



Oracle Business Intelligence 11g Masterclass

Oracle BI & FMW11g Security

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Agenda

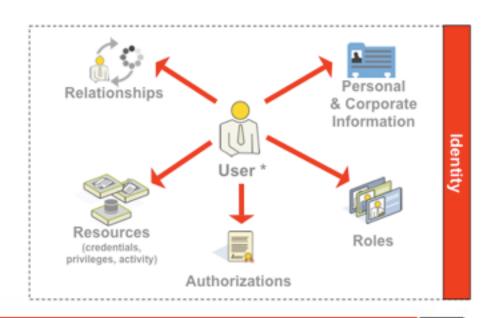
- What do we mean by "security"?
- What needs to be managed as part of OBIEE security?
- OBIEE 11g security overview
- Oracle Fusion Middleware 11g security overview
- Backward-compatibility with OBIEE 10g security
- Application Roles and Application Policies explained
- Performing common security tasks

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What Are We Talking About, When We Talk About Security?

- Security encompasses a wide area and set of tasks in OBIEE
- Aspects of security include:
 - Users logging in and out
 - User and group directories, internal and external to OBIEE
 - User and group membership administration
 - Job roles, rights and permissions
 - Permissions on BI objects (reports, dashboards, KPIs etc)
 - Application permissions (to use Answers, to create filters etc)
 - Security auditing

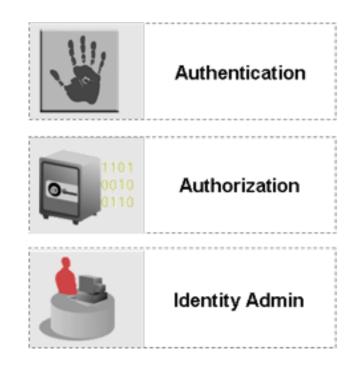


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Authentication, Authorization and Administration

- Security can be thought of as having three major aspects
 - Authentication: proving you are who you say you are
 - Authorization: what you have access to, when, where
 - Profile: attributes about you
- Security also has a lifecycle, and is a continuous process
 - Initial hire > promotion > departure
- How we "onboard' new users onto the BI system is very important
 - Granting access to applications
 - Scoping their view of data

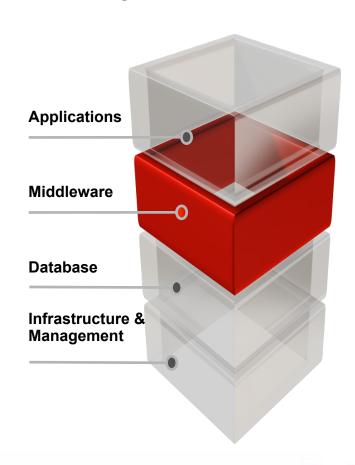


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OBIEE 11g Security and Oracle Fusion Middleware 11g

- OBIEE 11g delegates security to Oracle Fusion Middleware 11g
 - Leverages Oracle Platform Security Services
- Users and Groups in RPD now moved to embedded WLS LDAP Server
 - RPD and Webcat groups replaced by FMW11g Application Roles
- Comprehensive SSL and Credentials Managemnt
- Encrypted RPD, plus optional report encryption and watermarking
- Flexible authorization model through WLS and OPSS
- Still backwards compatible with LDAP model in OBIEE 10g

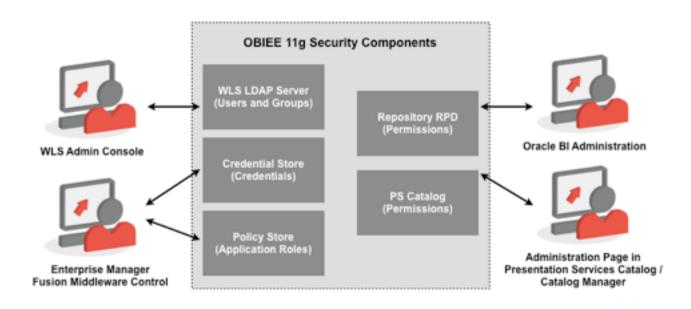


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OBIEE 11g Security Administration Tools

- WebLogic Server Admin Server (LDAP Server, Security Providers)
- Fusion Middleware Control (Application Roles)
- BI Administration tool (subject-area, and row-level security)
- Catalog Manager, and Presentation Services Catalog View (object permissions)
- Presentation Services Administration Page (PS functional permissions)

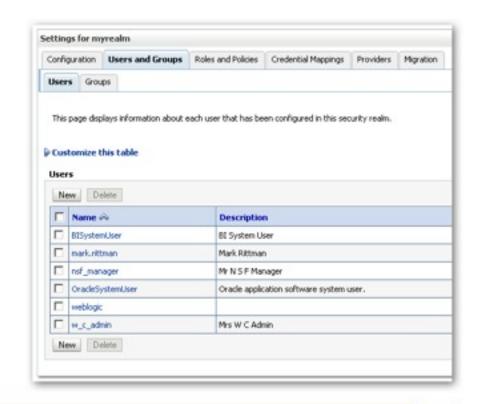


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WLS Embedded LDAP Server

- By default, OBIEE 11g users and groups are now held in the WLS LDAP Server
 - More robust directory for storing user details
 - Recommended for >1000 users
- WLS Admin Server Console now used for creating and maintaining users
- BI Server "outsources" all authentication, authorization to FMW11g
- BI Administration tool now used for subject area and row-level security, connection pool passwords only
- WLS LDAP Server can be "swapped out" for alternative directories (MS AD etc)

