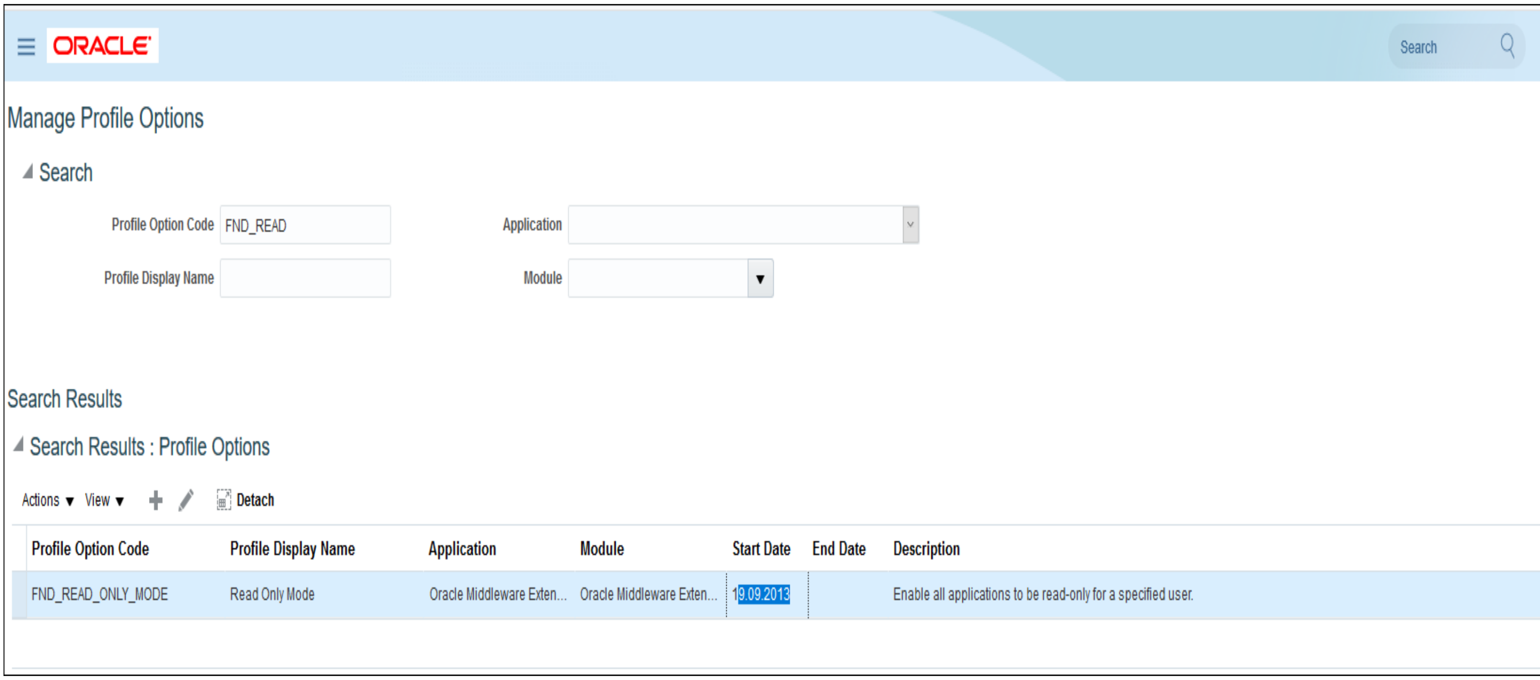
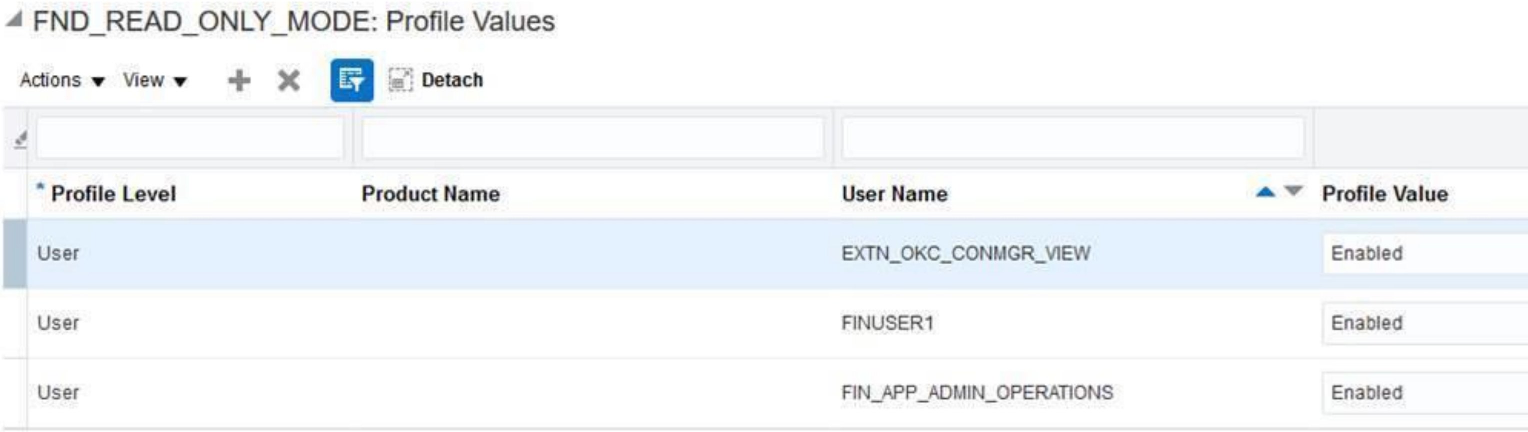
How To Access Fusion Setup Pages In Read Only Mode

Setup to be done

1. Navigate to Setup and Maintenance > Task > Search> "Manage Administrator Profile Values" task

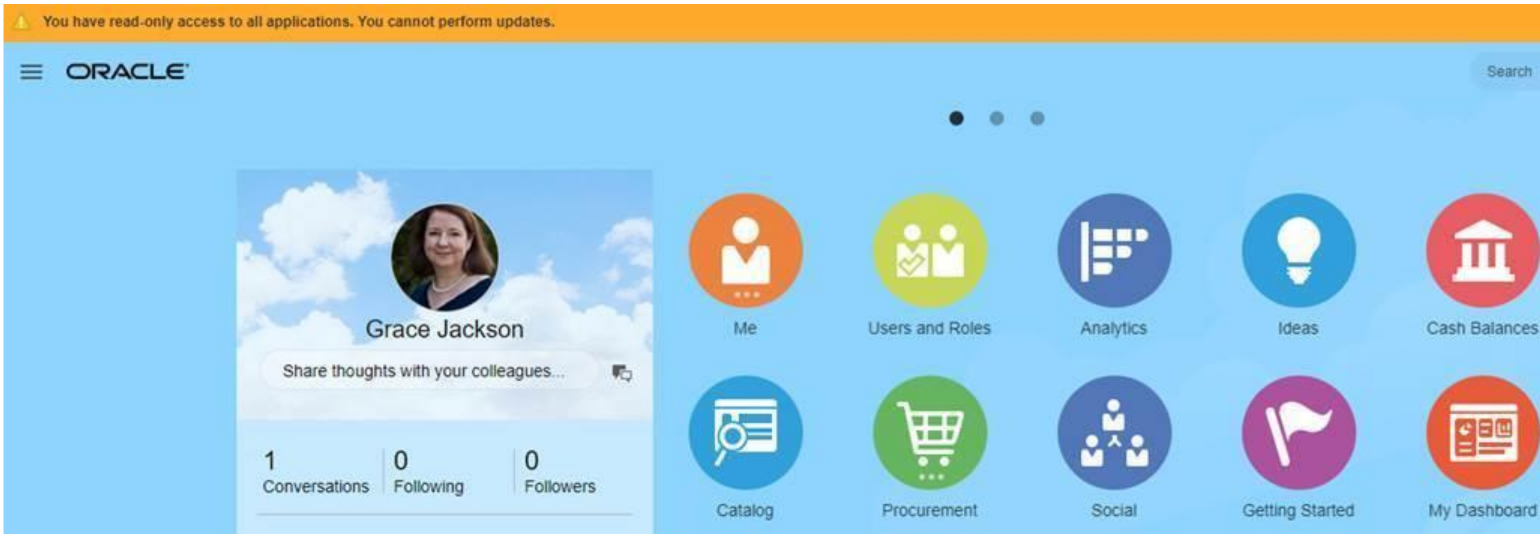


2. Enable profile option ‘FND_READ_ONLY_MODE’ at user level



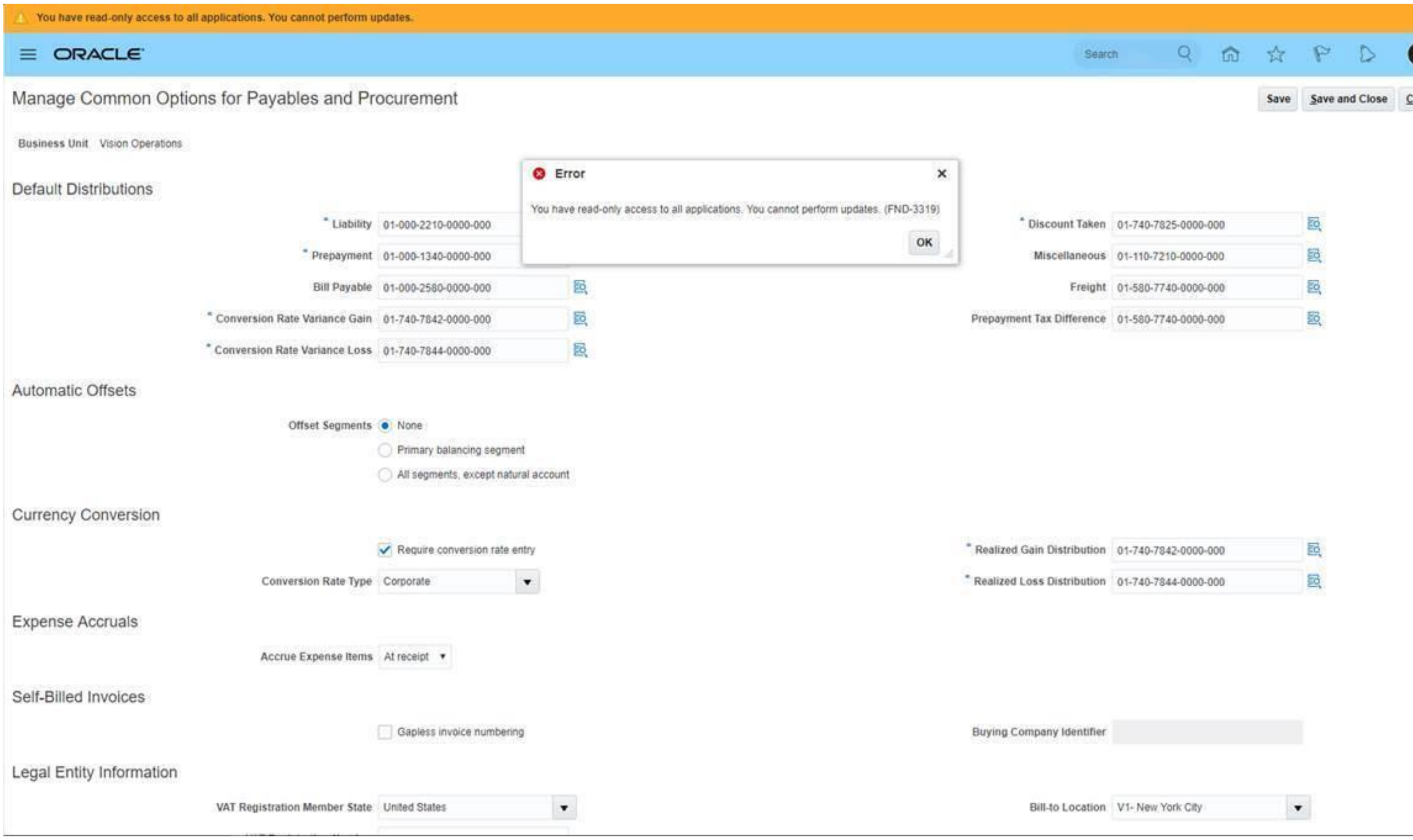
<u>How it Works</u>

1. When the user with read only access logs into the environment there shall be a red band displayed above the global menu in all the pages user navigates. The band displays a message that the user has read only access to the application and cannot make any updates.



2. When user navigates to the setup pages and as soon as the pages loads there is a message stating that user has ready only access ("You have read-only access to all applications. You cannot perform updates. (FND-3319)") and cannot make any updates.

If user edits the data and saves the data same error message is displayed again.



For customers looking for read only access to the Payables application, so far we had supported read only access to only the transaction pages (invoice/payment pages) using read only duty roles. There was no such provision to access the setup pages in read only mode. Now users can access the setups pages in read only mode by enabling the profile option.

When this profile option is enabled at a user level it will grant read only access to the setup pages in the application.

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How to create a Read Only Project Accountant role to just view the Project Costs in Fusion PPM ?

Solution

To view project costs in a read-only mode, here's what needs to be done:

1. Create a custom role and grant the following functional privileges:

• Manage Project Cost Activities

• Manage Project Expenditure Item

• View Project Expenditure Item Borrowed and Lent Distribution Lines

• View Project Expenditure Item Cost Distribution Lines

• View Project Labor Cost

2. Grant the following data security policy to this custom role:

• Data Resource: Business Unit

• Data Set: Select by instance set

• Condition Name: Access the business units for which the user is explicitly authorized

• Actions: Manage Project Expenditure Item

3. Assign this role to the user who you want to have read-only access to view project costs.

4. Grant data access to this user to the relevant business units for which you want the data to be viewed using the Manage Data Access for Users setup task.

The above user can now navigate to the Manage Project Costs page and view project costs but can't take any actions/perform adjustments on them.

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How to create read only role to view project costs?

