send by mail

New reporting and document rights that apply to all interfaces

Application Level : SPECIFIC RIGHTS	Status when a document is migrated to 4.x
<p><u>Reporting - create and edit input controls</u></p> <p>This security right control the creation of input control. Note that in order for the workflow to work, the right to create filter is need as well as the Report – Enable Formatting</p> <p>This right is done to differentiate the creation and the usage of input control. Usage of input control only requires the right to create filter (and report Formatting of course as a filter modify the report).</p> <p>This right is master compared to <u>Reporting - Create and edit report filter</u> : If a user is granted Reporting Edit Input Controls, then no matter what the <u>Reporting - Create and edit report filter</u> is. The user can still view and change filters.</p>	<p>Enabled in 4.x if the Rich Internet was enabled in 3.x</p> <p>Enabled in 4.x if the <i>Interactive - Reporting - Create and edit report filter</i> was enabled in 3.x</p> <p>Disabled if neither of the above is true.</p>
<p><u>Reporting - enable formatting</u></p> <p>This security right is required to act on the report specification. Basically you will need it to do actions such like drill, but also to perform any formatting action on the document. When this right is disabled/denied, then the application behave like a Viewer tool. Open/Refresh/Save.</p> <p>This security right is to limit the action user can have on report. This limit everything that requires a Report Spec submission, such as drill, fold, basic formatting...</p> <p>➔ Side effect of disabling this command</p> <ul style="list-style-type: none"> ⇒ In Rich Internet Application and Rich Client, the Design and Data mode (top right) are de-activated (grayed). ⇒ In Web interface the Design mode is de-activated (grayed). 	<p>Enabled in 4.x if the Rich Internet Application was enabled in 3.x.</p> <p>Enabled in 4.x if the <i>Interactive - Reporting - Create and edit report filter</i> was enabled in 3.x</p> <p>Disabled if neither of the above is true.</p> <p>This security right is required to act on the report specification. Basically you will need it to do actions such like drill, but also to perform any formatting action on the document. When this right is disabled/denied, then the application behave like a Viewer tool. Open/Refresh/Save.</p>

Security right	Status when a document is migrated to 4.x
Create a document	Now linked to the security right <u>Documents</u> -

	<p><u>enable creation</u>. This is to align all clients on the same security right.</p> <p>The administrator will grant a user report creation, and then grant which tools can be used.</p> <p>The administrator can decide which tool is usable for the end user, and what action the user can do (for all the authorized interfaces).</p>

Recently added document rights

- Enable publish and manage content as web service (since XI 3.0 SP2)
- Documents - disable automatic refresh on open (Since XI 3.0 SP4). This security right is added to enforce the security offered to the admin. This is also following some Customers CER (GSA and Bottom Line Technologies). This security right will force any document opened by the user to be refreshed on open before the user can view it. Therefore the user will never see the data set contained in the report.

Window specific rights that apply to all interfaces

In 3.x	In 4.x
Specific Rights for Web Intelligence Report	Specific Rights for Web Intelligence Report
<u>Download files associated with the object</u>	<u>Download files associated with the object</u>
<u>Edit Query</u>	<u>Edit Query</u>
<u>Export the report's data</u>	<u>Export the report's data</u>
<u>Refresh List of Values</u>	<u>Refresh List of Values</u>
<u>Refresh the report's data</u>	<u>Refresh the report's data</u>
<u>Save as CSV</u>	<u>Save as CSV</u>
<u>Save as excel</u>	<u>Save as excel</u>
<u>Save as PDF</u>	<u>Save as PDF</u>
<u>Use Lists of Values</u>	<u>Use Lists of Values</u>
<u>View SQL</u>	<u>Query script - enable viewing (SQL , MDX...)</u>
General Rights for Report	General Rights for Web Intelligence Report
<u>Add objects to folders that the user owns</u>	<u>Add objects to folders that the user owns</u>
<u>Add objects to the folder</u>	<u>Add objects to the folder</u>
<u>Copy objects that the user owns to another folder</u>	<u>Copy objects that the user owns to another folder</u>
<u>Copy objects to another folder</u>	<u>Copy objects to another folder</u>
<u>Define server groups to process jobs</u>	<u>Define server groups to process jobs</u>
<u>Define server groups to process jobs for objects that the user owns</u>	<u>Define server groups to process jobs for objects that the user owns</u>
<u>Delete instances</u>	<u>Delete instances</u>