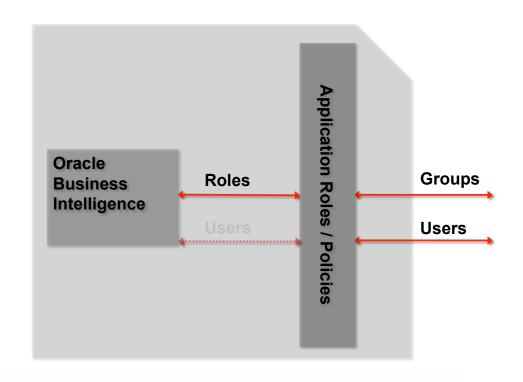


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Application Roles and Application Policies

- Application roles introduce an indirection between LDAP groups and BI groups
 - ▶ LDAP server provides users, groups
 - ▶ FMW11g provides application roles
 - Application roles are granted to LDAP users, groups
 - Permissions are assigned to application roles
- Breaks direct link between groups and roles
- Application roles can be exported between FMW11g environments
- All RPD, webcat permissions secured against application roles

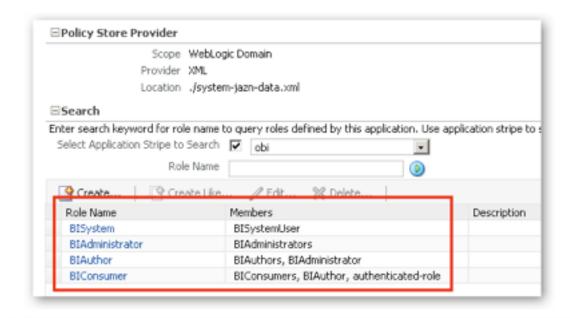


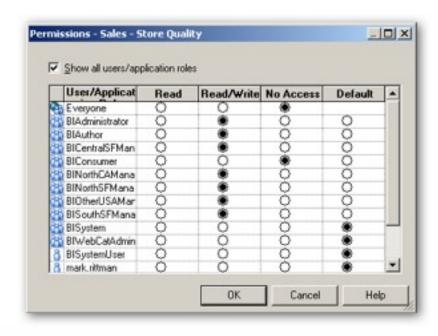
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Application Roles in Use

- Application Roles, Application Policies, and Role-LDAP Group mappings are defined using Fusion Middleware Control
- Oracle BI Administration, and Oracle Presentation Services administration page, are used for assigning permissions to these roles.





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Demonstration

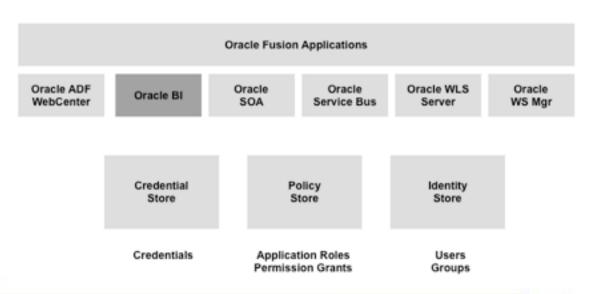
OBIEE 11g Users, Groups and Application Policies

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OBIEE Security Providers

- OBIEE 11g (through FMW11g) uses three Security Providers
 - Authentication Provider (defaults to WLS LDAP Server)
 - Policy Store Provider (defaults to WLS)
 - Credential Store Provider (defaults to WLS)
- Flexible security framework that allows easy linking to external security
- All enabled through Oracle Platform Security Services

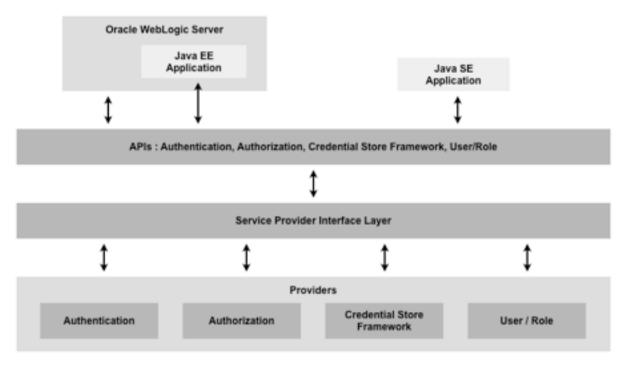


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Oracle Platform Security Services

- Standards-based, portable, integrated enterprise-grade security framework
- Underlying security platform that provides security to Fusion Middleware 11g
- Abstraction layer in the form of API that insulate applications from security infrastructure



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OPSS Key Concepts

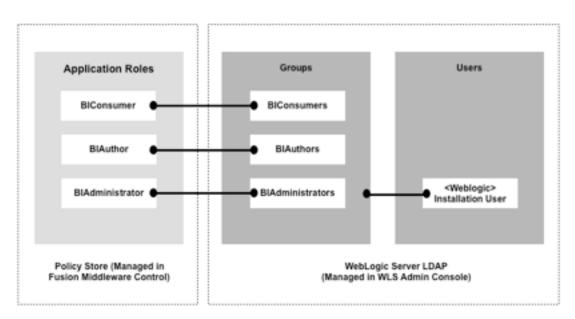
- Application Role
 - ▶ A defined job, role to which permissions are assigned
 - Example : Marketing Manager, WebCat Administrator
- Credential Store
 - A secure location for placing usernames, passwords required for inter-application authentication
- Application Policies and Permissions
 - Application Policies are collections of permissions assigned to roles
- Identity Store
 - ▶ LDAP Server, Database etc that stores users and groups
- Policy Store
 - ▶ Files, database etc that stores application roles and policies
- WLS Embedded LDAP Server
 - ▶ The built-in LDAP Server within WLS (restricted-use license)

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OBIEE 11gR1 Default Security Configuration