Solution

To view project costs in a read-only mode, here's what needs to be done:

1. Create a custom role and grant the following functional privileges:

- Manage Project Cost Activities
- Manage Project Expenditure Item
- View Project Expenditure Item Borrowed and Lent Distribution Lines
- View Project Expenditure Item Cost Distribution Lines
- View Project Labor Cost

2. Grant the following data security policy to this custom role:

- Data Resource: Business Unit
- Data Set: Select by instance set
- Condition Name: Access the business units for which the user is explicitly authorized
- Actions: Manage Project Expenditure Item

3. Assign this role to the user who you want to have read-only access to view project costs.

4. Grant data access to this user to the relevant business units for which you want the data to be viewed using the Manage Data Access for Users setup task.

The above user can now navigate to the Manage Project Costs page and view project costs but can't take any actions/perform adjustments on them.

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The customer created View Only Custom Role and after giving to the users the view only privileges, they are still able to update and save customer details.

Solution

In Oracle Fusion Receivables there is no possibility to achieve the same. For this functionality the following Enhancement Requests have been opened:

ENH 22727557 - VIEW ONLY ROLE FOR AR > BILLING > MANAGE CUSTOMERS

****

How to Create Read-Only / View Only Custom Role for Transactions & Receipts ?

Solution

To create a role to grant only view privileges for Transactions and Receipts:

I.

1. Functional Security Policies:

ORA_AR_RECEIVABLE_INQUIRY_DUTY

XLA_REVIEW_SUBLEDGER_JOURNAL_ENTRY_PRIV

2. Data Security Policies:

> Business Unit:

Data Set: Select by instance set

Condition Name: Access the business units for which the user is explicitly authorized

Actions Enabled:

Manage Receivables Activities

Manage Receivables Activity data

Manage Receivables Receipts

Manage Receivables Transactions

View Receivables Activities

> SetID Set:

Data Set: Select by instance set

Condition Name: Access the application reference data sets for which the user is explicitly authorized

Actions Enabled:

Manage Customer Account Relationship

Manage Customer Account Site

Manage Customer Account Site Use

Manage Trading Community Salesperson Setup

View Customer Account Relationship

View Customer Account Site

View Customer Account Site Use

View Trading Community Salesperson Setup

> Trading Community Customer Account

Data Set: All values

Actions Enabled:

Read

View Customer Account

> Trading Community Customer Account Site

Data Set: All values

Actions Enabled:

Read

View Customer Account Site

> Trading Community Customer Account Site Use

Data Set: All value

Actions Enabled:

Read

View Customer Account Site Use

3. Save and close

II.

Add the new role to the user along with the Employee role (ORA_PER_EMPLOYEE_ABSTRACT)

III.

Go to Task: Setup and Maintenance > Manage Data Access For Users

Grant the Business Unit access to the user for the custom role along with Reference Data Set.

IV.

Go to Scheduled Processes

1. Run Ess Job: Send Pending LDAP Requests
2. Run Ess Job: Import User and Role Application Security Data
3. Run Ess Job: Retrieve Latest LDAP Changes
4. Sign out and Sign in again to the application.

Oracle Inventory Management Inventory Management View Only Role

The first step in the process is to create a custom job role for Inventory Inquiry. In order to create a new job role, you must navigate to Oracle Security Console. To access Oracle Security Console, navigate to the main menu navigator and select ‘Security Console’ under ‘Tools.’

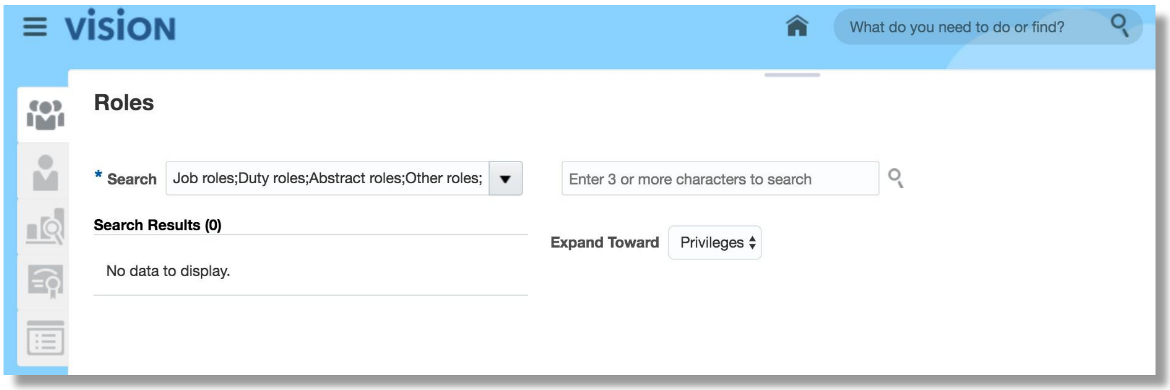


Figure 1 Security Console

Click the ‘Create Role’ button to create a new job role.

You need to complete the basic information when defining a new job role. Enter the Role Name, Role Code, Role Category, and Description. The Role Category Name is SCM – Job Roles. In the example, the role name ‘Inventory View Only Job Role’ has been entered as the role name. The role name should be intuitive and reflect the access provided to the user by assigning the job role.

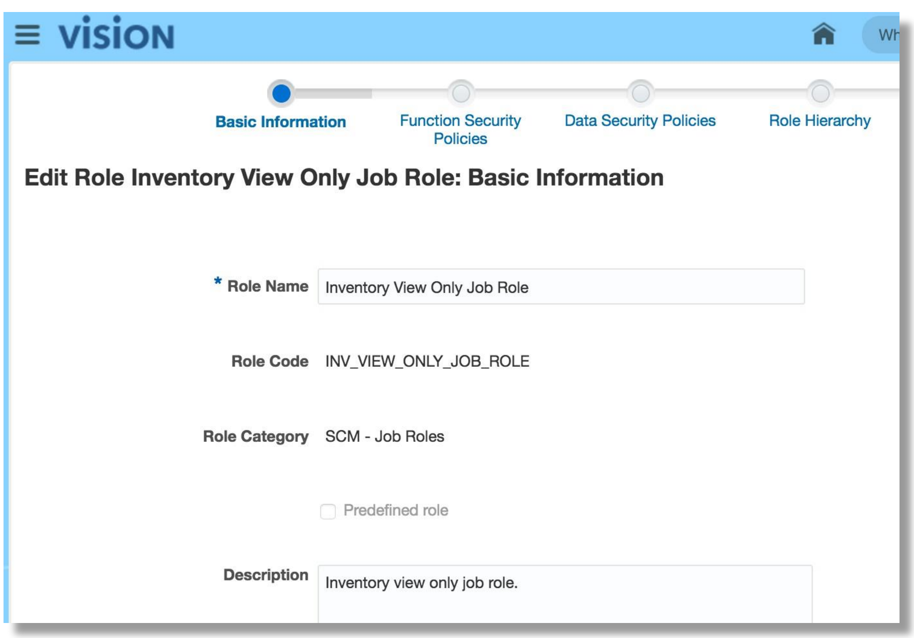


Figure 2 Create Job Role

The next step is to assign the newly create job role to the appropriate users.

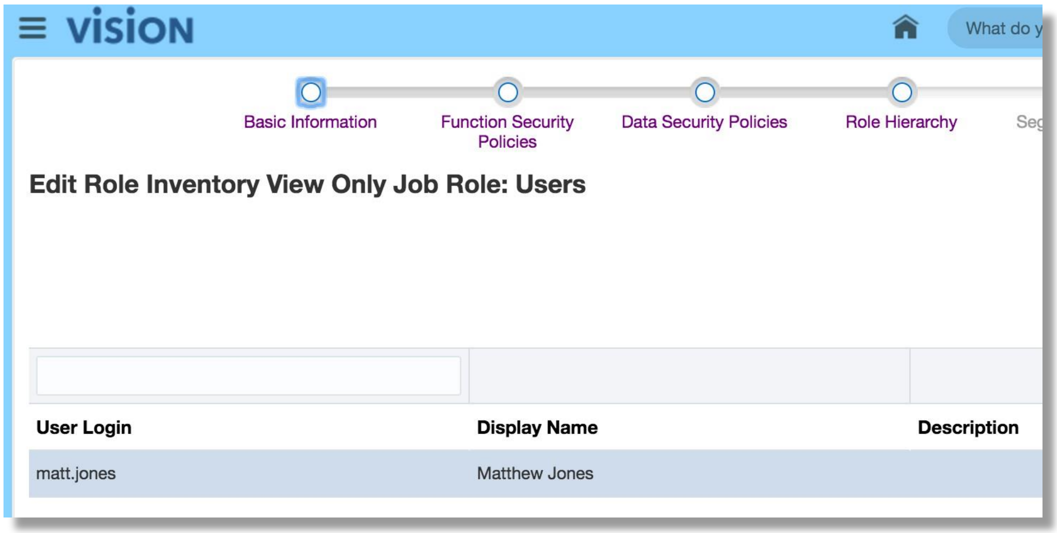


Figure 3 Assign Job Role to User

Create Inventory View Only Duty Role

Once the job role has been created successfully, the next step in the process is to create a new duty role. The duty role is created in Oracle Security Console.

You need to complete the basic information when defining a new duty role. Enter the Role Name, Role Code, Role Category, and Description. The Role Category is SCM – Duty Roles. In the example, the role name ‘Inventory View Only Duty Role’ has been entered as the role name. The role name should be intuitive and reflect the access provided to the user by assigning the job role.

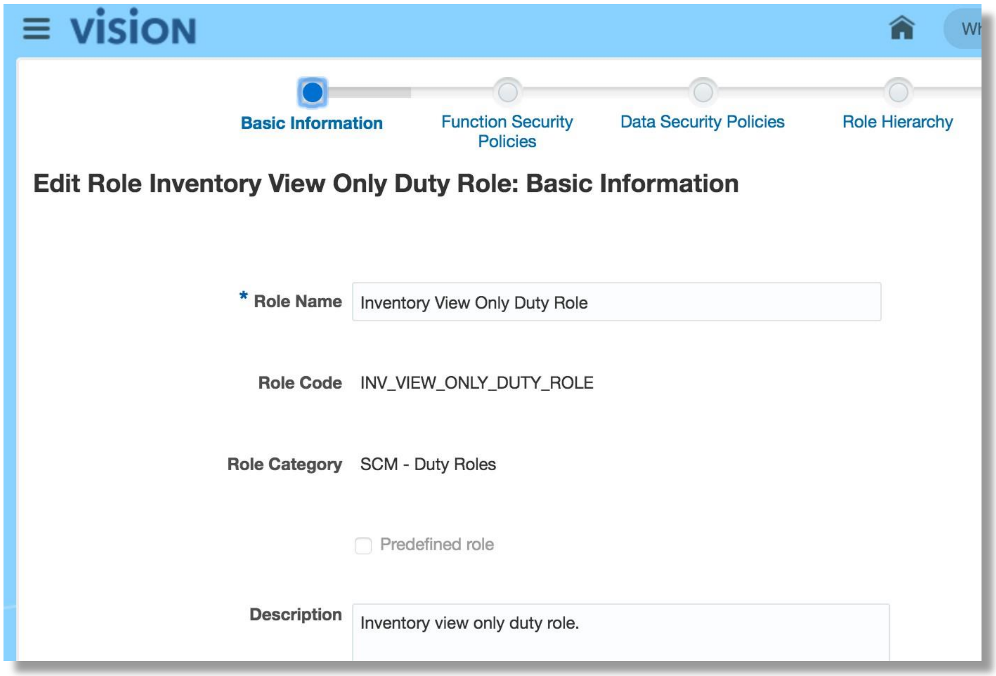


Figure 4 Create Duty Role

In this worked example, three privileges will be assigned to the duty role.

1. Manage On-Hand Quantity – This privilege will provide access to the Manage Item Quantities page.
2. Monitor Inventory Work Area – This privilege will provide access to the Inventory Management work area.
3. Review Completed Inventory Transaction – This privilege will provide access to the Review Completed Transactions page.

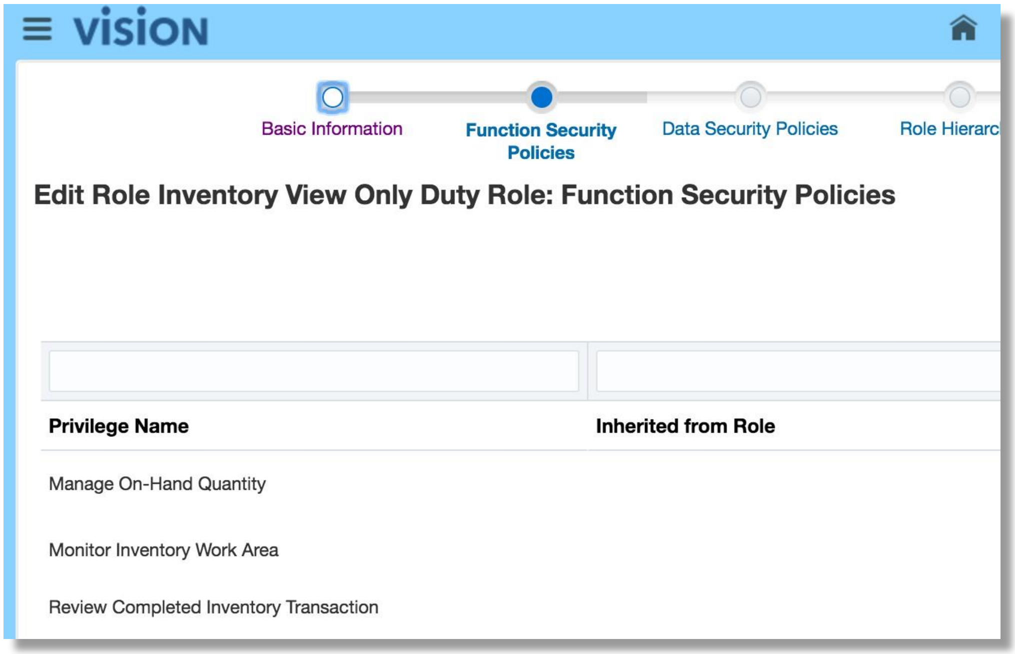


Figure 5 Create Function Security Policy

The next step is to create the data security policy. Fill in the following fields below.

