



Supervisor's Guide: Using Supervisor over the Web

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Contents

Preface	Maximizing Your Information Resources	5
	Information resources	7
	Services	9
	Useful addresses at a glance	10
	About this guide	12
Chapter 1	Getting Started	13
	What is Supervisor over the Web?	15
	Installing and configuring Supervisor over the Web	18
	Running Supervisor over the Web	20
	Logging out of Supervisor over the Web	22
	Using the online help	23
Chapter 2	Managing Groups	25
	Using the Group Management pane	27
	Adding a user	31
	Creating a new group	32
	Renaming a group	33
	Moving a group	34
	Deleting a group	35

Chapter 3	Managing Users	37
	Using the User Management pane	39
	Understanding user profiles	41
	Creating a new user	43
	Adding to a group	45
	Editing user properties	46
	Changing a password	52
	Renaming a user	53
	Deleting a user	54
	Removing a user from a group	55
Chapter 4	Managing Multiple Users	57
	Selecting users	59
	Editing multiple user properties	61
	Adding multiple users to a group	63
	Removing multiple users from a group	64
	Deleting multiple users	65
	Using the search options	66
	Index	69



Maximizing Your Information Resources



preface



Overview

Information, services, and solutions

The Business Objects business intelligence solution is supported by thousands of pages of documentation, available from the products, on the Internet, on CD, and by extensive online help systems and multimedia.

Packed with in-depth technical information, business examples, and advice on troubleshooting and best practices, this comprehensive documentation set provides concrete solutions to your business problems.

Business Objects also offers a complete range of support and services to help maximize the return on your business intelligence investment. See in the following sections how Business Objects can help you plan for and successfully meet your specific technical support, education, and consulting requirements.

Information resources

Whatever your Business Objects profile, we can help you quickly access the documentation and other information you need.

Where do I start?

Below are a few suggested starting points; there is a summary of useful web addresses on [page 10](#).

▶ Documentation Roadmap

The Documentation Roadmap references all Business Objects guides and multimedia, and lets you see at a glance what information is available, from where, and in what format.

View or download the **Business Objects Documentation Roadmap** at www.businessobjects.com/services/documentation.htm

▶ Documentation from the products

You can access electronic documentation at any time from the product you are using. Online help, multimedia, and guides in Adobe PDF format are available from the product Help menus.

▶ Documentation on the web

The full electronic documentation set is available to customers with a valid maintenance agreement on the **Online Customer Support** (OCS) website at www.businessobjects.com/services/support.htm

▶ Buy printed documentation

You can order printed documentation through your local sales office, or from the online **Business Objects Documentation Supply Store** at www.businessobjects.com/services/documentation.htm

▶ Search the Documentation CD

Search across the entire documentation set on the Business Objects Documentation CD shipped with our products. This CD brings together the full set of documentation, plus tips, tricks, multimedia tutorials, and demo materials.

Order the Documentation CD online, from the Business Objects Documentation Supply Store, or from your local sales office.

▶ **Multimedia**

Are you new to Business Objects? Are you upgrading from a previous release or expanding, for example, from our desktop to our web solution? Try one of our multimedia quick tours or Getting Started tutorials. All are available via the Online Customer Support (OCS) website or on the Documentation CD.

How can I get the most recent documentation?

You can get our most up-to-date documentation via the web. Regularly check the sites listed below for the latest documentation, samples, and tips.

▶ **Tips & Tricks**

Open to everyone, this is a regularly updated source of creative solutions to any number of business questions. You can even contribute by sending us your own tips.

www.businessobjects.com/forms/tipsandtricks_login.asp

▶ **Product documentation**

We regularly update and expand our documentation and multimedia offerings. With a valid maintenance agreement, you can get the latest documentation – in seven languages – on the Online Customer Support (OCS) website.

▶ **Developer Suite Online**

Developer Suite Online provides documentation, samples, and tips to those customers with a valid maintenance agreement and a Developer Suite license via the Online Customer Support (OCS) website.

Send us your feedback

Do you have a suggestion on how we can improve our documentation? Is there something you particularly like or have found useful? Drop us a line, and we will do our best to ensure that your suggestion is included in the next release of our documentation: documentation@businessobjects.com

NOTE

If your issue concerns a Business Objects product and not the documentation, please contact our Customer Support experts. For information about Customer Support visit: www.businessobjects.com/services/support.htm

Services

A global network of Business Objects technology experts provides customer support, education, and consulting to ensure maximum business intelligence benefit to your business.

How we can support you?

Business Objects offers customer support plans to best suit the size and requirements of your deployment. We operate three global customer support centers:

- Americas: San Jose, California and Atlanta, Georgia
- Europe: Maidenhead, United Kingdom
- Asia: Tokyo, Japan and Sydney, Australia

► Online Customer Support

Our Customer Support website is open to all direct customers with a current maintenance agreement, and provides the most up-to-date Business Objects product and technical information. You can log, update, and track cases from this site using the Business Objects Knowledge Base.

Having an issue with the product?

Have you exhausted the troubleshooting resources at your disposal and still not found a solution to a specific issue?

For support in deploying Business Objects products, contact Worldwide Customer Support at: www.businessobjects.com/services/support.htm

Looking for the best deployment solution for your company?

Business Objects consultants can accompany you from the initial analysis stage to the delivery of your deployment project. Expertise is available in relational and multidimensional databases, in connectivities, database design tools, customized embedding technology, and more.

For more information, contact your local sales office, or contact us at: www.businessobjects.com/services/consulting.htm

Looking for training options?

From traditional classroom learning to targeted e-learning seminars, we can offer a training package to suit your learning needs and preferred learning style. Find more information on the Business Objects Education website:

www.businessobjects.com/services/education.htm

Useful addresses at a glance

Address	Content
<p>Business Objects Documentation</p> <p>www.businessobjects.com/services/documentation.htm</p>	Overview of Business Objects documentation. Links to Online Customer Support, Documentation Supply Store, Documentation Roadmap, Tips & Tricks, Documentation mailbox.
<p>Business Objects Documentation mailbox</p> <p>documentation@businessobjects.com</p>	Feedback or questions about documentation.
<p>Product documentation</p> <p>www.businessobjects.com/services/support.htm</p>	The latest Business Objects product documentation, to download or view online.
<p>Business Objects product information</p> <p>www.businessobjects.com</p>	Information about the full range of Business Objects products.
<p>Developer Suite Online</p> <p>www.techsupport.businessobjects.com</p>	Available to customers with a valid maintenance agreement and a Developer Suite license via the Online Customer Support (OCS) website. Provides all the documentation, latest samples, kits and tips.
<p>Knowledge Base (KB)</p> <p>www.techsupport.businessobjects.com</p>	Technical articles, documents, case resolutions. Also, use the Knowledge Exchange to learn what challenges other users – both customers and employees – face and what strategies they find to address complex issues. From the Knowledge Base, click the Knowledge Exchange link.
<p>Tips & Tricks</p> <p>www.businessobjects.com/forms/tipsandtricks_login.asp</p>	Practical business-focused examples.