- OBIEE 11gR1 comes with a Default Security Configuration
 - WLS LDAP Server is the default Authentication Provider
 - WLS file-based policy and credential stores are used for Policy Store Provider and Credential Provider
- Default application roles and groups
- WLS admin user (weblogic) is default administrator
- Default configuration can be amended or extended as required
 - Create new roles
 - Plug-in external directory

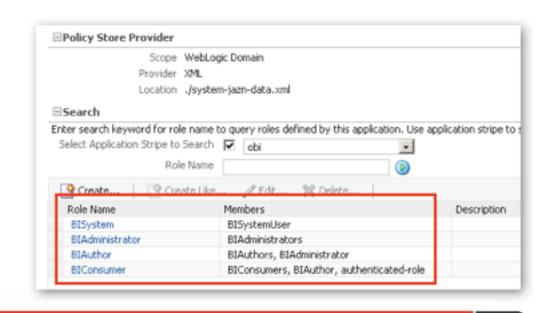


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Default Application Roles

- BIAdministrator (mapped to BIAdministrators LDAP group)
 - Can edit and create new RPDs, web catalog
 - Full control over all aspects of OBIEE
- BlAuthor (mapped to BlAuthors LDAP group)
 - ▶ Can create and amend Answers analyses, dashboards etc
 - Can create and amend BI Publisher reports etc
- BIConsumer (mapped to BIConsumers LDAP group)
 - Can run existing analyses, dashboards, reports

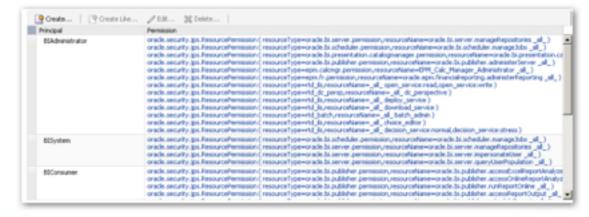


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Application Policies

- Polices are containers for permissions, made up of resource types and resource permissions, for example
 - resourceType=oracle.bi.server.permission
 - resourceName=oracle.bi.server.manageRepositories
- Used at high-level for OBIEE system components to provide admin rights
 - ▶ RPD and Webcat permissions provide granualar control
- Used more granularly for Java components (BIP etc)
- Granted to application roles, and both stored together in the policy store



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Granting Granular Presentation Server Privileges

- Whilst the policy store determines at high level whether web catalog can be accessed or edited, Presentation Services Administration page determines more granular application rights
 - Access to Answers
 - Create Action Types
 - Execute Direct SQL
 - Download Briefing Book
 - ▶ Edit Column Formulas
 - etc

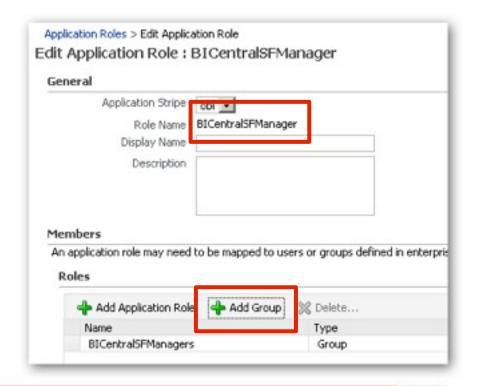


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Mapping Roles to LDAP Groups

- Roles are mapped to LDAP groups through role grants
 - ▶ Roles are granted to LDAP groups, or to users
 - ▶ Roles are then assigned permissions (policy store) and RPD/webcat privs
- Role assignment carried out through EM Fusion Middleware Control
- For clarity, create roles names as singular, groups as plural
 - ▶ BIConsumer : application role
 - ▶ BIConsumers : LDAP group

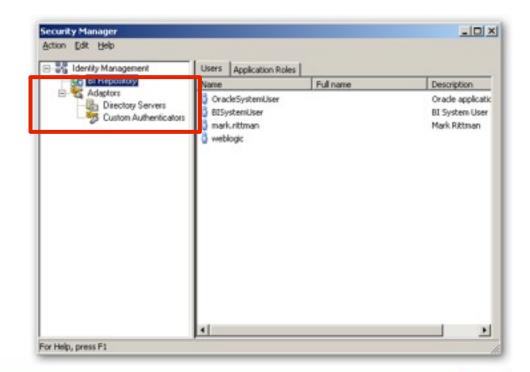


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Backwards-Compatibility with OBIEE 10g Security

- Application roles, use of the WLS LDAP Server, OPSS etc are all new with 11g
- Some things are still the same though as in OBIEE 10g
 - Init Blocks
 - External Authenticators
 - Custom Authenticators
 - Database Authentication
 - SA System Subject Area
 - RPD access control
 - Web Catalog access control
- FMW11g Upgrade Assistant will migrate RPD users, groups to WLS LDAP Server, and create corresponding mapped application roles



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Common OBIEE 11g Security Tasks

- 1. Adding new users to the LDAP server, adding to groups
- 2. Mapping groups to application roles
- 3. Creating and amending application roles, and assigning policies/permissions
- 4. Scoping RPD subject areas and row-level security to application roles
- 5. Integrating with external directories (MS Active Directory)
- 6. Managing Single Sign-On

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Creating New Users, Adding to Groups