- Policy Name – User-defined name
- Database Resource – Inventory Organization
- Data Set – Select by key
- ORGANIZATION_ID – Enter organization id associated with the inventory organization
- Actions – Manage On-Hand Quantity

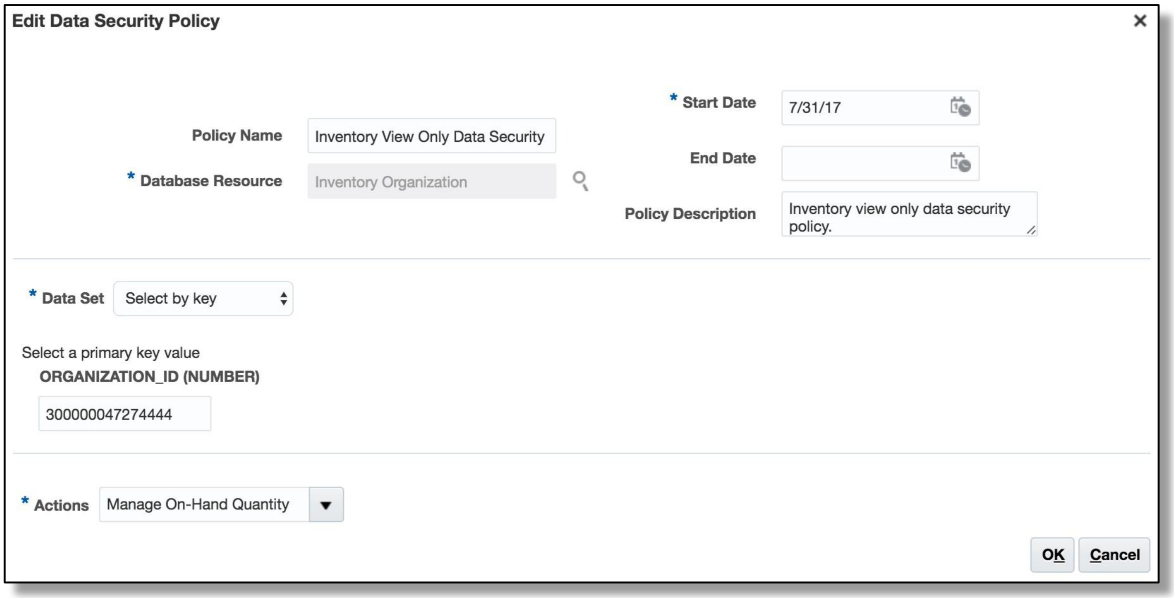


Figure 6 Data Security Policy

Complete Role Hierarchy by ensuring the duty role is assigned to the job role.

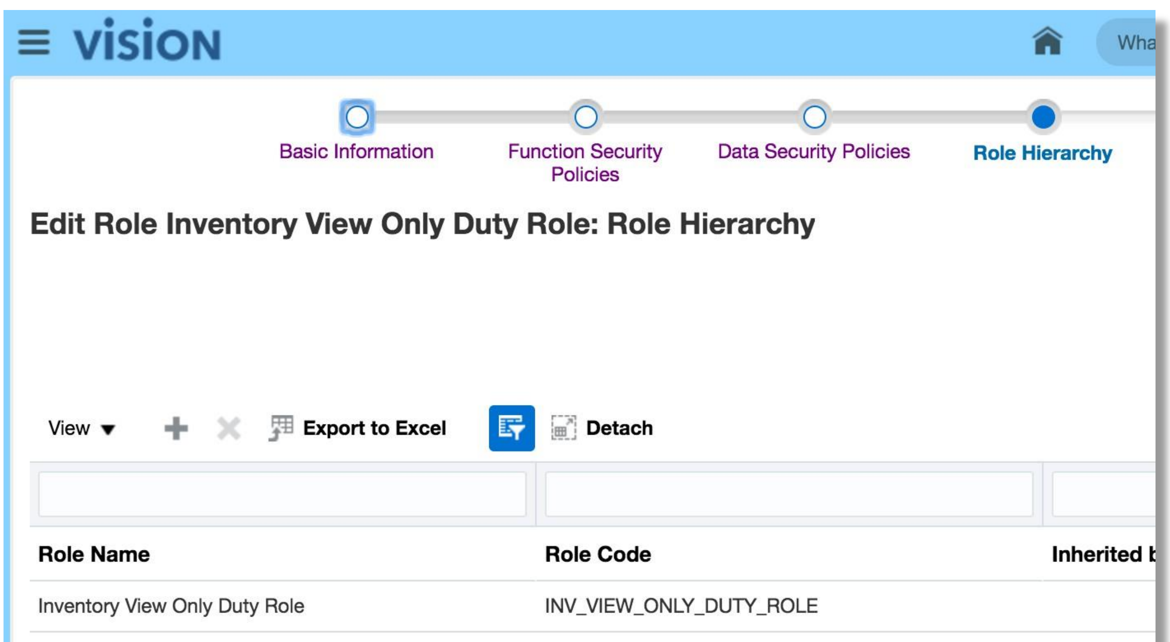


Figure 7 Role Hierarchy

Navigate to the last step ‘Summary and Impact Report’ and click the ‘Save and Close’ button.

Validate View Only Access

The last step in the process is to validate the changes in the Inventory work area. Login to Inventory Management with the user assigned the view only job role. Navigate to the Inventory work area. The Manage Item Quantities page is the default page for the Inventory work area. Open the task drawer and you will see two tasks Review Completed Transactions and Review Consumption Advice Exceptions. The Review Consumption Advice Exceptions page shares the same entitlement as the Review Completed Transactions page.

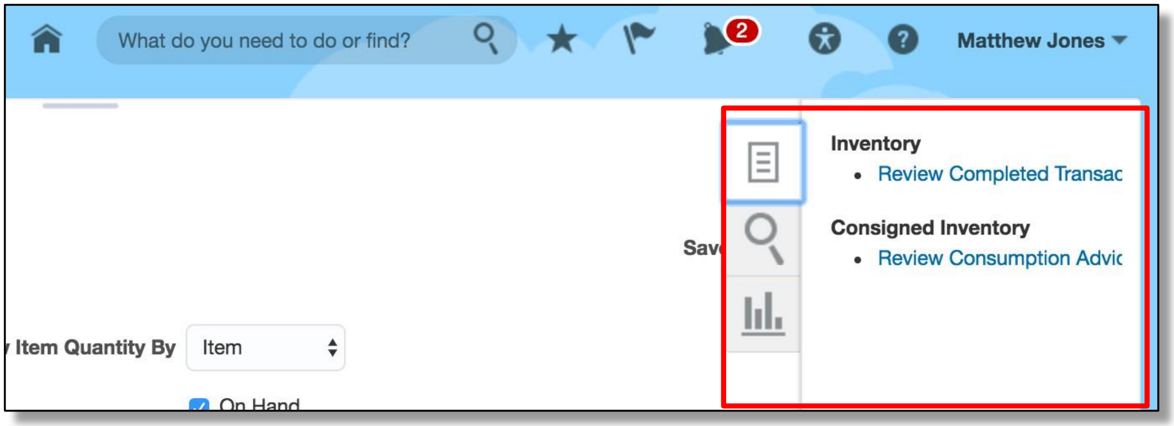


Figure 8 View Changes

PROCESS COMPLETE

EL Expression to make Read Only Field For Employee Role ?

We wanted to read only field for employee role

While employee are resigning we want that the user/ employee should be able read only Date of resignation field while Line manager and human resources specialist should be able to edit the field

We have used this el expression by it is making read only for Line Manager and Human resources specialist too
#{securityContext.userInRole['ORA_PER_EMPLOYEE_ABSTRACT']}

Solution

1. Customer would like to make resignation date field read only for employee.
2. Add below EL expression for read only attribute.
 "#{(pageFlowScope.ResignationFlag eq 'Y' and pageFlowScope.SameUserLoggedInFlag eq 'Y')}
3. Save and Apply the changes .
4. In the resignation page for employee the field became read only. Submit the transaction.
5. Logged in as the approver (HR/LM) and the field is editable for the approvers.

Need to create a custom role for an AP clerk that needs to see purchase orders when running a report but not have access to the PO UI?

Solution

The new buyer roles should only have the following function security (privileges and duty roles). Please keep the data security policies you have assigned and remove roles not in this list from the custom buyer role.

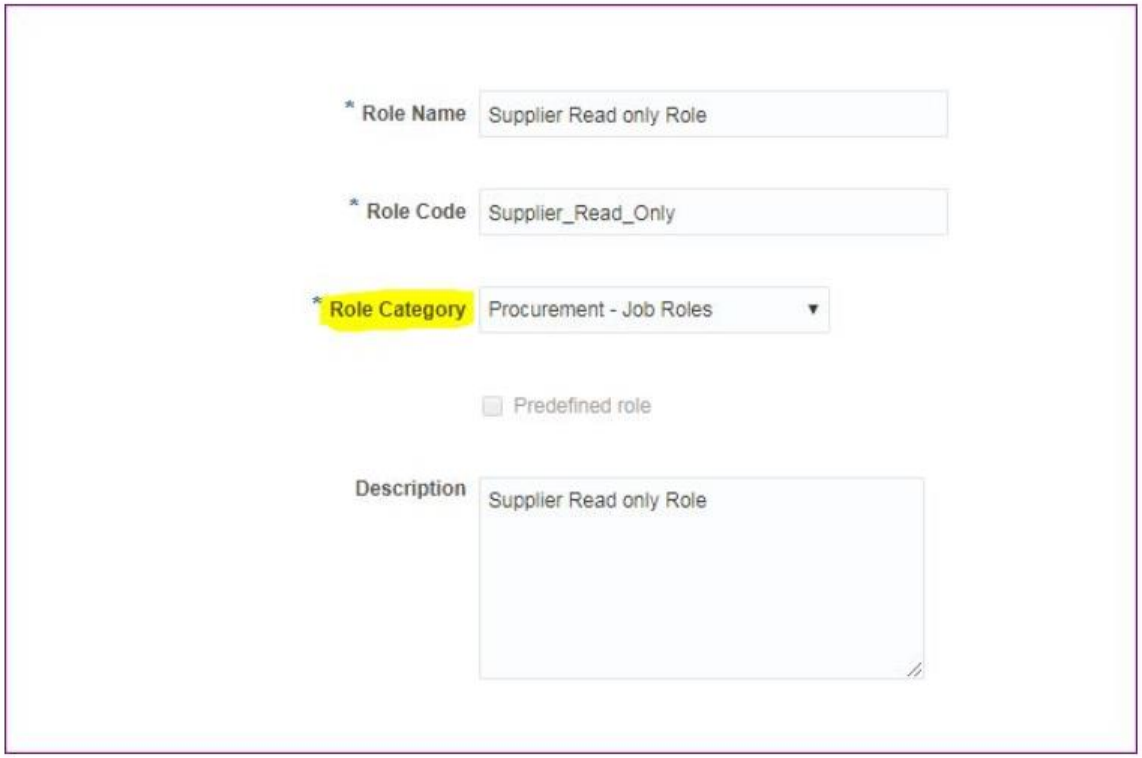
Purchase Order Inquiry Duty
Purchase Order Transaction Analysis Duty
Implemented Change Order Transaction Analysis Duty
Pending Change Order Transaction Analysis Duty
Purchase Requisitions Transaction Analysis Duty
Business Intelligence Applications Worker
Transactional Business Intelligence Worker
Item Inquiry Duty
Supplier Profile Inquiry Duty
Payables Invoice Inquiry Duty

Please include the following privileges assigned to the buyer role:
View Purchase Agreement Work Area
View Purchase Order Work Area

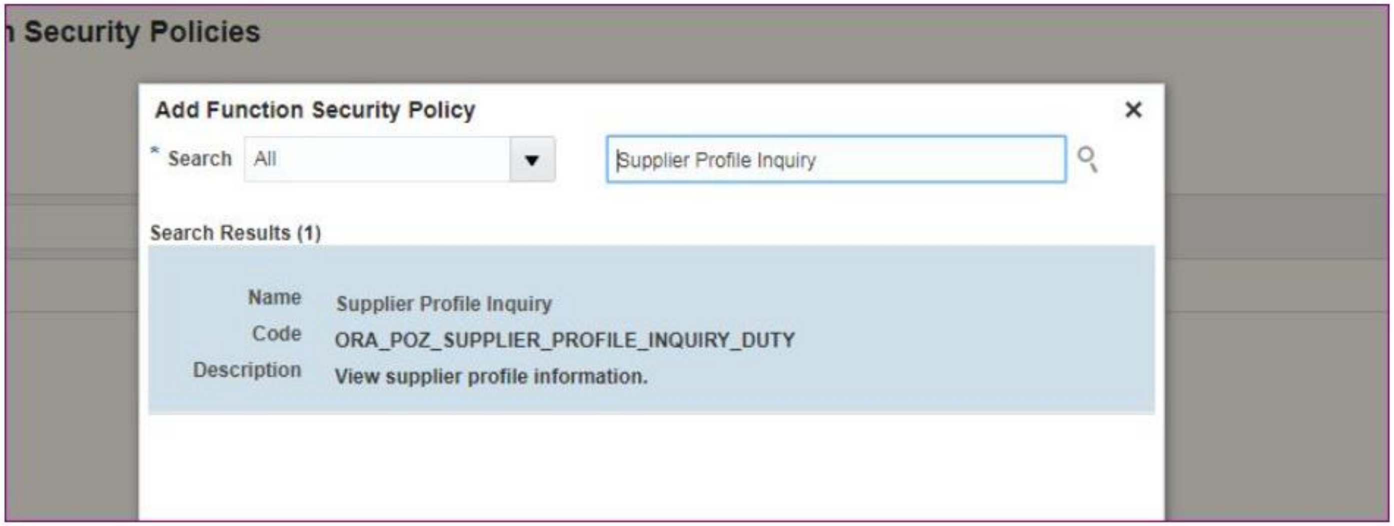
PRC:POZ How To Create A Supplier Read Only Role In Release 12 And Later Releases?

