

# Oracle

## **ERP Cloud**

## **Securing Oracle ERP Cloud**

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# Preface

This preface introduces information sources that can help you use the application.

## Oracle Applications Help

Use help icons  to access help in the application. If you don't see any help icons on your page, click the Show Help icon  in the global header. Not all pages have help icons. You can also access Oracle Applications Help at <https://fusionhelp.oracle.com>.

## Using Applications Help

 **Watch:** This video tutorial shows you how to find help and use help features.

You can also read [Using Applications Help](#).

## Additional Resources

- **Community:** Use [Oracle Cloud Customer Connect](#) to get information from experts at Oracle, the partner community, and other users.
- **Guides and Videos:** Go to the [Oracle Help Center](#) to find guides and videos.
- **Training:** Take courses on Oracle Cloud from [Oracle University](#).

## Conventions

The following table explains the text conventions used in this guide.

Convention	Meaning
<b>boldface</b>	Boldface type indicates user interface elements, navigation paths, or values you enter or select.
<code>monospace</code>	Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.
>	Greater than symbol separates elements in a navigation path.

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# 1 Introduction

## Securing Oracle ERP Cloud: Overview

Oracle ERP Cloud is secure as delivered. This guide explains how to enable user access to ERP functions and data. You perform some of the tasks in this guide either only or mainly during implementation. Most, however, can also be performed later and as requirements change. This topic summarizes the scope of this guide and identifies the contents of each chapter.

To manage roles, use the Security Console and other tasks available in the Setup and Maintenance work area. You may use either of these options to create or edit roles, or to view and work with them later; the choice is a matter of your preference. Some chapters in this guide discuss the use of Setup and Maintenance tasks, and later chapters discuss the use of the Security Console.

 **Note:** Any references to data roles in this guide are only applicable to Oracle HCM Cloud. Data roles are no longer used in Oracle ERP Cloud.

## Guide Structure

This table describes the content of each chapter in this guide.

Chapter	Content
Introduction	A brief overview of role-based security concepts
Using the Security Console	How to set up and manage the Security Console, and use it to view role hierarchies and Navigator menus
Managing Implementation Users	The purpose of implementation users and how you create them
Preparing for Application Users	Enterprise-wide options and related decisions that affect application users
Creating and Managing Application Users	The different ways you can create application users and maintain user accounts, with instructions for some methods
Provisioning Roles to Application Users	How to use tasks available from Setup and Maintenance to enable application users to acquire roles, with instructions for creating some standard role mappings
Configuring Security	How to create, review, and modify security components, with recommended best practices
Reviewing Roles and Role Assignments	How to use the Security Console to review roles and identify the users assigned to them
Configuring Roles in the Security Console	How to create, review, and modify roles in the Security Console, with recommended best practices

Chapter	Content
Managing Certificates and Keys	How to use the Security Console to generate, import, export, and delete digital certificates
Implementing Security in Oracle Fusion Financials	The additional security setup and configuration tasks associated with Oracle Fusion Financials
Implementing Security in Oracle Fusion Project Portfolio Management	The additional security setup and configuration tasks associated with Oracle Fusion Project Portfolio Management
Implementing Security in Oracle Fusion Procurement	The additional security setup and configuration tasks associated with Oracle Fusion Procurement

During implementation, you can perform security-related tasks from the Security Console if you have the IT Security Manager role. To use the Security Console, navigate to: **Tools > Security Console**.

For information on securing reports and analytics, see the Securing BI Publisher Reports and Related Components in the Oracle Cloud Administering Transactional Analyses guide.

## Implementing ERP Security: Overview


Oracle ERP Cloud predefines common job roles such as **Accounts Payable Manager** and **General Accounting Manager**. You can use these roles, modify them after creating a copy of the predefined role, or create new job roles as needed. A user can be assigned more than one role, so don't define a role that includes all the accesses needed for every user.

For a listing of the predefined job roles in Oracle ERP Cloud and their intended purposes, see the Security Reference Manual in the Oracle Help Center (<http://docs.oracle.com>).

Common functionality that is not job specific, such as creating expense reports and purchase requisitions, are granted to abstract roles like **Employee**, **Line Manager**, and **Purchase Requester**.

Oracle ERP Cloud includes the following roles that are designed for initial implementation and the ongoing management of setup and reference data:

- **Application Implementation Manager:** Used to manage implementation projects and assign implementation tasks.
- **Application Implementation Consultant:** Used to access all setup tasks.
- **IT Security Manager:** Used to access the Security Console to manage roles, users, and security.

 **Note:** For the ongoing management of setup and reference data, the **Financial Application Administrator**, a predefined administrator role, provides access to all financial setup tasks.

### Segregation of Duties Considerations

Segregation of duties (SOD) separates activities such as approving, recording, processing, and reconciling results so you can more easily prevent or detect unintentional errors and willful fraud.

Oracle ERP Cloud includes roles that have been defined with a knowledge of a set of SOD policies that are included in the Oracle Cloud's Access Controls Governor product. The job roles are based on those commonly defined in business and the duty definitions are defined using the Oracle Cloud SOD policies.

For example, the privilege **Create Payments** is incompatible with the privilege **Approve Invoice**. The predefined **Accounts Payable Manager** role has the privileges of **Force Approve Invoices** and **Create Payments**. When you assess and balance the cost of duty segregation against reduction of risk, you may determine that the **Accounts Payable Manager** role is not allowed to perform force approve invoices and remove this privilege.

To learn more about the policies and roles, see the Security Reference Manual in the Oracle Help Center (<http://docs.oracle.com>).

### Data Security Considerations

- Use segment value security rules to restrict access to transactions, journal entries, and balances based on certain values in the chart of accounts, such as specific companies and cost center values, to individual roles.
- Use data access set security for Oracle Fusion General Ledger users to control read or write access to entire ledgers or portions of the ledger represented as primary balancing segment values, such as specific legal entities or companies.

For more information on securing your applications, see the Oracle ERP Cloud Securing Oracle ERP Cloud guide in the Oracle Help Center (<http://docs.oracle.com>).

## Role Types: Explained

Oracle Enterprise Resource Planning (Oracle ERP) Cloud defines the following types of roles:

- Job roles
- Abstract roles
- Duty roles
- Aggregate privileges

This topic introduces the role types.

### Job Roles

Job roles represent the jobs that users perform in an organization. General Accountant and Accounts Receivables Manager are examples of predefined job roles. You can also create job roles.

### Abstract Roles

Abstract roles represent people in the enterprise independently of the jobs they perform. Some predefined abstract roles in Oracle Applications Cloud include Employee and Transactional Business Intelligence Worker. You can also create abstract roles.

All users are likely to have at least one abstract role that provides access to a set of standard functions. You may assign abstract roles directly to users.

## Duty Roles

Duty roles represent a logical collection of privileges that grant access to tasks that someone performs as part of a job. Budget Review and Account Balance Review are examples of predefined duty roles. You can also create duty roles. Other characteristics of duty roles include:

- They group multiple function security privileges.
- They can inherit aggregate privileges and other duty roles.
- You can copy and edit them.

Job and abstract roles may inherit duty roles either directly or indirectly. You don't assign duty roles directly to users.

## Aggregate Privileges

Aggregate privileges are roles that combine the functional privilege for an individual task or duty with the relevant data security policies. Functions that aggregate privileges might grant access to include task flows, application pages, work areas, dashboards, reports, batch programs, and so on.

Aggregate privileges differ from duty roles in these ways:

- All aggregate privileges are predefined. You can't create, modify, or copy them.
- They don't inherit any type of roles.

You can include the predefined aggregate privileges in your job and abstract roles. You assign aggregate privileges to these roles directly. You don't assign aggregate privileges directly to users.

## Role Inheritance: Explained

Almost every role is a hierarchy or collection of other roles.

- Job and abstract roles inherit aggregate privileges. They may also inherit duty roles.

**! Important:** In addition to aggregate privileges and duty roles, job and abstract roles are granted many function security privileges and data security policies directly. You can explore the complete structure of a job or abstract role in the Security Console.

- Duty roles can inherit other duty roles and aggregate privileges.

When you assign roles, users inherit all of the data and function security associated with those roles.

## Duty Role Components: Explained

This topic describes the components of a typical duty role. Function security privileges and data security policies are granted to duty roles. Duty roles may also inherit aggregate privileges and other duty roles.

## Data Security Policies

For a given duty role, you may create any number of data security policies. Each policy selects a set of data required for the duty to be completed and actions that may be performed on that data. The duty role may also acquire data security policies indirectly from its aggregate privileges.


Each data security policy combines:

- A duty role, for example Expense Entry Duty.
- A business object that's being accessed, for example Expense Reports.
- The condition, if any, that controls access to specific instances of the business object. For example, a condition may allow access to data applying to users for whom a manager is responsible.
- A data security privilege, which defines what may be done with the specified data, for example Manage Expense Report.

## Function Security Privileges

Many function security privileges are granted directly to a duty role. It also acquires function security privileges indirectly from its aggregate privileges.

Each function security privilege secures the code resources that make up the relevant pages, such as the Manage Grades and Manage Locations pages.

 **Tip:** The predefined duty roles represent logical groupings of privileges that you may want to manage as a group. They also represent real-world groups of tasks. For example, the predefined General Accountant job role inherits the General Ledger Reporting duty role. To create your own General Accountant job role with no access to reporting structures, you could copy the predefined job role and remove the General Ledger Reporting duty role from the role hierarchy.

## Aggregate Privileges: Explained

Aggregate privileges are a type of role. Each aggregate privilege combines a single function security privilege with related data security policies. All aggregate privileges are predefined. This topic describes how aggregate privileges are named and used.

### Aggregate Privilege Names

An aggregate privilege takes its name from the function security privilege that it includes. For example, the Manage Accounts Payable Accounting Period Status aggregate privilege includes the Manage Accounting Period Status function security privilege.

### Aggregate Privileges in the Role Hierarchy

Job roles and abstract roles inherit aggregate privileges directly. Duty roles may also inherit aggregate privileges. However, aggregate privileges can't inherit other roles of any type. As most function and data security in job and abstract roles is provided by aggregate privileges, the role hierarchy has few levels. This flat hierarchy is easy to manage.

## Use of Aggregate Privileges in Custom Roles

You can include aggregate privileges in the role hierarchy of a custom role. Treat aggregate privileges as role building blocks.

## Creating, Editing, or Copying Aggregate Privileges

You can't create, edit, or copy aggregate privileges, nor can you grant the privileges from an aggregate privilege to another role. The purpose of an aggregate privilege is to grant a function security privilege only in combination with a specific data security policy. Therefore, you must use the aggregate privilege as a single entity.

If you copy a job or abstract role, then the source role's aggregate privileges are never copied. Instead, role membership is added automatically to the aggregate privilege for the copied role.

# Security Configuration in Oracle Applications Cloud: Points to Consider

If the predefined security reference implementation doesn't fully represent your enterprise, then you can make changes.

For example, the predefined Line Manager abstract role includes compensation management privileges. If some of your line managers don't handle compensation, then you can create a line manager role without those privileges. To create a role, you can either copy an existing role or create a role from scratch.

During implementation, you evaluate the predefined roles and decide whether changes are needed. You can identify predefined application roles easily by their role codes, which all have the prefix `ORA_`. For example, the role code of the Payroll Manager application job role is `ORA_PAY_PAYROLL_MANAGER_JOB`. All predefined roles are granted many function security privileges and data security policies. They also inherit aggregate privileges and duty roles. To make minor changes to a role, copying and editing the predefined role is the more efficient approach. Creating roles from scratch is most successful when the role has very few privileges and you can identify them easily.

## Missing Enterprise Jobs

If jobs exist in your enterprise that aren't represented in the security reference implementation, then you can create your own job roles. Add privileges, aggregate privileges, or duty roles to custom job roles, as appropriate.

## Predefined Roles with Different Privileges

If the privileges for a predefined job role don't match the corresponding job in your enterprise, then you can create your own version of the role. If you copy the predefined role, then you can edit the copy to add or remove aggregate privileges, duty roles, function security privileges, and data security policies, as appropriate.

## Predefined Roles with Missing Privileges

If the privileges for a job aren't defined in the security reference implementation, then you can create your own duty roles. However, a typical implementation doesn't use custom duty roles. You can't create aggregate privileges.

### *Related Topics*

- [Reviewing Predefined Roles: Explained](#)

## 2 Using the Security Console

### Security Console: Overview

Use the Security Console to manage application security in your Oracle Applications Cloud service. Use the IT Security Manager role to perform security-related tasks pertinent to role management, role analysis, user-account management, and certificate management.

### Security Console Tasks

You can perform these tasks in the Security Console:

- Roles
  - Create job, abstract, and duty roles.
  - Edit custom roles.
  - Copy roles.
  - Compare roles.
  - Visualize role hierarchies and assignments to users.
  - Review Navigator menus available to roles or users, identifying roles that grant access to Navigator items and privileges required for that access.
- Users
  - Create user accounts.
  - Review, edit, lock, or delete existing user accounts.
  - Assign roles to user accounts.
  - Reset users' passwords.
- Analytics
  - Review statistics concerning role categories, the roles belonging to each category, and the components of each role.
  - View the data security policies, roles, and users associated with each database resource.
- Certificates
  - Generate, export, or import PGP or X.509 certificates, which establish encryption keys for data exchanged between Oracle Cloud applications and other applications.
  - Generate signing requests for X.509 certificates.
- Administration
  - Establish rules for the generation of user names.
  - Set password policies.

- Create standards for role definition, copying, and visualization.
- Review the status of role-copy operations.
- Define templates for notifications of user-account events such as password expiration.

## Security Console Access

You must have the IT Security Manager role to use the Security Console. This role inherits the following duty roles:

- Security Management
- Security Reporting

## Administering the Security Console: Explained

To prepare the Security Console for use, arrange to run background processes that replenish security data. Also use Security Console Administration pages to select general and role-oriented options, track the status of role-copy jobs, and select, edit, or add notification templates. These generate messages to notify users of events that concern them, such as password-expiration warnings.

### Background Processes

Run two background processes:

- The Retrieve Latest LDAP Changes process copies data from the LDAP directory to Oracle Cloud Applications Security tables. Run it once, during implementation. Select Setup and Maintenance from the Navigator. In the Setup and Maintenance work area, search for and select the Run User and Roles Synchronization Process task.
- The Import User and Role Application Security Data process copies users, roles, privileges, and data security policies from the identity store, policy store, and ApplCore grants schema to Oracle Cloud Applications Security tables. Schedule it to run regularly to update those tables: Select Scheduled Processes in the Tools work area, and then select the process from the Schedule New Process option.

### General Administration Options

Select the Security Console Administration tab, and then the General tab on the Administration page, to set these options:

- User Preferences
  - Select the format of the User Name, the value that identifies a user as he signs in. It is generated automatically in the format you select. Options include first and last name delimited by a period, email address, first-name initial and full last name, and person or party number.
  - Select the check box labeled "Generate system user name when generation rule fails" to enable the automatic generation of User Name values if the selected generation rule cannot be implemented.
- Password Policy
  - Establish the number of days a password remains valid. Set the number of days before expiration that a user receives a warning to reset the password. And define the period in which a user must respond to a notification to reset his password ("Hours Before Password Reset Token Expiration").



- Select a password format.
- Determine whether a previous password may be reused.
- Determine whether an administrator can manually modify passwords in the Reset Password dialog, available from a given user's record in the Users tab. This option applies only to the manual-reset capability. An administrator can always use the Reset Password dialog to initiate the automatic reset of a user's password.
- Certificate Preferences: Set the default number of days for which a certificate remains valid. (Certificates establish keys for the encryption and decryption of data that Oracle Cloud applications exchange with other applications.)
- Synchronization Process Preferences: Specify a number of hours since the last run of the Import User and Role Application Security Data process. When a user selects the Security Console Roles tab, a warning message appears if the process has not been run in this period.

## Role Administration Options

Select the Security Console Administration tab, and then the Roles tab on the Administration page, to set these options:

- Role prefixes and suffixes: Create the prefix and suffix added to the name and code of role copies. Each role has a Role Name (a display name) and a Role Code (an internal name). A role copy adopts the name and code of the source role, with this prefix or suffix (or both) added. The addition distinguishes the copy from its source. By default there is no prefix, the suffix for a role name is "Custom," and the suffix for a role code is "\_CUSTOM."
- Graph node limit: Set the maximum number of nodes a visualization graph can display. When a visualization graph would contain a greater number of nodes, the visualizer displays a message advising the user to select the table view.
- Enable edit of data security policies: Determine whether users can enter data in the Data Security Policies page of the role-creation and role-edit trains available from the Roles tab.
- Enable edit of user role membership: Determine whether users can enter data in the Users page of the role-creation and role-edit trains available from the Roles tab.
- Enable default table view: Determine whether visualizations generated from the Roles tab default to the table view or, if this option is cleared, the radial graph view.

## Role Copy Status

Select the Security Console Administration tab, and then the Role Copy Status tab on the Administration page, to view records of jobs to copy roles. These jobs are initiated in the Roles page. Job status is updated automatically until a final status, typically Completed, is reached. You can delete the row representing a copy job; click its x icon.

## Running Retrieve Latest LDAP Changes: Procedure

Information about users and roles in your LDAP directory is available automatically to Oracle Cloud Applications. However, in specific circumstances you're recommended to run the Retrieve Latest LDAP Changes process. This topic describes when and how to run Retrieve Latest LDAP Changes.

You run Retrieve Latest LDAP Changes if you believe data-integrity or synchronization issues may have occurred between Oracle Cloud Applications and your LDAP directory server. For example, you may notice differences between roles on the Security Console and roles on the Create Role Mapping page. On-premises customers should also run this process after applying monthly updates.

## Running Retrieve Latest LDAP Changes

Sign in with the IT Security Manager job role and follow these steps:

1. Open the Scheduled Processes work area.
2. Click **Schedule New Process** in the Search Results section of the Overview page.  
The **Schedule New Process** dialog box opens.
3. In the **Name** field, search for and select the Retrieve Latest LDAP Changes process.
4. Click **OK** to close the **Schedule New Process** dialog box.
5. In the **Process Details** dialog box, click **Submit**.
6. Click **OK**, then **Close**.
7. On the Scheduled Processes page, click the **Refresh** icon.

Repeat this step periodically until the process completes.

 **Note:** Only one instance of Retrieve Latest LDAP Changes can run at a time.

## Security Visualizations: Explained

A Security Console visualization graph consists of nodes that represent security items. These may be users, roles, privileges, or aggregate privileges. Arrows connect the nodes to define relationships among them. You can trace paths from any item in a role hierarchy either toward users who are granted access or toward the privileges roles can grant.

You can select either of two views:

- **Radial:** Nodes form circular (or arc) patterns. The nodes in each circle relate directly to a node at the center of the circle. That focal node represents the item you select to generate a visualization, or one you expand in the visualization.
- **Layers:** Nodes form a series of horizontal lines. The nodes in each line relate to one node in the line above. This is the item you select to generate a visualization, or one you expand in the visualization.

For example, a job role might consist of several duty roles. You might select the job role as the focus of a visualization (and set the Security Console to display paths leading toward privileges):

- The Radial view would initially show nodes representing the duty roles encircling a node representing the job role.
- The Layers view would initially show the duty-role nodes in a line beneath the job-role node.

You can then manipulate the image, for example by expanding a node to display the items it consists of.

As an alternative, you can generate a visualization table that lists items related to an item you select. For example, a table may list the roles that descend from a role you select, or the privileges inherited by the selected role. You can export tabular data to an Excel file.

## Working with a Visualization Graph: Explained

Within a visualization graph, you can select the Radial or Layers view. In either view, you can zoom in or out of the image. You can expand or collapse nodes, magnify them, or search for them. You can also highlight nodes that represent types of security items.

To select one of the views, click Switch Layout in the Control Panel, which is a set of buttons at the upper left of the visualization. Then select Radial or Layers.