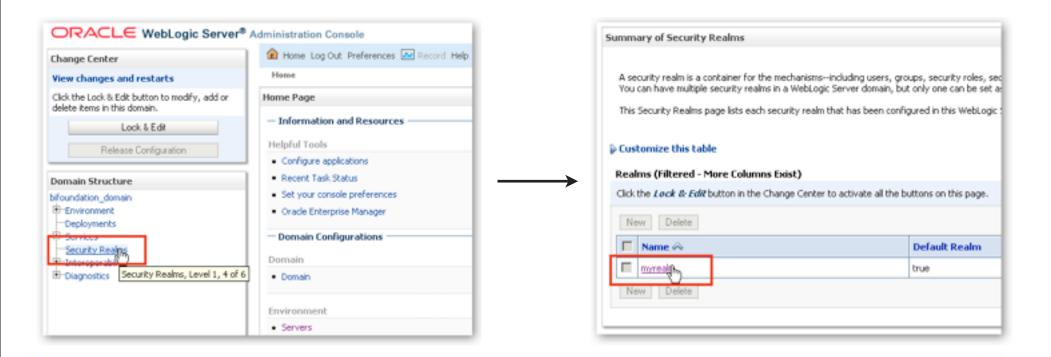
- For the embedded WLS LDAP Server, user and group maintenance is carried out through WLS Admin Server Console
- For alternative authentication providers, user and group administration is carried out using the provider's own administration screen
 - WLS Admin Server Console view becomes read-only

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Adding a New User Step 1: Select Security Realm

- Using WLS Admin Server Console, navigate to security realm
 - bifoundation_domain > Security Realms > myrealm
- Security Realms are containers for settings, only one can be active at one time

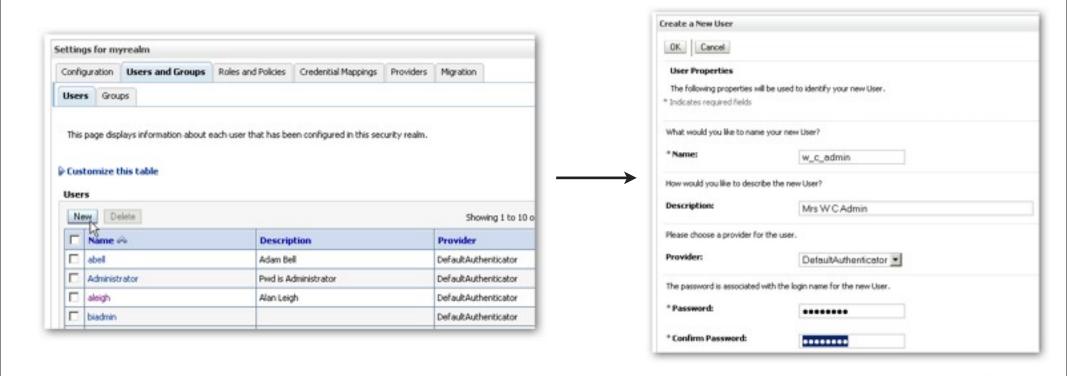


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Adding a New User Step 2 : Create User

- Press New and enter details for the new user
- User will appear immediately in BI Administration tool Security Manager

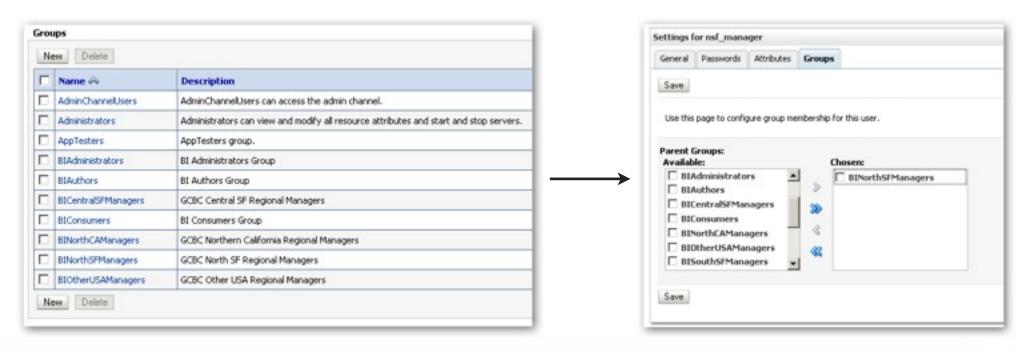


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Adding a New User Step 3: Assign to Groups

- Assign user to relevant LDAP groups
- These groups then have application roles granted to them using Fusion Middleware Control

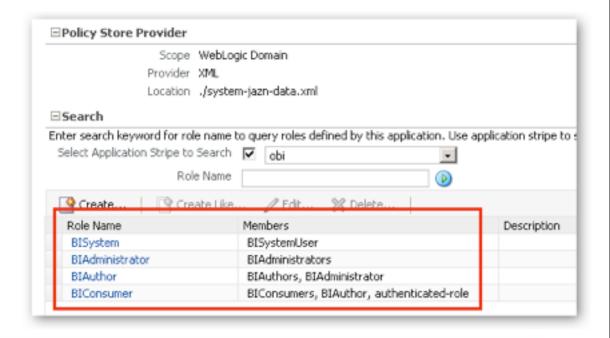


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Mapping Groups to Application Roles

- Mapping process is carried out using Fusion Middleware Control
- Roles and Polices, and role grants are held in the policy store
- Roles can be granted to users, but best practice is groups
- Roles can also be recursively granted to other roles

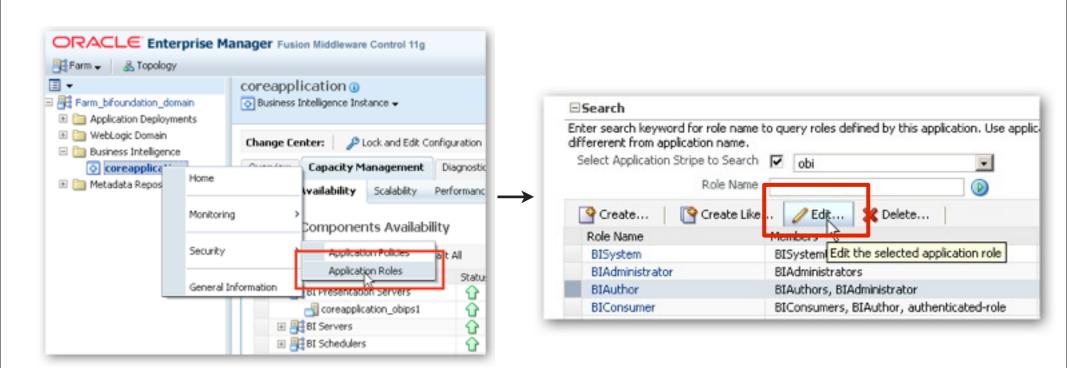


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Mapping Roles to Groups Step 1: Select Role for Editing