Address	Content
Online Customer Support www.techsupport.businessobjects.com www.businessobjects.com/services	Starting point for answering questions, resolving issues. Information about registering with Worldwide Customer Support .
Business Objects Education Services www.businessobjects.com/services/education.htm	The range of Business Objects training options and modules.
Business Objects Consulting Services www.businessobjects.com/services/consulting.htm	Information on how Business Objects can help maximize your business intelligence investment.

About this guide

This guide describes how to use Supervisor over the Web.

Audience

This guide is intended for administrators who manage user and group accounts.

Conventions used in this guide

The conventions used in this guide are described in the table below.

Convention	Indicates
This font	Code, SQL syntax, computer programs. For example: <code>@Select(Country\Country Id)</code> . This font is also used for all paths, directories, scripts, commands and files for UNIX.
Some code more code	Placed at the end of a line of code, the symbol (↵) indicates that the next line should be entered continuously with no carriage return.
\$DIRECTORYPATHNAME	The path to a directory in the Business Objects installation/configuration directory structure. For example: <ul style="list-style-type: none"> • \$INSTALLDIR refers to the Business Objects installation directory. • \$LOCDATADIR refers to a subdirectory of the BusinessObjects installation directory called locData.



Getting Started



1
chapter



Overview

This chapter contains the following sections:

- [What is Supervisor over the Web?](#)
- [Installing and configuring Supervisor over the Web](#)
- [Running Supervisor over the Web](#)
- [Logging out of Supervisor over the Web](#)
- [Using the online help](#)

What is Supervisor over the Web?

Supervisor over the Web allows you to manage users and groups via a web browser. You create a Business Objects repository using Supervisor. Then you use either Supervisor or Supervisor over the Web to define users and user groups, assign profiles to users, and edit their properties in the security domain.

Supervisor over the Web runs on 3-tier architecture in a JSP environment. It requires an application server and a Business Objects server with a connection to the relational database that hosts the repository. Supervisor over the Web relies on the Administration Server module that keeps a cache of the security domain.

NOTE

More than one supervisor working on the same repository resources at the same time from different desks can interfere with one another's work without this being immediately noticeable. Coordinate your work with other Business Objects supervisors so that you do not work on the same resources at the same time.

What can you do with Supervisor over the Web?

Supervisor over the Web offers the following abilities:

- managing groups
You can create, move, delete, and rename groups
- managing users
You can create, rename, and delete users, assign and remove them from groups, change passwords, and edit user properties
- managing many users at the same time
You can edit user properties, add users, remove, and delete multiple users in groups.

All changes performed in the Supervisor over the Web are immediately taken into account in the repository and in the Administration Server cache.

What you cannot do with Supervisor over the Web

You cannot do the following with Supervisor over the Web:

- create repositories
- manage resources, categories, Broadcast Agents, and security commands
- perform scan, compact, and repair operations
- import or export users or groups

You must use Supervisor to perform these operations.

Who can use Supervisor over the Web?

Any user authorized to access Supervisor can access Supervisor over the Web. This includes users with the following profiles:

- General supervisor
- Supervisor
- Supervisor-designer
- Versatile with supervisor rights

Security commands for Supervisor over the Web

Security commands control the actions performed using Supervisor and Supervisor over the Web. A general supervisor can allow supervisors to perform some tasks but not others, for example, a supervisor that can create users but not delete them.

You need to use Supervisor to manage security command settings, as they are not available via Supervisor over the Web.

To use Supervisor over the Web, users must have certain Supervisor security commands enabled. These commands are described below.

► Security command family: configuration

I want the supervisor to...	I enable Security Command...
Change a existing user's profile or assigning the profile of a new user	Change Profile

► **Security command family: tools**

I want the supervisor to...	I enable Security Command...
Change his or her own password, and those of the users managed	Change Password

► **Security command family: user and group**

I want the supervisor to...	I enable Security Command(s)...
Add an instance of a user to a group	Add to Group
Create a new group	Create Group
Create a new user	Create User
Delete a group	Delete Group
Delete a user	Delete User
Disable or enable a user	Disable/Enable User
Edit the properties of a user or group	Edit User/Group Properties
Remove user instances from groups	Remove User from Group
Rename a user or group	Rename User/Group
Move a group	Add to Group and Remove User from Group

NOTE

These security commands are enabled for general supervisors by default.

For more information about security commands, refer to the *Supervisor's Guide*.

Installing and configuring Supervisor over the Web

You need to have a licence for Supervisor to be able to install and run Supervisor over the Web.

Supervisor over the Web is supported in a JSP environment and requires an application server and a Business Objects server.

NOTE

You should have the following guides close by for reference:

- *Installation and Configuration for UNIX*
or
Installation and Configuration for Windows
- *Supervisor's Guide*
- the installation and configuration documentation for the application server
- the readme for Business Objects product suite
- for deployment information, see, depending on your platform, *Setting Up Your Business Objects Deployment under UNIX* or *Setting Up Your 3-tier Business Objects Deployment under Windows*.

To install and configure the Supervisor over the Web files you need to complete the following steps:

1. Install the application and web servers.
You can find an up-to-date list of the application and web server versions supported by Business Objects in the Products Availability Report (PAR) at www.techsupport.businessobjects.com. To install the servers refer to the installation documentation that accompanies them.
2. Install Supervisor over the Web with the Business Objects product suite. Refer to the *Installation and Configuration Guide for UNIX* or the *Installation and Configuration Guide for Windows*, depending on your platform, for instructions.
3. Using Supervisor, create the Business Objects repository, if this has not already been done.
You must use Supervisor because you cannot create a repository using Supervisor over the Web.

4. Configure the application and web servers for Supervisor over the Web using the Configuration Tool.
5. Set the virtual directory that allows you to access Supervisor over the Web through a browser.

For example, if you keep the default virtual directory proposed by the Configuration Tool (wsupervisor), you'll access the Supervisor over the Web through the URL:

```
http://<hostname>:<portnumber>/wsupervisor
```

or

```
https://<hostname>:<portnumber>/wsupervisor (only if you use  
an SSL web server)
```

When configuration is complete, this link provides access to Supervisor over the Web.