### Node Labels

You can enlarge or reduce a visualization, either by expanding or collapsing nodes or by zooming in or out of the image. As you do, the labels identifying nodes change:

- If the image is large enough, each node displays the name of the item it represents.
- If the image is smaller, symbols replace the names: U for user, R for role, S for predefined role, P for privilege, and A for aggregate privilege.
- If the image is smaller still, the nodes are unlabeled.

Regardless of labeling, you can hover over a node to display the name and description of the user, role, or privilege it represents.

Nodes for each type of item are depicted in a distinct color, so that item types are easily distinguished.

### Expanding or Collapsing Nodes

To expand a node is to reveal roles, privileges, or users to which it connects. To collapse a node is to hide those items. To perform these actions:

1. Select a node and right-click.
2. Select one of these options:
  - Expand reveals nodes to which the selected node connects directly, and Collapse hides those nodes.
  - Expand All reveals all generations of connecting nodes, and Collapse All hides those nodes.

Alternatively, double-click a collapsed node to expand it, or an expanded node to collapse it.

### Using Control Panel Tools

Apart from the option to select the Radial or Layers view, the Control Panel contains these tools:

- Zoom In: Enlarge the image. You can also use the mouse wheel to zoom in.
- Zoom Out: Reduce the image. You can also use the mouse wheel to zoom out.
- Zoom to Fit: Center the image and size it so that it is as large as it can be while fitting entirely in its display window. (Nodes that you have expanded remain expanded.)
- Magnify: Activate a magnifying glass, then position it over nodes to enlarge them temporarily. You can use the mouse wheel to zoom in or out of the area beneath the magnifying glass. Click Magnify a second time to deactivate the magnifying glass.

- Search: Enter text to locate nodes whose names contain matching text. You can search only for nodes that the image is currently expanded to reveal.
- Control Panel: Hide or expose the Control Panel.

## Using the Legend

At the upper right of the image, a Legend lists the types of items currently on display. You can:

- Hover over the entry for a particular item type to locate items of that type in the image. Items of all other types are grayed out.
- Click the entry for an item type to disable items of that type in the image. If an item of that type has child nodes, it is grayed out. If not, it disappears from the image. Click the entry a second time to restore disabled items.
- Hide or expose the Legend by clicking its button.


## Using the Overview

At the lower right of the image, click a plus sign to open the Overview, a thumbnail sketch of the visualization. In it, click any area of the thumbnail to focus the actual visualization on that area.

As an alternative, click the background of the visualization, then drag the entire image in any direction.

## Refocusing the Image

You can select any node in a visualization as the focal point for a new visualization: Right-click a node, then select Set as Focus.

 **Note:** You can review role hierarchies using either a tabular or a graphical view. The view you see by default depends on the setting of the **Enable default table view** option on the Administration tab.

## Working with a Visualization Table: Explained

A visualization table contains records of roles, privileges, or users related to a security item you select. The table displays records for only one type of item at a time:

- If you select a privilege as the focus of your visualization, select the Expand Toward Users option. Otherwise the table shows no results. Then use the Show option to list records of either roles or users who inherit the privilege.
- If you select a user as the focus of your visualization, select the Expand Toward Privileges option. Otherwise the table shows no results. Then use the Show option to list records of either roles or privileges assigned to the user.
- If you select any type of role or an aggregate privilege as the focus of your visualization, you can expand in either direction.
  - If you expand toward privileges, use the Show option to list records of either roles beneath, or privileges related to, your focus role.
  - If you expand toward users, use the Show option to list records of either roles above, or users related to, your focus role.

Tables are all-inclusive:

- A Roles table displays records for all roles related directly or indirectly to your focus item. For each role, inheritance columns specify the name and code of a directly related role.
- A Privileges table displays records for all privileges related directly or indirectly to your focus item. For each privilege, inheritance columns display the name and code of a role that directly owns the privilege.
- A Users table displays records for all users assigned roles related directly or indirectly to your focus item. For each user, Assigned columns display the name and code of a role assigned directly to the user.


Use a field above any column to enter search text, then press Enter. The table displays records whose column values contain text matching your search text.

You can export a table to Excel. Click the Export to Excel button. You may either open the Excel file directly or save it. If you opt to save the file, you're prompted to define a path.

## Generating a Visualization: Procedure

To generate a visualization:

1. Select the Roles tab in the Security Console.
2. Search for the security item on which you want to base the visualization.
  - In a Search field, select any combination of item types, for example job role, duty role, privilege, or user.
  - In a field immediately to the right, enter at least three characters. The search returns items of the types you selected, whose names contain the characters you entered.
  - Select one of those items. Or, click the Search button to load all the items in a Search Results column, and select an item there.
3. Select either a Show Graph button or a View as Table button.

 **Note:** In a page for role administration, you can determine which of these is the default view.

4. In the Expand Toward list, select Privileges to trace paths from your selected item toward items lower in its role hierarchy. Or select Users to trace paths from your selected item toward items higher in its hierarchy.
5. If the Table view is active, select an item type in the Show list: Roles, Privileges, or Users. (The options available to you depend on your Expand Toward selection.) The table displays records of the item type you select. Note that an aggregate privilege is considered to be a role.

## Simulating Navigator Menus in the Security Console: Procedure

You can simulate Navigator menus available to roles or users. From a simulation, you can review the access inherent in a role or granted to a user. You can also determine how to alter that access to create roles.

## Opening a Simulation

To open a simulated menu:

1. Select the Roles tab in the Security Console.
2. Create a visualization graph, or populate the Search Results column with a selection of roles or users.
3. In the visualization graph, right-click a role or user. Or, in the Search Results column, select a user or role and click its menu icon.
4. Select **Simulate Navigator**.

## Working with the Simulation

In a Simulate Navigator page:

- Select **Show All** to view all the menu and task entries that may be included in a Navigator menu.
- Select **Show Access Granted** to view the menu and task entries actually assigned to the selected role or user.

In either view:

- A padlock icon indicates that a menu or task entry can be, but is not currently, authorized for a role or user.
- An exclamation icon indicates an item that may be hidden from a user or role with the privilege for it, because it has been modified.

To plan how this authorization may be altered:

1. Click any menu item on the Simulate Navigator page.
2. Select either of the two options:
  - **View Roles That Grant Access:** Lists roles that grant access to the menu item.
  - **View Privileges Required for Menu:** Lists privileges required for access to the menu item.

## Security Console Analytics for Roles: Explained

You can review statistics about the roles that exist in your Oracle Cloud instance. Select the Analytics tab, and then the Roles tab on the Analytics page. Then view these analyses:

- Role Categories. Each role belongs to a category that defines some common purpose. Typically, a category contains a type of role configured for an application, for example "Financials - Duty Roles."

For each category, a Roles Category grid displays the number of:

- Roles
- Role memberships (roles belonging to other roles within the category)
- Security policies created for those roles

In addition, a Roles by Category pie chart compares the number of roles in each category with those in other categories.

- Roles in Category. Click a category in the Role Categories grid to list roles belonging to that category. For each role, the Roles in Category grid also shows the number of:
  - Role memberships
  - Security policies
  - Users assigned the role
- Individual role statistics. Click the name of a role in the Roles in Category grid to list the security policies and users associated with the role. The page also presents collapsible diagrams of hierarchies to which the role belongs. Click Export to export data from this page to a spreadsheet.

## Security Console Analytics for Database Resources: Explained

You can review information about data security policies that grant access to a database resource, or about roles and users granted access to that resource.

To begin, select the Analytics tab, and then the Database Resources tab on the Analytics page. Select the resource you want to review in the **Database Resource** field. Then click **Go**. Results are presented in three tables.

### Data Security Policies

The Data Security Policies table documents policies that grant access to the selected database resource.

Each row documents a policy, specifying by default:

- The data privileges it grants.
- The condition that defines how data is selected from the database resource.
- The policy name and description.
- A role that includes the policy.

For any given policy, this table may include multiple rows, one for each role in which the policy is used.

### Authorized Roles


The Authorized Roles table documents roles with direct or indirect access to the selected database resource. Any given role may:

- Include one or more data security policies that grant access to the database resource. The Authorized Roles table includes one row for each policy belonging to the role.
- Inherit access to the database resource from one or more roles in its hierarchy. The Authorized Roles table includes one row for each inheritance.

By default, each row specifies:

- The name of the role it documents.
- The name of a subordinate role from which access is inherited, if any. (If the row documents access provided by a data security policy assigned directly to the subject role, this cell is blank.)

- The data privileges granted to the role.
- The condition that defines how data is selected from the database resource.

 **Note:** A role's data security policies and hierarchy may grant access to any number of database resources. However, the Authorized Roles table displays records only of access to the database resource you selected.

## Authorized Users

The Authorized Users table documents users who are assigned roles with access to the selected database resource.

By default, each row specifies a user name, a role the user is assigned, the data privileges granted to the user, and the condition that defines how data is selected from the database resource. For any given user, this table may include multiple rows, one for each grant of access by a data security policy belonging to, or inherited by, a role assigned to the user.

## Manipulating the Results

In any of these three tables, you can:

- Add or remove columns. Select **View - Columns**.
- Search among the results. Select **View - Query by Example** to add a search field at the top of each column in a table.
- Export results to a spreadsheet. Select the **Export to Excel** option available for each table.

# Using the Bridge for Active Directory

## Bridge for Microsoft Active Directory: Explained

The bridge for Microsoft Active Directory synchronizes user account information between Oracle Applications Cloud and Microsoft Active Directory.

## Using the Bridge for Microsoft Active Directory

To use the bridge for Active Directory and synchronize information between Oracle Applications Cloud and Active Directory, perform the following steps:

1. Configure the bridge for Active Directory. Set the configuration options on the Administration tab in the Security Console.
2. Map attributes between source and target applications for synchronization.
3. Download and install the bridge for Active Directory.
4. Perform initial synchronization of users.
5. Perform manual or automatic synchronization regularly to maintain consistency of data on the source and target applications.

## Prerequisites

Before setting up the bridge between Active Directory and Oracle Applications Cloud, you must:

- Install Java Runtime environment (JRE). The bridge is compatible with JRE versions 6, 7, and 8.



- Install the bridge on a computer that can connect to your Active Directory server.
- Enable Single Sign-On (SSO) between Oracle Applications Cloud and your Active Directory instance.

## Source and Target

The bridge synchronizes information between the source and target:

- Source: Is the application that contains the user and role information that is copied to the target.
- Target: Is the application that is updated to contain the same user and role information as the source.

You can select either Oracle Applications Cloud or Active Directory as the source.

### *Related Topics*

- [Getting Started with Oracle Applications Cloud Bridge for Active Directory](#)

## FAQs for Using the Security Console

### What's the difference between private, personally identifiable, and sensitive information?

Private information is confidential in some contexts.

Personally identifiable information (PII) identifies or can be used to identify, contact, or locate the person to whom the information pertains.

Some PII information is sensitive.

A person's name is not private. It is PII but not sensitive in most contexts. The names and work phone numbers of employees may be public knowledge within an enterprise, so not sensitive but PII. Under some circumstances it is reasonable to protect such information.

Some data is not PII but is sensitive, such as medical data, or information about a person's race, religion or sexual orientation. This information cannot generally be used to identify a person, but is considered sensitive.

Some data is not private or personal, but is sensitive. Salary ranges for grades or jobs may need to be protected from view by users in those ranges and only available to senior management.

Some data is not private or sensitive except when associated with other data that is not private or sensitive. For example, date or place of birth is not a PII attribute because by itself it cannot be used to uniquely identify an individual, but it is confidential and sensitive in conjunction with a person's name.



# 3 Managing Implementation Users

## Implementation Users: Explained

The initial user can perform all the necessary setup tasks. She can also perform security tasks, including resetting passwords and the granting of additional privileges to herself and to others. After you sign in the first time, you can create additional implementation users with the same broad setup privileges that Oracle provides to the initial user. If you prefer, you can restrict the privileges of these implementation users based on your own setup needs.


The setup or implementation users are typically different from the Oracle Applications Cloud application users. For example:

- Setup users are usually not part of your Oracle Applications Cloud organization.
- You don't assign them product-specific work or make it possible for them to view product-specific data.

You do, however, have to give them the necessary privileges they require to complete application setup. You provide these privileges through role assignment.

Your application includes several types of roles. A job role, such as the IT Security Manager role, corresponds to a specific job that a person does in the organization. An abstract role, such as the Employee role, corresponds to general categories of people in an organization. You assign both types of roles to users in the security console. For the setup users, these roles are:


- Application Diagnostic Administrator
- Application Implementation Consultant
- Employee
- IT Security Manager

 **Note:** The Application Implementation Consultant role has unrestricted access to large amounts of data. Limit assignment of the Application Implementation Consultant abstract role to implementation users who perform a wide range of implementation tasks and move the setup data across environments. Use other administrator roles such as the Financials Applications Administrator for users required to perform specific implementation tasks.

There is nothing to stop you from providing the same setup permissions to users that are part of the organization, if you need to. Highly privileged implementation users are not the only users who can do setup. You can create administrative users who don't have such broad permissions, yet can configure product-specific structures and perform other related setup tasks.

## Creating ERP Implementation Users: Overview

As the service administrator for the Oracle ERP Cloud service, you're sent sign-in details when your environments are provisioned. This topic summarizes how to access the service for the first time and set up implementation users to perform the implementation. You must complete these steps before you release the environment to your implementation team.

 **Tip:** Create implementation users in the test environment first. Migrate your implementation to the production environment only after you have validated it. With this approach, the implementation team can learn how to implement security before setting up application users in the production environment.

## Signing In to the Oracle ERP Cloud Service

The service activation mail from Oracle provides the service URLs, user name, and temporary password for the test or production environment. Refer to the e-mail for the environment that you're setting up. The Identity Domain value is the environment name. For example, ERPA could be the production environment and ERPA-TEST could be the test environment.

Sign in to the test or production Oracle ERP Cloud service using the service home URL from the service activation mail. The URL ends with either **AtkHomePageWelcome** or **FuseWelcome**.

When you first sign in, use the password in the service activation mail. You're prompted to change the password and answer some challenge questions. Make a note of the new password. You must use it for subsequent access to the service.

Don't share your sign-in details with other users.

## Creating Implementation Users

This table summarizes the process of creating implementation users and assigning roles to them.

Step	Task or Activity	Description
1	Create Implementation Users	<p>The Application Implementation Consultant user may be your only implementation user. However, you can create the implementation users TechAdmin and ERPUser, and assign the required job roles to them if you need these implementation users and they don't already exist in your environment.</p> <p>You don't associate named workers with these users at this time because your service isn't yet configured to onboard users in the integrated HCM core. As your implementation progresses, you may decide to replace these users or change their definitions.</p>
2	Run User and Roles Synchronization Process	Run the process Retrieve Latest LDAP Changes to copy changes to users and their assigned roles to Oracle Fusion Human Capital Management (Oracle Fusion HCM).
3	Assign Security Profiles to Abstract Roles	Enable basic data access for the predefined Employee, Contingent Worker, and Line Manager abstract roles.
4	Create a Generic Role Mapping for the Roles	Enable the roles created in step 3 to be provisioned to implementation users.
5	Assign Abstract Role and Data Access to the Implementation User	Assign the implementation user with the roles that enable functional implementation to proceed.

Step	Task or Activity	Description
6	Verify Implementation User Access	Confirm that the implementation user can access the functions enabled by the assigned roles.

Once these steps are complete, you're recommended to reset the service administrator sign-in details.

#### Related Topics

- [Creating the TechAdmin Implementation User: Procedure](#)

## Managing User Accounts: Explained

The User Accounts page of the Security Console provides summaries of user accounts that you select to review. For each account, it always provides:

- The user's login, first name, and last name, in a User column.
- Whether the account is active, whether it is locked, and the user's password-expiration date, in a Status column.

It may also provide:

- Associated worker information, if the user account was created in conjunction with a worker record in Human Capital Management. This may include person number, manager, job title, and business unit.
- Party information, if the user account was created in conjunction with a party record created in CRM. This may include party number and party usage.

The User Accounts page also serves as a gateway to account-management actions you can complete. These include:

- Reviewing details of, editing, or deleting existing accounts.
- Adding new accounts.
- Locking accounts.
- Resetting users' passwords.

To begin working with user accounts:

1. Select the Users tab in the Security Console.
2. In a Search field, select any combination of user states and enter at least three characters.

The search returns user accounts at the states you selected, whose login, first name, or last name begins with the characters you entered.

## Reviewing and Editing User Accounts: Explained

To review full details for an existing account, search for it in the User Accounts page and click its user login in the User column. This opens a User Account Details page.

These details always include:

- User information, which consists of user, first, and last name values, and an e-mail address. It also includes an external identifier if one has been created. This is an external-system identifier, such as a single sign-on account ID if single sign-on is enabled.
- Account information, which comprises the user's password-expiration date, whether the account is active, and whether it is locked.
- A table listing the roles assigned to the user, including whether they are autoprovisioned or assignable. A role is assignable if it can be delegated to another user.

The page may also include an Associated Worker Information region or an Associated Party Information region. The former appears only if the user account is related to a worker record in Human Capital Management, and the latter if the user account is related to a party record in CRM.

To edit these details, click Edit in the User Account Details page. Be aware, however:

- You can edit values only in the User Information, Account Information, and Roles regions.
- Even in those regions, you can edit some fields only if the user is not associated with a worker or a party. If not, for example, you can modify the First Name and Last Name values in the User Information region. But if the user is associated with a worker, you would manage these values in Human Capital Management. They would be grayed out in this Edit User Details page.
- In the Roles table, Autoprovisioned check boxes are set automatically, and you cannot modify the settings. The box is checked if the user obtained the role through autoprovisioning, and cleared if the role was manually assigned. You can modify the Assignable setting for existing roles.

Click Add Autoprovisioned Roles to add any roles for which the user is eligible. Or, to add roles manually, click Add Role. Search for roles you want to add, select them, and click Add Role Membership.

You can also delete roles. Click the x icon in the row for the role, and then respond Yes to a confirmation message.

## Adding User Accounts: Procedure

The ability to add user accounts in the Security Console is intended for the creation of implementation users. The expectation is that an implementation user would set up Oracle Human Capital Management (HCM). You would then use HCM to create accounts for application users.

To add a user account in the Security Console:

1. Select the Users tab in the Security Console to open the User Accounts page.
2. Click the Add User Account button.
3. Select a value for Associated Person Type: Worker if this account is to be linked to a worker record in HCM, or None if not.
4. By default, the account is set to be active and unlocked in the Account Information area. Typically these values are appropriate, but you may modify them.
5. Enter name, e-mail, and password values in the User Information region.
  - You need not enter a User Name value. It is generated automatically according to the user-name-generation rule selected in the General Administration page.
  - The First Name value is not required. However, you are expected to enter one if the selected user-name-generation rule makes use of the first name or the first-name initial.
  - The Password value must conform to the password policy established in the General Administration page. The Confirm Password value must match the Password value.

- An external identifier is the user's ID in another system, such as a single sign-on account ID if single sign-on is enabled.
- 6. Click Add Autoprovisioned Roles, to assign roles for which role-provisioning rules make the user eligible.
- 7. Click Add Roles to assign other roles. Search for roles you want to assign, select them, then click Add Role Membership. Select Done when you are finished.
- 8. In the Roles table, select Assignable for any role that can be delegated to another user.
- 9. Click Save and Close.

## Resetting Passwords: Procedure

An administrator may use the Security Console to reset other users' passwords. That action triggers an e-mail notification to each user, informing him or her of the new password.


A new password must conform to your password policy. You establish this policy in the General Administration page. The page in which you reset the password displays the policy.

To reset a password:

1. In the User Accounts page, search for the user whose password you want to change.
2. In that user's row, click the Action icon, then Reset Password.

As an alternative, open the user's account for editing: click the User Login value in the User Accounts page, then Edit in a User Account Details page. In that page, select Reset Password.