Right-click on Business Intelligence > coreapplication > Security, and select
 Application Roles

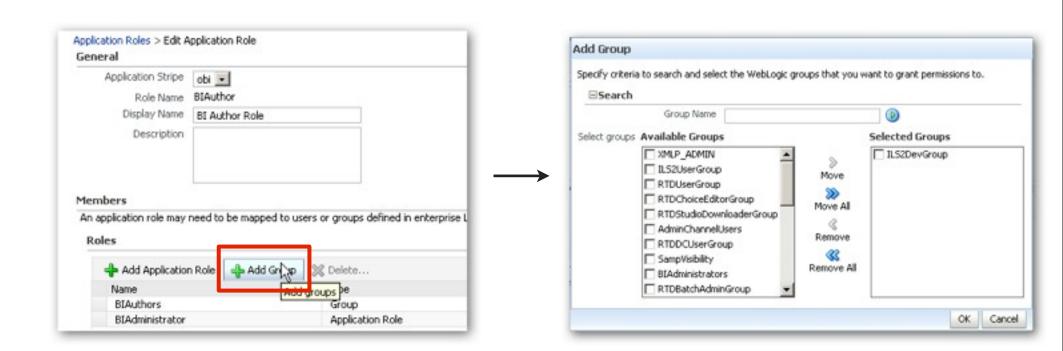


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Mapping Roles to Groups Step 2: Grant Role to Group

- Click Add Group to bring up the groups selector
- Select groups for which the role will be granted
- Restart BI Server after process, to reflect changes in BI Administration tool

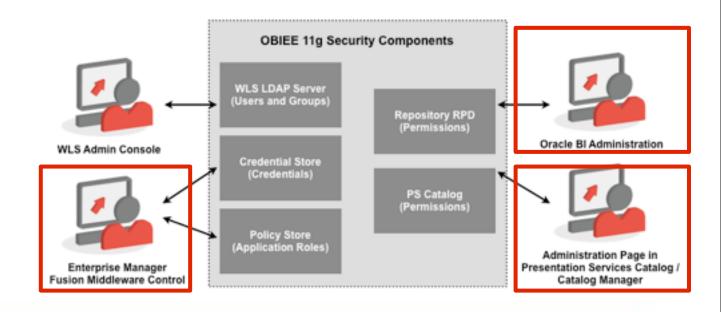


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Creating Application Roles and Assigning Policies

- Application roles are containers for permissions, and are assigned to users and groups
- Roles can be used just for data filtering, or can be assigned permissions
- Permissions are granted using Application Policies (FMW Control) and through various legacy OBIEE tools (BI Administration, Presentation Server Admin etc)

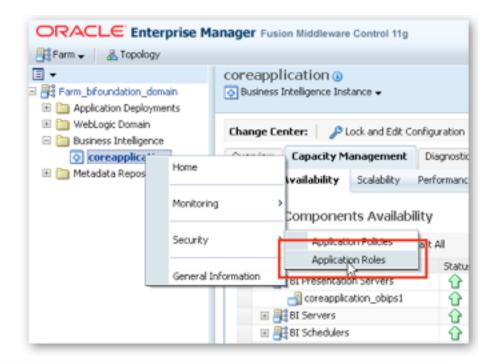


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Creating Application Roles Step 1 : Select Roles from Menu

Right-click on Business Intelligence > coreapplication > Security, and select
 Application Roles

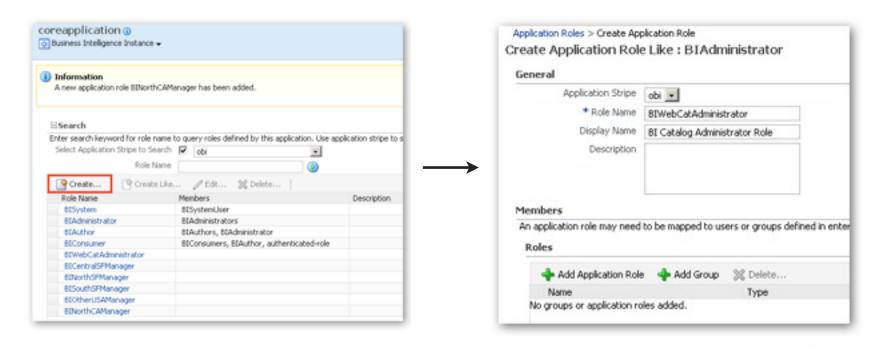


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Creating Application Roles Step 2: Create New Role

- Select Create... button just above list of existing roles, enter details for new role
- Use Create Like... button to create role with same grants (not policy) as existing role
- Perform initial mapping to LDAP groups, or grant role recursively to other roles

