



# Xir2 security concepts, migration and administration

Thank you to the Dallas BusinessObjects User Group Committee for giving us this opportunity to share our knowledge and success stories.

360  view™  
Release 2



- 1 BO5 or BO6 security concepts
- 2 BOE Xir2 new security concepts
- 3 Comparison. Examples
- 4 Migration and Implementation: A triple challenge
- 5 Our approach: 360view

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- **Security definition:** User rights and restrictions = links between actors (user or group) and universes - universe overloads, documents, applications - security commands, domains and stored procedures.
- **Supervisor:** « **User centric** » security vision.
- « **User centric** » security **implementation:** Publications and assignments.
- **Group inheritance:** Nearest value selected.
- Only **3 ways** to implement security. Easy to administrate. But the repository is a black box.
- A user can belong to more than one group: **User instances.**

- **Effective rights** (user real rights) = explicit rights aggregation.
- Possible explicit values:
  - Granted (**OK**): Right is given.
  - Denied or hidden (**KO**): Right is denied.
  - Not specified (**NS**): No right.

	NS	OK	KO	OK + NS	KO + NS	OK + KO
Applications	OK	OK	KO	OK	OK	OK
Security commands	OK	OK	KO	OK	KO	KO
Stored procedures	KO	OK	KO	OK	KO	OK
Domains	KO	OK	KO	OK	KO	OK
Documents (*)	KO	OK	KO	OK	KO	OK
Universes (*)	KO	OK	KO	OK	KO	OK

(\*) Rights depend also with domains rights.

Note: "NS" means "Not Specified"

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- Under BOE Xir2, universes and documents (objects) are stored in **folders** (before they were stored under the repository database).
- Unlimited folders tree for documents and universes. Objects can be stored in one folder only.



Objects folders tree (documents & universes)

- Group structure is no longer a classic tree like under BO5 or BO6 with a root group: A group can belong to more than one group. A kind of **acyclic graph**:



- A user can belong to more than one group (usually belong to more than one group: Everyone group and other).

- Security management under the **CMC**.
- **CMC**: « **Object centric** » security vision.
- **Security Viewer**: « **User centric** » security vision.
- « **Object centric** » security **implementation**: Publications and assignments.
- **Universe overloads** are now managed under **Designer** (« object centric »).
- **Double inheritance** security: Group and folder inheritance.



- George could access to all documents of the folder « Sales UK » due to the double inheritance right given between his ancestor group « Worldwide sales » and the parent folder « Sales ».
- Folder rights work like a **set of doors**, like Windows security.

« Sales » folder

Right assignment

Name	Full Name	Object	Description	Access Level	Net Access
Administrators		Group	Users who can administrate this system	(Inherited Rights)	Full Control
Everyone		Group	All users of this system	(Inherited Rights)	Schedule
World wide sales		Group		Schedule	Schedule

« Worldwide sales » group

Explicit right

Inherited right

	Administrators	Everyone	Worldwide sales	Sales Europe	US sales	
Root Folder	A	NA	(NA)	(NA)	(NA)	
Sales (...)	(A)	(NA)	(VOD)	(VOD)	(VOD)	
Sales Europe (...)	(A)	(NA)	(VOD)	(VOD)	(VOD)	
Sales France (...)	(A)	(NA)	(VOD)	(VOD)	(VOD)	
Sales UK (...)	(A)	(NA)	(VOD)	(VOD)	(VOD)	
Sales USA (...)	(A)	(NA)	(VOD)	(VOD)	(VOD)	

Rights double inheritance: Folder and Group

- Assign an object gives rights to a user or a group stored like an ACL (Access Control List).
- 3 possible explicit values:
  - **Explicitly granted** (**OK**): User or group is given the right.
  - **Explicitly denied** (**KO**): User or group is denied the right.
  - **Not specified** (**NS**): No right assignment.
- New descending right rule to respect: No locked system of increasing rights.

- Explicit rights override inherited rights:

	Administrators	Everyone	Worldwide sales	Sales Europe	English sales	US sales	
Root Folder	A	NA	(NA)	(NA)	(NA)	(NA)	
Sales (...)	(A)	(NA)	VOD	(VOD)	(VOD)	(VOD)	
Sales Europe (...)	(A)	(NA)	(VOD)	View Refresh	(A)	(VOD)	
Sales France (...)	(A)	(NA)	(VOD)	(A)	(A)	(VOD)	
Sales UK (...)	(A)	(NA)	(VOD)	(A)	(A)	(VOD)	
Sales USA (...)	(A)	(NA)	(VOD)	(VOD)	(VOD)	(VOD)	

- Effective rights (user real rights) = explicit rights aggregation.