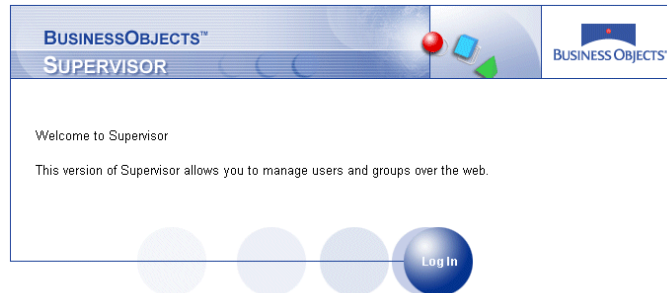
For complete configuration instructions, see the *Installation and Configuration Guide for UNIX* or the *Installation and Configuration Guide for Windows*, depending on your platform.

Running Supervisor over the Web

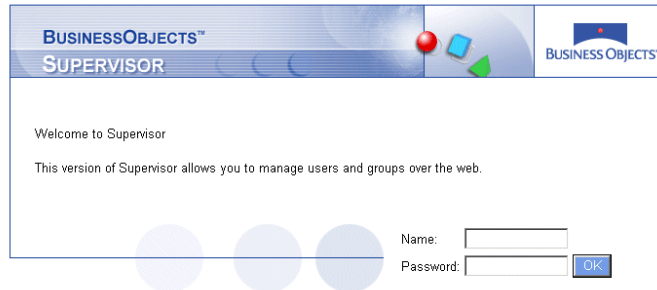
Once you have installed and configured Supervisor over the Web, you need to do the following to access Supervisor over the Web

1. Start the application and web servers.
For information on configuring and starting the application server, see the *Installation and Configuration Guide for UNIX* or the *Installation and Configuration Guide for Windows*, depending on your platform.
2. Start the Business Objects server.
3. If this is the first time you are running Supervisor over the Web, use the Business Objects Administration Console to enable the following modules in your cluster:
 - Administration Server
 - Login Server
4. In a browser, go to the Supervisor over the Web virtual directory created using the Configuration Tool. It should have the following format:
`http://<hostname>:<portnumber>/wsupervisor`

The login page for Supervisor over the Web appears.



5. Click **Log In**.



Welcome to Supervisor

This version of Supervisor allows you to manage users and groups over the web.

Name:

Password:

6. Enter your user name and password.

If you have the supervisor profile, only the groups to which you belong as a supervisor, and their subgroups, appear in the subgroup tree. General supervisors belong to the repository root group and can therefore see all groups and users.

NOTE

If your login fails, remember that:

- If the *Change password at first login* option is activated in your user properties, you need to go first to another tool, for example BusinessObjects or Supervisor, to change your password.
- If a timestamp is applied to you or your group, you cannot log in to Supervisor over the Web outside the timestamp period(s).
- If the amount of your incorrect password entries exceeds the maximum tries authorized, your password is disabled. You need to contact another general supervisor to get your password enabled.

For information on starting the Business Objects server or enabling modules, refer to the *System Administrator's Guide for UNIX* or *System Administrator's Guide for Windows*, depending on your platform.

Logging out of Supervisor over the Web

When you have finished using Supervisor over the Web, log out of the product instead of just closing your browser. This enables the Login Server to be refreshed with the changes that you performed.

You log out of Supervisor over the Web by clicking the Logout button in the Supervisor over the Web toolbar.

If you leave Supervisor over the Web inactive longer than the maximum time period defined by the Administration Server's Client Session Timeout parameter, your session is closed automatically, and you must log in again. This parameter can only be modified in the Administrative Console.

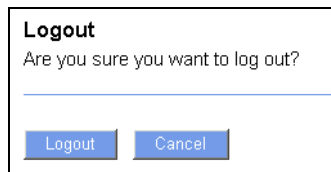
To log out:



Logout

1. Click **Logout** in the Supervisor over the Web toolbar.

A confirmation window appears.



2. Click **Logout**.

The Login page appears. You have logged out.

If you decide not to log out, click **Cancel**.

Using the online help

The Supervisor over the Web online help provides you with a description of Supervisor over the Web and complete instructions for using the product.



To access the Supervisor over the Web online help, click **Help** on the Supervisor over the Web toolbar. The Supervisor over the Web Online Help page appears.

The navigation frame is resizable, and consists of:

- an expandable and collapsible table of contents
- a multi-level index with keyword search
- a search facility

Click individual help topics in the navigation frame to display their contents. Where relevant, it also contains links to related help topics and to online guides in PDF format.



Managing Groups



2



chapter

Overview

Supervisor over the Web allows you to manage groups by:

- [Using the Group Management pane](#)
- Adding a user
- Creating a new group
- Renaming a group
- Moving a group
- Deleting a group

Using the Group Management pane

When you log in to Supervisor over the Web, the Group Management pane's subgroup tree shows the groups to which you belong as a supervisor and their subgroups. If you are a general supervisor, it shows the repository root group as the current group. When you select a subgroup, that group appears as the current group.

The screenshot shows the Group Management pane with the following components labeled:

- up icon**: Points to the 'BOCC' group in the subgroup tree.
- subgroup tree**: Points to the entire sidebar navigation area.
- current group level**: Points to the breadcrumb 'Current group: /BOCC'.
- current group section**: Points to the 'Current group' header and its associated action links.
- users in group section**: Points to the 'Users in group' header and its associated action links.
- search options link**: Points to the 'Show search options' link.
- list sort bar**: Points to the header of the user list table.

<input type="checkbox"/>	Users	Groups
<input type="checkbox"/>	casperdi	BOCC
<input type="checkbox"/>	nisseral	BOCC
<input type="checkbox"/>	brownid	BOCC
<input type="checkbox"/>	denisse	BOCC
<input type="checkbox"/>	sperdi	BOCC
<input type="checkbox"/>	andersonpr	BOCC
<input type="checkbox"/>	johnsonna	BOCC

The Group Management pane contains the following:

- up icon - takes you to the parent of the current group
- subgroup tree - contains links to the groups within the current group to which you have access
- current group level - indicates the complete path of the current group in the group hierarchy
- current group section - contains the actions that you can perform on the current group
- users in group section - contains the actions that you can perform on one or more users in the current group and its subgroups, the search options, and the list of users in the group and its subgroups with a list sort bar. For more information on the user profiles go to [Understanding user profiles on page 41](#).
- search options link - allows you to show the search options.
- list sort bar - allows you to sort the users by user name, group name, user profile, and select or unselect all users.