3. In a Reset Password dialog, select whether to generate the password automatically or change it manually. For a manual change, also enter a new password value and a confirmation value, which must match the new value.

 **Note:** The option to reset a password to an automatically generated value is always available. For the manual-reset option to be available, an "Administrator can manually reset password" option must be selected on the General Administration page.

4. Click the Reset Password button.

### Related Topics

- [Administering the Security Console: Explained](#)

## Locking and Unlocking User Accounts: Procedure

An administrator may use the Security Console to lock users' accounts. When an account is locked, its user cannot sign in. He or she must either use the "forgot password" flow to reset the password or contact the help desk to have the account unlocked.

You can lock a user account in either of two ways. In either case, open the User Accounts page and search for the user whose account you want to lock.

To complete the first procedure:

1. In the user's row, click the Action icon, then Lock Account.
2. Respond Yes to a confirmation message.

To complete the second procedure:

1. Open the user's account for editing: click the User Login value in the User Accounts page, then Edit in a User Account Details page.
2. In the Edit User Account page, select the Locked check box in the Account Information region.
3. Select Save and Close.

You can unlock the account only from the Edit User Account page, by clearing the Locked check box.

## Deleting User Accounts: Procedure

An administrator may use the Security Console to delete users' accounts.

1. Open the User Accounts page and search for the user whose account you want to delete.
2. In the user's row, click the Action icon, then Delete.
3. Respond Yes to a confirmation message.

## Defining Notification Templates: Explained

Users may receive email notifications of user-account events, such as account creation or password expiration. These notifications are generated from a set of templates, each of which specifies an event. A template generates a message to a user when that user is involved in the event tied to the template.

To work with templates, select the Administration tab in the Security Console, and then the Notifications tab in the Administration page.

There are eight events, and a predefined template exists for each event. Only one template linked to a given event can be enabled at a time. To use notification templates, ensure that notifications are enabled. To do that, select the **Enable Notifications** check box in the Notification Preferences region of the Notifications Administration page.

Even so, you can enable or disable templates, edit them, or create templates to replace existing ones. To create a template:

1. Click the Add Template button in the Notifications Administration page.
2. Enter a name for the template and, optionally, a description.
3. Select an event. When you do, values for Message Subject and Message are copied from an already-configured template for which the same event is selected.
4. Edit the message subject, message text, or both. Note that message text may include tokens, which are replaced in runtime by literal values appropriate for a given user or account.
5. Select the Enabled check box to use the template immediately. If you do, the application automatically disables the template that had been enabled for that event. Or, leave the check box cleared to hold the template in reserve.
6. Click Save and Close.

To edit a template, click its name in the Notifications Administration page. Then follow essentially the same process as you would to create a template. Note, however, that you cannot modify the event selected for a template that has been saved. You may enable or disable an individual template by selecting or clearing its Enabled check box as you edit it.

You can disable, but cannot delete, predefined templates. You can delete the templates you created. To do so, click the **x** icon in the row for a template in the Notifications Administration page. Then respond to a confirmation message. If you delete a template that had been enabled, no other template is enabled automatically.

The following table lists the tokens you can use in the message text for a template:



Token	Meaning
\${userLoginId}	The user name of the person whose account is being created or modified.
\${firstName}	The given name of the person whose account is being created or modified.
\${lastName}	The surname of the person whose account is being created or modified.
\${managerFirstName}	The given name of the person who manages the person whose account is being created or modified.
\${managerLastName}	The surname of the person who manages the person whose account is being created or modified.
\${loginUrl}	The web address to sign in to Oracle Cloud. The user can sign in and use the Preferences page to change a password that is about to expire. Or, without signing in, the user can engage a forgot-password procedure to change a password that has already expired.
\${resetUrl}	A one-time web address expressly for the purpose of resetting a password, used in the Password Generated, Password Reset, New Account, and New Account Manager templates.
\$(CRLF)	Insert line break.
\$(SP4)	Insert four spaces.

## Synchronizing User and Role Information: Procedure

You run the process Retrieve Latest LDAP Changes once during implementation. This process copies data from the LDAP directory to the Oracle Fusion Applications Security tables. Thereafter, the data is synchronized automatically. To run this process, perform the task Run User and Roles Synchronization Process as described in this topic.

### Running the Retrieve Latest LDAP Changes Process

Follow these steps:

1. Sign in to your Oracle Applications Cloud service environment as the service administrator.
2. Select **Navigator > Setup and Maintenance** to open the Setup and Maintenance work area.
3. In the Setup and Maintenance work area, select the Run User and Roles Synchronization Process task in the Initial Users functional area.

The process submission page for the Retrieve Latest LDAP Changes process opens.

4. Click **Submit**.
5. Click **OK** to close the confirmation message.

# Resetting the Cloud Service Administrator Sign-In Details: Procedure

Once you have set up your implementation users, you can reset the service administrator sign-in details for your Oracle Applications Cloud service. You reset these details to avoid problems later when you're loaded to the service as an employee. This topic describes how to reset the service administrator sign-in details.

## Resetting the Service Administrator Sign-In Details

Sign in to your Oracle Applications Cloud service using the TechAdmin user name and password and follow these steps:

1. In the Setup and Maintenance work area, select the Create Implementation Users task in the Initial Users functional area.  
  
The User Accounts page of the Security Console opens.
2. Search for your service administrator user name, which is typically your email. Your service activation mail contains this value.
3. In the search results, click your service administrator user name to open the User Account Details page.
4. Click **Edit**.
5. Change the **User Name** value to **ServiceAdmin**.
6. Delete any value in the **First Name** field.
7. Change the value in the **Last Name** field to **ServiceAdmin**.
8. Delete the value in the **Email** field.
9. Click **Save and Close**.
10. Sign out of your Oracle Applications Cloud service.

After making these changes, you use the user name **ServiceAdmin** when signing in as the service administrator.

# 4 Preparing for Application Users

## Overview

During implementation, you prepare your Oracle Applications Cloud service for application users. Decisions made during this phase determine how you manage users by default. Most of these decisions can be overridden. However, for efficient user management, you're recommended to configure your environment to both reflect enterprise policy and support most or all users.

The following table lists some key decisions and tasks that are explained in this chapter.

Decision or Task	Topic
Whether user accounts are created automatically for application users	User Account Creation Option: Explained
How user names are formed	Default User Name Format Option: Explained
How role provisioning is managed	User Account Role Provisioning Option: Explained
Whether user accounts are maintained automatically	User Account Maintenance Option: Explained
Whether and where user sign-in details are sent	Send User Name and Password Option: Explained
Understanding user-account password policy	Password Policy: Explained
Ensuring that the employee, contingent worker, and line manager abstract roles are provisioned automatically either within a Human Capital Management setup or by using the Create Users user interface.	Provisioning Abstract Roles to Users Automatically: Procedure

## User and Role-Provisioning Setup: Critical Choices

This topic introduces the user and role-provisioning options, which control the default management of some user-account features. To set these options, perform the Manage Enterprise HCM Information task in the Setup and Maintenance work area. You can edit these values as necessary and specify an effective start date for changed values.

## User Account Creation

The **User Account Creation** option controls:

- Whether user accounts are created automatically when you create a person, user, or party record
- The automatic provisioning of roles to users at account creation

This option may be of interest if:

- Some workers don't need access to Oracle Applications Cloud.
- Your existing provisioning infrastructure creates user accounts, and you plan to integrate it with Oracle Applications Cloud.

## User Account Role Provisioning

Once a user account exists, users both acquire and lose roles as specified by current role-provisioning rules. For example, managers may provision roles to users manually, and the termination process may remove roles from users automatically. You can control role provisioning by setting the **User Account Role Provisioning** option.

 **Note:** Roles that you provision to users directly on the Security Console aren't affected by this option.

## User Account Maintenance

The **User Account Maintenance** option controls whether user accounts are suspended and reactivated automatically. By default, a user's account is suspended automatically when the user is terminated and reactivated automatically if the user is rehired.

## User Account Creation for Terminated Workers

The **User Account Creation for Terminated Workers** option controls whether user-account requests for terminated workers are processed or suppressed. This option takes effect when you run the Send Pending LDAP Requests process.

### Related Topics

- [User Account Creation for Terminated Workers Option: Explained](#)

## User Account Creation Option: Explained

The **User Account Creation** option controls whether user accounts are created automatically when you create a person or party record. Use the Manage Enterprise HCM Information task to set this option.

This table describes the **User Account Creation** option values.

Value	Description
<b>Both person and party users</b>	User accounts are created automatically for both person and party users.  This value is the default value.

Value	Description
<b>Party users only</b>	<p>User accounts are created automatically for party users only.</p> <p>User accounts aren't created automatically when you create person records. Instead, account requests are held in the LDAP requests table, where they're identified as suppressed. They're not processed.</p>
<b>None</b>	<p>User accounts aren't created automatically.</p> <p>All user account requests are held in the LDAP requests table, where they're identified as suppressed. They're not processed.</p>

If user accounts are created automatically, then role provisioning also occurs automatically, as specified by current role mappings when the accounts are created. If user accounts aren't created automatically, then role requests are held in the LDAP requests table, where they're identified as suppressed. They aren't processed.

If you disable the automatic creation of user accounts for some or all users, then you can:

- Create user accounts individually on the Security Console.
- Link existing user accounts to person and party records using the Manage User Account or Manage Users task.

Alternatively, you can use an external provisioning infrastructure to create and manage user accounts. In this case, you're responsible for managing the interface with Oracle Applications Cloud, including any user-account-related updates.

## User Account Role Provisioning Option: Explained

Existing users both acquire and lose roles as specified by current role-provisioning rules. For example, users may request some roles for themselves and acquire others automatically. All provisioning changes are role requests that are processed by default. You can control what happens to role requests by setting the **User Account Role Provisioning** option. Use the Manage Enterprise HCM Information task to set this option.

This table describes the **User Account Role Provisioning** option values.

Value	Description
<b>Both person and party users</b>	<p>Role provisioning and deprovisioning occur for both person and party users.</p> <p>This value is the default value.</p>
<b>Party users only</b>	<p>Role provisioning and deprovisioning occur for party users only.</p> <p>For person users, role requests are held in the LDAP requests table, where they're identified as suppressed. They're not processed.</p>
<b>None</b>	<p>For both person and party users, role requests are held in the LDAP requests table, where they're identified as suppressed. They're not processed.</p>

## User Account Maintenance Option: Explained

By default, a user's account is suspended automatically when the user has no roles. This situation occurs typically at termination. The user account is reactivated automatically if you reverse the termination or rehire the worker. The **User Account Maintenance** option controls these actions. Use the Manage Enterprise HCM Information task to set this option.

This table describes the **User Account Maintenance** option values.

Value	Description
<b>Both person and party users</b>	<p>User accounts are maintained automatically for both person and party users.</p> <p>This value is the default value.</p>
<b>Party users only</b>	<p>User accounts are maintained automatically for party users only.</p> <p>For person users, account-maintenance requests are held in the LDAP requests table, where they're identified as suppressed. They're not processed.</p> <p>Select this value if you manage accounts for person users in some other way.</p>
<b>None</b>	<p>For both person and party users, account-maintenance requests are held in the LDAP requests table, where they're identified as suppressed. They're not processed.</p> <p>Select this value if you manage accounts for both person and party users in some other way.</p>

## Setting the User and Role Provisioning Options: Procedure

The user and role provisioning options control the creation and maintenance of user accounts for the enterprise. This procedure explains how to set these options. To create and maintain Oracle Applications Cloud user accounts automatically for all users, you can use the default settings.

### Setting the User and Role Provisioning Options

Follow these steps:

1. In the Setup and Maintenance work area, select the Manage Enterprise HCM Information task in the Workforce Structures functional area.
2. On the Enterprise page, select **Edit > Update**.
3. In the **Update Enterprise** dialog box, enter the effective date of any changes and click **OK**. The Edit Enterprise page opens.
4. Scroll down to the User and Role Provisioning Information section.
5. Set the User Account Options, as appropriate. The User Account Options are:
  - o **User Account Creation**
  - o **User Account Role Provisioning**

- **User Account Maintenance**
- **User Account Creation for Terminated Workers**

These options are independent of each other. For example, you can set **User Account Creation** to **None** and **User Account Role Provisioning** to **Yes**.

6. Click **Submit** to save your changes.
7. Click **OK** to close the **Confirmation** dialog box.

## Provisioning Abstract Roles to Users Automatically: Procedure

Provisioning the Employee, Contingent Worker, and Line Manager abstract roles automatically to users is efficient, as most users have at least one of these roles. It also ensures that users have basic access to functions and data when they first sign in. This topic explains how to set up automatic role provisioning during implementation using the Manage Role Provisioning Rules task.

### Provisioning the Employee Role Automatically to Employees

Follow these steps:

1. Sign in as the TechAdmin user or another user with the IT Security Manager job role or privileges.
2. In the Setup and Maintenance work area, select the Manage Role Provisioning Rules task in the Users and Security functional area. The Manage Role Mappings page opens.
3. In the Search Results section of the Manage Role Mappings page, click the **Create** icon. The Create Role Mapping page opens.
4. In the **Mapping Name** field enter Employee.
5. Complete the fields in the Conditions section of the Create Role Mapping page as shown in the following table.

Field	Value
<b>System Person Type</b>	Employee
<b>HR Assignment Status</b>	Active

6. In the Associated Roles section of the Create Role Mapping page, add a row.
7. In the **Role Name** field of the Associated Roles section, click **Search**.
8. In the **Search and Select** dialog box, enter Employee in the **Role Name** field and click **Search**.
9. Select Employee in the search results and click **OK**.
10. If **Autoprovision** isn't selected automatically, then select it. Ensure that the **Requestable** and **Self-Requestable** options aren't selected.
11. Click **Save and Close**.

### Provisioning the Contingent Worker Role Automatically to Contingent Workers

Repeat the steps in Provisioning the Employee Role Automatically to Employees, with the following changes:

- In step 4, enter Contingent Worker as the mapping name.


- In step 5, set **System Person Type** to Contingent Worker.
- In steps 8 and 9, search for and select the Contingent Worker role.

## Provisioning the Line Manager Role Automatically to Line Managers

Follow these steps:

1. In the Search Results section of the Manage Role Mappings page, click the **Create** icon. The Create Role Mapping page opens.
2. In the **Mapping Name** field enter Line Manager.
3. Complete the fields in the Conditions section of the Create Role Mapping page as shown in the following table.

Field	Value
<b>System Person Type</b>	Employee
<b>HR Assignment Status</b>	Active
<b>Manager with Reports</b>	Yes

 **Tip:** Setting **Manager with Reports** to Yes is the same as setting **Manager Type** to Line Manager. You don't need both values.

4. In the Associated Roles section of the Create Role Mapping page, add a row.
5. In the **Role Name** field of the Associated Roles section, click **Search**.
6. In the **Search and Select** dialog box, enter Line Manager in the **Role Name** field and click **Search**.
7. Select Line Manager in the search results and click **OK**.
8. If **Autoprovision** isn't selected automatically, then select it. Ensure that the **Requestable** and **Self-Requestable** options aren't selected.
9. Click **Save and Close**.
10. On the Manage Role Mappings page, click **Done**.

To provision the line manager role automatically to contingent workers, follow these steps to create an additional role mapping. In step 2, use a unique mapping name (for example, Contingent Worker Line Manager). In step 3, set **System Person Type** to Contingent Worker.

## FAQs for Preparing for Application Users

### Can I implement single sign-on in the cloud?

Yes. Single sign-on enables users to sign in once but access multiple applications, within and across product families.

Submit a service request for implementation of single sign-on. For more information, see Oracle Applications Cloud Service Entitlements (2004494.1) on My Oracle Support at <https://support.oracle.com>.



# 5 Creating and Managing Application Users

## Creating Users

### Creating Users: Procedure

During implementation, you can use the Create User task to create test application users. By default, this task creates a minimal person record and a user account. After implementation, you should use the Hire an Employee task to create application users. The Create User task isn't recommended after implementation is complete. This topic describes how to create a test user using the Create User task.

Sign in and follow these steps:

1. Select **Navigator > - My Team > - Manage Users** to open the Manage Users page.
2. In the Search Results section, click **Create**.

The Create User page opens.

### Completing Personal Details

1. Enter the user's name.
2. In the **E-Mail** field, enter the user's primary work e-mail.
3. In the **Hire Date** field, enter the hire date for a worker. For other types of users, enter a user start date. You can't edit this date after you create the user.

### Completing User Details

You can enter a user name for the user. If you leave the **User Name** field blank, then the user name follows the enterprise default user-name format.

### Setting User Notification Preferences

The **Send user name and password** option controls whether a notification containing the new user's sign-in details is sent when the account is created. This option is enabled only if notifications are enabled on the Security Console and an appropriate notification template exists. For example, if the predefined notification template New Account Template is enabled, then a notification is sent to the new user. If you deselect this option, then you can send the e-mail later by running the Send User Name and Password E-Mail Notifications process. An appropriate notification template must be enabled at that time.

### Completing Employment Information

1. Select a **Person Type** value.
2. Select **Legal Employer** and **Business Unit** values.

### Adding Roles

1. Click **Autoprovision Roles**. Any roles for which the user qualifies automatically, based on the information that you have entered so far, appear in the Role Requests table.

2. To provision a role manually to the user, click **Add Role**. The Add Role dialog box opens.
3. Search for and select the role. The role must appear in a role mapping for which you satisfy the role-mapping conditions and where the **Requestable** option is selected for the role.

The role appears in the Role Requests region with the status **Add requested**. The role request is created when you click **Save and Close**.

Repeat steps 2 and 3 for additional roles.

4. Click **Save and Close**.
5. Click **Done**.

## Importing Users: Explained

You can import workers from legacy applications to Oracle Fusion Applications using the Import Worker Users task . You can access this task from the Setup and Maintenance work area. By enabling you to bulk-load existing data, this task is an efficient way of creating and enabling users of Oracle Fusion Applications.

### The Import Worker Users Process

Importing worker users is a two-stage process:

1. When you perform the Import Worker Users task, the Initiate Spreadsheet Load page opens. On the Initiate Spreadsheet Load page, you generate and complete the Create Worker spreadsheet. You must map your data to the spreadsheet columns and provide all required attributes. Once the spreadsheet is complete, you click **Upload** in the spreadsheet to import the data to the Load Batch Data stage tables.
2. As the upload process imports valid data rows to the Load Batch Data stage tables, the Load Batch Data process runs automatically. Load Batch Data is a generic utility for loading data to Oracle Fusion Human Capital Management from external sources. This process loads data from the Load Batch Data stage tables to the Oracle Fusion application tables.

### User-Account Creation

The application creates Oracle Fusion user accounts automatically for imported workers.

By default, user account names and passwords are sent automatically to users when their accounts are created. This default action may have been changed at enterprise level, as follows:

- You can disable notifications for all user life cycle events.
- You can disable notifications for the New User Created and New Account Create Manager events.

### Role Provisioning

Once user accounts exist, roles are provisioned to users automatically in accordance with current role-provisioning rules. For example, current rules could provision the employee abstract role to every worker. Role provisioning occurs automatically and cannot be disabled for the enterprise.

#### *Related Topics*

- [Uploading Data Using HCM Spreadsheet Data Loader: How It's Processed](#)
- [Uploading Data Using HCM Spreadsheet Data Loader: Worked Example](#)
- [User and Role-Provisioning Setup: Critical Choices](#)

## Importing Users: Worked Example

This example shows how to import worker users from legacy applications to Oracle Fusion Applications. The following table summarizes key decisions for this task.

Decisions to Consider	In This Example
What's my spreadsheet name?	WorkersMMDDYYBatchnn. xlsx
You can define your own naming convention. In this example, the name is selected to make identifying the spreadsheet contents easy.	For example, Workers042713Batch01. xlsx.
What's my batch name?	Workers042713Batchnn
You can define your own batch name, which must be unique.	