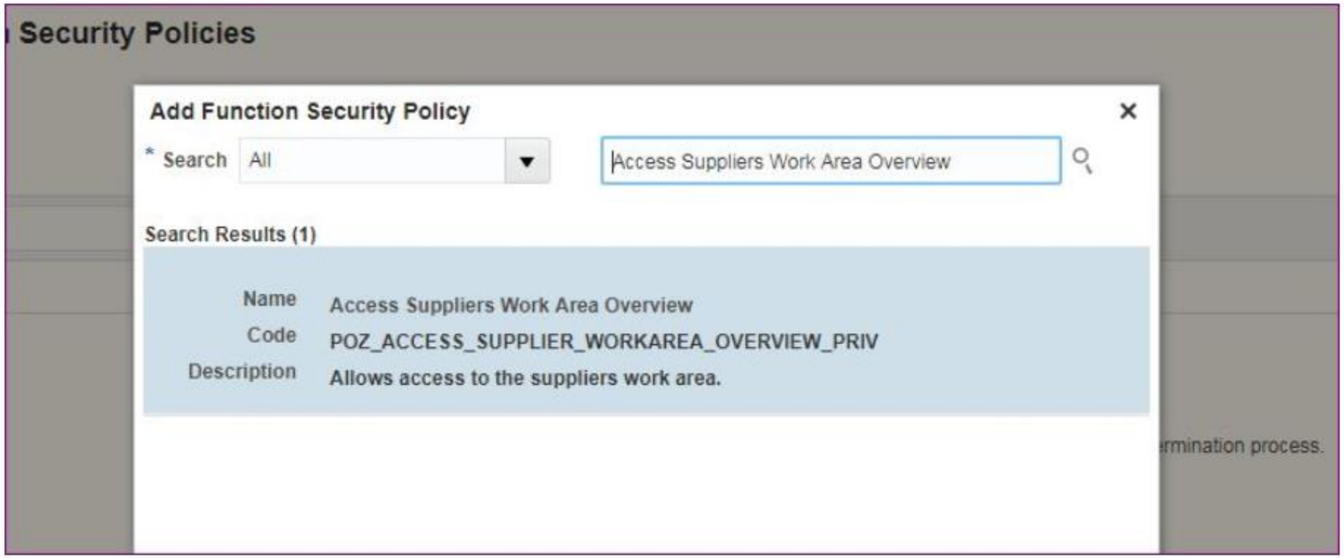
Steps in creating a custom role

1. From Security console -> Create role



2. **Add the required functional security policies.**
    1. **Supplier Profile Inquiry**
    2. **Access Suppliers Work Area overview**





3. Create and add the required data security polices(Not a mandatory step)

Policy Name	Po	Data Resource	Privilege	Condition
SIQ		Supplier Personally Identifiable Information	Read;	

4.Add users

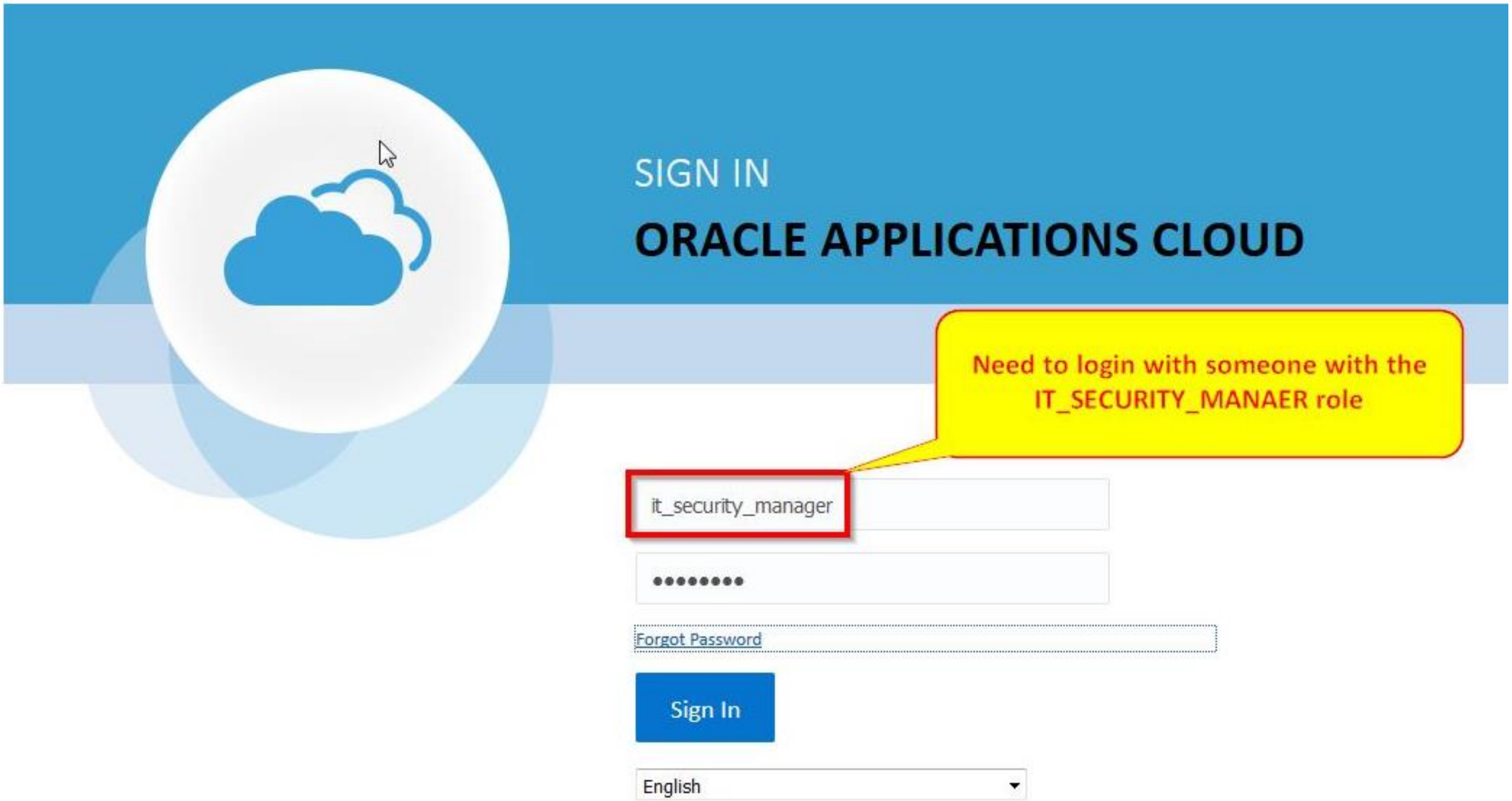
5. Review and submit

Run Retrieve Latest LDAP Changes

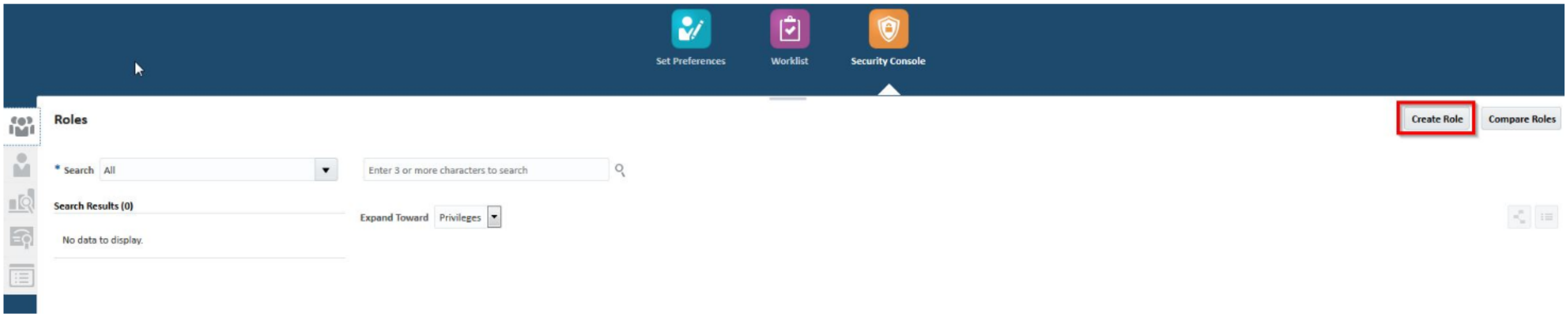
Login as the assigned user to see the supplier workarea

How To Create A Custom Fixed Asset Read Only Role in Release 12 and onward?

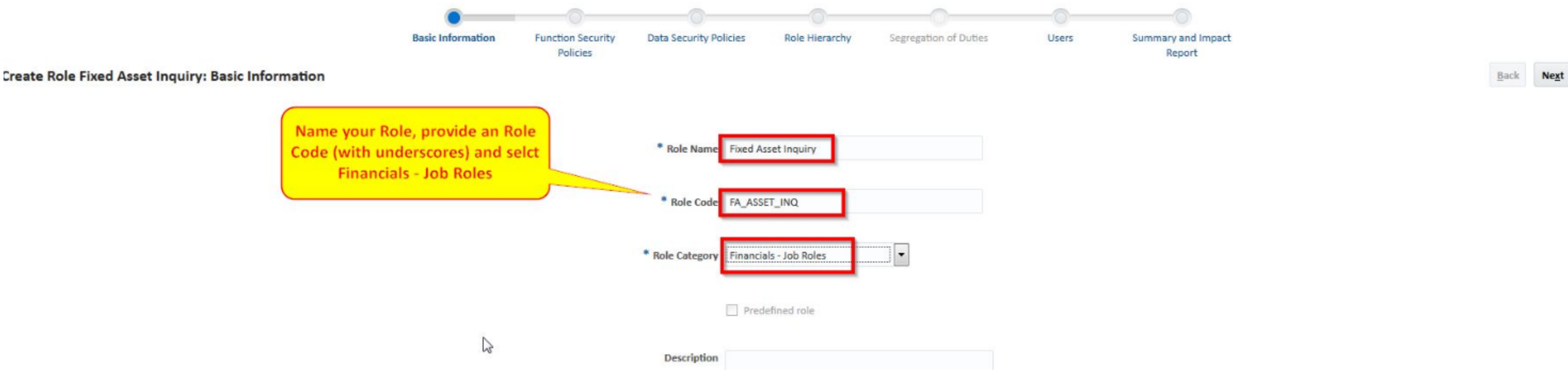
1. Login to the Application with the **IT_SECURITY_MANAGER** privilege



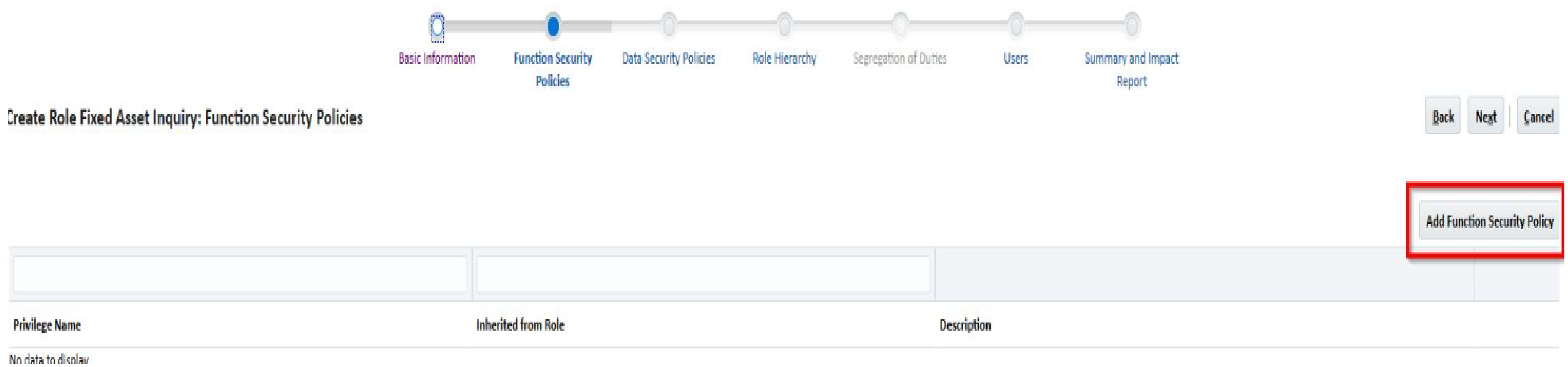
2. Click on the **Tools** - **Security Console**
3. Click on **Create Role**.