	NS	OK	KO	OK + NS	KO + NS	OK + KO
Xir2 Objects	KO	OK	KO	OK	KO	KO

Note: "NS" means "Not Specified"

- Aggregation rules are easier in BOE Xir2, because object independent.
- But different (opposed) in comparison with BO5 or BO6 !
- « **NS** » can be largely used because it does not have any effect on effective rights calculation. Used with « **OK** » or « **KO** », it is transparent.
- Caution: A single « **NS** » is equivalent to a « **KO** ».

- Under BO5 or BO6 security commands were attached to applications (**minimum value** retained).
  
- Under BOE Xir2, **security commands** are **divided in two**:
  1. Security Commands still **attached to applications**, thus no granularity (same minimum rule).
  2. Security Commands now **attached to folders and/or objects**, and thus granularity possible.

Desktop Intelligence				
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Refresh the report's data
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Refresh List of Values
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Use Lists of Values
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	View SQL
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Export the report's data
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Download files associated with the object
Desktop Intelligence Add in				
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Download files associated with the object
Desktop Intelligence Template				
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Download files associated with the object
Report				
Text				
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Allow discussion threads
Web Intelligence Document				
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Refresh the report's data
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Edit Query
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Refresh List of Values
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Use Lists of Values
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	View SQL
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Export the report's data
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Download files associated with the object

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**BOE Xir2 effective rights (user real rights):**



	NS	OK	KO	OK + NS	KO + NS	OK + KO
Xir2 Objects	KO	OK	KO	OK	KO	KO

Note: "NS" means "Not Specified"

**BO5 or BO6 effective rights (user real rights):**

	NS	OK	KO	OK + NS	KO + NS	OK + KO
Universes	KO	OK	KO	OK	KO	OK

In Version 5.x or 6.x you could denied access to a universe to a user in one group and allow him/her in another group.

In Xi, not even an "Explicitly granted" **OK** will over rule an "Explicitly denied" **KO**.

**Morale: Use the "Explicitly denied" right wisely !**

The image displays three screenshots of the 360view interface, illustrating different views of a hierarchical organization structure and associated data tables.

**Top Left Screenshot:** Shows a tree view of the organization structure. The 'Facturation' folder is selected. The associated table is:

Nom du fichier	Nom
AuditRec	Suivi BO recursif
UNVFAC	facturation

**Top Middle Screenshot:** Shows a tree view of the organization structure. The 'Facturation' folder is selected. The associated table is:

Nom du fichier	Nom	Domaine	Hérité de
AuditRec	Suivi BO recursif	Univers	Seb
UNVFAC	facturation	Univers	Seb

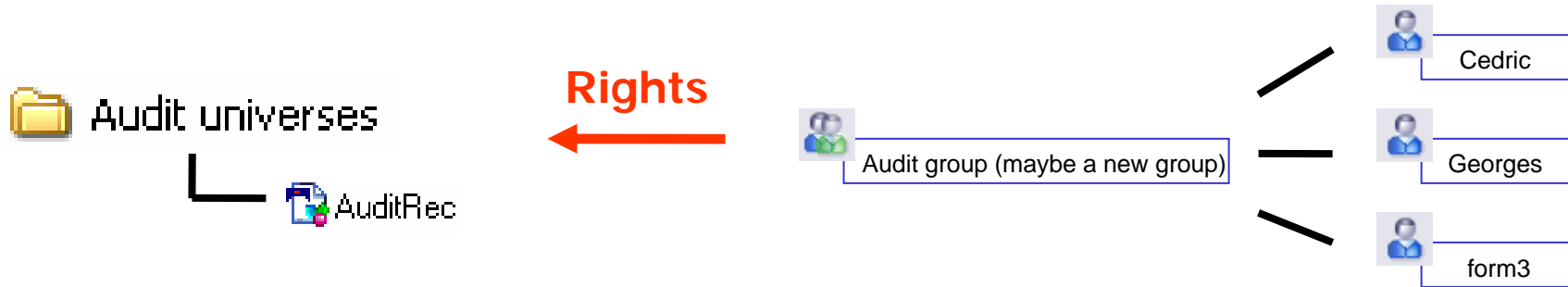
**Top Right Screenshot:** Shows a tree view of the organization structure. The 'Facturation' folder is selected. The associated table is:

Nom du fichier	Nom	Domaine	Hérité de
AuditRec	Suivi BO recursif	Univers	Cedric
UNVFAC	facturation	Univers	Facturation

**Bottom Screenshot:** Shows a tree view of the organization structure. The 'Formation' folder is selected. The associated table is:

Nom du fichier	Nom	Domaine	Hérité de
managero	Designer Univer...	Univers	Formation
AuditRec	Suivi BO recursif	Univers	Formation

- Under the Supervisor: Rights vision and assignment to a user or a group.
- No « object centric » vision like: Which users can create a report on this universe ?