## Summary of the Tasks

Import worker users by:

1. Selecting the Import Worker Users task
2. Creating the spreadsheet
3. Entering worker data in the spreadsheet
4. Importing worker data and correcting import errors
5. Reviewing and correcting load errors

## Prerequisites

Before you can complete this task, you must have:

1. Installed the desktop client Oracle ADF Desktop Integration Add-in for Excel
2. Enabled the Trust Center setting **Trust access to the VBA project object model** in Microsoft Excel

## Selecting the Import Worker Users Task

1. On the Overview page of the Setup and Maintenance work area, click the All Tasks tab.
2. In the Search region, complete the fields as shown in this table.

Field	Name
<b>Search</b>	Task
<b>Name</b>	Import Worker Users

3. Click **Search**.
4. In the search results, click **Go to Task** for the task Import Worker Users. The Initiate Spreadsheet Load page opens. Alternatively, you can select the Import Worker Users task from an implementation project.

## Creating the Spreadsheet

1. On the Initiate Spreadsheet Load page, find the entry for Create Worker in the list of business objects.

Create Worker appears after other business objects such as departments, locations, and jobs. You must create those business objects before worker users, regardless of how you create them.

2. Click **Create Spreadsheet** for the Create Worker entry.
3. When prompted, save the spreadsheet locally using the name Workers042713Batch01.xlsx.
4. When prompted, sign in to Oracle Fusion Applications using your Oracle Fusion user name and password.

## Entering Worker Data in the Spreadsheet

1. In the **Batch Name** field of the spreadsheet Workers042713Batch01.xlsx, replace the default batch name with the batch name Workers042713Batch01.
2. If your data includes flexfields, then click **Configure Flexfield** to configure flexfield data. Otherwise, go to step 5 of this task.
3. In the **Configure Flexfield** window, select an attribute value and click **OK**.
4. See the Flexfields Reference tab for information about the configured flexfield.
5. Enter worker data in the spreadsheet.

Ensure that you provide any required values and follow instructions in the spreadsheet for creating rows.

## Importing Worker Data and Correcting Import Errors

Use the default values except where indicated.

1. In the workers spreadsheet, click **Upload**.
2. In the **Upload Options** window, click **OK**.

As each row of data uploads to the Load Batch Data stage tables, its status updates.

3. When uploading completes, identify any spreadsheet rows with the status **Insert Failed**, which indicates that the row didn't import to the stage tables.
4. For any row that failed, double-click the status value to display a description of the error.
5. Correct any import errors and click **Upload** again to import the remaining rows to the same batch.

As rows import successfully to the stage tables, the data loads automatically to the application tables.

## Reviewing and Correcting Load Errors

1. In the spreadsheet, click **Refresh** to display latest load status.

Any errors that occur during the load process appear in the spreadsheet.

2. Correct any load errors in the spreadsheet.
3. Repeat this process from Importing Worker Data and Correcting Import Errors until all spreadsheet rows both import and load successfully.
4. Close the spreadsheet.


To load a second batch of worker users on the same date, increment the batch number in the spreadsheet and batch names (for example, Workers042713Batch02).

## Inactive Users Report

Run the Inactive Users Report to identify users who haven't signed in for a specified period.

To run the report:

1. In the Scheduled Processes work area, click **Schedule New Process**.
2. Search for and select the Import User Login History process.

 **Note:** Whenever you run the Inactive Users Report process, you must first run the Import User Login History process. This process imports information that the Inactive Users Report process uses to identify inactive users. You're recommended to schedule Import User Login History to run daily.

3. When the Import User Login History process completes, search for and select the Inactive Users Report process.
4. In the **Process Details** dialog box, set parameters to identify one or more users.
5. Click **Submit**.

### Inactive Users Report Parameters

All parameters except **Days Since Last Activity** are optional.

#### User Name Begins With

Enter one or more characters.

#### First Name Begins With

Enter one or more characters.

#### Last Name Begins With

Enter one or more characters.

#### Department

Enter the department from the user's primary assignment.

#### Location

Enter the location from the user's primary assignment.

#### Days Since Last Activity

Enter the number of days since the user last signed in. Use this parameter to specify the meaning of the term inactive user in your enterprise. Use other parameters to filter the results.

This value is required and is 30 by default. This value identifies users who haven't signed in during the last 30 or more days.

#### Last Activity Start Date

Specify the start date of a period in which the last activity must fall.

#### Last Activity End Date

Specify the end date of a period in which the last activity must fall.

## Viewing the Report

The process produces an `Inactive_Users_List_processID.xml` file and a `Diagnostics_processID.zip` file.

The report includes the following details for each user who satisfies the report parameters:

- Number of days since the user was last active
- Date of last activity
- User name
- First and last names
- Assignment department
- Assignment location
- City and country
- Report time stamp

### *Related Topics*

- [Importing User Login History: Explained](#)

## Managing Users

### Managing User Accounts: Procedure

Human resource specialists (HR specialists) can manage user accounts for users whose records they can access. This topic describes how to update a user account.

To access the user account page for a person:

1. Open the Person Management work area.
2. On the Search Person page, search for the person whose account you're updating.
3. In the search results, select the person and select **Actions > Personal and Employment > Manage User Account**. The Manage User Account page opens.

### Managing User Roles

To add a role:

1. Click **Add Role**.  
The **Add Role** dialog box opens.
2. In the **Role Name** field, search for the role that you want to add.
3. In the search results, select the role and click **OK**.  
The role appears in the Role Requests region with the status **Add Requested**.
4. Click **Save**.

To remove a role from any section of this page:

1. Select the role and click **Remove**.
2. In the **Warning** dialog box, click **Yes** to continue.
3. Click **Save**.

Clicking **Save** sends requests to add or remove roles to your LDAP directory server. Requests appear in the Role Requests in the Last 30 Days section. Once provisioned, roles appear in the Current Roles section.

To update a user's roles automatically, select **Actions > Autoprovision Roles**. This action applies to roles for which the **Autoprovision** option is selected in all current role mappings. The user immediately:

- Acquires any role for which he or she qualifies but doesn't currently have
- Loses any role for which he or she no longer qualifies

You're recommended to autoprovision roles for individual users if you know that additional or updated role mappings exist that affect those users.

## Copying Personal Data to LDAP

By default, changes to personal data, such as person name and phone, are copied to your LDAP directory periodically. To copy any changes immediately:


1. Select **Actions > Copy Personal Data to LDAP**.
2. In the **Copy Personal Data to LDAP** dialog box, click **Overwrite LDAP**.

## Resetting Passwords

To reset a user's password:

1. Select **Actions > Reset Password**.
2. In the **Warning** dialog box, click **Yes** to continue.

This action sends a notification containing a reset-password link to the user's work email.


 **Note:** A notification template for the password reset event must exist and be enabled. Otherwise, no notification is sent.

## Editing User Names

To edit a user name:

1. Select **Actions > Edit User Name**.
2. In the **Update User Name** dialog box, enter the user name and click **OK**. The maximum length of the user name is 80 characters.
3. Click **Save**.

This action sends the updated user name to your LDAP directory. Once the request is processed, the user can sign in using the updated name. As the user receives no automatic notification of the change, you're recommended to send the details to the user.

 **Tip:** Users can add roles, autoprovision roles, and copy their personal data to LDAP by selecting **Navigator > My Account**. Line managers can add, remove, and autoprovision roles and copy personal data to LDAP for their reports from the Directory or by selecting **Navigator > My Team**.


## Changing User Names: Explained

By default, user names are generated automatically in the enterprise default format when you create a person record. Users who have the human resource specialist (HR specialist) role can change user names for existing HCM users whose records they can access. This topic describes the automatic generation of user names and explains how to change an existing user name.

### User Names When Creating Users

You create an HCM user by selecting a task, such as Hire an Employee, in the New Person work area. The user name is generated automatically in the enterprise default format. This table summarizes the effects of the available formats for Oracle HCM Cloud users.

User-Name Format	Description
Email	The worker's work email is the user name. If you don't enter the work email when hiring the worker, then it can be entered later on the Security Console. This format is used by default. A different default format can be selected on the Administration tab of the Security Console.
FirstName. LastName	The user name is the worker's first and last names separated by a single period.
FLastName	The user name is the worker's last name prefixed with the initial of the worker's first name.
Person number	If your enterprise uses manual numbering, then any number that you enter becomes the user name. Otherwise, the number is generated automatically and you can't edit it. The automatically generated number becomes the user name.

 **Note:** If the default user-name rule fails, then a system user name can be generated. The option to generate a system user name is enabled by default but can be disabled on the Security Console.


### Existing User Names

HR specialists can change an existing user name on the Manage User Account page.

To change a worker's user name:

1. Search for and select the worker in the Person Management work area.
2. For the selected worker, select **Actions > Personal and Employment > Manage User Account**.
3. On the Manage User Account page, select **Actions > Edit User Name**.

The updated name, which can be in any format, is sent automatically to your LDAP directory server. The maximum length of the user name is 80 characters.

 **Tip:** When you change an existing user name, the user's password and roles remain the same. However, the user receives no automatic notification of the change. Therefore, you're recommended to send details of the updated user name to the user.



## Sending Personal Data to LDAP: Explained

User accounts for users of Oracle Fusion Applications are maintained on your LDAP directory server. By default, Oracle HCM Cloud sends some personal information about users to the LDAP directory. This information includes the person number, person name, phone, and manager of the person's primary assignment. HCM Cloud shares these details to ensure that user-account information matches the information about users in HCM Cloud.

This topic describes how and when you can send personal information explicitly to your LDAP directory.

### Bulk Creation of Users

After loading person records using HCM Data Loader, for example, you run the process Send Pending LDAP Requests. This process sends bulk requests for user accounts to the LDAP directory.

When you load person records in bulk, the order in which they're created in HCM Cloud is undefined. Therefore, a person's record may exist before the record for his or her manager. In such cases, the Send Pending LDAP Requests process includes no manager details for the person in the user-account request. The LDAP directory information therefore differs from the information that HCM Cloud holds for the person. To correct any differences between these versions of personal details, you run the Send Personal Data for Multiple Users to LDAP process.

### The Send Personal Data for Multiple Users to LDAP Process

Send Personal Data for Multiple Users to LDAP updates the LDAP directory information to match information held by HCM Cloud. You run the process for either all users or changed users only, as described in this table.

User Population	Description
All users	The process sends personal details for all users to the LDAP directory, regardless of whether they have changed since personal details were last sent.
Changed users only	The process sends only personal details that have changed since details were last sent to the LDAP directory (regardless of how they were sent). This option is the default setting.

 **Note:** If User Account Maintenance is set to **No** for the enterprise, then the process doesn't run.

The process doesn't apply to party users.

You must have the Human Capital Management Application Administrator job role to run this process.

### The Copy Personal Data to LDAP Action

Users can copy their own personal data to the LDAP directory from the Manage User Account page. Human resource specialists and line managers can also perform this action for users whose records they can access. By default, personal data changes are copied periodically to the LDAP directory. However, this action is available for copying changes immediately, if necessary.

#### Related Topics

- [User and Role-Provisioning Setup: Critical Choices](#)

## Processing a User Account Request: Explained

This topic describes the Process User Account Request action, which may appear on the Manage User Account page for users who have no user account.

### The Process User Account Request Action

The Process User Account Request action is available when the status of the worker's user account is either **Requested** or **Failed**. These values indicate that the account request hasn't completed.

Selecting this action submits the request again. Once the request completes successfully, the account becomes available to the user. Depending on your enterprise setup, the user may receive an email containing the user name and password.

### Role Provisioning

Any roles that the user will have appear in the Roles section of the Manage User Account page. You can add or remove roles before selecting the Process User Account Request action. If you make changes to roles, then you must click **Save**.

### The Send Pending LDAP Requests Process

The Process User Account Request action has the same effect as the Send Pending LDAP Requests process. If Send Pending LDAP Requests runs automatically at intervals, then you can wait for that process to run if you prefer. Using the Process User Account Request action, you can submit user-account requests immediately for individual workers.

## Suspending User Accounts: Explained

By default, user accounts are suspended automatically when a user has no roles. This automatic suspension of user accounts is controlled by the **User Account Maintenance** enterprise option. Human resource (HR) specialists can also suspend a user account manually, if necessary. This topic describes how automatic account suspension and reactivation occur. It also explains how to suspend a user account manually.

### Automatic Suspension of User Accounts

When you terminate a work relationship:

- The user loses any automatically provisioned roles for which he or she no longer qualifies. This deprovisioning is automatic.
- If the user has no other active work relationships, then the user also loses manually provisioned roles. These are:
  - Roles that he or she requested
  - Roles that another user, such as a line manager, provisioned to the user

If the user has other, active work relationships, then he or she keeps any manually provisioned roles.


When terminating a work relationship, you specify whether the user is to lose roles on the termination date or on the day following termination.

A terminated worker's user account is suspended automatically at termination only if he or she has no roles. Users can acquire roles automatically at termination, if an appropriate role mapping exists. In this case, the user account remains active.

## Automatic Reactivation of User Accounts

User accounts are reactivated automatically when you reverse a termination or rehire a worker. If you reverse the termination of a work relationship, then:

- The user regains any role that he or she lost automatically at termination. For example, if the user automatically lost roles that had been provisioned manually, then those roles are reinstated.

 **Note:** If you removed any roles from the user manually at termination, then you must restore them to the user manually, if required.

- The user loses any role that he or she acquired automatically at termination.
- If the user account was suspended automatically at termination, then it's automatically reactivated.

The autoprovisioning process runs automatically when you reverse a termination. Therefore, the user's roles are updated automatically as specified by current role mappings.


When you rehire a worker, the user account is reactivated automatically and roles are provisioned automatically as specified by current role mappings. In all other cases, you must reactivate suspended user accounts manually on the Edit User page.

 **Tip:** Authorized users can also manage user account status directly on the Security Console.

## Manual Suspension of User Accounts

To suspend a user account manually, HR specialists follow these steps:

1. Select **Navigator > Manage Users**.
2. Search for and select the user to open the Edit User page.
3. In the User Details section of the Edit User page, set the **Active** value to **Inactive**. You can reactivate the account by setting the **Active** value back to **Active**.
4. Click **Save and Close**.

 **Note:** Role provisioning isn't affected by the manual suspension and reactivation of user accounts. For example, when you reactivate a user account manually, the user's autoprovisioned roles aren't updated unless you click **Autoprovision Roles** on the Edit User page. Similarly, a suspended user account isn't reactivated when you click **Autoprovision Roles**. You must explicitly reactivate the user account first.

IT security managers can lock user accounts on the Security Console. Locking a user account on the Security Console or setting it to **Inactive** on the Edit User page prevents the user from signing in.

### Related Topics

- [User Account Maintenance Option: Explained](#)

## User Details System Extract Report Parameters

The Oracle BI Publisher User Details System Extract Report includes details of Oracle Fusion Applications user accounts. This topic describes the report parameters. Run the report in the Reports and Analytics work area.

## Parameters

### User Population

Enter one of the values shown in this table to identify user accounts to include in the report.

Value	Description
<b>HCM</b>	User accounts with an associated HCM person record.
<b>TCA</b>	User accounts with an associated party record.
<b>LDAP</b>	Accounts for users in the PER_USERS table who have no person number or party ID. Implementation users are in this category.
<b>ALL</b>	HCM, TCA, and LDAP user accounts.

### From Date

Accounts for HCM and LDAP users that exist on or after this date appear in the report. If you specify no **From Date** value, then the report includes accounts with any creation date, subject only to any **To Date** value.

From and to dates don't apply to the TCA user population. The report includes all TCA users if you include them in the report's user population.

### To Date

Accounts for HCM and LDAP users that exist on or before this date appear in the report. If you specify no **To Date** value, then the report includes accounts with any creation date, subject only to any **From Date** value.

From and to dates don't apply to the TCA user population. The report includes all TCA users if you include them in the report's user population.

### User Active Status

Enter one of the values shown in this table to identify the user-account status.

Value	Description
<b>A</b>	Include active accounts, which belong to users with current roles.
<b>I</b>	Include inactive accounts, which belong to users with no current roles.
<b>All</b>	Include both active and inactive user accounts.

### Related Topics

- [Running the User Details System Extract Report: Procedure](#)

## User Details System Extract Report

The Oracle BI Publisher User Details System Extract Report includes details of Oracle Fusion Applications user accounts. This topic describes the report contents.

Run the report in the Reports and Analytics work area.

## Report Results

The report is an XML-formatted file where user accounts are grouped by type, as follows:

- Group 1 (G\_1) includes HCM user accounts.
- Group 2 (G\_2) includes TCA party user accounts.
- Group 3 (G\_3) includes LDAP user accounts.

The information in the extract varies with the account type.

### HCM User Accounts

**Business Unit Name**

The business unit from the primary work relationship.

**Composite Last Update Date**

The date when any one of a number of values, including assignment managers, location, job, and person type, was last updated.

**Department**

The department from the primary assignment.

**Worker Type**

The worker type from the user's primary work relationship.

**Generation Qualifier**

The user's name suffix (for example, Jr., Sr., or III).

**Hire Date**

The enterprise hire date.

**Role Name**

A list of roles currently provisioned to workers whose work relationships are all terminated. This value appears for active user accounts only.

**Title**

The job title from the user's primary assignment.

## TCA User Accounts

### Organizations

A resource group.

### Roles

A list of job, abstract, and data roles provisioned to the user.

### Managers

The manager of a resource group.

## LDAP User Accounts

### Start Date

The account's start date.

### Created By

The user name of the user who created the account.

### Related Topics

- [Running the User Details System Extract Report: Procedure](#)

## FAQs for Creating and Managing Application Users

### Where do default user names come from?

User names are generated automatically in the format specified on the Security Console. The default format is the worker's primary work email, but this value can be overridden for the enterprise. For example, your enterprise may use person number as the default user name.

### Why did some roles appear automatically?

In a role mapping:

- The conditions specified for the role match the user's assignment attributes, such as job.
- The role has the **Autoprovision** option selected.

### How can I create a user?

If you want to create application users, access the Manage Users task. When the Search Person page appears, click the **New** icon in Search Results grid. The Create User page appears for you to fill in and save.

If you use the HCM pages to upload workers, hire employees, or add contingent workers, you also automatically create application users and identities.

When you create a new user, it automatically triggers role provisioning requests based on role provisioning rules.

#### *Related Topics*

- [Creating Partner User Accounts: Explained](#)

## What happens when I autoprovision roles for a user?

The role-provisioning process reviews the user's assignments against all current role mappings.

The user immediately:

- Acquires any role for which he or she qualifies but doesn't have
- Loses any role for which he or she no longer qualifies

You're recommended to autoprovision roles to individual users on the Manage User Account page when new or changed role mappings exist. Otherwise, no automatic updating of roles occurs until you next update the user's assignments.

## Why is the user losing roles automatically?

The user acquired these roles automatically based on his or her assignment information. Changes to the user's assignments mean that the user is no longer eligible for these roles. Therefore, the roles no longer appear.

If a deprovisioned role is one that you can provision manually to users, then you can reassign the role to the user, if appropriate.

## Why can't I see the roles that I want to provision to a user?

You can provision a role if a role mapping exists for the role, the **Requestable** option is selected for the role in the role mapping, and at least one of your assignments satisfies the role-mapping conditions. Otherwise, you can't provision the role to other users.

## What happens if I deprovision a role from a user?

The user loses the access to functions and data that the removed role was providing exclusively. The user becomes aware of the change when he or she next signs in.

If the user acquired the role automatically, then future updates to the user's assignments may mean that the user acquires the role again.

## What happens if I edit a user name?

The updated user name is sent to your LDAP directory for processing when you click **Save** on the Manage User Account or Edit User page. The account status remains **Active**, and the user's roles and password are unaffected. As the user isn't notified automatically of the change, you're recommended to notify the user.

Only human resource specialists can edit user names.

## What happens if I send the user name and password?

The user name and password go to the work email of the user or user's line manager, if any. Notification templates for this event must exist and be enabled.