NOTE

You are not allowed to perform actions on:

- your own user instances. When your user instance appears in a user list, the check box is not displayed.
- a general supervisor instance if you are not logged in as a general supervisor.
- a link that is inactive for one of the following reasons:
 - the security commands that allow this action are disabled for your profile
 - this action is not possible by design

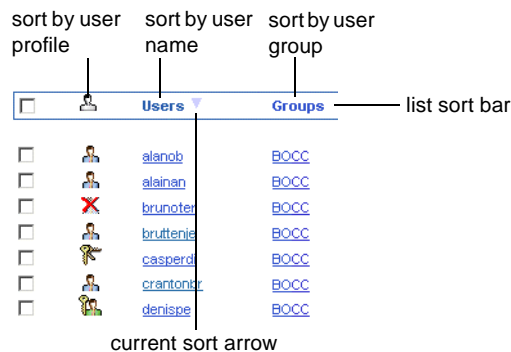
Navigating in the subgroup tree

You can navigate in the subgroup tree by doing the following:

- To display a subgroup in the Group Management Pane, click its name. It then becomes the current group.
- To return to the root group, click the root group name in the current group level.
- To display the parent group of the current group, click the up icon.

Sorting users in the group management pane

To sort the list of users in the *Users in group* section of the Group Management pane use the list sort bar.



► **Sorting user list by profile**

For information on profiles, refer to [Understanding user profiles on page 41](#).

To sort users by profile:

1. Click the profile icon in the list sort bar.

A small, blue arrow appears next to the profile icon. This indicates that the list of users is now sorted by user profile. The arrow points downward to indicate that the sort order is descending.

The profile column is sorted in the following order:

- General supervisor
- Supervisor
- Designer
- Supervisor-designer
- User
- Versatile

Within each profile the list is sorted by user name, then group.

2. To sort the list in ascending order, click the arrow.

The list reappears with the arrow pointing upward to indicate that the sort order is ascending.

► **Sorting user list by name**

To sort users by user name:

1. Click **Users** in the list sort bar.

The list is sorted in descending order. A small, blue arrow appears next to Users. This indicates that the user list is now sorted by user name. The arrow points downwards to indicate that the sort order is descending.

If a user has more than one user instance, they are sorted according to profile, then group.

2. To sort the list in ascending order, click the blue arrow.

The list reappears with the arrow pointing upwards to indicate that the sort order is ascending.

▶ **Sorting user list by group**

To sort users by group name:

1. Click **Groups** in the list sort bar.

The list is sorted in descending order. A small, blue arrow appears next to Groups. This indicates that the user list is now sorted by group name. The arrow points downwards to indicate that the sort order is descending.

Within each group, the list is sorted by profile, then user name.

2. To sort the list in ascending order, click the blue arrow.

The list reappears with the arrow pointing upwards to indicate that the sort order is ascending.

Adding a user

A user can belong to more than one group. Each occurrence of the same user in different groups is an "instance." Using Supervisor over the Web, you can add an instance of an existing user to a group. A user added to a group inherits the rights of that group.

To add an existing user to a group:

1. In the Current group section click **Add user**.

The *Add user in group* "<group name>" pane appears.



The screenshot shows a dialog box titled "Add user in group 'BOCC'". It contains two input fields: "Enter user name:" with a text box, and "Select profile:" with a dropdown menu showing "User". At the bottom, there are two buttons: "OK" and "Close".

2. In the **Enter user name** box, type the name of an existing user that you want to add to the group.
3. Select a profile from the **Select profile** list.
The profile selected for this user does not affect the user's profile in other groups.
4. Click **OK** to confirm, or **Close** to cancel the operation and return to the Group Management pane.
5. To add more users the group, repeat steps 2 through 4.
6. To return to the Group Management pane after adding the new user(s), click **Close**.

NOTE

You cannot:

- select the General Supervisor profile using the *Add user* function
- add users from groups to which you do not have Supervisor rights
- if the Set Profile security command is disabled for your profile, select other than the User profile

Creating a new group

The root group, which is created in the repository, represents your organization. All other groups you create are subgroups of the root group.

To create a new group in a selected group:

1. In the Current group section click **New group**.

The *Create new group in group "<group name>"* pane appears.



The screenshot shows a dialog box titled "Create new group in group 'BOCC'". Below the title bar is a horizontal line. Underneath, there is a text input field with the label "Enter new group name:". At the bottom of the dialog box, there are two buttons: "OK" and "Close".

2. In the **Enter new group name** box, type a name for the new group. Group names are unique within a repository. No two groups may have the same name.
3. Click **OK** to confirm, or **Close** to cancel the operation and return to the Group Management pane.
4. To create more new groups, repeat steps 2 and 3.
5. To return to the Group Management pane click **Close**.

Renaming a group

To rename the current group:

1. In the Current group section click **Rename**.

The *Rename group* "<group name>" pane appears.



The screenshot shows a dialog box titled "Rename group 'Marketing'". Inside the dialog, there is a text input field with the label "Enter new group name:". Below the input field are two buttons: "OK" and "Close".

2. In the **Enter new group name** box, type the new name of the group. Group names are unique within a repository. No two groups may have the same name.
3. Click **OK** to confirm and return to the Group Management pane, or **Close** to cancel the operation and return to the Group Management pane.

Moving a group

Using Supervisor over the Web, you can move a group if:

- it is not the root group
- you are a General Supervisor or the group is within your scope

To move a selected group:

1. In the Current group section click **Move**.

The *Move group* “<group name>” pane appears.



The screenshot shows a dialog box titled "Move group 'Marketing'". Inside the dialog, there is a label "Select a new parent group:" followed by a dropdown menu currently displaying "Bench". At the bottom of the dialog, there are two buttons: "OK" and "Close".

2. From the **Select a new parent group** list select the group to which you want to move the current group.
3. Click **OK** to confirm and return to the Group Management pane, or **Close** to cancel the operation and return to the Group Management pane.

Deleting a group

Using Supervisor over the Web, you can delete a group if:

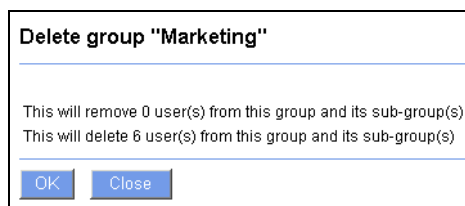
- it is not the root group
- you are a General Supervisor or the group is within your scope
- the group does not have a Broadcast Agent assigned to it

Broadcast Agents are assigned to groups as part of group properties, which can only be managed with Supervisor, not Supervisor over the Web. Use Supervisor to remove a Broadcast Agent from a group before deleting the group.