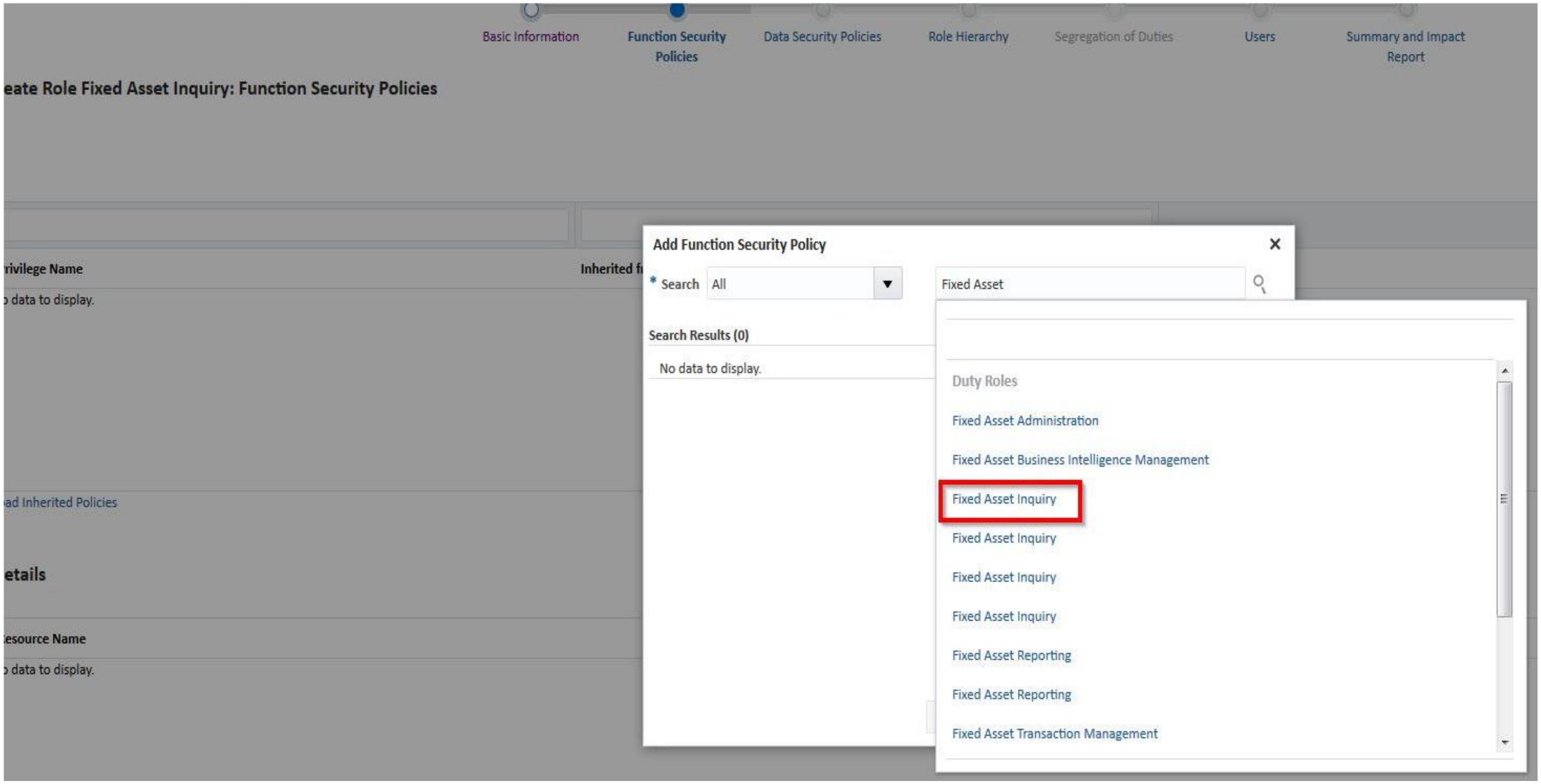
4. Name the **Role**, set the **Role Code** (with underscore values) and select the **Role Category** of Financials - Job Roles and click **NEXT**.

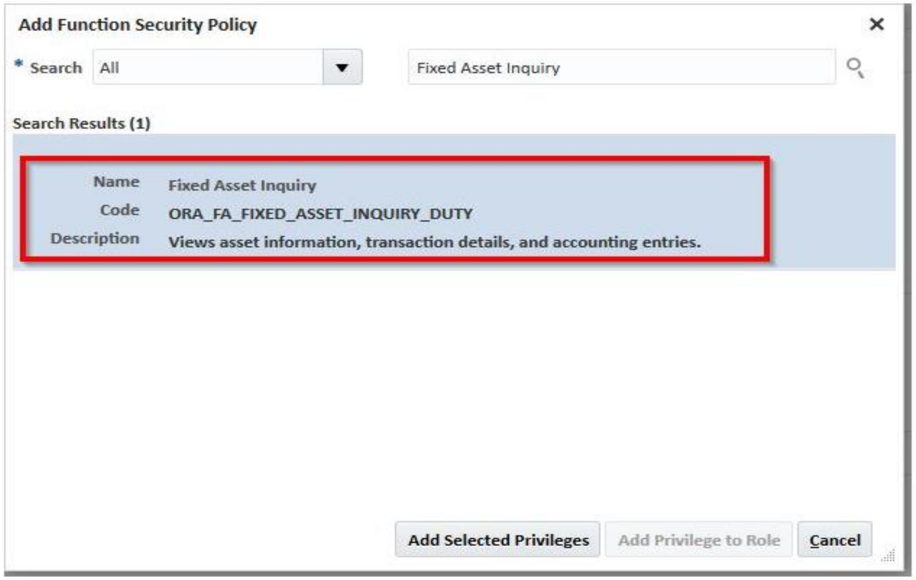


5. Click on **Add Function Security Policy**

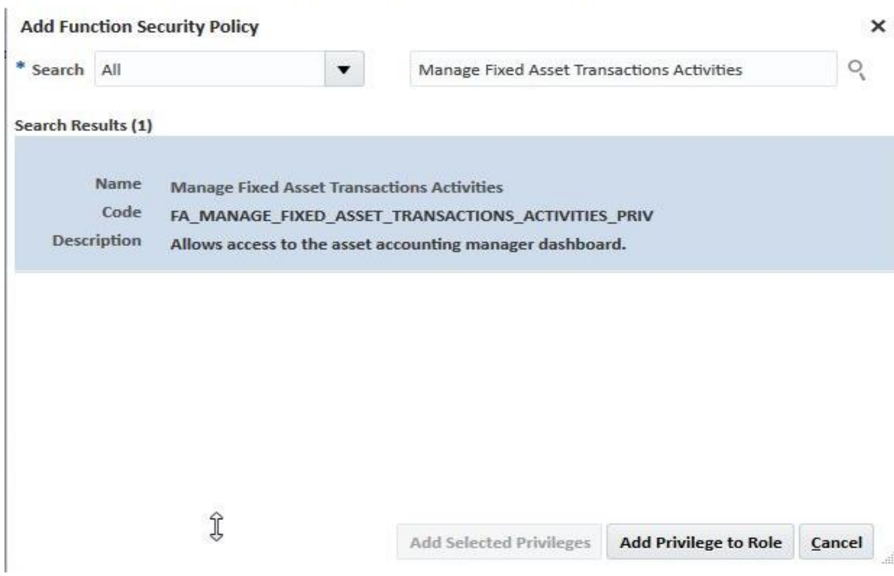


6. Look for the **Fixed Asset Inquiry Duty Role**. There may be a number of them, but you need to make sure that you select the one that only shows Fixed Asset Inquiry as shown below:





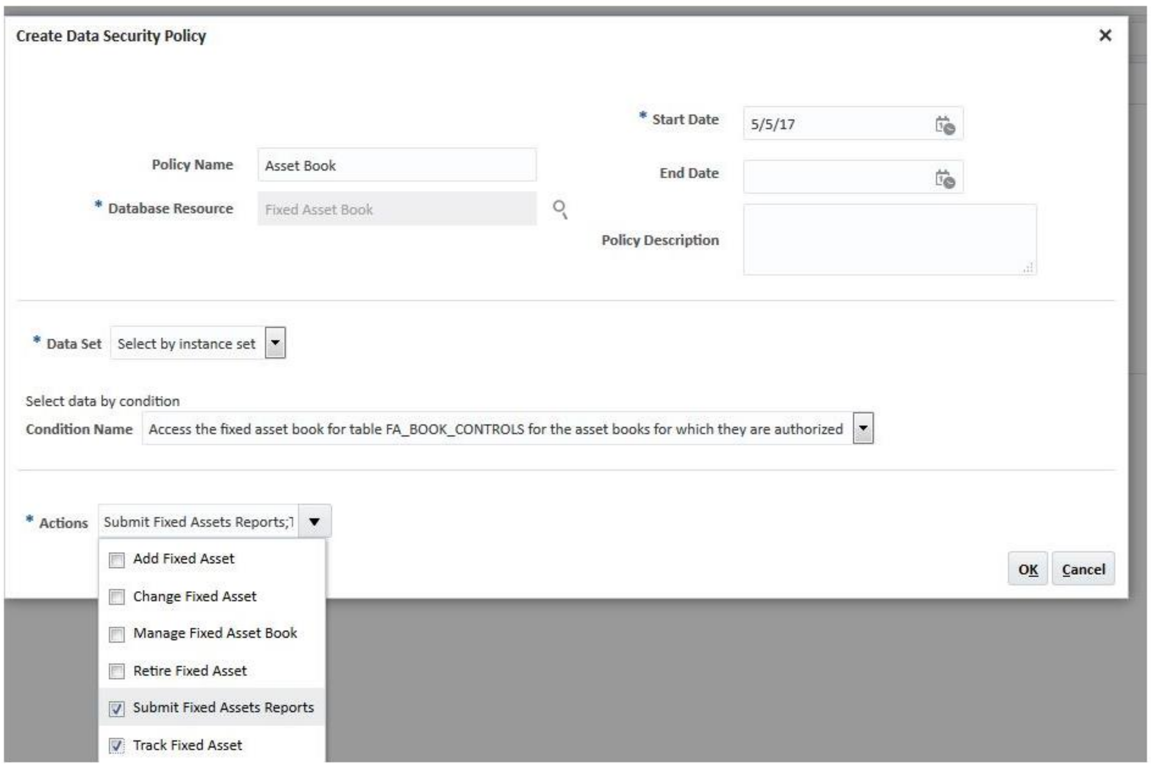
7. Click on **Add Selected Privileges**
8. Then search for the **Manage Fixed Asset Transactions Activities** and click **Add Privilege to Role** then Cancel.



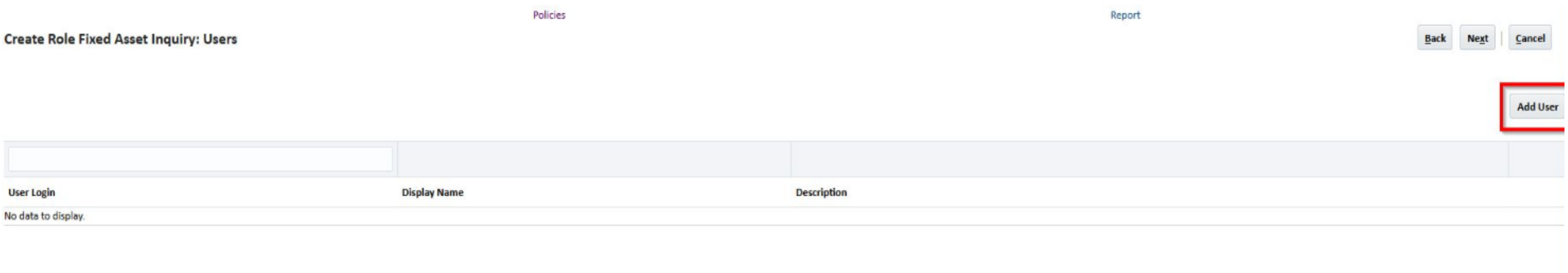
9. The next screen shows you what you added.

10. In the **Data Security Policies** form, click on **Create Data Security Policy.**

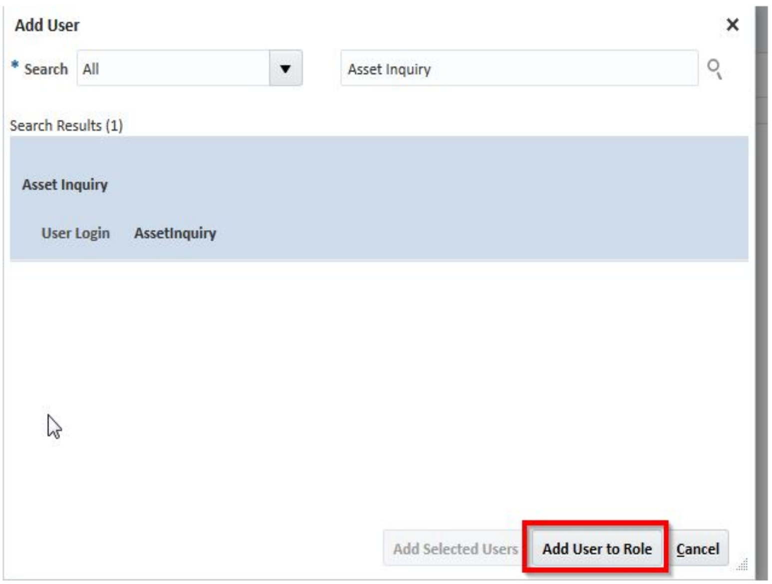
11. Fill in the fields as shown below.