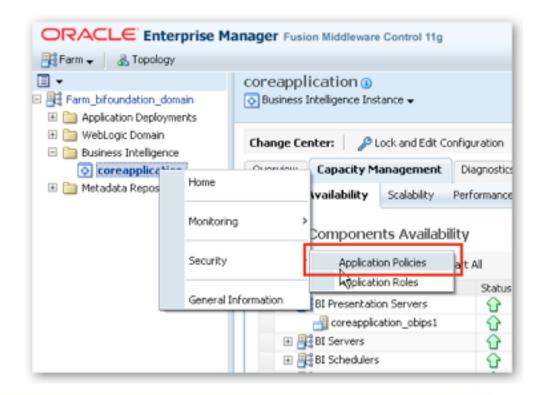


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Creating Application Roles Step 3 : Create Policy for Role

- If role is to be used to grant application privileges, then policy may be required
 - ▶ High-level for legacy OBIEE, detail-level for java components

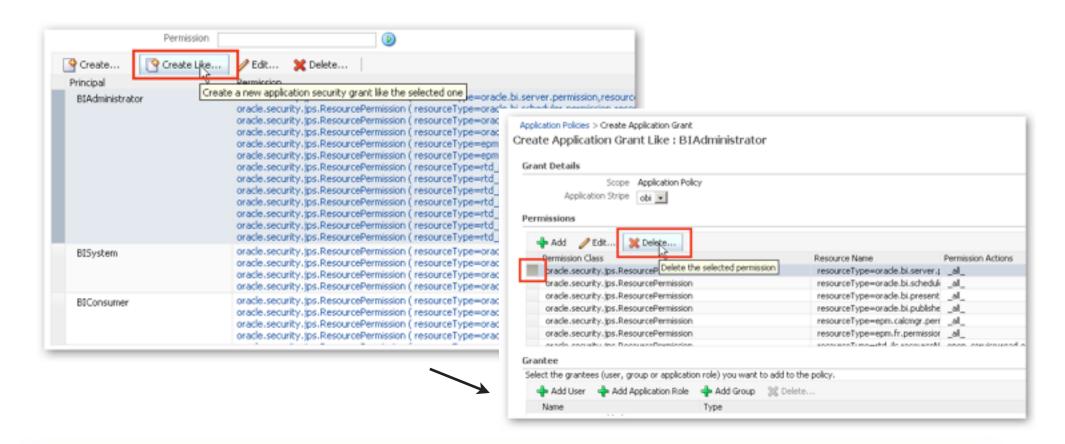


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Creating Application Roles Step 4 : Define Policy

Use Create Like... to base policy on another, deleting or adding as necessary



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Creating Application Roles Step 5 : Set OBIPS Privileges

- Policy store only sets high-level permissions for Presentation Server
 - Edit catalog, access catalog etc
- Individual component and feature privileges need to be set using PS Admin page



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Scoping RPD and Web Catalog using Application Roles

- Once application roles are configured, RPD and webcat elements can be scoped as with OBIEE 10g
- Set permissions on subject areas, and set row-level security
- Set permissions on web catalog objects
- Set privileges for Presentation Server functionality
- Set permissions on connection pools etc



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Connecting to Alternative Directories

- WLS LDAP Server is the default authenticator for OBIEE 11g (and FMW11g)
- Other directories and authentication providers can be used instead (or together)
 - Microsoft Active Directory
 - Oracle Internet Directory
 - Other LDAP servers
 - Database authentication
 - etc
- Connection is made through WLS and OPPS
 - Direct connection through RPD is still supported, but deprecated
- Only one directory (authentication provider) can be active at any one time, but weblogic/welcome1 superuser will keep working to log into WLS/EM (as long as it remains in WLS LDAP directory)



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Registering Active Directory Step 1: Select Security Realm

- Using WLS Admin Server Console, navigate to security realm
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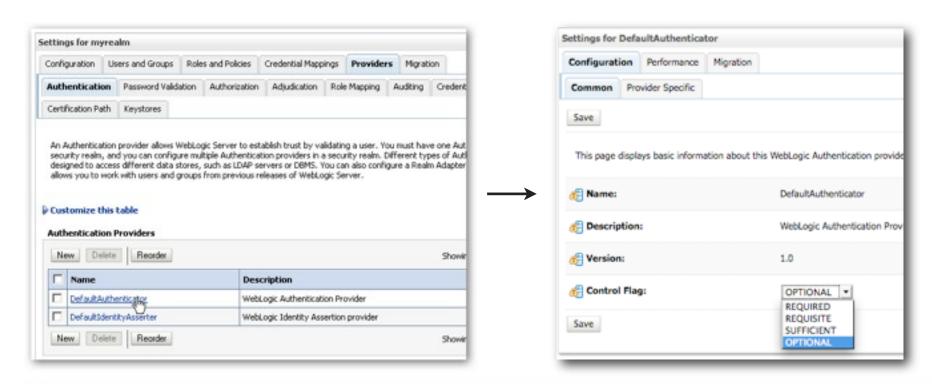


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Registering Active Directory Step 2: Amend Existing Provider

- Click on Providers > Authentication, then select DefaultAuthenticator
- Set Control Flag to Optional
 - Removes requirement for OPSS to authenticate through WLS LDAP

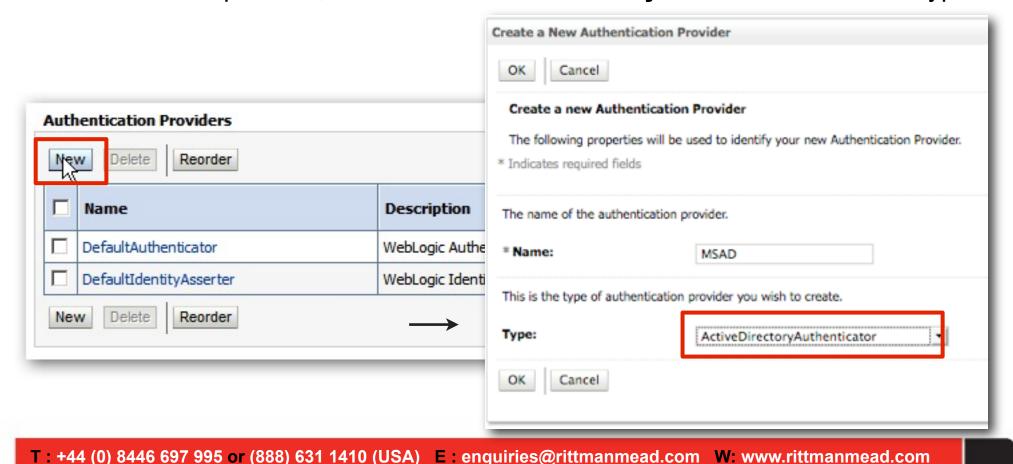


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Registering Active Directory Step 3: Create New Provider