To delete the current group:

1. In the Current group section click **Delete**.

The *Delete group* “<group name>” pane appears listing the number of users that will be deleted or removed from the group.



NOTE

If there is at least one other instance of a user in another group, the instance in the deleted group is removed, but the user is not deleted from the repository. If the user belongs only to the deleted group, then the user is deleted from the repository.

2. Click **OK** to confirm and return to the Group Management pane, or **Close** to cancel the operation and return to the Group Management pane.



Managing Users



3



chapter

Overview

Supervisor over the Web allows you to manage user accounts by:

- [Using the User Management pane](#)
- [Creating a new user](#)
- [Adding to a group](#)
- [Editing user properties](#)
- [Renaming a user](#)
- [Deleting a user](#)
- [Removing a user from a group](#)

Using the User Management pane

When you select a user in the Group Management pane, the *User Management* pane appears.

The screenshot shows the 'User Management' pane with the following sections and annotations:

- Current user:** /BOCC/Marketing/District Supervisor (location of current user)
- Groups:** Supervisor, User, Versatile (the groups to which the user belongs)
- Password & Security:** Disable login, Enable offline login, Enable password modification, Object security level, Change password at first login, Password validity, Identification strategy (the user's password and security properties)
- Actions:** Rename, Add to group, Remove, Delete user, Change password (current user actions)

The User Management pane contains the following sections:

- location of current user
Indicates the complete path of the current group in which the user instance is located
- current user actions
This section contains actions that can be performed on the current user instance
- groups
This section lists the groups to which the user belongs, and the user's profile in each group
- password & security
This section contains the properties for the user password and other access security options

NOTE

- The User Management pane is available only for users within your scope.
 - If the User Management pane is for your own instance:
 - the **OK** button is not displayed
 - the **Rename**, **Add to Group**, **Remove**, and **Delete** links are not active
 - the properties displayed cannot be changed
 - If you need to edit your own general supervisor user instance, you need to log in as a different general supervisor, although some parameters are automatically set for a general supervisor instance and cannot be changed.
 - You are not allowed to perform an action for a link that is not active for one of the following reasons:
 - the security commands that allow this action are disabled for your profile
 - this action is not possible by design
 - it is your own user instance
-

Understanding user profiles

Supervisor and Supervisor over the Web offer several user profiles. The user profile determines what products a user can use:

- General supervisor (all products)
- Supervisor (all products but Designer)
- Designer (all products but Supervisor and Supervisor over the Web)
- Supervisor-designer (all products)
- User (all products but Designer, Supervisor, and Supervisor over the Web)
- Versatile (configurable)

You assign these profiles in Supervisor and Supervisor over the Web to reflect the needs of the users. The profiles are described below.



▶ **General supervisor**

The general supervisor is the primary system administrator. A general supervisor has all permissions in its security domain.

A general supervisor can:

- create user groups and any type of user, including other general supervisors
- manage user accounts and privileges, and resources in the entire repository
- use any feature in Business Objects products



▶ **Supervisor**

The supervisor is responsible for user administration within its groups and subgroups. A supervisor can:

- create users with any profile except general supervisor
- create user groups
- administer user accounts and privileges
- manage resources in its groups

By default, the supervisor can use any feature of all Business Objects products except Designer, but a general supervisor or supervisor can limit a supervisor's rights to user or resource management features.



▶ **Designer**

The universe designer uses Designer to create and maintain universes for a particular group of users. A universe designer can distribute a universe as a file through the file system, or by exporting it to a repository.

**▶ Supervisor-Designer**

This user has all the rights of the supervisor and the universe designer combined.

**▶ User**

Users use the Business Objects end-user products to view, query, report and analyze data. They may also use the optional Reporter and Explorer modules for multidimensional analysis. End users can produce documents containing data from one or more data sources. Users with this profile do not have access to Designer, Supervisor, or Supervisor over the Web.

**▶ Versatile**

You can configure the rights of a versatile user who can, for example, have access to WebIntelligence, but not BusinessObjects. This user can be given access to any combination of Business Objects products.

NOTE

The profile icon of all of a user's instances appear with a red X when a user:

- is disabled either by another user with the right to disable users.
 - has a failed login after a number of unsuccessful password entries higher than the maximal authorized.
-

Creating a new user

A user can belong to more than one group. Each occurrence of the same user in different groups is an 'instance'.

When the first instance is created for a user, it has the following default parameters:

Parameter	Setting
Password	<username>
Disable login	Off
Enable offline login	On
Enable password modification	On
Object security level	Private
Change password at first login	Off
Password validity	Off
Identification strategy	Full Checking

To edit these parameters after creating a user, click on the user instance link. The User Management pane for that instance opens.

To create a new user:

1. Using the subgroup tree, navigate to the group in which you want to create a user.

For information about the Group Management pane, refer to [Using the Group Management pane on page 27](#).

2. Click **New user** in the Current group section.

The *Create new user in group "<group name>"* pane appears.

The screenshot shows a dialog box titled "Create new user in group "Marketing"". Inside the dialog, there is a text input field labeled "Enter user name:" and a dropdown menu labeled "Select profile:" with "User" selected. At the bottom of the dialog, there are two buttons: "OK" and "Close".

3. In the **Enter user name** box, type the name of the new user.

User names are unique within the repository. No two users may have the same name. If you type the name of an existing user, an error message appears. In this case, enter a different name for the user and click **OK**. If you meant to add an existing user with this name to the group, you can use *Add user* in the Group Management pane or *Add to group* in the User Management pane.

4. Select a profile from the **Select profile** list.

If the Set Profile security command is disabled for your profile, you can only assign the User profile.

You cannot assign the general supervisor profile unless:

- you are logged in as a general supervisor
- the new user is created in the repository root group

5. Click **OK** to create the new user, or **Close** to return to the Group Management pane.
6. To create other users, repeat steps 2 through 4, or click **Close** to return to the Group Management pane.

Adding to a group

Using Supervisor over the Web, you can use *Add to group* to add a user to a group if:

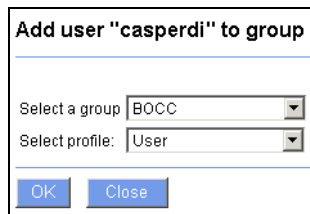
- the group or user is within your scope
- the instance is not your own
- you are trying to add a user that is not a General Supervisor

For information on adding more than one user from a group at a time, refer to [Adding multiple users to a group on page 63](#).