You can send these details once only for any user. If you deselect this option on the Manage User Account or Create User page, then you can send the details later. To do this, run the Send User Name and Password Email Notifications process.

## What happens if I reset a user's password?

A notification containing a reset-password link is sent to the user's work email. A notification template for this event must exist and be enabled.

## How can I notify users of their user names and passwords?

You can run the Send User Name and Password Email Notifications process in the Scheduled Processes work area. For users for whom you haven't so far requested an email, this process sends out user names and reset-password links. The email goes to the work email of the user or the user's line manager. You can send the user name and password once only to any user. A notification template for this event must exist and be enabled.



# 6 Provisioning Roles to Application Users

## Role Mappings: Explained

Roles give users access to data and functions. To provision a role to users, you define a relationship, called a role mapping, between the role and some conditions. This topic describes how to provision roles to users both automatically and manually. Use the Manage Role Provisioning Rules task in the Setup and Maintenance work area.

 **Note:** All role provisioning generates requests to provision roles. Only when those requests are processed successfully is role provisioning complete.

## Automatic Provisioning of Roles to Users

Role provisioning occurs automatically if:

- At least one of the user's assignments matches all role-mapping conditions.
- You select the **Autoprovision** option for the role in the role mapping.

For example, for the data role Sales Manager Finance Department, you could select the **Autoprovision** option and specify the conditions shown in this table.

Attribute	Value
<b>Department</b>	Finance Department
<b>Job</b>	Sales Manager
<b>HR Assignment Status</b>	Active

Users with at least one assignment that matches these conditions acquire the role automatically when you either create or update the assignment. The provisioning process also removes automatically provisioned roles from users who no longer satisfy the role-mapping conditions.

## Manual Provisioning of Roles to Users

Users such as line managers can provision roles manually to other users if:

- At least one of the assignments of the user who's provisioning the role, for example, the line manager, matches all role-mapping conditions.
- You select the **Requestable** option for the role in the role mapping.

For example, for the data role Training Team Leader, you could select the **Requestable** option and specify the conditions shown in this table.

Attribute	Value
<b>Manager with Reports</b>	Yes
<b>HR Assignment Status</b>	Active

Any user with at least one assignment that matches both conditions can provision the role Training Team Leader manually to other users.

Users keep manually provisioned roles until either all of their work relationships are terminated or you deprovision the roles manually.

## Role Requests from Users

Users can request a role when managing their own accounts if:

- At least one of their assignments matches all role-mapping conditions.
- You select the **Self-requestable** option for the role in the role mapping.

For example, for the data role Expenses Reporter you could select the **Self-requestable** option and specify the conditions shown in this table.

Attribute	Value
<b>Department</b>	Finance Department
<b>System Person Type</b>	Employee
<b>HR Assignment Status</b>	Active

Any user with at least one assignment that matches these conditions can request the role. Self-requested roles are defined as manually provisioned.

Users keep manually provisioned roles until either all of their work relationships are terminated or you deprovision the roles manually.

## Role-Mapping Names

Role mapping names must be unique in the enterprise. Devise a naming scheme that shows the scope of each role mapping. For example, the role mapping Autoprovisioned Roles Sales could include all roles provisioned automatically to workers in the sales department.

### *Related Topics*

- [Role Mappings: Examples](#)

## Creating a Role Mapping: Procedure

To provision roles to users, you create role mappings. This topic explains how to create a role mapping.

Sign in as IT Security Manager and follow these steps:

1. Select **Navigator > Setup and Maintenance** to open the Setup and Maintenance work area.
2. Search for and select the Manage Role Provisioning Rules or Manage HCM Role Provisioning Rules task.

The Manage Role Mappings page opens.

3. In the Search Results section of the page, click **Create**.

The Create Role Mapping page opens.

### Defining the Role-Mapping Conditions

Set values in the Conditions section to specify when the role mapping applies. For example, use the values given in the following table to limit the role mapping to current employees of the Finance Department in Redwood Shores whose job is Accounts Payable Supervisor.

Field	Value
<b>Department</b>	Finance Department
<b>Job</b>	Accounts Payable Supervisor
<b>Location</b>	Redwood Shores
<b>System Person Type</b>	Employee
<b>HR Assignment Status</b>	Active

Users must have at least one assignment that meets all these conditions.


### Identifying the Roles

1. In the Associated Roles section, click **Add Row**.
2. In the **Role Name** field, search for and select the role that you're provisioning.
3. Select one or more of the role-provisioning options as listed in the following table:

Role-Provisioning Option	Description
<b>Requestable</b>	Qualifying users can provision the role to other users.
<b>Self-requestable</b>	Qualifying users can request the role for themselves.

Role-Provisioning Option	Description
<b>Autoprovision</b>	Qualifying users acquire the role automatically.

Qualifying users have at least one assignment that matches the role-mapping conditions.

 **Note:** **Autoprovision** is selected by default. Remember to deselect it if you don't want autoprovisioning.

The **Delegation Allowed** option indicates whether users who have the role or can provision it to others can also delegate it. You can't change this value, which is part of the role definition. When adding roles to a role mapping, you can search for roles that allow delegation.

4. If appropriate, add more rows to the Associated Roles section and select provisioning options. The role-mapping conditions apply to all roles in this section.
5. Click **Save and Close**.

## Applying Autoprovisioning

You're recommended to run the process Autoprovision Roles for All Users after creating or editing role mappings and after loading person records in bulk. This process compares all current user assignments with all current role mappings and creates appropriate autoprovioning requests.

## Role Provisioning and Deprovisioning: Explained

You must provision roles to users. Otherwise, they have no access to data or functions and can't perform application tasks. This topic explains how role mappings control role provisioning and deprovisioning. Use the Manage Role Provisioning Rules or Manage HCM Role Provisioning Rules task to create role mappings.

## Role Provisioning Methods

You can provision roles to users:

- Automatically
- Manually
  - Users such as line managers can provision roles manually to other users.
  - Users can request roles for themselves.

For both automatic and manual role provisioning, you create a role mapping to specify when a user becomes eligible for a role.

## Role Types

You can provision data roles, abstract roles, and job roles to users. However, for Oracle HCM Cloud users, you typically include job roles in HCM data roles and provision those data roles.

## Automatic Role Provisioning

Users acquire a role automatically when at least one of their assignments satisfies the conditions in the relevant role mapping. Provisioning occurs when you create or update worker assignments. For example, when you promote a worker to a management position, the worker acquires the line manager role automatically if an appropriate role mapping exists. All changes to assignments cause review and update of a worker's automatically provisioned roles.

## Role Deprovisioning

Users lose automatically provisioned roles when they no longer satisfy the role-mapping conditions. For example, a line manager loses an automatically provisioned line manager role when he or she stops being a line manager. You can also manually deprovision automatically provisioned roles at any time.

Users lose manually provisioned roles automatically only when all of their work relationships are terminated. Otherwise, users keep manually provisioned roles until you deprovision them manually.

## Roles at Termination

When you terminate a work relationship, the user automatically loses all automatically provisioned roles for which he or she no longer qualifies. The user loses manually provisioned roles only if he or she has no other work relationships. Otherwise, the user keeps manually provisioned roles until you remove them manually.

The user who's terminating a work relationship specifies when the user loses roles. Deprovisioning can occur:

- On the termination date
- On the day after the termination date

If you enter a future termination date, then role deprovisioning doesn't occur until that date or the day after. The Role Requests in the Last 30 Days section on the Manage User Account page is updated only when the deprovisioning request is created. Entries remain in that section until they're processed.

Role mappings can provision roles to users automatically at termination. For example, a terminated worker could acquire the custom role Retiree at termination based on assignment status and person type values.

## Reversal of Termination

Reversing a termination removes any roles that the user acquired automatically at termination. It also provisions roles to the user as follows:

- Any manually provisioned roles that were lost automatically at termination are reinstated.
- As the autoprovisioning process runs automatically when a termination is reversed, roles are provisioned automatically as specified by current role-provisioning rules.

You must reinstate manually any roles that you removed manually, if appropriate.

## Date-Effective Changes to Assignments

Automatic role provisioning and deprovisioning are based on current data. For a future-dated transaction, such as a future promotion, role provisioning occurs on the day the changes take effect. The Send Pending LDAP Requests process identifies future-dated transactions and manages role provisioning and deprovisioning at the appropriate time. These role-provisioning

changes take effect on the system date. Therefore, a delay of up to 24 hours may occur before users in other time zones acquire their roles.

## Autoprovisioning: Explained

Autoprovisioning is the automatic allocation or removal of user roles. It occurs for individual users when you create or update assignments. You can also apply autoprovisioning explicitly for the enterprise using the Autoprovision Roles for All Users process. This topic explains the effects of applying autoprovisioning for the enterprise.

### Roles That Autoprovisioning Affects

Autoprovisioning applies only to roles that have the **Autoprovision** option enabled in a role mapping.

It doesn't apply to roles without the **Autoprovision** option enabled.

### The Autoprovision Roles for All Users Process

The Autoprovision Roles for All Users process compares all current user assignments with all current role mappings.

- Users with at least one assignment that matches the conditions in a role mapping and who don't currently have the associated roles acquire those roles.
- Users who currently have the roles but no longer satisfy the associated role-mapping conditions lose those roles.

When a user has no roles, his or her user account is also suspended automatically by default.

The process creates requests immediately to add or remove roles. These requests are processed by the Send Pending LDAP Requests process. When running Autoprovision Roles for All Users, you can specify when role requests are to be processed. You can either process them immediately or defer them as a batch to the next run of the Send Pending LDAP Requests process. Deferring the processing is better for performance, especially when thousands of role requests may be generated. Set the **Process Generated Role Requests** parameter to **No** to defer the processing. If you process the requests immediately, then Autoprovision Roles for All Users produces a report identifying the LDAP request ranges that were generated. Requests are processed on their effective dates.

### When to Run the Process

You're recommended to run Autoprovision Roles for All Users after creating or editing role mappings. You may also have to run it after loading person records in bulk if you request user accounts for those records. If an appropriate role mapping exists before the load, then this process isn't necessary. Otherwise, you must run it to provision roles to new users loaded in bulk. Avoid running the process more than once in any day. Otherwise, the number of role requests that the process generates may slow the provisioning process.

Only one instance of Autoprovision Roles for All Users can run at a time.

### Autoprovisioning for Individual Users

You can apply autoprovisioning for individual users on the Manage User Account page.

#### *Related Topics*

- [What happens when I autoprovision roles for a user?](#)

- [Scheduling the Send Pending LDAP Requests Process: Procedure](#)

## User and Role Access Audit Report

The User and Role Access Audit Report provides details of the function and data security privileges granted to specified users or roles. This information is equivalent to the information that you can see for a user or role on the Security Console. This report is based on data in the Applications Security tables, which you populate by running the Import User and Role Application Security Data process.

To run the User and Role Access Audit Report:

1. In the Scheduled Processes work area, click **Schedule New Process**.
2. Search for and select the User and Role Access Audit Report.
3. In the **Process Details** dialog box, set parameters and click **Submit**.
4. Click **OK** to close the confirmation message.

## User and Role Access Audit Report Parameters

### Population Type

Set this parameter to one of these values to run the report for one user, one role, multiple users, or all roles.

- **All roles**
- **Multiple users**
- **Role name**
- **User name**

### User Name

Search for and select the user name of a single user.

This field is enabled only when **Population Type** is **User name**.

### Role Name

Search for and select the name of a single aggregate privilege or data, job, abstract, or duty role.

This field is enabled only when **Population Type** is **Role name**.

### From User Name Starting With

Enter one or more characters from the start of the first user name in a range of user names.

This field is enabled only when **Population Type** is **Multiple users**. It enables you to report on a subset of multiple users.

### To User Name Starting With

Enter one or more characters from the start of the last user name in a range of user names.

This field is enabled only when **Population Type** is **Multiple users**. It enables you to report on a subset of multiple users.


### User Role Name Starts With

Enter one or more characters from the start of a role name.

This field is enabled only when **Population Type** is **Multiple users**. It enables you to report on a subset of all users and roles.

Data Security Policies

Select the **Data Security Policies** check box, when you want to view the data security report for any population. When you leave the option deselected, only the function report is generated.

 **Note:** If you don't need the data security policy document, leave the option deselected. This reduces the processing time to run the report.

Debug

Select the **Debug** check box to include role GUID in the report. The role GUID is used to troubleshoot. Use this option only when requested by the Oracle Support team.

Viewing the Report Results

The report produces one or two .zip files depending on the parameters you select. When you select the Data Security Policies check box, two .zip files are generated: one with information about the data security policies and the other on functional security policies in a hierarchical format.

The file names are in the following format: [FILE\_PREFIX]\_[PROCESS\_ID]\_[DATE]\_[TIME]\_[FILE\_SUFFIX]. The file prefix depends on the specified **Population Type** value.


This table shows the file prefix values for each population type.

Report Type	File Prefix
User name	USER_NAME
Role name	ROLE_NAME
Multiple users	MULTIPLE_USERS
All roles	ALL_ROLES

This table shows the file suffix, file format, and file contents for each population type.

Report Type	File Suffix	File Format	File Contents
Any	DataSec	CSV	Data security policies. The .zip file contains one file for all users or roles. The data security policies file is generated only when the Data Security Policies check box is selected.



Report Type	File Suffix	File Format	File Contents
 <b>Note:</b> Extract the data security policies only when needed as it takes a long time to generate the file.			
Any	Hierarchical	CSV	Functional security policies in a hierarchical format. The .zip file contains one file for each user or role.
<ul style="list-style-type: none"> <li>Multiple users</li> <li>All roles</li> </ul>	CSV	CSV	Functional security policies in a comma-separated, tabular format.

The process also produces a .zip file containing a diagnostic log.

For example, if you report on a job role at 13.30 on 17 December 2015 with process ID 201547 and the Data Security Policies option selected, then the report files are:

- ROLE\_NAME\_201547\_12-17-2015\_13-30-00\_DataSec.zip
- ROLE\_NAME\_201547\_12-17-2015\_13-30-00\_Hierarchical.zip
- Diagnostics.zip

## Managing Data Access for Users: Explained

You can assign users access to appropriate data based on their job roles. The Oracle Fusion security model requires a three-way link between users, role, and data. It is summarized as: who can do what on which data. Who refers to the users, what are the job roles the user is assigned, and which refers to the data that is specific to a particular security context, typically an element of the enterprise structure, such as a business unit, asset book, or ledger.

For example, consider a user, Mary Johnson, who manages accounts payable functions, such as creating invoices for the US Operations business unit. In this scenario, Mary Johnson must be assigned the job role of an Accounts Payable Specialist, and given access to the US Operations business unit.

The following table lists the elements of the enterprise structure to which users can be assigned access based on their job roles.

Product	Security Context
Oracle Fusion Financials	Business Unit
	Data Access Set
	Ledger
	Asset Book
	Control Budget

Product	Security Context
	Reference Data Set
Oracle Fusion Supply Chain Management	Intercompany Organization
	Reference Data Set
	Cost Organization
	Inventory Organization
	Manufacturing Plant
Oracle Fusion Procurement	Business Unit
Oracle Fusion Project Portfolio Management	Project Organization Classification
Oracle Fusion Incentive Compensation	Business Unit

## Assigning Data Access

Assigning data access to users is a three step process:

1. Create users using one of the following:
  - o Manage Users task in Oracle Fusion Functional Setup Manager

Specify user attributes such as user name, assigned business unit, legal employer, department, job, position, grade, and location.
  - o Security Console
2. Assign at least one job role to users. Use Oracle Fusion Human Capital Management or the Security Console to assign job roles.
3. Assign data access using the Manage Data Access for Users task in the Functional Setup Manager. For General Ledger users, you can also use the Manage Data Access Set Data Access for Users task to assign data access.

## Assigning Data Access to Users: Worked Example

Use the Manage Data Access for Users page to assign data access to users based on their job roles. You can assign data access to:

- One user at a time
- Group of users with similar job roles

The following table lists the questions you can consider before assigning data access to users.

Decision to Consider	In This Example
Which user role is being given data access?	Accounts Payable Manager
What is the security context to which access is being given?	Business Unit

## Prerequisites

Before you can complete this task, you must:

1. Create users and specify the user attributes such as a user name, assigned business unit, legal employer, department, job, position, grade and location, and so on. To create users, use the Manage Users task in the Functional Setup Manager or the Create User page. If you're implementing Oracle Fusion HCM, you can also use the Hire an Employee page. You can also use the Security Console to create the implementation users who create the setups, such as legal entities, business units, and so on, that are required to create the users in the Manage Users or Hire an Employee page.
2. Assign users their job roles. You can either use Oracle Fusion Human Capital Management or the Security Console to assign job roles.
3. Run the Retrieve Latest LDAP Changes process.

## Assigning Data Access to Users Using a Spreadsheet

1. Sign in to the Functional Setup Manager as an IT Security Manager or Application Implementation Consultant and navigate to the Setup and Maintenance page.
2. Search for and select the Manage Data Access for Users task. Alternatively, you can perform this task through the product-specific task list.
3. Click **Users without Data Access** to view users who don't have data access. Alternatively, to assign additional data access to users, use the **Users with Data Access** option.
4. Select the **Security Context**, for our example, select **Business Unit**.
5. Search for users with no data access. For our example, enter **Accounts Payable Specialist** in the **Role** field.

 **Note:** The search fields are related to the user attributes.

6. Click **Search**. The Search Results region displays users who don't have any data access.
7. Click the **Authorize Data Access** button to export the search results to a Microsoft Excel spreadsheet. You can provide data access to a group of users through the spreadsheet.
8. Click **OK** to open the spreadsheet using Microsoft Excel.
9. Select the **Security Context** from the drop-down list for each user.
10. Enter the **Security Context Value**.
  - o To provide additional data access to the user, add a new row and enter the user name, role, security context, and security context value.
  - o You can click the **View Data Access** button to see what other data access the user already has even if this is outside the parameters of the search. This may help to identify users you want to grant access to because of existing access.
11. Click the **Upload** button on the spreadsheet when you have assigned data access.

12. Select the upload options on the Upload Options window and click **OK**.
13. Note the status of your upload in the **Upload** column.
  - o If the status of the upload is **Successful** and there are no validation errors in the log file, you can view the data access assignment to the users using the search criteria on the Manage Data Access for Users page.
  - o If the upload status is **Failed**, check the details in your upload file, correct any errors, and upload the file again.

## FAQs for Provisioning Roles to Application Users

### What's a role-mapping condition?

Most are assignment attributes, such as job or department. At least one of a user's assignments must match all assignment values in the role mapping for the user to qualify for the associated roles.

### What's an associated role in a role mapping?

Any role that you want to provision to users. You can provision data roles, abstract roles, and job roles to users. The roles can be either predefined or custom.

### What's the provisioning method?

The provisioning method identifies how the user acquired the role. This table describes its values.

Provisioning Method	Meaning
Automatic	The user qualifies for the role automatically based on his or her assignment attribute values.
Manual	Either another user assigned the role to the user, or the user requested the role.
External	The user acquired the role outside Oracle Applications Cloud.

### How do I provision roles to users?

Use the following tasks to provision roles to users.

- Manage Users
- Provision Roles to Implementation Users

The Manage Users task is available in Oracle Fusion Human Capital Management (HCM) Cloud, Oracle Fusion Sales Cloud, Oracle Fusion ERP Cloud, and Oracle Fusion Suppliers.

Human Resources (HR) transaction flows such as Hire and Promote also provision roles.

## How do I view the privileges or policies carried by a job role?

The most efficient way is to use the Security Console to search for and select the job role. When it appears in the visualizer, you can see all inherited roles, aggregate privileges, and privileges. If you edit the role from the visualizer, you can see the policies on the function policies and data policies pages.

## How can I tell which roles are provisioned to a user?

Use the Security Console to search for the user. When you select the user, the user and any roles assigned to the user appear in the visualizer. Navigate the nodes to see the role hierarchies and privileges. You must be assigned the IT Security Manager role to access the Security Console.