- Select Providers tab, then press New
- Enter name for provider, and select ActiveDirectoryAuthenticator as the type

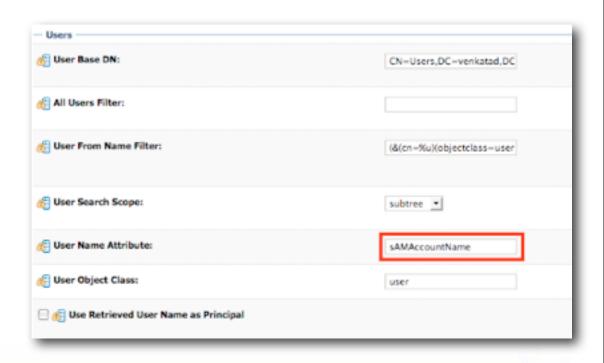


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Registering Active Directory Step 4: Enter Connection Details

- Select Configuration > Provider Specific
- Enter connection details for the Active Directory server
 - These will be different for each domain
 - See documentation, and your
 AD details, for correct settings
 - Ensure User Name Attribute is set to sAMAccountName



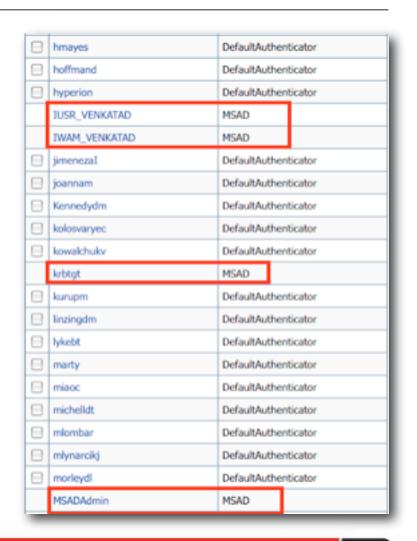
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Registering Active Directory Step 5: Check Users/Groups Appear

- Restart the WLS Admin Server
- Navigate back to myrealm > Users and Groups, and check that AD users now appear in the Users and Groups listing
 - If they do not, check your AD settings

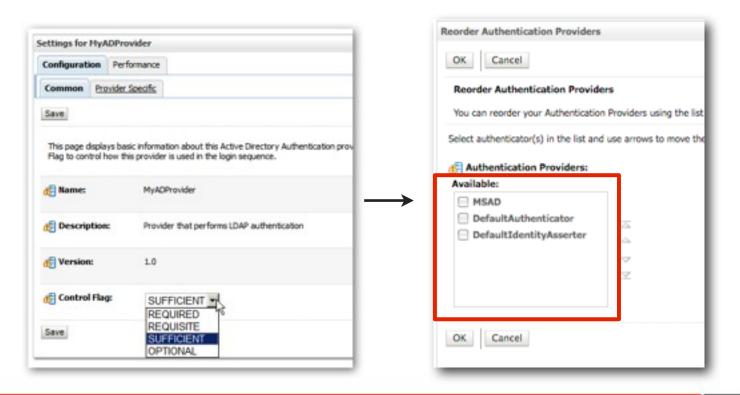


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Registering Active Directory Step 6: Set Provider Order

- Select Configuration > Common, and set Control Flag to Sufficient
 - ▶ Tells OPSS to authenticate against AD if possible, and allow in if OK
- Set provider order to search AD first

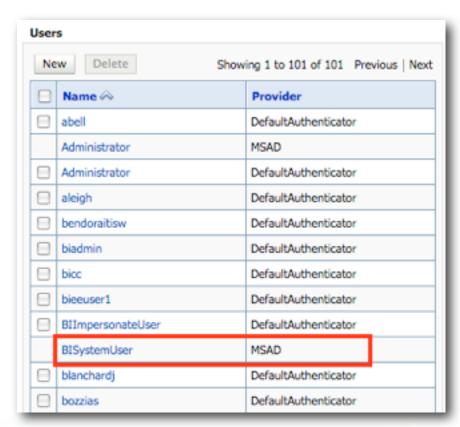


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Registering Active Directory Step 7: Recreate BISystem User

- From the Users view, delete the BISystemUser user from the default authenticator (WLS LDAP)
 - BISystemUser is used for running agents and other automated processes
- Then recreate it in Active Directory (you will use it in a moment)
- User the **Users** view to check it is now present in the AD directory