- In BOE Xir2, reversed effective right implementation.
- In the CMC, rights visualisation and assignment for an object or a folder.
- In the CMC, no « user centric » vision like: Which objects a user can access to. But, it's possible to see « user centric » effective and explicit rights using the Security Viewer.

- BO5 or BO6 security vision and assignment « **user centric** » and not « **object centric** ».
- Conversely, BOE Xir2 security vision and assignment « object centric » **in the CMC** and « user centric » vision **in the Security Viewer**.
- Aggregation rules are harder in BO5/6, because **object dependency**.
- Aggregation rules are easier in BOE Xi release 2 because **object independency**.
- Objects are stored under a **folders tree** in BOE Xir2.
- **Centralised** security management in the Supervisor in BO5 or BO6. Now managed in **CMC and Designer** in BOE Xir2.

- In BOE Xir2, don't work with a locked system of increasing rights.
- **Granularity is possible** on some security commands in BO Xir2, not in BO5 or BO6.
- **Only 3 ways** to implement security under BO5 or BO6 keeping it easy to administrate.
- **More than 300 ways** to implement security under BOE Xir2: Very powerful but can quickly become hard to maintain and manage.
- **Conclusion and official BO migration practice: Redefine manually your security under BOE Xir2.**

- ✓ **Remodel your security** when migrating from BO5 or BO6 to Xir2.
- ✓ Apply **rights** at **group and folder level**.
- ✓ **Folders** structure: **Content driven**.
- ✓ **Groups** structure: Users with **similar access rights**.
- ✓ Implement a **group tree** instead of an acyclic graph.
- ✓ Use **predefined access levels** instead of customized access rights.
- ✓ Use **Not Specified** right instead of Denied whenever possible.

- ✓ Use an **open system of decreasing rights** (to navigate through folders).
- ✓ Deploy and use the **Security Viewer**.
- ✓ **Do not break inheritance**.
- ✓ Do not manage universe **overloads** in Designer but **directly in the DB**.
- ✓ Take advantage of the **Everyone group**.
- ✓ Use **Recycle Bin** folders and groups.
- ✓ **Understand and master these security concepts.**

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- BOE Xir2 **main evolution: Security management**. Triple challenge of security migration or implementation:

## Challenge 1:

**Manage** the repository post migration or post implementation, whilst limiting administration tasks and by offering an optimum quality of service to end-users.

## Challenge 2:

**Migrate** security = **manual redefinition of security** in the CMC and the Designer.

## Challenge 3:

**Implement** and **Document** your Xi security.

- Define a « security conceptual model » allowing easiest administration.
- Security Matrices definition: **Groups and Folders structure definition** and Links between them.
- **Rewrite all administration processes**: Documents and universes management between environments, user's Rights definition.
- Essential Security Matrices documentation.

- Essential preparation of migration data. **Technical and functional preparation.** Audit and cascading cleaning.
- Work with end-users teams during all the project.
- Migrate necessary objects only. Direct impact on migration tasks (documents - universes) and on security redefinition. The less you migrate (actors, objects and rights), the faster and cheaper the migration will be.
- Delete all inconsistencies to deduce universes, categories assignments... Documents assignment is the master.

- Main objective: **Transparent** technical **migration** for end-users.
- For a given end-user: Same user rights and restrictions.
- **Difficulties:**
  - Manual mapping of existing security: User access rights (universes, documents and domains) and restrictions (universe overloads and security commands). Manual calculation of effective rights.
  - Manual inversion of the security dynamic map (effective rights inversion).
  - Xi groups and folders definition.
- **Two risks to be covered in SOX environment on strategic and sensitive data:**
  - Project cost and length.
  - Post migration side effects.

- CMC usage can be **time consuming**.
- Managing Security is not easy in Xi R2.
- The CMC offers **less flexibility** and especially **visibility** on your security configuration.
- The Security Viewer provides only a “User centric” vision. No implementation.
- CMS can easily become a **black box** for Administrators and End-Users.
- Essential manual Security Matrices documentation.