## Why can't a user access a task?

If a task doesn't appear in a user's task list, you may need to provision roles to the user.

A position or job and its included duties determine the tasks that users can perform. Provisioned roles provide access to tasks through the inherited duty roles.

The duty roles in a role hierarchy carry privileges to access functions and data. You don't assign duty roles directly to users. Instead, duty roles are assigned to job or abstract roles in a role hierarchy. If the duties assigned to a predefined job role don't match the corresponding job in your enterprise, you can create copies of job roles and add duties to or remove duties from the copy.



**Note:** You cannot change predefined roles to add or remove duties. In the Security Console, you can identify predefined roles by the **ORA\_** prefix in the Role Code field. Create copies and update the copies instead.

Users are generally provisioned with roles based on role provisioning rules. If a user requests a role to access a task, always review the security reference implementation to determine the most appropriate role.



# 7 Configuring Security

## Managing Data Security Policies

### Data Security: Explained

By default, users are denied access to all data.  
Data security makes data available to users by the following means.

- Policies that define grants available through provisioned roles
- Policies defined in application code

You secure data by provisioning roles that provide the necessary access.

Data roles also can be generated based on HCM security profiles. Data roles and HCM security profiles enable defining the instance sets specified in data security policies.

When you provision a job role to a user, the job role limits data access based on the data security policies of the inherited duty roles. When you provision a data role to a user, the data role limits the data access of the inherited job role to a dimension of data.

Data security consists of privileges conditionally granted to a role and used to control access to the data. A privilege is a single, real world action on a single business object. A data security policy is a grant of a set of privileges to a principal on an object or attribute group for a given condition. A grant authorizes a role, the grantee, to actions on a set of database resources. A database resource is an object, object instance, or object instance set. An entitlement is one or more allowable actions applied to a set of database resources.

The following table describes the ways through which data is secured.

Data security feature	Does what?
Data security policy	Defines the conditions under which access to data is granted to a role.
Role	Applies data security policies with conditions to users through role provisioning.
HCM security profile	Defines data security conditions on instances of object types such as person records, positions, and document types without requiring users to enter SQL code

The sets of data that a user can access are defined by creating and provisioning data roles. Oracle data security integrates with Oracle Platform Security Services (OPSS) to entitle users or roles (which are stored externally) with access to data. Users are granted access through the privilege assigned to the roles or role hierarchy with which the user is provisioned. Conditions are WHERE clauses that specify access within a particular dimension, such as by business unit to which the user is authorized.

## Data Security Policies

Data security policies articulate the security requirement "Who can do what on which set of data."


The following table provides an example, accounts payable managers can view AP disbursements for their business unit.

Who	can do	what	on which set of data
Accounts payable managers	view	AP disbursements	for their business unit

A data security policy is a statement in a natural language, such as English, that typically defines the grant by which a role secures business objects. The grant records the following.

- Table or view
- Entitlement (actions expressed by privileges)
- Instance set (data identified by the condition)

For example, disbursement is a business object that an accounts payable manager can manage by payment function for any employee expenses in the payment process.

 **Note:** Some data security policies are not defined as grants but directly in applications code. The security reference manuals for Oracle Fusion Applications offerings differentiate between data security policies that define a grant and data security policies defined in Oracle Fusion applications code.

A data security policy identifies the entitlement (the actions that can be made on logical business objects or dashboards), the roles that can perform those actions, and the conditions that limit access. Conditions are readable WHERE clauses. The WHERE clause is defined in the data as an instance set and this is then referenced on a grant that also records the table name and required entitlement.

## HCM Security Profiles

HCM security profiles are used to secure HCM data, such as people and departments. Data authorization for some roles, such as the Manager role, is managed in HCM, even in ERP and SCM applications. You can use HCM security profiles to generate grants for a job role such as Manager. The resulting data role with its role hierarchy and grants operates in the same way as any other data role.

For example, an HCM security profile identifies all employees in the Finance division.

Applications outside of HCM can use the HCM Data Roles UI pages to give roles access to HR people.

## Advanced Data Security: Explained

Advanced Data Security offers two types of added data protection. Database Vault protects data from access by highly privileged users and Transparent Data Encryption encrypts data at rest. Advanced Data Security is available for Oracle Applications Cloud by subscription to Break-Glass service.

## Oracle Database Vault

Database Vault reduces the risk of highly privileged users such as database and system administrators accessing and viewing your application data. This feature restricts access to specific database objects, such as the application tables and SOA objects.



Administrators can perform regular database maintenance activities, but cannot select from the application tables. If a DBA requires access to the application tables, request temporary access to the Oracle Fusion schema at which point keystroke auditing is enabled.

## Transparent Data Encryption

Transparent Data Encryption (TDE) protects Oracle Fusion Applications data which is at rest on the file system from being read or used. Data in the database files (DBF) is protected because DBF files are encrypted. Data in backups and in temporary files is protected. All data from an encrypted tablespace is automatically encrypted when written to the undo tablespace, to the redo logs, and to any temporary tablespace.

Advanced security enables encryption at the tablespace level on all tablespaces which contain applications data. This includes SOA tablespaces which might contain dehydrated payloads with applications data.

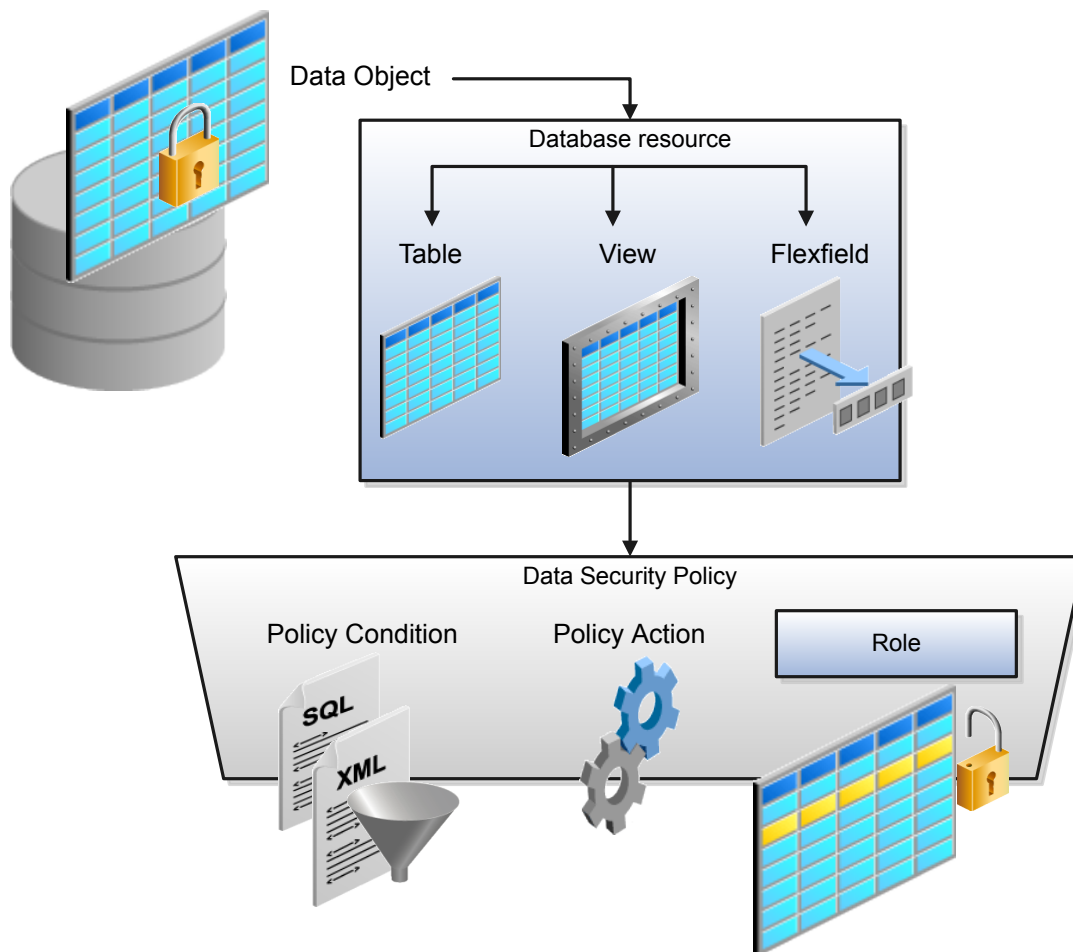
Encryption keys are stored in the Oracle Wallet. The Oracle Wallet is an encrypted container outside the database that stores authentication and signing credentials, including passwords, the TDE master key, PKI private keys, certificates, and trusted certificates needed by secure sockets layer (SSL). Tablespace keys are stored in the header of the tablespace and in the header of each operating system (OS) file that makes up the tablespace. These keys are encrypted with the master key which is stored in the Oracle Wallet. Tablespace keys are AES128-bit encryption while the TDE master key is always an AES256-bit encryption.

## Database Resources and Data Security Policies: How They Work Together

A data security policy applies a condition and allowable actions to a database resource for a role. When that role is provisioned to a user, the user has access to data defined by the policy. In the case of the predefined security reference implementation, this role is always a duty role.

The database resource defines an instance of a data object. The data object is a table, view, or flexfield.

The following figure shows the database resource definition as the means by which a data security policy secures a data object. The database resource names the data object. The data security policy grants to a role access to that database resource based on the policy's action and condition.



## Database Resources


A database resource specifies access to a table, view, or flexfield that is secured by a data security policy.

- Name providing a means of identifying the database resource
- Data object to which the database resource points

## Data Security Policies

Data security policies consist of actions and conditions for accessing all, some, or a single row of a database resource.

- Condition identifying the instance set of values in the data object
- Action specifying the type of access allowed on the available values


 **Note:** If the data security policy needs to be less restrictive than any available database resource for a data object, define a new data security policy.

## Actions

Actions correspond to privileges that entitle kinds of access to objects, such as view, edit, or delete. The actions allowed by a data security policy include all or a subset of the actions that exist for the database resource.

## Conditions

A condition is either a SQL predicate or an XML filter. A condition expresses the values in the data object by a search operator or a relationship in a tree hierarchy. A SQL predicate, unlike an XML filter, is entered in a text field in the data security user interface pages and supports more complex filtering than an XML filter, such as nesting of conditions or sub queries. An XML filter, unlike a SQL predicate, is assembled from choices in the UI pages as an AND statement.

 **Note:** An XML filter can be effective in downstream processes such as business intelligence metrics. A SQL predicate cannot be used in downstream metrics.

### Related Topics

- [Securing Data Access: Points to Consider](#)

# FAQs for Configuring Security

## What's the difference between function security and data security?

Function security is a statement of what actions you can perform in which user interface pages.

Data security is a statement of what action can be taken against which data.

Function security controls access to user interfaces and actions needed to perform the tasks of a job. For example, an accounts payable manager can view invoices. The Accounts Payable Manager role provisioned to the accounts payable manager authorizes access the functions required to view invoices.

Data security controls access to data. In this example, the accounts payable manager for the North American Commercial Operation can view invoices in the North American Business Unit. Since invoices are secured objects, and a data role template exists for limiting the Accounts Payable Manager role to the business unit for which the provisioned user is authorized, a data role inherits the job role to limit access to those invoices that are in the North American Business Unit. Objects not secured explicitly with a data role are secured implicitly by the data security policies of the job role.

Both function and data are secured through role-based access control.

### Related Topics

- [Function Security: Explained](#)

## How can I design roles?

You can simulate menus that existing roles present to users to determine how the access they provide may be expanded. Create a visualization, or populate the Search Results column with a selection of roles or users. Select the user or role and click the Actions menu. A menu appears, click Simulate Navigator.

A simulated Navigator menu appears, listing menu and task entries. If the menu item appears without a lock, the menu is not authorized for the role or user. If the menu item appears with a lock, the menu is authorized for the role or user. Click any menu item and select either of two options. One lists roles that grant access to the menu item. The other lists privileges required for access to the menu item.

## How can I have data masking applied to my nonproduction environments in Oracle Applications Cloud services?

To have an environment created with the data masked, create a service request using the Production to Test (P2T) template. Before you submit the request, be sure you select the **Data Mask** check box.


To have the data in an existing nonproduction environment masked, create a standard service request. Enter the following as the service request title: Data Mask for Environment: **Name\_of\_The\_Environment\_To\_Mask**

## How do I create a role hierarchy?

The most efficient way to create role hierarchies is to use the Security Console. You use the Edit Role action to navigate through the steps and add roles and privileges in the visualizer or table view.

## Why would I need to remove duty roles from a role hierarchy?

If your custom duty roles enable actions and user interface features that your enterprise does not want users to perform in your application.

 **Note:** Don't remove duty roles from predefined job or abstract roles in the reference implementation. In the Security Console, you can identify predefined application roles by the **ORA\_** prefix in the **Role Code** field. You must copy any role that doesn't match your needs, and then edit the copy.

## How do I create a new job role?

Click the **Create Role** button in the Security Console to create job roles. Enter a job role category in the Create Roles page and then navigate to each subsequent page that you see in the page header. You can add functional and data security policies, roles, and privileges to create the job role.

# 8 Reviewing Roles and Role Assignments

## Reviewing Role Assignments: Procedure

You can use the Security Console to:

- View the roles assigned to a user.
- Identify users who have a specific role.

You must have the IT Security Manager job role to perform these tasks.


### Viewing the Roles Assigned to a User

Follow these steps:

1. Open the Security Console.
2. On the Roles tab, search for and select the user.

Depending on the enterprise setting, either a table or a graphical representation of the user's role hierarchy appears. Switch to the graphical representation if necessary to see the user and any roles that the user inherits directly. User and role names appear on hover. To expand an inherited role:


- a. Select the role and right-click.
- b. Select **Expand**. Repeat these steps as required to move down the hierarchy.

 **Tip:** Switch to the table to see the complete role hierarchy at once. You can export the details to Microsoft Excel from here.

### Identifying Users Who Have a Specific Role

Follow these steps:

1. On the Roles tab of the Security Console, search for and select the role.
2. Depending on the enterprise setting, either a table or a graphical representation of the role hierarchy appears. Switch to the graphical representation if it doesn't appear by default.
3. Set **Expand Toward** to **Users**.


 **Tip:** Set the **Expand Toward** option to control the direction of the graph. You can move either up the hierarchy from the selected role (toward users) or down the hierarchy from the selected role (toward privileges).

In the refreshed graph, user names appear on hover. Users may inherit roles either directly or indirectly from other roles. Expand a role to view its hierarchy.

4. In the Legend, click the **Tabular View** icon for the **User** icon. The table lists all users who have the role. You can export this information to Microsoft Excel.

## Reviewing Role Hierarchies: Explained

On the Security Console you can review the role hierarchy of a job role, an abstract role, a duty role, or an HCM data role. You must have the IT Security Manager job role to perform this task.

 **Note:** Although you can review HCM data roles on the Security Console, you must manage them on the Manage HCM Data Role and Security Profiles page. Don't attempt to edit them on the Security Console.

Follow these steps:

1. On the Roles tab of the Security Console, ensure that **Expand Toward** is set to **Privileges**.
2. Search for and select the role. Depending on the enterprise setting, either a table or a graphical representation of the role appears.
3. If the table doesn't appear by default, click the **View as Table** icon. The table lists every role inherited either directly or indirectly by the selected role. Set **Show to Privileges** to switch from roles to privileges.

 **Tip:** Enter text in a column search field and press **Enter** to show only those roles or privileges that contain the specified text.

Click **Export to Excel** to export the current table data to Microsoft Excel.

## Comparing Roles: Procedure

You can compare any two roles to see the structural differences between them. As you compare roles, you can also add function and data security policies existing in the first role to the second role, providing that the second role is not a predefined role.

For example, assume you have copied a role and edited the copy. You then upgrade to a new release. You can compare your edited role from the earlier release with the role as shipped in the later release. You may then decide whether to incorporate upgrade changes into your edited role. If the changes consist of new function or data security policies, you can upgrade your edited role by adding the new policies to it.

### Selecting Roles for Comparison

1. Select the Roles tab in the Security Console.
2. Do any of the following:
  - Click the **Compare Roles** button.
  - Create a visualization graph, right-click one of its roles, and select the **Compare Roles** option.
  - Generate a list of roles in the Search Results column of the Roles page. Select one of them, and click its menu icon. In the menu, select **Compare Roles**.
3. Select roles for comparison:
  - If you began by clicking the **Compare Roles** button, select roles in both **First Role** and **Second Role** fields.

- If you began by selecting a role in a visualization graph or the Search Results column, the **First Role** field displays the name of the role you selected. Select another role in the **Second Role** field.

For either field, click the search icon, enter text, and select from a list of roles whose names contain that text.

## Comparing Roles

1. Select two roles for comparison.
2. Use the **Filter Criteria** field to filter for any combination of these artifacts in the two roles:
  - Function security policies
  - Data security policies
  - Inherited roles
3. Use the **Show** field to determine whether the comparison returns:
  - All artifacts existing in each role
  - Those that exist only in one role, or only in the other role
  - Those that exist only in both roles
4. Click the **Compare** button.

You can export the results of a comparison to a spreadsheet. Select the **Export to Excel** option.

After you create the initial comparison, you can change the filter and show options. When you do, a new comparison is generated automatically.

## Adding Policies to a Role

1. Select two roles for comparison.
  - As the **First Role**, select a role in which policies already exist.
  - As the **Second Role**, select the role to which you are adding the policies. This must be a custom role. You cannot modify a predefined role.
2. Ensure that your selection in the Filter Criteria field excludes the **Inherited roles** option. You may select **Data security policies**, **Function security policies**, or both.
3. As a Show value, select **Only in first role**.
4. Click the **Compare** button.
5. Among the artifacts returned by the comparison, select those you want to copy.
6. An **Add to Second Role** option becomes active. Select it.





# 9 Configuring Roles Using the Security Console

## Creating Roles

### Creating Roles in the Security Console: Procedure

You can use the Security Console to create duty, job, or abstract roles.


In many cases, an efficient method of creating a role is to copy an existing role, then edit the copy to meet your requirements. Typically, you would create a role from scratch if no existing role is similar to the role you want to create.

To create a role from scratch, select the Roles tab in the Security Console, then click the Create Role button. Enter values in a series of role-creation pages, selecting Next or Back to navigate among them.

### Providing Basic Information

On a Basic Information page:

1. In the Role Name field, create a display name, for example North America Accounts Receivable Specialist.
2. In the Role Code field, create an internal name for the role, such as AR\_NA\_ACCOUNTS\_RECEIVABLE\_SPECIALIST\_JOB.

 **Note:** Do not use "ORA\_" as the beginning of a role code. This prefix is reserved for roles predefined by Oracle. You cannot edit a role with the ORA\_ prefix.

3. In the Role Category field, select a tag that identifies a purpose the role serves in common with other roles. Typically, a tag specifies a role type and an application to which the role applies, such as Financials - Job Roles.

If you select a duty-role category, you cannot assign the role you are creating directly to users. To assign it, you would include it in the hierarchy of a job or abstract role, then assign that role to users.

4. Optionally, describe the role in the Description field.

### Adding Function Security Policies

A function security policy selects a set of functional privileges, each of which permits use of a field or other user-interface feature. On a Function Security Policies page, you may define a policy for:

- A duty role. In this case, the policy selects functional privileges that may be inherited by duty, job, or abstract roles to which the duty is to belong.
- A job or abstract role. In this case, the policy selects functional privileges specific to that role.

As you define a policy, you can either add an individual privilege or copy all the privileges that belong to an existing role:

1. Select Add Function Security Policy.
2. In a Search field, select the value Privileges or types of role in any combination and enter at least three characters. The search returns values including items of the type you selected, whose names contain the characters you entered.

3. Select a privilege or role. If you select a privilege, click Add Privilege to Role. If you select a role, click Add Selected Privileges.