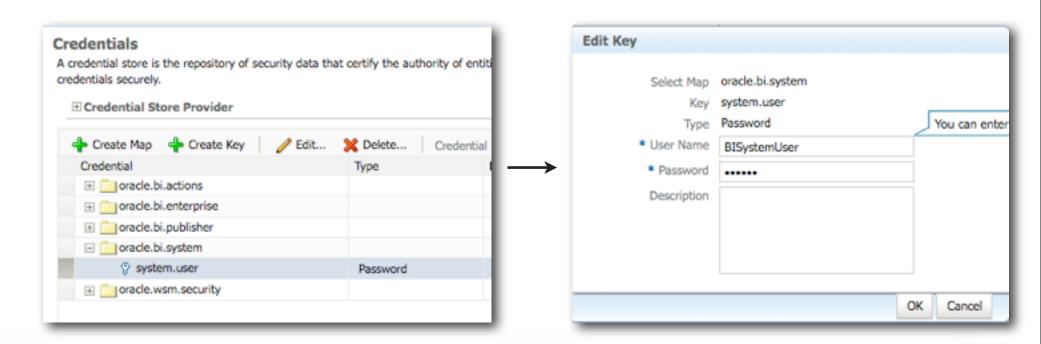


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Registering Active Directory Step 8 : Set Trusted User

- Using EM, grant the BISystemUser account the BISystem application role
- If you wish to use set a different password for the BISystemUser account, edit Enterprise Manager Credential Store entry and change the password
 - Also use this setting if you have change the account name from BISystemUser

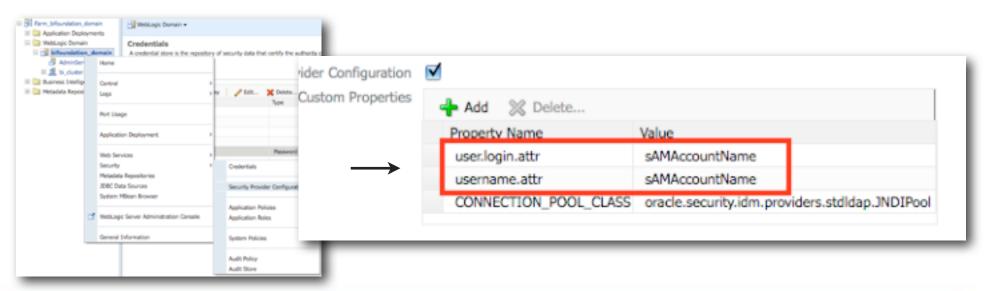


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Registering Active Directory Step 9 : Configure User Name Attrib.

- Required as AD uses a different attribute as the user name attribute
- From EM, open WebLogic Domain > bifoundation_domain, select
 Security > Security Provider Configuration
- Click on the Configure button of the Identity Store Provider and add the 2 entries
 - user.login.attr = sAMAccountName
 - username.attr = sAMAccountName

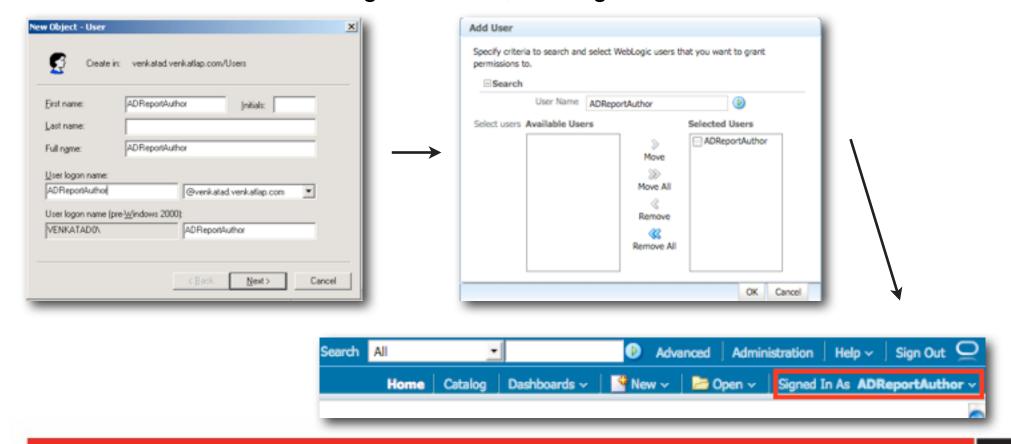


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Registering Active Directory Step 10: Create and Test User

- Create new user in AD, assign to the BlAuthor application role using EM
- Check that user has been granted role, and log into OBIEE to test

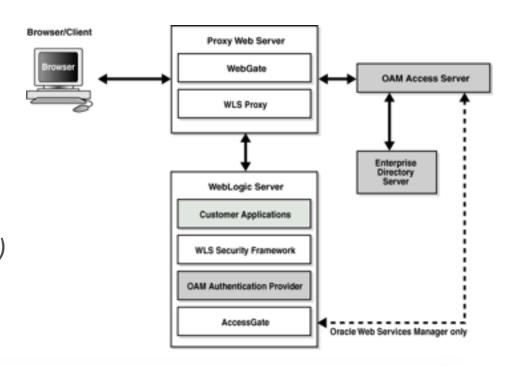


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Single Sign-On

- Recommended SSO solution is Oracle Access Manager
- SSO is performed through WebLogic Server and OAM
- Requires some setup at the WLS level
- After SSO is set up, OBIPS accepts incoming request as SSO authenticated
- OBIPS then connects to OBIS and uses the impersonation feature
- Full details are in Enabling SSO Authentication within Oracle® Fusion Middleware Security Guide for Oracle Business Intelligence Enterprise Edition 11g Release 1 (11.1.1)



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Summary

- Security in OBIEE 11g has significantly changed compared to 10g
- Identity Store is embedded LDAP server (WLS)
- Users available everywhere
- Application Roles available everywhere
- User Profile derived from LDAP server
- Users/Groups no longer defined in RPD
- Administrator and Administrators not hard-coded
- RPD protected by RPD Password
- Administrator user not used for Inter-Process Communication (component to component)
- Some aspects are still however the same as 10g (RPD scoping, Webcat scoping)
- Update Assistant from 10g will load RPD users into WLS LDAP Server
- Main user and development change is to start working with application roles

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