



FeneVision® Best Practice

Modify BI Report Permissions (BP0033)

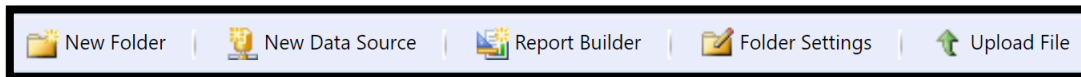
Introduction

Some customers do not want all FeneVision users to have access to all Business Intelligence (BI) reports. The reports in the management menu are often restricted, with particular attention paid to the reports displaying sales, cost, and margin.

Using

BI uses Windows groups for permissions (individual users can be used, but groups are recommended). Below are instructions on how to set up these reports to be more restrictive. Replace “SERVER” and “DOMAIN” as required.

Open <http://SERVER/Reports> and see a menu item ‘Folder Settings’.

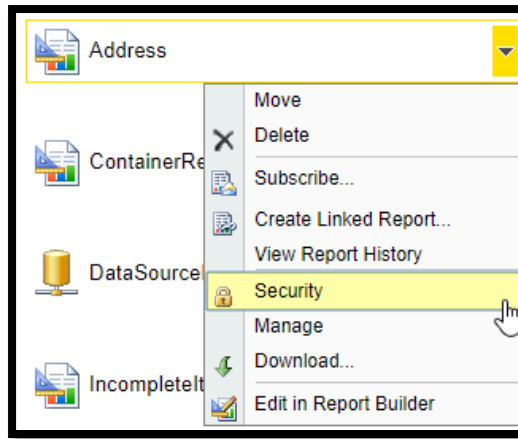


After clicking that button, the groups (and users) already given permission to view all BI reports are displayed.

<input type="checkbox"/>	Group or User ↑	Role(s)	Role(s)
<input type="checkbox"/>	Edit Fenevision Security Group	Browser	Browser

At this time, every user in the “FeneVision Security Group” has permission to run all BI reports. The following steps will give certain users permission to view reports. Note that each customer may use a differently named Group.

1. Create new Windows security groups (via Windows AD groups, not within reporting services).
 - a. Keep the current ‘FeneVision Security Group’ with everyone in it. This is still required for SQL permissions and general CORE reporting.
 - b. Create as many other groups as needed. Typically, there exists a FeneVision ‘Admins Group’ and a FeneVision ‘Users Group’.
2. Assign users to those groups.
 - a. ‘Admins Group’ – Users who should be able to see all the BI reports.
 - b. ‘Users Group’ – Users who should be able to see *only* production reports (e.g., no sales reporting).
3. Navigate to <http://SERVER/Reports> and add ‘Admins Group’ to the highest level of security (‘Home’).
 - a. ‘Folder Settings’ >> ‘Security’ >> ‘New Role Assignment’
 - i. The domain should be used (e.g., “DOMAIN\FeneVision Admins”).
 - b. Give this group ‘Browser’ rights.
 - c. These permissions will cascade down to all the reports. the ‘Users Group’ is not added here.
4. Return to the ‘Home’ screen and click on the ‘FeneVision BI’ folder. Contained within are all the individual BI reports.
5. At this point, the ‘Users Group’ will still have permissions to run all these reports because the users are also a part of the ‘FeneVision Security Group’.
6. Return to the ‘FeneVision BI’ folder.
7. Complete the following steps for each report for which ‘Users Group’ should have permissions (this is the most tedious part of the process).
 - a. Select the arrow drop down for the report and choose ‘Security’.



- b. Select 'Edit Security Item'.
- c. Add the 'Users Group' with 'Browser' rights.
 - i. *Note: Sub-reports will need enabled as well.*
8. Remove the permissions for 'FeneVision Security Group' group from the 'FeneVision BI' folder.
 - a. Access 'Folder Settings' (in the BI folder) >> 'Security' >> 'Edit Item Security'
 - i. This will detach the BI folder's permissions from the parent, 'Home'.
 - b. Select 'FeneVision Security Group' and then click 'Delete'.

Testing

It is imperative to evaluate. Select a user from 'Users Group' and verify the person can see every report that he or she is required to see. Also, verify that they cannot see any report that they do not have permission to see.