The Function Security Policies page lists all selected privileges. When appropriate, it also lists the role from which a privilege is inherited. You can:


- Click a privilege to view details of the code resource it secures.
- Delete a privilege. You may, for example, have added the privileges associated with a role. If you want to use only some of them, you must delete the rest. To delete a privilege, click its x icon.

## Adding Data Security Policies

A data security policy may be explicit or implicit.

- An explicit policy grants access to a particular set of data, such as that pertaining to a particular business unit. This type of policy is not used in predefined roles in Oracle ERP Cloud.
- An implicit policy applies a data privilege (such as read) to a set of data from a specified data resource. Create this type of policy for a duty, job, or abstract role. For each implicit policy, you must grant at least the read and view privileges.

You can use a Data Security Policies page to manage implicit policies.

 **Note:** For the Data Security Policies page to be active, you must select an "Enable edit of data security policies" option. To locate it, select the Administration tab, and then the Roles tab on the Administration page. If this option is not selected, the Data Security Policies page is read-only.

To create a data security policy, click the Create Data Security Policy button, then enter values that define the policy. A start date is required; a name, an end date, and a description are optional. Values that define the data access include:

- Database Resource: A database table.
- Data Set: A definition that selects a subset of the data made available by the database resource.
  - Select by key. Choose a primary key value, to limit the data set to a record in the data resource whose primary key matches the value you select.
  - Select by instance set. Choose a condition that defines a subset of the data in the data resource. Conditions vary by resource.
  - All values: Include all data from the data resource in your data set.
- Actions: Select one or more data privileges to apply to the data set you have defined.

The Data Security Policies page lists all policies defined for the role. You can edit or delete a policy: click the Actions button, and select the Edit or Remove option.

## Configuring the Role Hierarchy

A Role Hierarchy page displays either a visualization graph, with the role you are creating as its focus, or a visualization table. Select the Show Graph button or View as Table button to select between them. In either case, link the role you are creating to other roles from which it is to inherit function and data security privileges.

- If you are creating a duty role, you can add duty roles or aggregate privileges to it. In effect, you are creating an expanded set of duties for incorporation into a job or abstract role.
- If you are creating a job or abstract role, you can add aggregate privileges, duty roles, or other job or abstract roles to it.


To add a role:

1. Select Add Role.
2. In a Search field, select a combination of role types and enter at least three characters. The search returns values including items of the type you selected, whose names contain the characters you entered.
3. Select the role you want, and click Add Role Membership. You add not only the role you have selected, but also its entire hierarchy.

In the graph view, you can use the visualization Control Panel, Legend, and Overview tools to manipulate the nodes that define your role hierarchy.

## Adding Users

On a Users page, you can select users to whom you want to assign a job or abstract role you are creating. (You cannot assign a duty role directly to users.)

 **Note:** For the Users page to be active, you must select an "Enable edit of user role membership" option. To locate it, select the Administration tab, and then the Roles tab on the Administration page. If this option is not selected, the Users page is read-only.

To add a user:

1. Select Add User.
2. In a Search field, select the value Users or types of role in any combination and enter at least three characters. The search returns values including items of the type you selected, whose names contain the characters you entered.
3. Select a user or role. If you select a user, click Add User to Role. If you select a role, click Add Selected Users; this adds all its assigned users to the role you are creating.

The Users page lists all selected users. You can delete a user. You may, for example, have added all the users associated with a role. If you want to assign your new role only to some of them, you must delete the rest. To delete a user, click its x icon.

## Completing the Role

On a Summary and Impact Report page, review the selections you have made. Summary listings show the numbers of function security policies, data security policies, roles, and users you have added and removed. An Impact listing shows the number of roles and users affected by your changes. Expand any of these listings to see names of policies, roles, or users included in its counts.

If you determine you must make changes, navigate back to the appropriate page and do so. If you are satisfied with the role, select Save and Close.

### Related Topics

- [Working with a Visualization Graph: Explained](#)

## Copying or Editing Roles in the Security Console: Explained

Rather than create a role from scratch, you can copy a role, then edit the copy to create a new role. Or you can edit existing roles.

Initiate a copy or an edit from the Roles tab in the Security Console. Do either of the following:

- Create a visualization graph and select any role in it. Right-click and select **Copy Role** or **Edit Role**.

- Generate a list of roles in the Search Results column of the Roles page. Select one of them, and click its menu icon. In the menu, select **Copy Role** or **Edit Role**.

If you are copying a role, select one of two options in a Copy Option dialog:

- **Copy top role:** You copy only the role you have selected. The source role has links to roles in its hierarchy, and the copy inherits links to the original versions of those roles. If you select this option, subsequent changes to the inherited roles affect not only the source top role, but also your copy.
- **Copy top role and inherited roles:** You copy not only the role you have selected, but also all of the roles in its hierarchy. Your copy of the top role is connected to the new copies of subordinate roles. If you select this option, you insulate the copied role from changes to the original versions of the inherited roles.

Next, an editing train opens. Essentially, you follow the same process in editing a role as you would to create one. However, note the following:

- In the Basic Information page, a **Predefined role** box is checked if you selected the Edit Role option for a role shipped by Oracle. In that case, you can:
  - Add custom data security policies. Modify or remove those custom data security policies.
  - Add or remove users if the role is a job, abstract, or discretionary role.

You cannot:

- Modify, add, or remove function security policies.
- Modify or remove data security policies provided by Oracle.
- Modify the role hierarchy.

The **Predefined role** check box is cleared if you are editing a custom role or if you have copied a role. In that case, you can make any changes to role components.

- By default, the name and code of a copied role match the source role's, except a prefix, suffix, or both are appended. In the Roles Administration page, you can configure the default prefix and suffix for each value.
- A copied role cannot inherit users from a source job or abstract role. You must select users for the copied role. (They may include users who belong to the source role.)
- When you copy a role, the Role Hierarchy page displays all roles subordinate to it. However, you can add roles only to, or remove them from, the top role you copied.

To monitor the status of a role-copy job, select the Administration tab, and then the Role Copy Status tab of the Administration page.

#### *Related Topics*

- [Generating a Visualization: Procedure](#)

## Security Console Role-Copy Options: Explained

When you copy a role on the Security Console, you select one of the following options:

- Copy top role
- Copy top role and inherited roles

This topic explains the effect of each of these options on the copied role.

## Copy Top Role

If you select the **Copy top role** option, then memberships are created for the copy in the roles of which the original is a member. Subsequent changes to those roles appear in your copy of the role. Therefore, you can


- Add roles directly to the copied role without affecting the source role.
- Remove any role that's inherited directly by the copied role without affecting the source role.

However, if you:

- Remove any role that's inherited indirectly by the copied role, then the removal affects any role that inherits the removed role's parent role, including the source role
- Edit any inherited role, then the changes affect any role that inherits the edited role

These types of changes aren't limited to the copied role. This option is referred to as a shallow copy.

To edit the inherited roles without affecting other roles, you must first make copies of those inherited roles. To copy the inherited roles, select the **Copy top role and inherited roles** option. Alternatively, copy individual inherited roles separately, edit the copies, and use them to replace the existing versions.

 **Tip:** The Copy Role: Summary and Impact Report page provides a useful summary of your changes. Review this information to ensure that you haven't accidentally made a change that affects other roles.

## Copy Top Role and Inherited Roles

Selecting **Copy top role and inherited roles** is a request to copy the entire role hierarchy. If you're copying a job or abstract role, then:

- Inherited aggregate privileges are never copied. Instead, membership is added to each aggregate privilege for the copied role.
- Inherited duty roles are copied if a copy with the same name doesn't already exist. Otherwise, membership is added to the existing **copies** of the duty roles for the copied application role.

When inherited duty roles are copied, you can edit them without affecting other roles. Equally, changes made subsequently to the source duty roles don't appear in the copied roles. This option is referred to as a deep copy.

### Related Topics

- [Copying HCM Roles: Points to Consider](#)


## Copying Job or Abstract Roles: Procedure

You can copy any job role or abstract role and use it as the basis for a custom role. Copying roles is more efficient than creating them from scratch, especially if your changes are minor. This topic explains how to copy a role to create a role. You must have the IT Security Manager job role to perform this task.


## Copying a Role

Follow these steps:

1. On the Roles tab of the Security Console, search for the role to copy.
2. Select the role in the search results. The role hierarchy appears in tabular format by default.

 **Tip:** Click the **Show Graph** icon to show the hierarchy in graphical format.

3. In the search results, click the down arrow for the selected role and select **Copy Role**.
4. In the **Copy Options** dialog box, select a copy option.
5. Click **Copy Role**.
6. On the Copy Role: Basic Information page, review and edit the **Role Name**, **Role Code**, and **Description** values, as appropriate.

 **Tip:** The role name and code have the default prefix and suffix for copied roles specified on the Roles subtab of the Security Console Administration tab. You can overwrite these values for the role that you're copying. However, any roles inherited by the copied role are unaffected by any name changes that you make here.

7. Click the **Summary and Impact Report** train stop.
8. Click **Submit and Close**, then **OK** to close the confirmation message.
9. Review the progress of your copy on the Role Copy Status subtab of the Security Console Administration tab. Once the status is **Complete**, you can edit the copied role.

#### Related Topics

- [Copying HCM Roles: Points to Consider](#)

## Editing Job and Abstract Roles: Procedure

You can create a role by copying a predefined job role or abstract role and editing the copy. This topic describes how to edit a role on the Security Console. You must have the IT Security Manager job role to perform this task.

### Editing the Role

Follow these steps:


1. On the Roles tab of the Security Console, search for and select your custom role.
2. In the search results, click the down arrow for the selected role and select **Edit Role**.
3. On the Edit Role: Basic Information page, you can edit the role name and description, but not the role code.
4. Click **Next**.

### Managing Functional Security Privileges

On the Edit Role: Functional Security Policies page, any function security privileges granted to the copied role appear. Select a privilege to view details of the code resources that it secures in the Details section of the page.

To remove a privilege from the role, select the privilege and click the **Delete** icon. To add a privilege to the role:

1. Click **Add Function Security Policy**.
2. In the **Add Function Security Policy** dialog box, search for and select a privilege or role.
3. If you select a role, then click **Add Selected Privileges** to add all function security privileges from the selected role to your custom role. If you select a single privilege, then click **Add Privilege to Role**.
4. Click **OK** to close the confirmation message.
5. Repeat from step 2 for additional privileges.
6. Close the **Add Function Security Policy** dialog box.
7. Click **Next**.

 **Note:** If a function security privilege forms part of an aggregate privilege, then add the aggregate privilege to the role hierarchy. Don't grant the function security privilege directly to the role. The Security Console enforces this approach.

## Managing Data Security Policies

Make no changes on the Copy Role: Data Security Policies page.

 **Note:** Whether this page is enabled for edit depends on the current setting of the **Enable edit of data security policies** option. Set this option on the Roles subtab of the Security Console Administration tab.

Click **Next**.

## Adding and Removing Inherited Roles

The Edit Role: Role Hierarchy page shows the copied role and its inherited aggregate privileges and duty roles. The hierarchy is in tabular format by default. You can add or remove roles.

To remove a role:

1. Select the role in the table.
2. Click the **Delete** icon.
3. Click **OK** to close the confirmation message.

To add a role:


1. Click the **Add Role** icon.
2. In the **Add Role Membership** dialog box, search for and select the role to add.
3. Click **Add Role Membership**.
4. Click **OK** to close the confirmation message.
5. Repeat from step 2 for additional roles.
6. Close the **Add Role Membership** dialog box.

The Edit Role: Role Hierarchy page shows the updated role hierarchy.

7. Click **Next**.

## Provisioning the Role to Users

To provision the role to users, you must create a role mapping in the usual way. Don't provision the role to users here.

 **Note:** Whether this page is enabled for edit depends on the current setting of the **Enable edit of user role membership** option. Set this option on the Roles subtab of the Security Console Administration tab.

Click **Next**.

## Reviewing the Role

On the Edit Role: Summary and Impact Report page, review the summary of changes. Click **Back** to make corrections. Otherwise:

1. Click **Save and Close** to save the role.
2. Click **OK** to close the confirmation message.

The role is available immediately.

## Creating Job or Abstract Roles from Scratch: Procedure

If the predefined roles aren't suitable or you need a role with few privileges, then you can create a role from scratch. This topic explains how to create a job role or abstract role. To perform this task, you must have the IT Security Manager job role.

### Entering Basic Information

Follow these steps:


1. On the Roles tab of the Security Console, click **Create Role**.
2. On the Create Role: Basic Information page, enter the role's display name in the **Role Name** field. For example, enter Sales Department Administration Job Role.
3. Complete the **Role Code** field. For example, enter SALES\_DEPT\_ADMIN\_JOB.  
Abstract roles have the suffix **\_ABSTRACT**, and job roles have the suffix **\_JOB**.
4. In the **Role Category** field, select either **HCM - Abstract Roles** or **HCM - Job Roles**, as appropriate.
5. Click **Next**.

### Adding Functional Security Policies

When you create a role from scratch, you're most likely to add one or more aggregate privileges or duty roles to your role. You're less likely to grant function security privileges directly to the role.

If you aren't granting function security privileges, then click **Next**. Otherwise, to grant function security privileges to the role:

1. On the Create Role: Functional Security Policies page, click **Add Function Security Policy**.
2. In the **Add Function Security Policy** dialog box, search for and select a privilege or role.
3. If you select a role, then click **Add Selected Privileges** to add all function security privileges from a selected role to your custom role. If you select a single privilege, then click **Add Privilege to Role**.
4. Click **OK** to close the confirmation message.
5. Repeat from step 2 for additional privileges.
6. Close the **Add Function Security Policy** dialog box.
7. Click **Next**.

 **Note:** If a function security privilege forms part of an aggregate privilege, then add the aggregate privilege to the role hierarchy. Don't grant the function security privilege directly to the role. The Security Console enforces this approach.

### Creating Data Security Policies

Make no entries on the Create Role: Data Security Policies page.

 **Note:** Whether this page is enabled for edit depends on the current setting of the **Enable edit of data security policies** option. Set this option on the Roles subtab of the Security Console Administration tab.

Click **Next**.

### Building the Role Hierarchy

The Create Role: Role Hierarchy page shows the hierarchy of your custom role in tabular format by default. You can add one or more aggregate privileges, job roles, abstract roles, and duty roles to the role. Typically, when creating a job or abstract role you add aggregate privileges. Roles are always added directly to the role that you're creating.




To add a role:

1. Click the **Add Role** icon.
2. In the **Add Role Membership** dialog box, search for and select the role to add.
3. Click **Add Role Membership**.
4. Click **OK** to close the confirmation message.
5. Repeat from step 2 for additional roles.
6. When you finish adding roles, close the **Add Role Membership** dialog box.
7. Click **Next**.

## Provisioning the Role

To provision the role to users, you must create a role mapping in the usual way once the role exists. Don't provision the role to users here.

 **Note:** Whether this page is enabled for edit depends on the current setting of the **Enable edit of user role membership** option. Set this option on the Roles subtab of the Security Console Administration tab.

Click **Next**.

## Reviewing the Role

On the Create Role: Summary and Impact Report page, review the summary of the changes. Click **Back** to make corrections. Otherwise:

1. Click **Save and Close** to save the role.
2. Click **OK** to close the confirmation message.

Your custom role is available immediately.


# Copying and Editing Duty Roles: Procedure

You can copy a duty role and edit the copy to create a duty role. Copying duty roles is the recommended way of creating duty roles. This topic explains how to copy a duty role and edit the copy. You must have the IT Security Manager job role to perform these tasks.


## Copying a Duty Role

Follow these steps:

1. On the Roles tab of the Security Console, search for the duty role to copy.
2. Select the role in the search results. The role hierarchy appears in tabular format by default.

 **Tip:** Click the **Show Graph** icon to show the hierarchy in graphical format.

3. In the search results, click the down arrow for the selected role and select **Copy Role**.
4. In the **Copy Options** dialog box, select a copy option.
5. Click **Copy Role**.
6. On the Copy Role: Basic Information page, edit the **Role Name**, **Role Code**, and **Description** values, as appropriate.

 **Tip:** The role name and code have the default prefix and suffix for copied roles specified on the Roles subtab of the Security Console Administration tab. You can overwrite these values for the role that you're copying. However, any roles inherited by the copied role are unaffected by any name changes that you make here.

7. Click the **Summary and Impact Report** train stop.
8. Click **Submit and Close**, then **OK** to close the confirmation message.
9. Review the progress of your copy on the Role Copy Status subtab of the Security Console Administration tab. Once the status is **Complete**, you can edit the copied role.

## Editing the Copied Duty Role

Follow these steps:


1. On the Roles tab of the Security Console, search for and select your copy of the duty role.
2. In the search results, click the down arrow for the selected role and select **Edit Role**.
3. On the Edit Role: Basic Information page, you can edit the role name and description, but not the role code.
4. Click **Next**.

## Managing Functional Security Policies

On the Edit Role: Functional Security Policies page, any function security privileges granted to the copied role appear. Select a privilege to view details of the code resources that it secures.

To remove a privilege from the role, select the privilege and click the **Delete** icon. To add a privilege to the role:

1. Click **Add Function Security Policy**.
2. In the **Add Function Security Policy** dialog box, search for and select a privilege or role.
3. If you select a role, then click **Add Selected Privileges** to grant all function security privileges from the selected role to your custom role. If you select a single privilege, then click **Add Privilege to Role**.
4. Click **OK** to close the confirmation message.
5. Repeat from step 2 for additional privileges.
6. Close the **Add Functional Security Policies** dialog box.
7. Click **Next**.

 **Note:** If a function security privilege forms part of an aggregate privilege, then add the aggregate privilege to the role hierarchy. Don't grant the function security privilege directly to the role. The Security Console enforces this approach.

## Managing Data Security Policies

Make no changes on the Edit Role: Data Security Policies page.

 **Note:** Whether this page is enabled for edit depends on the current setting of the **Enable edit of data security policies** option. Set this option on the Roles subtab of the Security Console Administration tab.

Click **Next**.

## Adding and Removing Inherited Roles

The Edit Role: Role Hierarchy page shows the copied duty role and any duty roles and aggregate privileges that it inherits. The hierarchy is in tabular format by default. You can add or remove roles.

To remove a role:

1. Select the role in the table.
2. Click the **Delete** icon.
3. Click **OK** to close the information message.

To add a role:

1. Click **Add Role**.
2. In the **Add Role Membership** dialog box, search for and select the role to add.
3. Click **Add Role Membership**.
4. Click **OK** to close the confirmation message.
5. Repeat from step 2 for additional roles.
6. Close the **Add Role Membership** dialog box.

The Edit Role: Role Hierarchy page shows the updated role hierarchy.

7. Click **Next**.

## Reviewing the Role

On the Edit Role: Summary and Impact Report page, review the summary of changes. Click **Back** to make corrections. Otherwise:

1. Click **Save and Close** to save the role.
2. Click **OK** to close the confirmation message.

The role is available immediately.


### Related Topics

- Copying HCM Roles: Points to Consider

# Role Optimization

## Role Optimizer: Explained

Role optimization is the process used to analyze the existing role hierarchy for redundancies or other inefficiencies. Role optimization enables you to create a role hierarchy that minimizes the number of roles necessary to authorize every job role to its currently authorized privileges. The role optimizer feature automates the analysis process and generates a report you can use to optimize your job hierarchies.

 **Note:** The use of the Role Optimization Report is not included in the cost of your service subscription or application license and incurs charges in addition to your subscription or licensing fee.