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## 360view Solution key features:

- **Universes and documents** on BOBJ repository (security domain).
- Reports giving a **360 degrees view of current Security**.
- 360view Solution is complementary with Auditor.
- Easy-to-deploy and Easy-to-use.
- Includes **inheritance** and **effective rights vision**.
- **3 modules**: Audit, Cleaning and Security Matrices.
  1. **Audit**: Allowing to make a complete audit of deployed Security like useful affectations and useless ones not to be reproduced under Xi.
  2. **Cleaning**: Allowing to reduce the number of objects (universes, documents...), rights and actors to migrate.
  3. **Xir2 Security Matrices**: Accurate BOE Xir2 Security Matrices to reproduce in the CMC and the Designer: Universes and Documents Folders, Groups definition and Rights between them.

## 360view benefits for migration projects to BOE Xir2:

- ✓ **Easier**
  - Buy-in from end-users by providing them with an easy-to-use tool in their current environment.
  - Enabling a complete re-think of their Security.
  - Easier administration of current environment.
- ✓ **Faster**
  - No manual mapping of current deployed Security.
- ✓ **Cheaper**
  - Reduced manpower and length of migration projects.
  - Optimize data for migration: Direct impact on project costs (tests and Security Matrices).
- ✓ **Safer**
  - Security Matrices 100% accurate.
  - Limited assistance needed post migration.
  - Avoid rejection of the migration.
  - Possible comparison with Security Viewer csv export.

✓ Using **360view** is **recommended by Business Objects !**

✓ Numerous worldwide customer references (from 50 to 45 000 users)

## 360view Release 2 solution key features:

- **User-friendly web-based interface** to manage, implement and document Xi security.
- Manage your security with complete control:
  - Setup security using **dynamic web matrices**.
  - Manage and use your **custom security profiles**.
  - Manage contents and actors using a **hierarchical perspective**.
  - Delegate Xi administration to local administrators.
- **Document** your deployed security:
  - Automatic generation of rights matrices and actor/content trees in Excel.
  - Visualise and document universe overloads (SQL restrictions, connections overloads).
- **Audit** your deployed security.

## 360View Release 2 benefits for Xi r2 security administration:

- ✓ **Save time and money**
  - Save more than 70% of your administration time!
  - Use the most useful features of the old Supervisor 360 view brought back.
  
- ✓ **Be SOX compliant**
  - Document every single element of your repository.
  - Be sure to put the right reports and datas in the right hands.
  
- ✓ **Control all your security**
  - Have a 360-degree accurate view of deployed security.
  - See the 'Big Picture' for your security configuration.

Dynamic Security setup (Folders, Universe Folders, Applications, Groups ...) within web Matrices

Use your own Predefined Profiles

	Administrators	Everyone	Sales	Sales Japan	Sales Managers
User Folders (...)	FC	(NA)	(NA)	(NA)	(NA)
Inboxes (...)	FC	(NA)	(NA)	(NA)	(NA)
Root Folder	FC	V	(NA)	(NA)	(NA)
Sales (...)	(FC)	NA	VIEW-REFRESH	(A)	(A)
Regional Sales - JP (...)	(FC)	(NA)	NA	V	(NA)
Regional Sales - US (...)	(FC)	(NA)	NA	(NA)	V



Export to Excel or CSV those Rights Matrices (Folders, Universe Folders, Applications, Groups ...)

Accurate overview of all SQL restrictions, connection overloads ...

goodunv (Path: > Universes > Sales)

- no user no group
  - + User Groups
  - + Users
  - Definition
    - Connection
      - gtgt
    - + Controls
    - SQL
      - Query
        - Allow use of subqueries: Yes
        - Allow use of union, intersect and minus operators: No
        - Allow complex operands in Query Panel: Yes
        - Multiple paths
          - Multiple SQL statements for each context: Yes
          - Multiple SQL statements for each measure: Yes
          - Allow selection of multiple contexts: No
        - Cartesian products
          - Warn
      - + Objets
      - Rows
        - Restricted tables :de, Where clause: de='NY'
      - + Table Mapping
        - Row restriction combination: Combine row restrictions using AND



→ Export to Excel those Universe overloads

Implement and Manage your Actors (Users and Groups) or Contents (Universes and Objects) within a hierarchical perspective

● Groups and Users Management



Export to Excel or CSV those Actor or Content trees



For BO 5 and BO 6  
Security documentation  
Accurate migration to Xi



For BOE Xi r2  
Security implementation  
Security documentation



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