To add a user to a group:

1. In the User Management pane for the current user, click **Add to group**.

The *Add user "<user name>" to group* pane appears.



The screenshot shows a dialog box titled "Add user 'casperdi' to group". It contains two dropdown menus: "Select a group" with "BOCC" selected, and "Select profile:" with "User" selected. At the bottom, there are "OK" and "Close" buttons.

2. From the **Select a group** list, select the group to which you want to add the user.

3. Select a profile from the **Select profile** list.

If the Set Profile security command is disabled for your profile, you can only assign the User profile.

The General Supervisor profile is not available for this action. This profile can only be assigned to a user who has only one instance and is at the repository root level.

4. Click **OK** to add the user to the group and return to the User Management pane, or **Close** to cancel the operation and return to the User Management pane.

Editing user properties

Using Supervisor over the Web you can perform the following actions on user properties:

- [Changing a user profile](#)
- [Changing login properties](#)
- [Setting the object security level](#)
- [Setting the identification strategy](#)
- [Changing password settings](#)

NOTE

You cannot change:

- properties for your own instance.
 - the following parameters for general supervisor instances:
 - Disable Login (you can only set it to Off)
 - Enable Offline Login
 - Enable Password Modification
 - Object Security Level
-

Changing a user profile

To change the profile of a user:

1. Select the user instance in the Group Management pane.
The User Management pane appears for that user.
2. In the Groups section, select the profile that you want to assign to that user instance in the correct group.
If the Set Profile security command is disabled for your profile, you can only assign the User profile.
You cannot assign the general supervisor profile unless:
 - you are logged in as a general supervisor
 - the user has only one instance and this instance is located in the repository root group
3. Click **OK** to confirm.
The Group Management pane reappears.

NOTE

When you set a profile to general supervisor, the following parameters are automatically changed:

- Disable Login is set to Off
 - Enable Offline Login is set to On
 - Enable Password Modification is set to On
 - Object Security Level is set to Private
-

Changing login properties

The *Disable login* and *Enable offline login* options are in the *Password & Security* section of the User Management pane.

Password & Security		
Disable login	<input type="radio"/> On	<input checked="" type="radio"/> Off
Enable offline login	<input checked="" type="radio"/> On	<input type="radio"/> Off

▶ Enabling and disabling login

The Disable login property grants or denies permission to a user to log in.

1. Select the user instance in the Group Management pane.
The User Management pane appears for that user.
2. In the Password & Security section, click **On** or **Off** for *Disable login*.
3. Click **OK** to confirm.

If you disabled the login, user's profile icon in the Group Management pane appears with a red X. If you enabled the user's profile icon, the red X disappears.

▶ Enabling and disabling offline login

The Enable offline login property grants or denies permission to a user to log in without a connection to the repository.

1. Select the user instance in the Group Management pane.
The User Management pane appears for that user.
2. In the Password & Security section, click **On** or **Off** for *Enable offline login*.
3. Click **OK** to confirm.

Setting the object security level

Objects are components in Business Objects universes that make data accessible to users. Their security level is defined by the designers who create them. By default, their security level is Public, meaning any user can work with them. If they are given a higher security level, only users granted the corresponding Object Security level have access to them. The levels are, from highest to lowest:

- private
- confidential
- restricted
- controlled
- public

For more information on object security levels, refer to the *Designer's Guide*.

To set the object security level for a user:

1. Select the user instance in the Group Management pane.
The User Management pane appears for that user.
2. In the Password & Security section, select a level from the **Object security level** list.
3. Click **OK** to confirm.

Changing password settings

Supervisor over the Web allows you to edit the password settings for a user.

▶ Allowing users to modify their password

To allow users to modify their password:

1. Select the user instance in the Group Management pane.
The User Management pane appears for that user.
2. In the Password & Security section, click **On** or **Off** for *Enable password modification*.
3. Click **OK** to confirm.

► **Forcing users to change their password at the first login**

To force users to change their password at their first login:

1. Select the user instance in the Group Management pane.
The User Management pane appears for that user.
2. In the Password & Security section, click **On** or **Off** for *Change password at first login*.
3. Click **OK** to confirm.

► **Forcing users to change their password at set periods**

If you want to force users to change their password after a specified number of days has elapsed:

1. Select the user instance in the Group Management pane.
The User Management pane appears for that user.
2. In the Password & Security section, click **On** for *Password validity*.
The Password validity box and the Periodic action options appear.

Password validity	<input checked="" type="radio"/> On	<input type="radio"/> Off
Password validity	<input type="text" value="30"/>	Days
Periodic action	<input type="radio"/> On	<input checked="" type="radio"/> Off

3. In the Password validity box, type the desired number of days.
The password becomes invalid after the number of days has elapsed.
4. To activate *Periodic action*, click **On**.
With this option selected, the password validity period you entered is applicable each time the user changes the password. When Password validity is On and Periodic action is Off, the password validity period only applies once.
5. Click **OK** to confirm.

Setting the identification strategy

Supervisor over the Web allows you to set the identification, or password checking, strategy for a user.

To control the password checking strategy associated with a user:

1. Select the user instance in the Group Management pane.
The User Management pane appears for that user.
2. In the Password & Security section, select an option from the **Identification Strategy** list.

Option	Description
Full Checking	The default option. The Business Objects repository always checks the validity of the user password.
No Password Checking	Removes all password controls for this user as long as the option is selected.

3. Click **OK** to confirm.

Changing a password

To change a password:

1. Select the user instance in the Group Management pane.
The User Management pane appears for that user.
2. Click **Change password**.
The *Change password for user "<user name>"* pane appears.



The screenshot shows a dialog box titled "Change password for user 'hanbyrd'". It contains two text input fields: "Enter new password:" and "Confirm new password:". At the bottom of the dialog, there are two buttons: "OK" and "Close".

3. In the **Enter new password** box, type the new password.
4. In the **Confirm new password** box, type the new password again.
5. Click **OK** to confirm and return to the User Management pane, or **Close** to cancel the operation and return to the User Management pane.

Renaming a user

To rename a user:

1. Select the user instance in the Group Management pane.
The User Management pane appears for that user.

1. Click **Rename**.

The *Rename user "<user name>"* pane appears.



The screenshot shows a dialog box titled "Rename user 'denispe'". It contains a text input field with the label "Enter new user name:". Below the input field are two buttons: "OK" and "Close".

2. In the **Enter new user name** box, type a new name for the user. This name must not already exist in the repository.
3. Click **OK** to confirm and return to the User Management pane, or **Close** to cancel the operation and return to the User Management pane.

NOTE

You cannot rename your own instances.