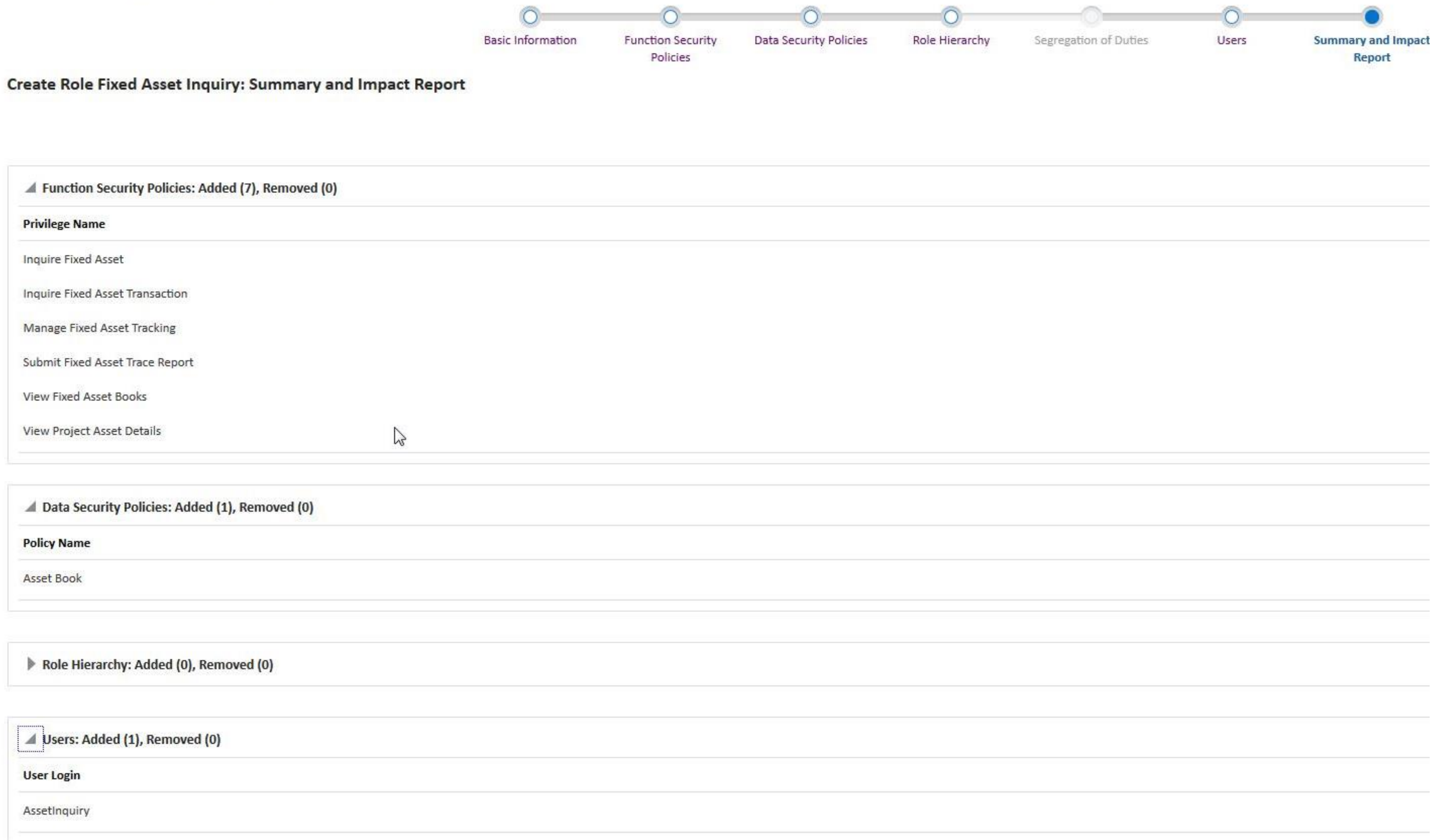
12. Then when you get to the form to add user, click on **Add User.**



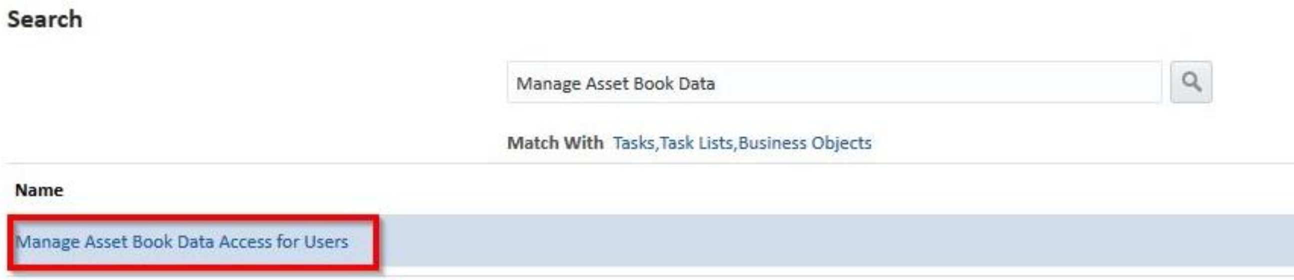
13. Search for the User you would like to add this role to.



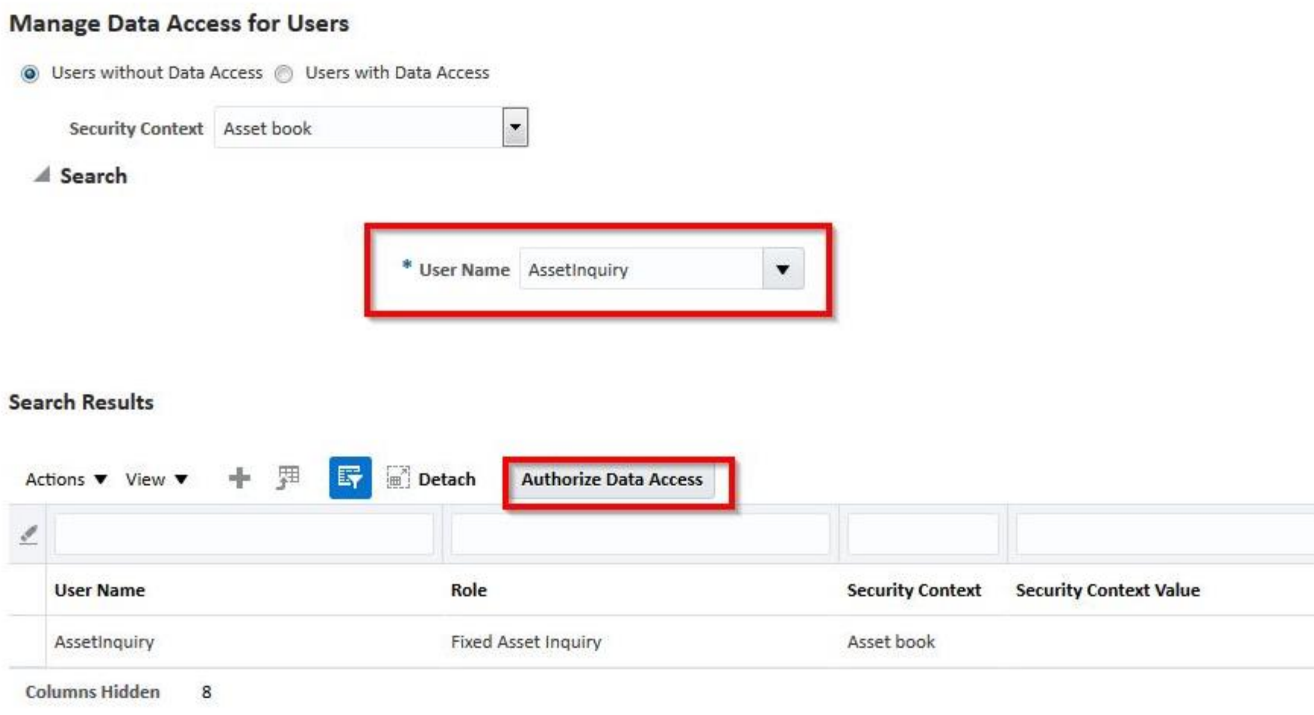
14. The **Summary and Impact Report** shows you the breakdown of what was added.



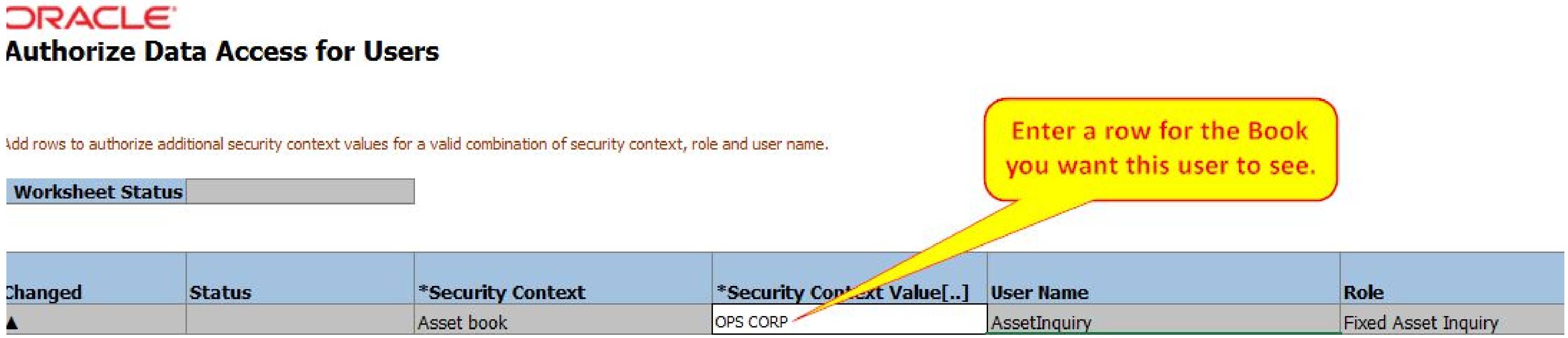
15. Next you need to go to **Setup and Maintenance** - **Manage Asset Book Data Access for Users** task.



16. Search for the user that you want to add access for and click on **Authorize Data Access.**



17. This opens up the Spreadsheet. Here is where you enter in the Books that you want this role to have access to.

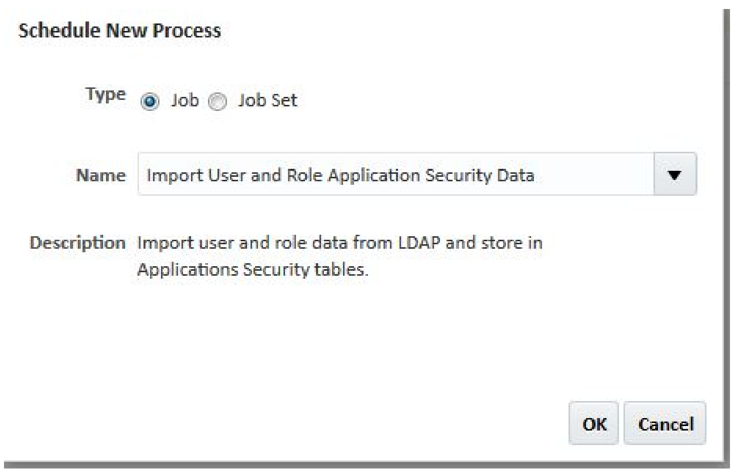


18. Then go to the **Authorize Data Access For Users** tab in Excel (Beside the ADD-INS tab) and click Upload.

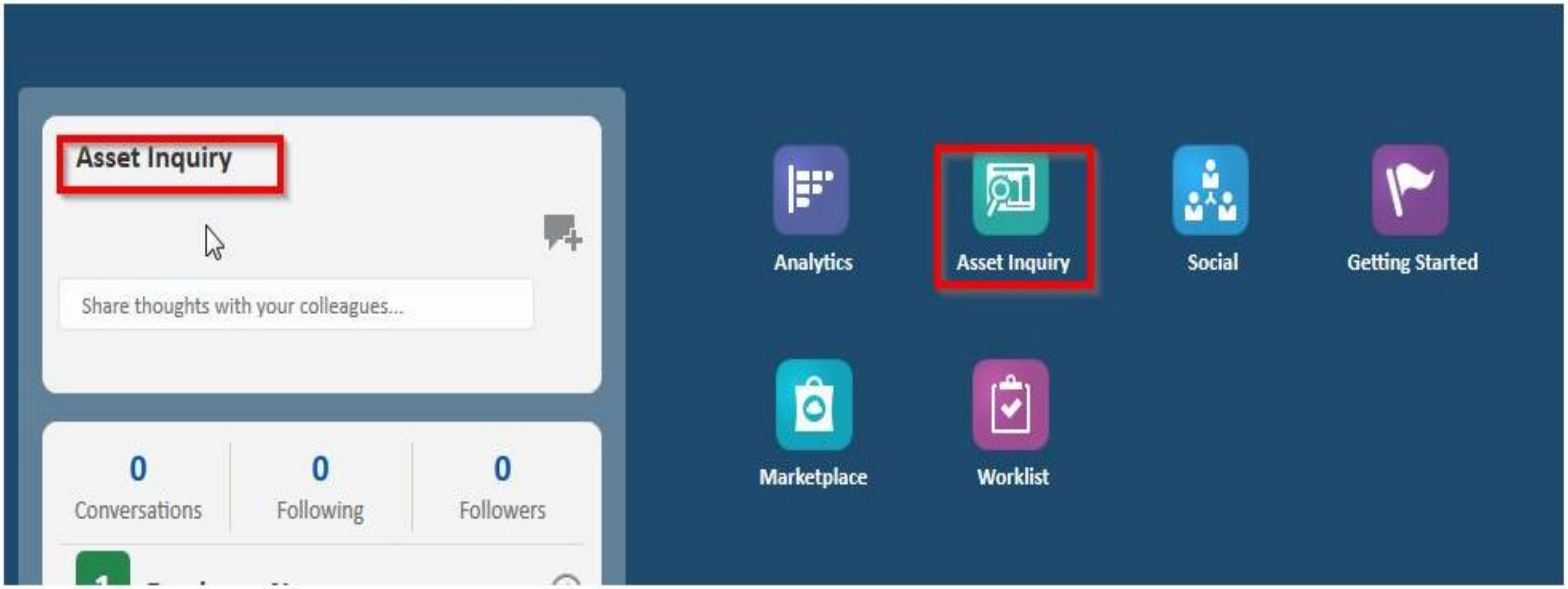
19. You should see the Row updated successfully.

20. Now you need to run the following requests:

- **Retrieve Latest LDAP Changes**
- **Import User and Role Application Security Data**



21. Logout and log back in with the user and see if they have the Asset Inquiry functionality.



Revenue Management - RMCS View Only / Read Only Role - Customer Contract UI

Requirement -

Restricted user should have view only/read only option to customer contract screen.

Currently assigning privilege Manage Revenue Processing grants access to edit screen as well.

Solution

As per the current system configuration, view only / read-only role for RMCS Contracts UI is not available.

Fusion Global HR: Employee Role - Read Only Functionality For Identification Info

Remove the Add button for Employee role on Visas and Permits - Identification info but keep it visible for HR roles.

Solution

To implement the solution please follow below steps:

1. Create an sandbox and make it active.
2. Go to Edit Pages
3. Switch to Source view
4. Select the edit button and will see that the edit option is unavailable.
5. Scroll to the first line from source code: 'PanelSectionEdit'
6. Click on edit and go to the attribute: "Edit Rendered".
7. Click on down arrow and go to Expression Builder and delete the EL expression.

Please add EL Expression: #{!securityContext.userInRole['HRRoleName']}
Apply and close.

Retest the issue.

PRC:PO:Making Read only Role To View Only PO Without Creating Any PO

How to give role for creating PO without any edit or enable to create order ?

Solution

1. To give the access for view PO only, create a custom role with the privileges of the "View Purchase Order Work Area", "Search Purchase Order" and add it to user and assign data access.
2. Then Run User and Roles Synchronization Process .
3. Add the person in manage agents list so user will have the access to search and open the PO.

How to Create a Custom Role which is a Read Only version of the delivered Human Resource Specialist?