<i>Delete instances that the user owns</i>	<u><i>Delete instances that the user owns</i></u>
<i>Delete objects</i>	<u><i>Delete objects</i></u>
<i>Delete objects that the user owns</i>	<u><i>Delete objects that the user owns</i></u>
<i>Edit objects</i>	<u><i>Edit objects</i></u>
<i>Edit objects that the user owns</i>	<u><i>Edit objects that the user owns</i></u>
<i>Modify the rights users have to objects</i>	<u><i>Modify the rights users have to objects</i></u>
<i>Modify the rights users have to objects that the user owns</i>	<u><i>Modify the rights users have to objects that the user owns</i></u>
<i>Pause and Resume document instances</i>	<u><i>Pause and Resume document instances</i></u>
<i>Pause and Resume document instances that the user owns</i>	<u><i>Pause and Resume document instances that the user owns</i></u>
<i>Replicate content</i>	<u><i>Replicate content</i></u>
<i>Reschedule instances</i>	<u><i>Reschedule instances</i></u>
<i>Reschedule instances that the user owns</i>	<u><i>Reschedule instances that the user owns</i></u>
<i>Schedule document that the user owns to run</i>	<u><i>Schedule document that the user owns to run</i></u>
<i>Schedule document to run</i>	<u><i>Schedule document to run</i></u>
<i>Schedule objects that the user owns to destinations</i>	<u><i>Schedule objects that the user owns to destinations</i></u>
<i>Schedule on behalf of other users</i>	<u><i>Schedule on behalf of other users</i></u>
<i>Schedule on behalf of other users that</i>	<u><i>Schedule on behalf of other users that</i></u>
<i>Securely modify right inheritance settings</i>	<u><i>Securely modify right inheritance settings</i></u>
<i>Securely modify right inheritance settings for objects that the user owns</i>	<u><i>Securely modify right inheritance settings for objects that the user owns</i></u>
<i>Securely modify rights users have to objects that the user owns.</i>	<u><i>Securely modify rights users have to objects that the user owns.</i></u>
<i>Securely modify rights users have to objects.</i>	<u><i>Securely modify rights users have to objects.</i></u>
<i>Use access level for security assignment</i>	<u><i>Use access level for security assignment</i></u>
<i>Use access level that user owns for security assignment</i>	<u><i>Use access level that user owns for security assignment</i></u>
<i>View document instances</i>	<u><i>View document instances</i></u>
<i>View document instances that the user owns</i>	<u><i>View document instances that the user owns</i></u>
<i>View objects</i>	<u><i>View objects</i></u>
<i>View objects that the user owns</i>	<u><i>View objects that the user owns</i></u>

Migrating documents from 3.x to 4.x

Some rights no longer exist in 4.x due to the redesign of the interface. For example, the toolbar could be disabled (not visible) in 3.x. In 4.x, the toolbar is replaced by toolboxes that are always visible, but specific functions are disabled depending on the logged user's rights.

Important note concerning migrating from 3.x to 4.x

Where the 3.x administrator has set the user's security with (Import/Export to/from BIOD) security settings, you must not migrate the security settings. You should remove these settings first and then migrate the users and test it in 4.0.3.x

In XI3 SP4 the Import/Export to/from BIOD security properties were introduced. These rights are incompatible with 4.x. In this case, migrate Everything but security, and manually reassign security.

Migrate everything and check security. Potential risks are limited to :

`WebIDisableExportToBIOD` collision with `CreateEditInputControls`

`WebIDisableImportFromBIOD` collision with `EditDocumentFormatting`

Check the Create input control and Enable Document Formatting security rights for all users.

Special cases

What are the rights to take into account:

- 1) Login to WebI (Application, general right) → If not then no Web Intelligence in BI launch pad.
- 2) 3 rights on applet, WRC, html.
- 3) Document - Enable Creation:

Reporting – create formulas and variables

Case of “**Reporting - create formulas and variables**”:

Loads of places to update in Viewers to ensure that we lock the use of formula language:

- Free Cell, Section and Block: Menu Edit Formula should not be available.
- Format Report Element Dialog box, should not be available
- Data Access / Data Objects: New Variable should not be available
- Alerters: Formula language in Alerters should not be available
- Formula Toolbar: should not be available
- Data Manager/New Variable: Should not be available.

Exceptions: Hyperlink and Chart Dialog, can use the Formula Language, as this is not used to do BI but formatting only.

Case of Interface available.

In the CMC we can define which Interface the end user can use. The BI Launch Pad Preference page should only display (active) the Interface that the user has the right to use.

Same for Rich Internet Application Web Intelligence Rich Client.