Deleting a user

You can delete the user permanently from the repository, which removes all instances of the user in all groups, and also deletes from the repository any documents that have been sent only to that user.

For information on deleting more than one user at a time, refer to [Deleting multiple users on page 65](#).

To delete all instances of a user:

1. In the User Management pane for the user you want to delete, click **Delete**.
The *Delete user "<user name>"* pane appears indicating the number of instances of the user that will be deleted.



2. Click **OK** to confirm and return to the Group Management pane, or **Close** to cancel the operation and return to the User Management pane.

NOTE

You cannot delete your own instances.

Removing a user from a group

When a user belongs to more than one group, the instance of the user in any one group can be removed without permanently deleting the user from the repository.

You cannot remove the last instance of a user using *Remove*. You need to delete the user using the process [Deleting a user on page 54](#).

For information on removing more than one user from a group at a time, refer to [Removing multiple users from a group on page 64](#).

To remove a user from a group:

1. In the Group Maintenance pane for the group from which the user is to be removed, click on the user instance.

The User Management pane for the user appears.

NOTE

It is important to access users through the group from which they need to be removed. The Remove action is tied to the location of the user instance.

2. Click **Remove**.

The *Remove user "<user name>" from group "<group name>"* pane appears.



3. Click **OK** to confirm and return to the Group Management pane, or **Close** to cancel the operation and return to the User Management pane.

NOTE

You cannot remove your own instance from a group.



Managing Multiple Users



4



chapter

Overview

Supervisor over the Web allows you to change the settings for more than one user in a group at a time. The actions you can perform on multiple users in a group include:

- [Selecting users](#)
- [Editing multiple user properties](#)
- [Adding multiple users to a group](#)
- [Removing multiple users from a group](#)
- [Deleting multiple users](#)
- [Using the search options](#)

Selecting users

The *Users in group* section in the Group Management pane displays the user instances in the current group and its subgroup.

To perform actions on users, you need to select their instances. Click the checkbox next to the instances in the *Users in group* section.

<input type="checkbox"/>		Users ▾	Groups
<input type="checkbox"/>		albertob	Marketing
<input checked="" type="checkbox"/>		andersonlh	Marketing
<input checked="" type="checkbox"/>		denisppe	Marketing
<input type="checkbox"/>		smithjp	Marketing
<input checked="" type="checkbox"/>		johnsonna	Marketing
<input type="checkbox"/>		alanob	Marketing

To select or unselect all instances, click the checkbox in the list sort bar.

TIP

- To narrow the list of users within a large group and its subgroup(s) in the *Users in group* section of the Group Management pane, use the search options. For example, you may want to find all disabled users within a group and its subgroups. To do a search, refer to [Using the search options on page 66](#).
- To organize a list to find specific users whose properties you want to edit, for example all of the users with a Supervisor profile within a group, you can use the list sort option on the profiles column. For information on the list sort options, refer to [Sorting users in the group management pane on page 28](#).

Once you have selected the users, you can perform any of the operations described in the following sections.

NOTE

You cannot:

- select your own instance.
 - select a general supervisor instance if you are not logged in as a general supervisor.
 - perform an action if the security commands that allow this action are disabled for your profile.
-

Editing multiple user properties

After selecting multiple users in the Users in group section of the Group Management pane, you can edit their properties.

1. In the *Users in group* section of the Group Management pane, select the users whose properties you want to edit.

For information on selecting users, see [Selecting users on page 59](#).

2. Click **Edit**.

The *Edit selected users* pane appears with a list of the selected users at the top. By default, the settings are set to *<Unchanged>*. Descriptions of the Password & Security settings are available in [Editing user properties on page 46](#). You need to leave the status as *<Unchanged>* for any parameters that you do not want to change.

Edit selected users	
andersonln johnsonna	
Profile	
Profile	<Unchanged>
Password & Security	
Disable login	<Unchanged>
Enable offline login	<Unchanged>
Enable password modification	<Unchanged>
Object security level	<Unchanged>
Change password at first login	<Unchanged>
Password validity	<Unchanged>
Password validity	<Unchanged> Days
Periodic action	<Unchanged>
Identification strategy	<Unchanged>
OK Close	

3. Select the actions that you want to perform on the selected users:

- To change the profile, select a profile that will be applied to the selected users in the current group from the **Profile** list.

If the Set Profile security command is disabled for your profile, you can only assign the User profile.

You cannot assign the General Supervisor profile unless you are logged in as a General Supervisor and the users are in the repository root group.

- To disable login, select **On** from the *Disable login* list. To enable the login, select **Off** from the list.
- To enable offline mode, select **On** from the *Enable offline login* list. To disable this option, select **Off** from the list.
- To enable password modification, select **On** from the *Enable password modification* list. To disable this option, select **Off** from the list.
- To set the object security level, select a level from the **Object security level** list.

For information on object security levels, see [Setting the object security level on page 49](#).

- To force the selected users to change their passwords at the first login, select **On** from the *Change password at first login* list. To disable this option, select **Off** from the list.
 - To activate the password validity option that forces the selected users to change their passwords at least once, select **On** from the *Password validity* list. To disable this option, select **Off** from the list.
 - If you activated the password validity option, you must set the period of time that must pass before the selected users are required to change their passwords. In the **Password validity** box type a number of days.
 - To require a password change each time the password validity period recurs, select **On** from the *Periodic action* list. To disable this option, select **Off** from the list.
 - To change the identification strategy, select an option from the **Identification strategy** list.
4. Click **OK** to confirm and return to the Group Management pane, or **Close** to cancel the operation and return to the Group Management pane.

Adding multiple users to a group

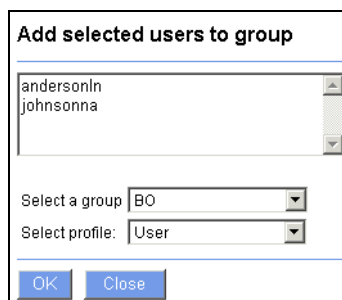
To add multiple users to a group:

1. In the *Users in group* section of the Group Management pane, select the users that you want to add to a group.

For information on selecting users, see [Selecting users on page 59](#).

2. Click **Add to group**.

The *Add selected users to group* pane appears, showing the list of selected users.



The screenshot shows a dialog box titled "Add selected users to group". It contains a list of selected users: "andersonln" and "johnsonna". Below the list, there are two dropdown menus: "Select a group" with "BO" selected and "Select profile:" with "User" selected. At the bottom of the dialog are "OK" and "Close" buttons.