- Customer is trying to create a custom role which is derived from the delivered Human Resource Specialist but does not have access to modify and add updates to person records.

Solution

One needs to remove the duties that secure the actions that allow for performing updates.

It is a matter of identifying the actions that the role should not have and removing the securing duties.

And in some cases, pages are not designed with specific actions secured, so a page composer personalization may be the only other solution.

How to Create Custom Role To Have Read Only Access To One Book and Full Access to Another

Create a new Role and ONLY add the inquiry roles. If you have any transaction data policies, then the one book will be able to perform transactions as well.

In custom role setup, you need to assign Fixed Asset Inquiry seeded duty role and then this data policy.

In Role Hierarchy tab you need to select fixed assets inquiry duty role.

Search Result Count : 1

Name FA_TEST_INQUIRY
Code FA_TEST_INQUIRY
Description

Expand Toward Privileges

FA_TEST_INQUIRY

Show Roles

Role Name	Role Code	Inherited by Role Name	Inherited by Role Code
Fixed Asset Inquiry	ORA_FA_FIXED_ASSET_INQUIRY_DUTY	FA_TEST_INQUIRY	FA_TEST_INQUIRY
Payables Invoice Inquiry	ORA_AP_PAYABLES_INVOICE_INQUIRY_DUTY	Fixed Asset Inquiry	ORA_FA_FIXED_ASSET_INQUIRY_DUTY
Customer Account Inquiry	ORA_FUN_CUSTOMER_ACCOUNT_INQUIRY_DUTY	Fixed Asset Inquiry	ORA_FA_FIXED_ASSET_INQUIRY_DUTY

Data Security Policy on that custom role:

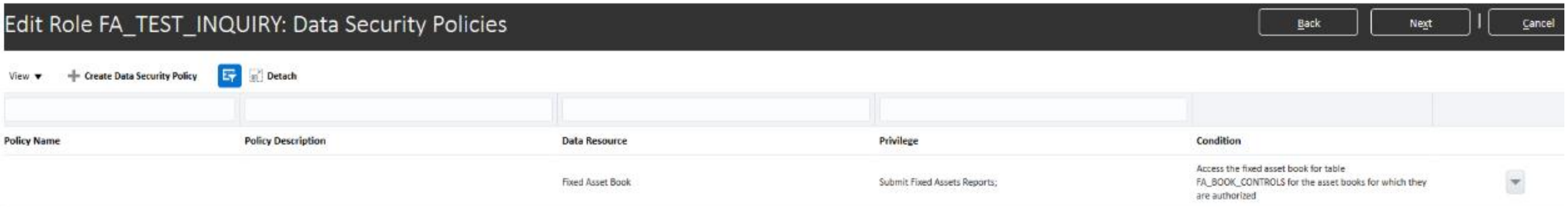
Edit Role FA_TEST_INQUIRY: Data Security Policies

Back Next Cancel

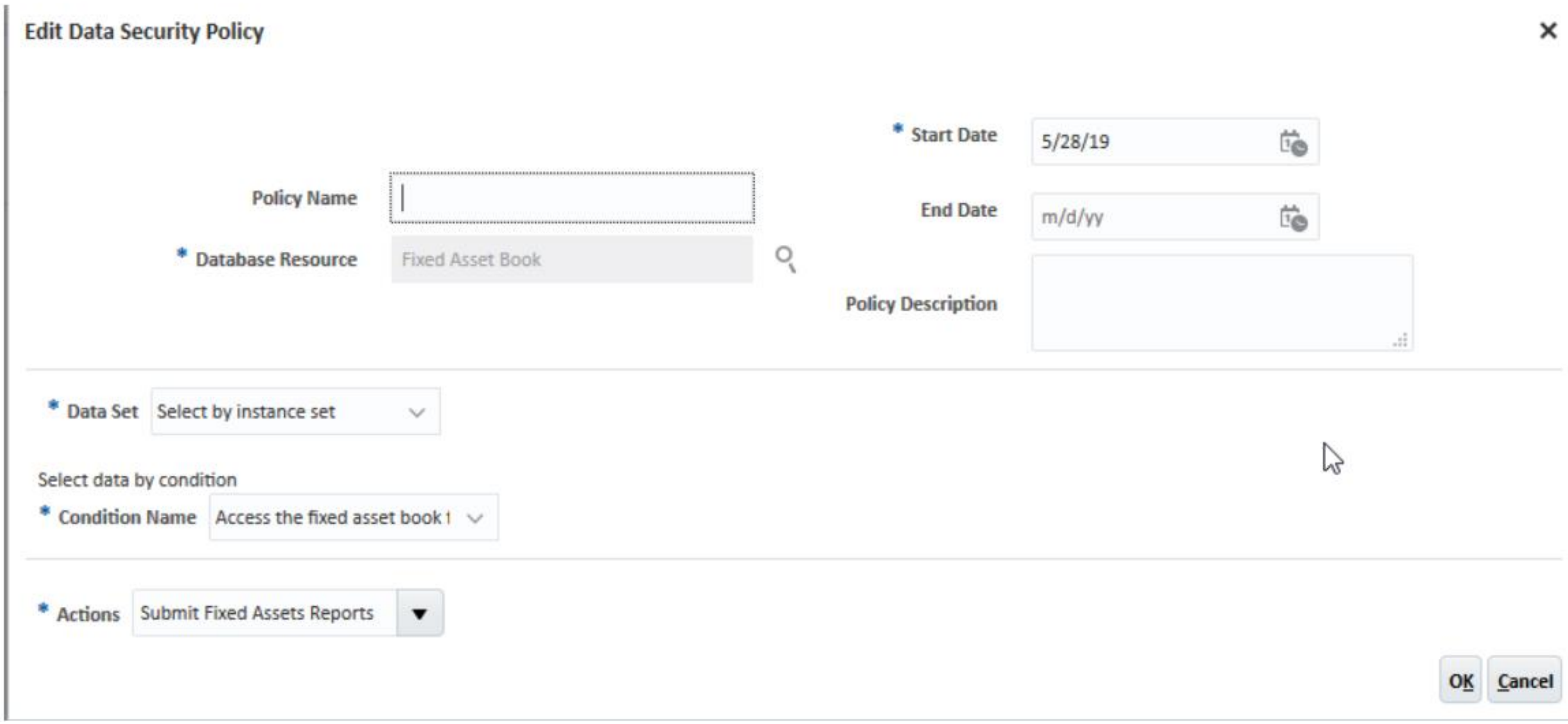
View ▾ + Create Data Security Policy Detach

Policy Name	Policy Description	Data Resource	Privilege	Condition
		Fixed Asset Book	Submit Fixed Assets Reports;	Access the fixed asset book for table FA_BOOK_CONTROLS for the asset books for which they are authorized

Data Security Policy on that custom role:



Edit Security Policy shows:



Then assign the following to the user.

User has two roles, seeded asset accounting manager and custom inquiry role. Give one book full access for seeded role and the other book access to custom role for inquiry only.

Roles

Role	Role Code	Assignable	Auto-Provisioned
Asset Accounting Manager	ORA_FA_ASSET_ACCOUNTING_MANAGER_JOB	Yes	No
Employee	ORA_PER_EMPLOYEE_ABSTRACT	No	No
FA_TEST_INQUIRY	FA_TEST_INQUIRY	No	No

How to remove Privilege: ‘Lock Project Budget Working Version’ From A Project Manager Read Only Custom Role?

Solution

Privilege name: ‘Lock Project Budget Working Version’ is Inherited from Role: ‘Project Budget Management Custom’

You need to go directly and alter the ‘Project Budget Management Custom’ Duty Role. Remove whichever Privileges are not desired (ie ‘Lock Project Budget Working Version’) and that will be rolled up to the custom Job Role

Then recheck the issue.

Collections Inquiry Role : How to Create a Read Only Custom Role For Collections Dashboard And Collections Work Area?

Is it possible to create a custom read only role for viewing information on the collections work area ?

Solution

At this moment is not possible to create a customer read only role to view the information from Collection.

For this functionality it was opened an Enhancement request : ENH 27893935 - INQUIRY ROLE FOR FUSION ADVANCED COLLECTIONS.

Need A View Only Role For OTBI Payables Transactions Real Time

How can we create a View Only Role for OTBI Payables Transactions real time?

We are unable to view Payables Transactions in OTBI.
Requirement is to be able to provide Readonly to this, without enabling data entry via the UI.

You will need to add Data Security privilege "Report Payables" to the Duty role you are using.

Steps:-
1) In the Fusion UI go to Setup and Maintenance.
2) Search for "Manage Duties"
3) Filter the duty roles and edit the appropriate Duty Role.
4) Click on "Create Data Security Policy"
5) Policy Name:- "Report Payables"
  Database Source :- "Business Unit"
  Fill up the remaining fields appropriately.

How to Restrict Employee's Ability To Edit Invoice Distributions

Customer has an invoice approver who just has employee role, but user is able to edit the distributions on the approval notifications. Ideally, the Accounts payable specialist/supervisor should be able to edit them.

Solution

The Employee role is able to edit the distributions because of the Privilege Manage Payables Invoices. Employee Job role is inheriting this privilege through duty role Payables Invoice Inquiry Duty.

So to stop this access, we need to remove this privilege from Employee job role. Please execute the following :

1. Create a custom employee job role by doing a deep copy of employee job role
2. Verify the name of the custom role created for Payables Invoice Inquiry Duty under the new custom job role.
3. Now query this custom Payables Invoice Inquiry Duty role
4. Remove the privilege Manage Payables Invoice form the custom Payables Invoice Inquiry Duty role

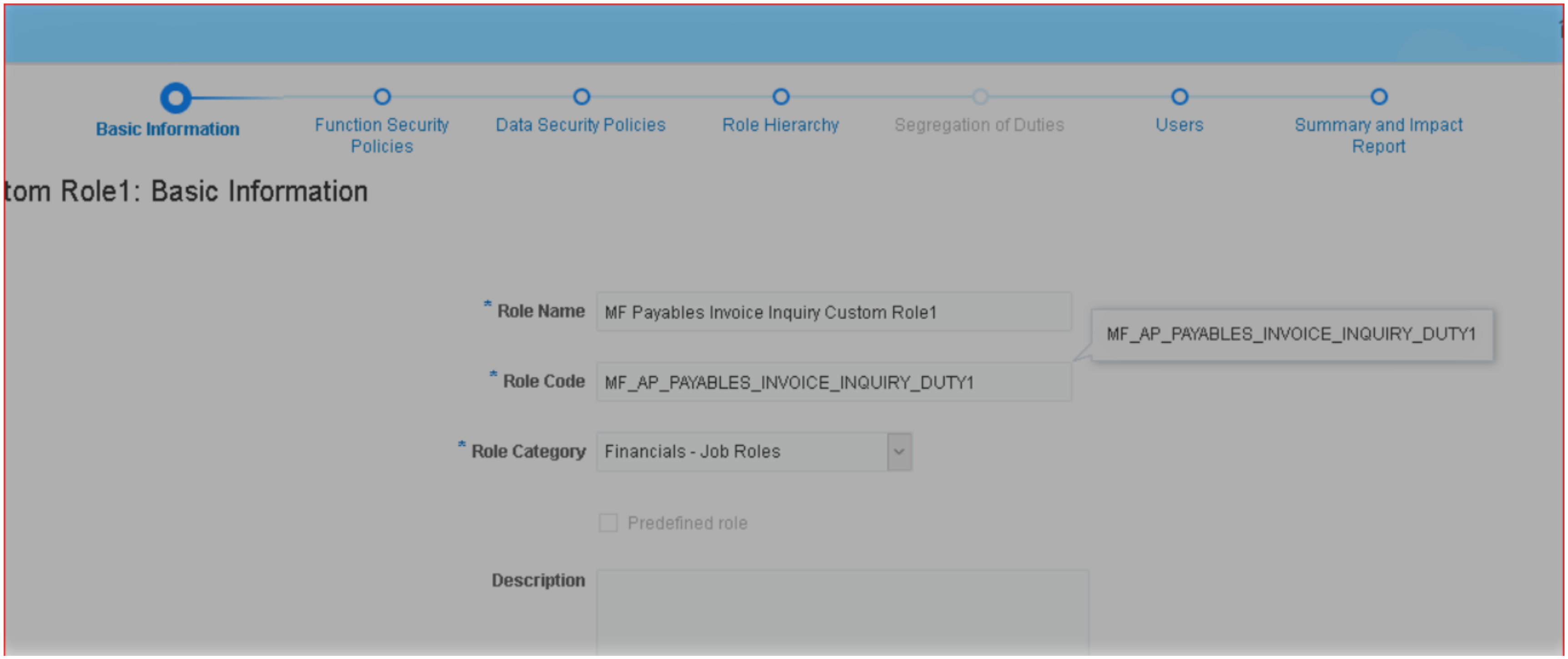
5. Now the custom Employee Job Role doesn’t inherit the Manage Payables Invoice privilege
6. Assign this custom Employee Job Role to user and test

Payables Invoice Inquiry (Read-Only custom role)

Create a new custom role based on seeded Payables Inquiry duty: ORA_AP_PAYABLES_INVOICE_INQUIRY_DUTY.