3. Select a group from the **Select a group** list.
4. Select a profile from the **Select profile** list.

NOTE

You cannot assign the General Supervisor profile using the *Add to group* action. If the Set Profile security command is disabled for your profile, you can only assign the User profile.

5. Click **OK** to confirm and return to the Group Management pane, or **Close** to cancel the operation and return to the Group Management pane.

Removing multiple users from a group

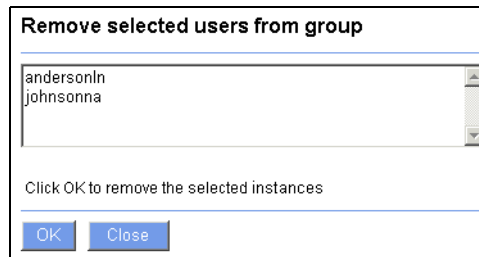
To remove more than one user from a group:

1. Navigate to the group that contains the user instances you want to remove.
2. In the *Users in group* section of the Group Management pane, select the user instances to be removed.

For information on selecting users, see [Selecting users on page 59](#).

3. Click **Remove**.

The *Remove selected users from group* pane appears with a list of selected instances that you want to remove.



4. Click **OK** to confirm and return to the Group Management pane, or **Close** to cancel the operation and return to the Group Management pane.

Deleting multiple users

This operation deletes ALL instances of the selected users in the repository. If you are unsure of the affiliations of any of the users, remove them from the current group instead. See [Removing a user from a group on page 55](#).

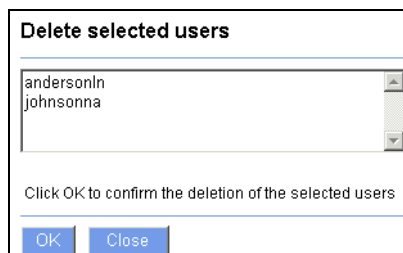
To delete more than one user:

1. In the *Users in group* section of the Group Management pane, select the users you want to delete.

For information on selecting users, see [Selecting users on page 59](#).

2. Click **Delete**.

The *Delete selected users* pane appears with a list of the selected users.



3. Click **OK** to confirm and return to the Group Management pane, or **Close** to cancel the operation and return to the Group Management pane.

Using the search options

By default, the Group Management pane displays users in the current group. Use the search options to narrow this list or search for a user in the current group and its subgroups.

To use these options, click **Show search options** in the *Users in group* section of the Group Management pane. Search options are displayed and the Show search options link toggles to Hide search options.

To hide the search options, click **Hide search options**.

Searching by name or wildcard

To search for users by name or wildcard:

- In the box next to the Search button do one of the following:
 - to search by name, type the name
 - to use a wildcard, use the following formats:

To search for...	Use...
Any name that contains a letter or list of letters in the current group	*<letter or list of letters>*
Any name that begins with a letter or list of letters in the current group	<letter or list of letters>*
Any name that ends with a letter or list of letters in the current group	*<letter or list of letters>
All names in the current group	*

- Click **Search**.

The list is refreshed to display only those users that match the criteria of your search.

Searching by subgroup

To search for users in the parent group as well as the subgroups:

1. In the search options, select **Include subgroups**.
2. In the box next to the Search button, type a name or wildcard. For more information about this type of search refer to [Searching by name or wildcard on page 66](#)
3. Click **Search**.

The list is refreshed to display users in the current group and its subgroups.

Searching for disabled users

To search for disabled users in the parent group:

1. In the search options, select **Disabled only**.
2. In the box next to the Search button, type a name or wildcard. For more information about this type of search refer to [Searching by name or wildcard on page 66](#)
3. Click **Search**.

The list is refreshed to display only disabled users.

NOTE

You can combine search options. For example, you can search for disabled users across subgroups, or for disabled users with a user name beginning with C.

Index

A

adding a user to a group 31, 45

B

Business Objects

consulting services 9, 11

documentation 8

Documentation Supply Store 7

support services 9

training services 9, 11

C

changing password 52

configuring

supervisor over the web 18

consultants

Business Objects 9

creating

group 32

user 43

customer support 9

D

deleting

group 35

multiple users 65

user 54

demo

materials 7

designer profile 41

Developer Suite 8, 10

disabled users

searching for 67

disabling

login 48

offline login mode 48

documentation

CD 7

feedback on 8

on the web 7

printed, ordering 7

roadmap 7

search 7

Documentation Supply Store 7

E

editing

login properties 48

password settings 49

user properties 46

education see training

enabling

login 48

offline login mode 48

F

feedback

on documentation 8

G

general supervisor

profile 41

group

adding a user to 31

adding multiple users 63

creating 32

deleting 35

moving 34

removing a user 55

removing multiple users 64

renaming 33

- group management pane
 - description 27
 - using the list sort bar 28

H

- help
 - online 23

I

- identification strategy 51
- index
 - online 23
- installing supervisor over the web 18

K

- Knowledge Base 10

L

- logging in 20
- logging out 22
- login
 - disabling 48
 - enabling 48
- login properties
 - changing 48

M

- moving a group 34
- multimedia
 - quick tours 8
- multiple users
 - adding to a group 63
 - deleting 65
 - editing properties 61
 - removing from a group 64
 - selecting 59

O

- object level security 49
- offline login mode
 - disabling 48
 - enabling 48
- Online Customer Support 9

P

- password
 - changing 52
 - settings 49
- periodic action 50
- periodic validity 50
- properties
 - editing for multiple users 61
 - login 48
 - user 46

R

- removing
 - multiple users 64
- renaming
 - groups 33
 - users 53
- running Supervisor over the Web 20

S

- search
 - documentation 7
- search options 66
- searching
 - by name 66
 - by subgroup 67
 - by wildcard 66
 - for disabled users 67
- security commands required 16
- setting
 - identification strategy 51
 - object level security 49
- sorting
 - using the list sort bar 28
- subgroup
 - searching by 67

- supervisor
 - description 15
 - profile 41
 - restrictions 41
- supervisor over the web
 - configuring 18
 - installing 18
- supervisor-designer profile 42
- support
 - customer 9

T

- Tips & Tricks 8
- training
 - on Business Objects products 9

U

- user
 - adding to a group 31, 45
 - creating 43
 - deleting 54
 - properties 46
 - removing from group 55
 - renaming 53
 - searching for 66
- user profiles
 - designer 41
 - end user 42
 - general supervisor 41
 - supervisor 41
 - supervisor-designer 42
 - user 42
- user properties
 - editing 46
- using search options 66

V

- versatile user profile 42

W

- web
 - customer support 9
 - getting documentation via 7
 - useful addresses 10
- wildcard search 66