1. Create custom role (from Security Console)

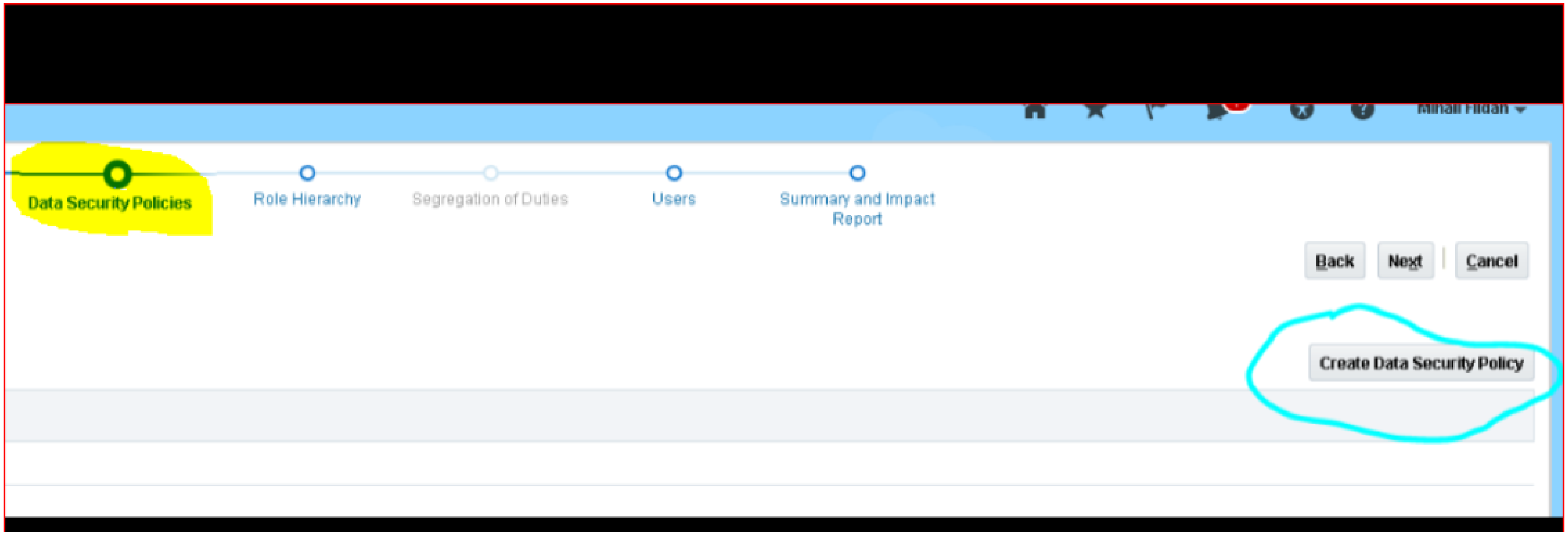
Role Name: MF Payables Invoice Inquiry Custom Role1
Role Code: MF_AP_PAYABLES_INVOICE_INQUIRY_DUTY1
Role Category: Financials – Job Roles



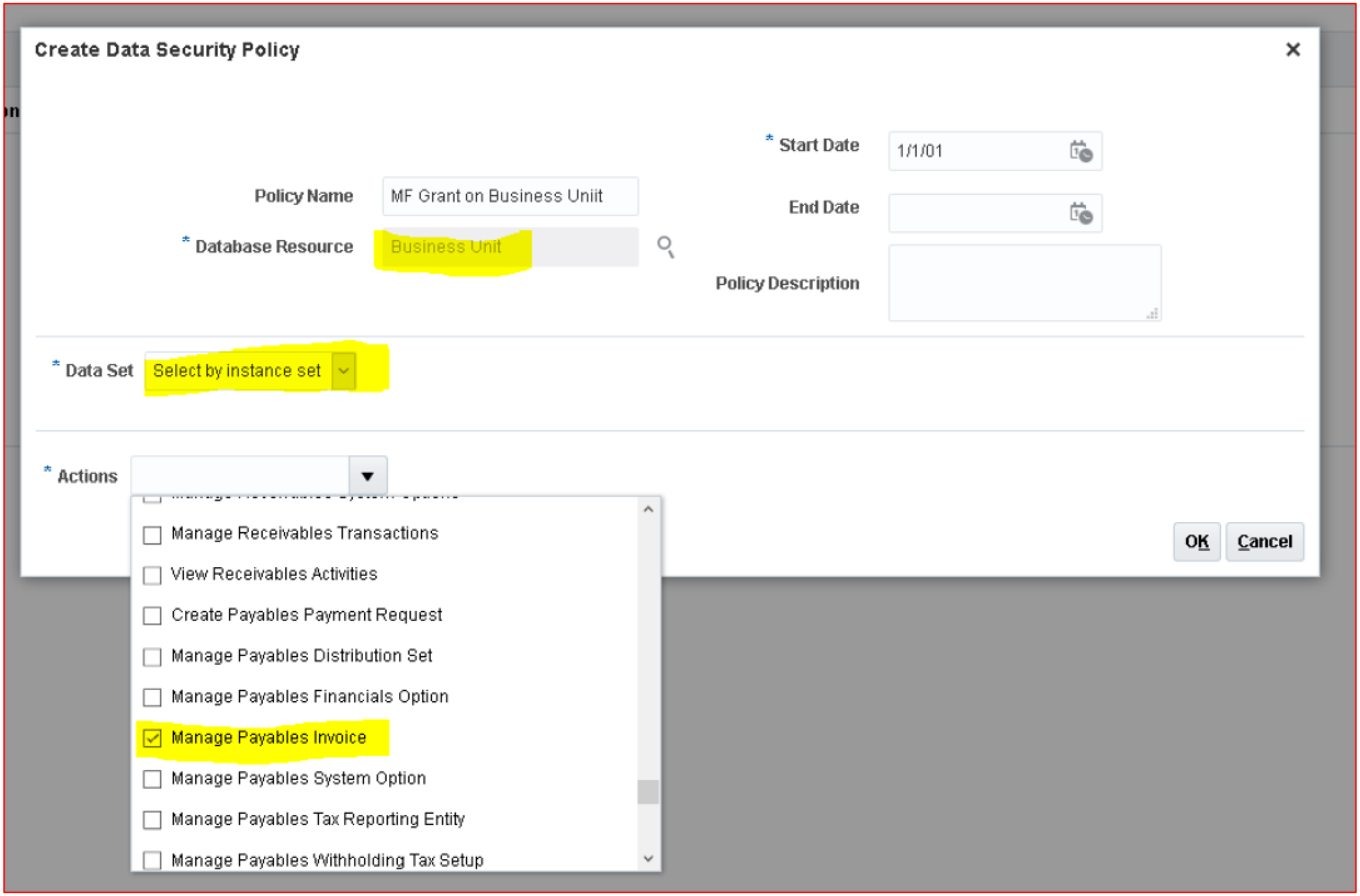
2. Add seeded duty role:
Select role in Role Hierarchy tab and add Payables Transaction Review (Add role)
ORA_AP_PAYABLES_TRANSACTION_REVIEW_DUTY

3. Add data security policy

Security console: Edit custom role

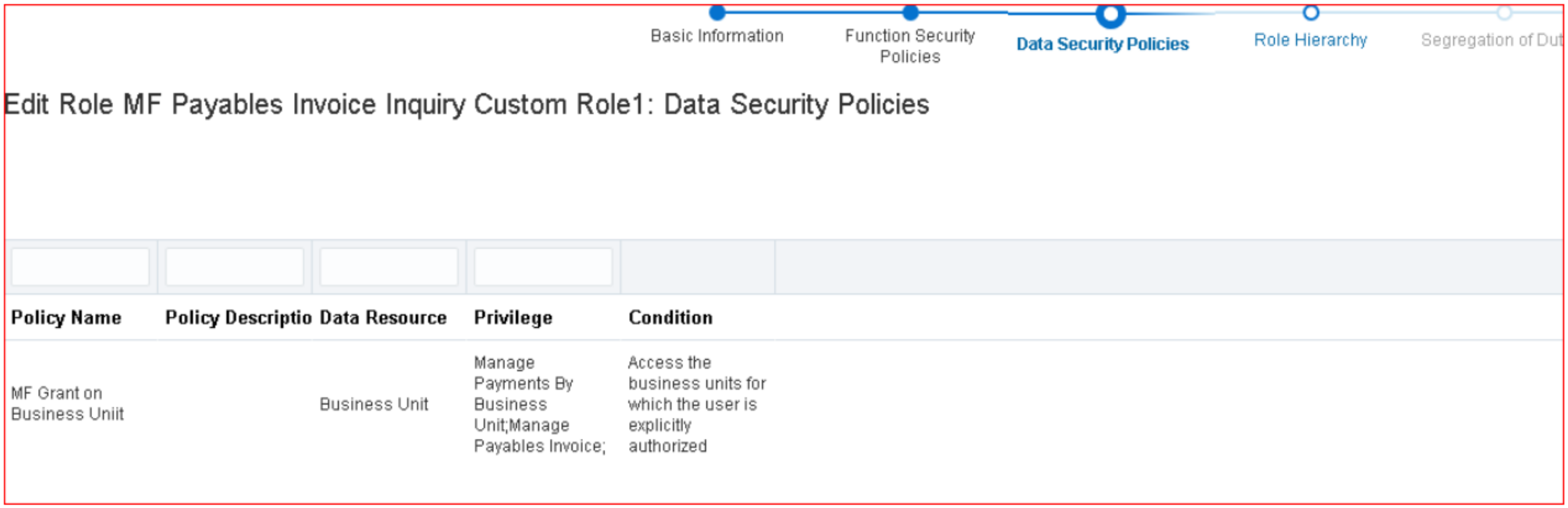


Create **Data Security Policy**



Check:

- Manage Payables Invoice
- Manage Payment by Business Unit



Do the same for Grant on Subledger Accounting Ledger, Grant on Subledger Accounting Ledger, Grant on Subledger Source Transaction.

Finally you will have 4 policies defined.

#	Policy Name	Database Resource	Start Date	Data Set	Condition Name	Action/Privilege
1	XX Grant on Business Unit	Business Unit	Any Date	Select by instance set	Access the business unit for which the user is explicitly authorized	Manage Payables Invoice Manage Payments by Business Unit
2	XX Grant on Subledger Accounting Ledger	Subledger Accounting ledger	Any Date	Select by instance set	Access Ledgers associated with Business Unit	Manage Ledger for Subledger Data
3	XX Grant on Subledger Application	Subledger Application	Any Date	Select by instance set	Subledger Application Instance Set Parameter1: 200	Manage Subledger Application Data
4	XX Grant on Subledger Source Transaction	Subledger Source Transaction	Any Date	Select by instance set	Access Subledger Source Transactions for a Business Unit Parameter1: 200	Manage Subledger Source Transaction Data

Policy Name	Policy Descriptio	Data Resource	Privilege	Condition
Business Uniit		Business Unit	Business Unit; Manage Payables Invoice;	which the user is explicitly authorized
MF Grant on Subledger Application		Subledger Application	Manage Subledger Application Data;	Subledger Application Instance Set
MF Grant on Subledger Source Transaction		Subledger Source Transaction	Manage Subledger Source Transaction Data;	Access Subledger Source Transactions for a Business Unit
MF Grant on Subledger		Subledger	Manage Ledger	Access Ledgers

4. Assign the custom role to the user

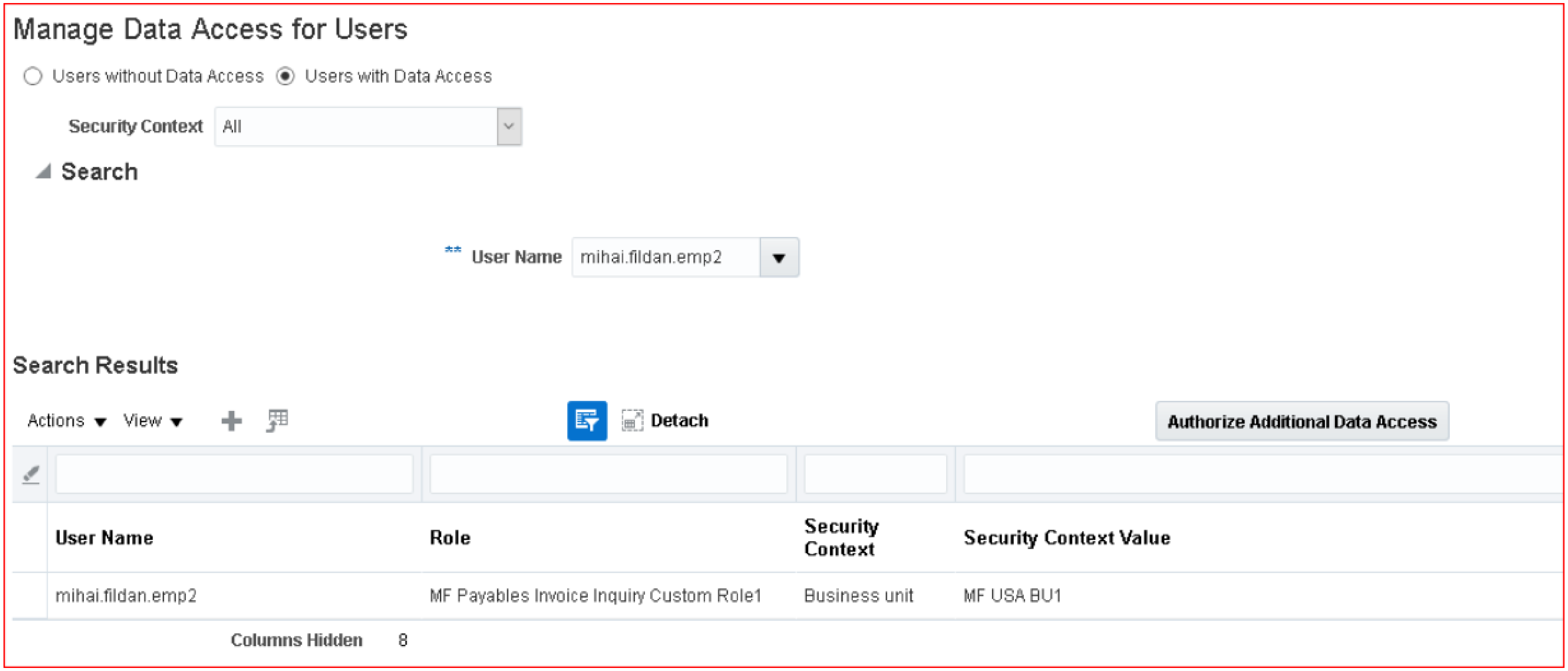
- MF Payables Invoices Inquiry Custom ROle1
- Employee

Current Roles

View ▾ Format ▾

Role Name	Start Date	Provisioning Method
Employee	2/13/18	Manual
MF Payables Invoice Inquiry Custom Role1	2/13/18	Manual

5. Add data access set for user



6. Test the custom role