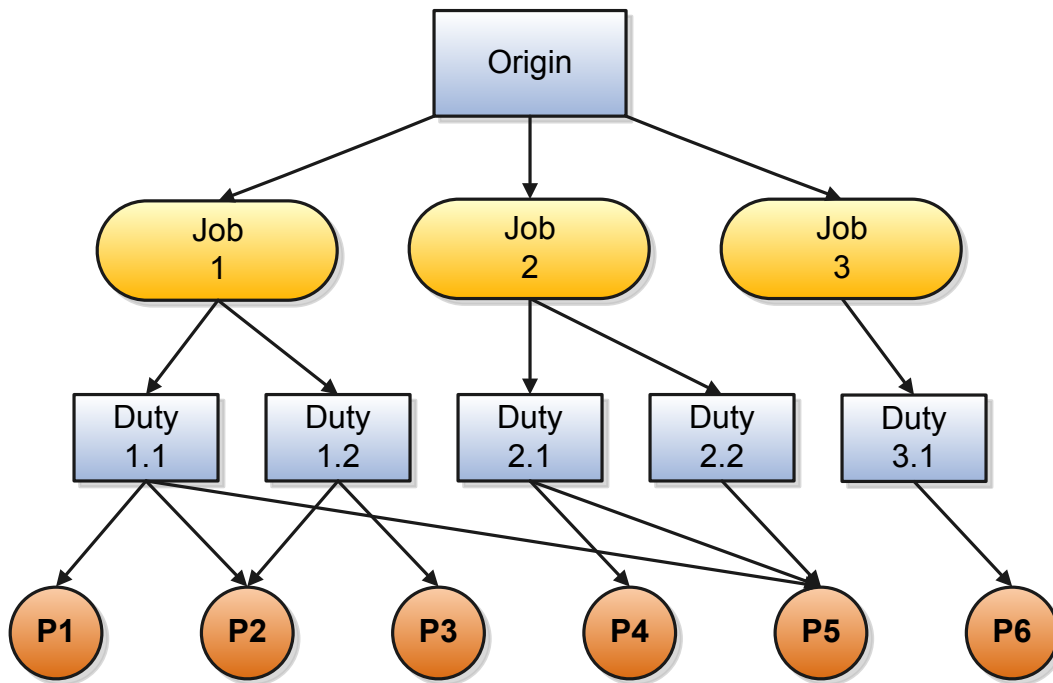
## Reasons to Optimize

Changes to the predefined role hierarchies can put the privacy of your application data at risk. You can unintentionally make your data less secure if you:

- Create duty roles with small groups of privileges in an attempt to minimize:
  - Dependencies

- The impact of making incremental changes
- Grant privileges that already exist in the role hierarchy

The following figure illustrates how roles can proliferate or have duplicate privileges over time making your role hierarchy less efficient.



## Benefits of Optimization

By using the role optimizer, you can:

- Increase user productivity.

You save time that you can perform other tasks.

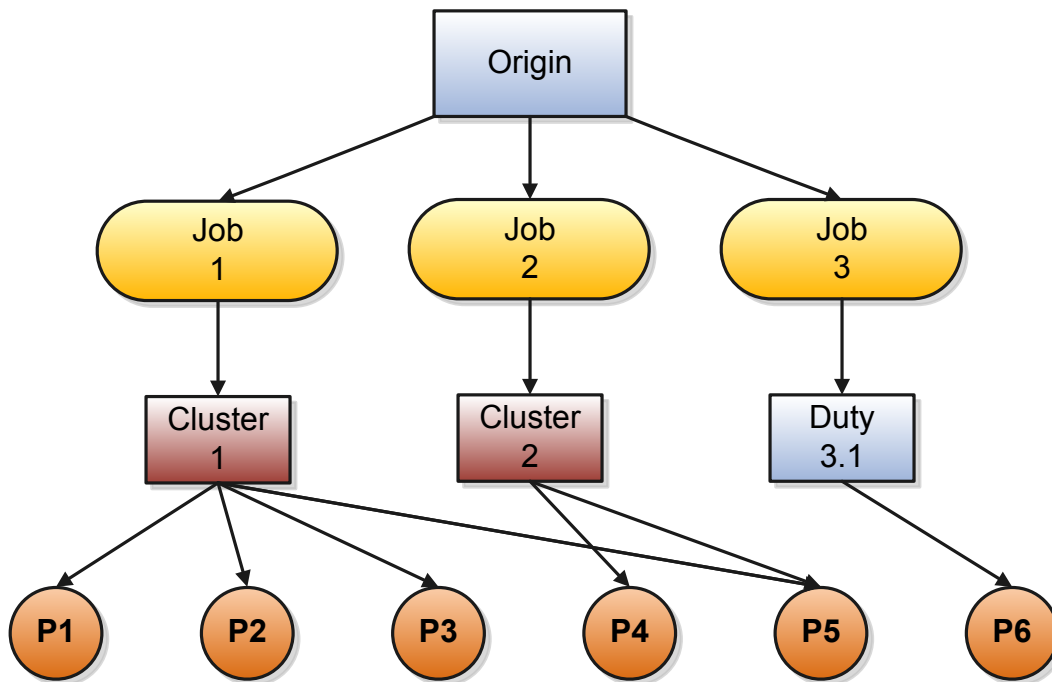
- Lower administrative costs.

You reduce the number of security objects and the amount of time you spend maintaining that you must administer them.

- Decrease access risk associated with undocumented role hierarchy changes.

You identify and can eliminate redundant and inappropriate grants of privilege.


The role optimizer can suggest more efficient role hierarchies, such as the one you see in the following figure.



## Role Optimizer Access


The role optimizer feature is available as a predefined report. Schedule and submit the Role Optimization Report on the Overview page of the Scheduled Processes work area. The process:

1. Analyzes your existing job role hierarchies.
2. Generates the optimized job role hierarchy and stores the data for each job role in a separate CSV file.
3. Archives and attaches the CSV files as the process output.
4. Generates a log and archives it as a ZIP file. The log file includes technical details of the analysis for troubleshooting.

 **Note:** The role optimization process makes no changes to your security structures. You use the report to map privileges to roles and update the role hierarchies.

## Role Optimization Report


Use the Role Optimization Report to create the most efficient role hierarchy for your organization. Use the report results to evaluate and, if necessary, update your role hierarchy. The report results enable you to create a role hierarchy with the minimum number of roles necessary to authorize every job role to every privilege it is currently authorized to.

 **Note:** The use of the Role Optimization Report is not included in the cost of your service subscription or application license and incurs charges in addition to your subscription or licensing fee.

Users with the IT Security Manager role can run the Role Optimization Report, which is available from the security console.

You should run this report if you:

- Make changes to the predefined role hierarchy.
- Implement your own role hierarchy instead of the predefined role hierarchy.

 **Note:** The process makes no changes to your role hierarchies.

The predefined role hierarchy in the security reference implementation is optimized as delivered.

## Report Files

Monitor the process status on the Overview page. When the status value is Succeeded, two files appear in the **Log and Output** section of the report details. The following table describes the two files:

File Name	Description
ClusterAnalysis-Job-CSVs. zip	<p>Contains one CSV file for every job role. Each CSV file contains the duty roles and privileges that make up the optimized job role hierarchy. The name of a CSV file, identifies the job role hierarchy data that the file contains.</p> <p>For example, the ClustersforJob-AR_ REVENUE_ MANAGER_ JOB_ 14240.csv file contains all of the role hierarchy data for the Accounts Receivables Revenue Manager job role.</p>
Diagnostics. zip	Contains a log file that provides technical details about the analysis process. You can use this file for troubleshooting purposes.

Import the raw data from the CSV file into your preferred application to read the results. Report data appears in these two sections:

- Privilege Clusters
- Cluster Details

## Role Optimization Report Results

### Privilege Clusters

The Privilege Clusters section lists each privilege and the name of a recommended privilege cluster. Specific cluster recommendations are described in the cluster details section.

### Cluster Details

A Cluster Details section appears for each privilege cluster referenced in the Privilege Clusters section. Each detail section includes:

- Cluster name.
- Names of recommended candidate roles that map to the privilege cluster.
- Names and descriptions of the jobs and privileges associated with the cluster.

The following table provides descriptions of the fields that appear in the Cluster Details section:

Field Name	Description
Cluster Name	The name of the optimized cluster, usually in this format: Cluster ###

Field Name	Description
Primary, Secondary, Tertiary Candidate Role	<p>Recommended role mappings for the privileges in the cluster. Up to three recommended duty roles map to the listed privileges.</p> <p>Select a role. Then assign the privileges in the cluster to that role.</p>
Jobs in Cluster	<p>The number of job roles that inherit the privilege cluster.</p> <p>A list of job names and descriptions is also included.</p>
Privileges in Cluster	<p>The number of privileges that make up the cluster.</p> <p>A list of privilege names and descriptions is also included.</p>

## FAQs for Configuring Roles in the Security Console

### Why didn't the role optimization process update my roles?

The role optimization process doesn't change any security structures. It analyzes your role hierarchy and provides data in a report you can use to optimize the role hierarchy.





# 10 Managing Certificates and Keys

## Managing Certificates: Explained

Certificates establish keys for the encryption and decryption of data that Oracle Cloud applications exchange with other applications. Use the Certificates page in the Security Console functional area to work with certificates in either of two formats, PGP and X.509.

For each format, a certificate consists of a public key and a private key. The Certificates page displays one record for each certificate. Each record reports these values:

- **Type:** For a PGP certificate, "Public Key" is the only type. For an X.509 certificate, the type is either "Self-Signed Certificate" or "Trusted Certificate" (one signed by a certificate authority).
- **Private Key:** A check mark indicates that the certificate's private key is present. For either certificate format, the private key is present for your own certificates (those you generate in the Security Console). The private key is absent when a certificate belongs to an external source and you import it through the Security Console.
- **Status:** For a PGP certificate, the only value is "Not Applicable." (A PGP certificate has no status.) For an X.509 certificate, the status is derived from the certificate.

Click the Actions menu to take an appropriate action for a certificate. Actions include:

- Generate PGP or X.509 certificates.
- Generate signing requests to transform X.509 certificates from self-signed to trusted.
- Export or import PGP or X.509 certificates.
- Delete certificates.

## Generating Certificates: Explained

For a PGP or X.509 certificate, one operation creates both the public and private keys. From the Certificates page, select the Generate option. In a Generate page, select the certificate format, then enter values appropriate for the format.

For a PGP certificate, these values include:

- An alias (name) and passphrase to identify the certificate uniquely.
- The algorithm by which keys are generated, DSA or RSA.
- A key length.

For an X.509 certificate, these values include:

- An alias (name) and private key password to identify the certificate uniquely.
- A common name, which is an element of the "distinguished name" for the certificate. The common name identifies the entity for which the certificate is being created, in its communications with other web entities. It must match the name of the entity presenting the certificate. The maximum length is 64 characters.
- Optionally, other identifying values: Organization, Organization Unit, Locality, State/Province, and Country. These are also elements of the distinguished name for the certificate, although the Security Console does not perform any validation on these values.

- An algorithm by which keys are generated, MD5 or SHA1.
- A key length.
- A validity period, in days. This period is preset to a value established on the General Administration page. You can enter a new value to override the preset value.

## Generating a Signing Request: Procedure

You can generate a request for a certificate authority (CA) to sign a self-signed X.509 certificate, to make it a trusted certificate. (This process does not apply to PGP certificates.)

1. Select **Generate Certificate Signing Request**. This option is available in either of two menus:
  - One menu opens in the Certificates page, from the row for a self-signed X.509 certificate.
  - The other menu is the Actions menu in the details page for that certificate.
2. Provide the private key password for the certificate, then select a file location.
3. Save the request file. Its default name is [alias]\_CSR.csr.

You are expected to follow a process established by your organization to forward the file to a CA. You would import the trusted certificate returned in response.

## Importing and Exporting X.509 Certificates: Procedure

For an X.509 certificate, you import or export a complete certificate in a single operation.

To export:

1. From the Certificates page, select the menu available in the row for the certificate you want to export. Or open the details page for that certificate and select its Actions menu.
2. In either menu, select Export, then Certificate.
3. Select a location for the export file. By default, this file is called [alias].cer.

To import, use either of two procedures. Select the one appropriate for what you want to do:

- The first procedure replaces a self-signed certificate with a trusted version (one signed by a CA) of the same certificate. (A prerequisite is that you have received a response to a signing request.)
  - a. In the Certificates page, locate the row for the self-signed certificate, and open its menu. Or, open the details page for the certificate, and select its Actions menu. In either menu, select Import.
  - b. Enter the private key password for the certificate.
  - c. Browse for and select the file returned by a CA in response to a signing request, and click the Import button.

In the Certificates page, the type value for the certificate changes from self-signed to trusted.

- The second procedure imports a new X.509 certificate. You can import a .cer file, or you can import a keystore that contains one or more certificates.
  - a. In the Certificates page, click the Import button. An Import page opens.
  - b. Select X.509, then choose whether you are importing a certificate or a keystore.

- c. Enter identifying values, which depend on what you have chosen to import. In either case, enter an alias (which, if you are importing a .cer file, need not match its alias). For a keystore, you must also provide a keystore password and a private key password.
- d. Browse for and select the import file.
- e. Select Import and Close.

## Importing and Exporting PGP Certificates: Procedure

For a PGP certificate, you export the public and private keys for a certificate in separate operations. You can import only public keys. (The assumption is that you will import keys from external sources, who will not provide their private keys to you.)

To export:

1. From the Certificates page, select the menu available in the row for the certificate you want to export. Or open the details page for that certificate and select its Actions menu.
2. In either menu, select Export, then Public Key or Private Key.
3. If you selected Private Key, provide its passphrase. (The public key does not require one.)
4. Select a location for the export file. By default, this file is called [alias]\_pub.asc or [alias]\_priv.asc.

To import a new PGP public key:

1. On the Certificates page, select the Import button.
2. In the Import page, select PGP and specify an alias (which need not match the alias of the file you are importing).
3. Browse for the public-key file, then select Import and Close.

The Certificates page displays a record for the imported certificate, with the Private Key cell unchecked.

Use a distinct import procedure if you need to replace the public key for a certificate you have already imported, and do not want to change the name of the certificate:

1. In the Certificates page, locate the row for the certificate whose public key you have imported, and open its menu. Or, open the details page for the certificate, and select its Actions menu. In either menu, select Import.
2. Browse for the public-key file, then select Import.

## Deleting Certificates: Procedure

You can delete both PGP and X.509 certificates:

1. In the Certificates page, select the menu available in the row for the certificate you want to delete. Or, in the details page for that certificate, select the Actions menu.
2. In either menu, select Delete.
3. Respond to a warning message. If the certificate's private key is present, you must enter the passphrase (for a PGP certificate) or private key password (for an X.509 certificate) as you respond to the warning. Either value would have been created as your organization generated the certificate.



# 11 Implementing Security in Oracle Fusion Financials

## Security for Country-Specific Features: Explained

For new implementations, you must assign the country-specific duty roles to your enterprise job roles or users before you can use the features specific to these regions. You have to assign country-specific duty roles to fscm application and obi application stripe to view the country-specific reports on the Scheduled Processes page, and to open the Parameters page of the selected process.

This table describes the duty role for each region:

Region	Duty Role	Role Code
Europe, the Middle East, and Africa (EMEA)	EMEA Financial Reporting	ORA_JE_EMEA_FINANCIAL_REPORTING_DUTY
Asia Pacific (APAC)	APAC Financial Reporting	ORA_JA_APAC_FINANCIAL_REPORTING_DUTY

## General Ledger

### General Ledger Security: Explained

General ledger functions and data are secured through job roles, data access sets, and segment value security rules.

#### Functional Security

Functional security, which is what you can do, is managed using job roles. The following job roles are predefined for Oracle Fusion General Ledger:

- General Accounting Manager
- General Accountant
- Financial Analyst

Each job role includes direct privilege grants, as well as duty role assignments, to provide access to application functions that correspond to their responsibilities. For example, the General Accounting Manager role grants comprehensive access to all General Ledger functions to the general accounting manager, controller, and chief financial officer in your organization.

## Data Security

Data security, which controls what action can be taken against which data, is managed using:

- Data access sets
- Segment value security rules

Data access sets can be defined to grant access to a ledger, ledger set, or specific primary balancing segment values associated with a ledger. You decide whether each data access set provides read-only access or read and write access to the ledger, ledger set, or specific primary balancing segment values, which typically represent your legal entities that belong to that ledger. Primary balancing segment values without a specific legal entity association can also be directly assigned to the ledger.

Segment value security rules control access to data that is tagged with the value set values associated with any segment in your chart of accounts.

## Security Assignment

Use the Security Console to assign users roles (job roles, as well as roles created for segment value security rules or others). Use the Manage Data Access Set Data Access for Users task to assign users data access sets as the security context paired with their General Ledger job role assignments.

For more information about security assignments, see the Securing Oracle ERP Cloud guide.

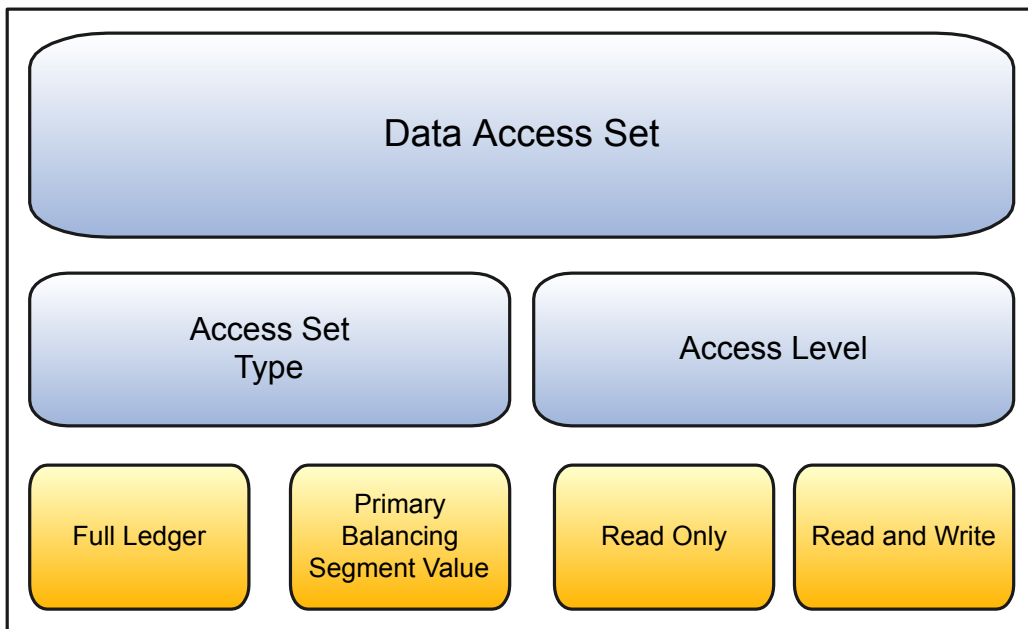
## Data Access Set Security: Overview

Data Access Sets secure access to ledgers, ledger sets, and portions of ledgers using primary balancing segment values. If you have primary balancing segment values assigned to a legal entity, then you can use this feature to secure access to specific legal entities.

You can combine ledger and ledger set assignments in single data access sets if the ledgers share a common chart of accounts and calendar. If you have primary balancing segment values assigned to a legal entity within the ledger, then you can use data access sets to secure access to specific legal entities. You can also secure access to primary balancing segments assigned directly to the ledger.

When a ledger or ledger set is created, a data access set for that ledger or ledger set is automatically created, giving full read and write access to those ledgers. You can also manually create data access sets to give read and write access, or read-only access to entire ledgers or portions of the ledger represented as primary balancing segment values.

The following figure shows that a data access set consists of an access set type and an access level. The access set type can be set to full ledger or primary balancing segment value. The access level can be read only or read and write.



The **Full Ledger** access set type provides access to the entire ledger or ledger set. This could be for read-only access or both read and write access to the entire ledger.

The **Primary Balancing Segment Value** access set type provides access to one or more primary balancing segment values for that ledger. This access set type security can be specified by parent or detail primary balancing segment values. The specified parent value and all its descendants, including middle level parents and detail values are secured. You can specify read only, read and write access, or combination of both, for different primary balancing segment values for different ledgers and ledger sets.

## Data Access Set Security: Examples

This example shows a data access set that secures access by using primary balancing segment values that correspond to legal entities.

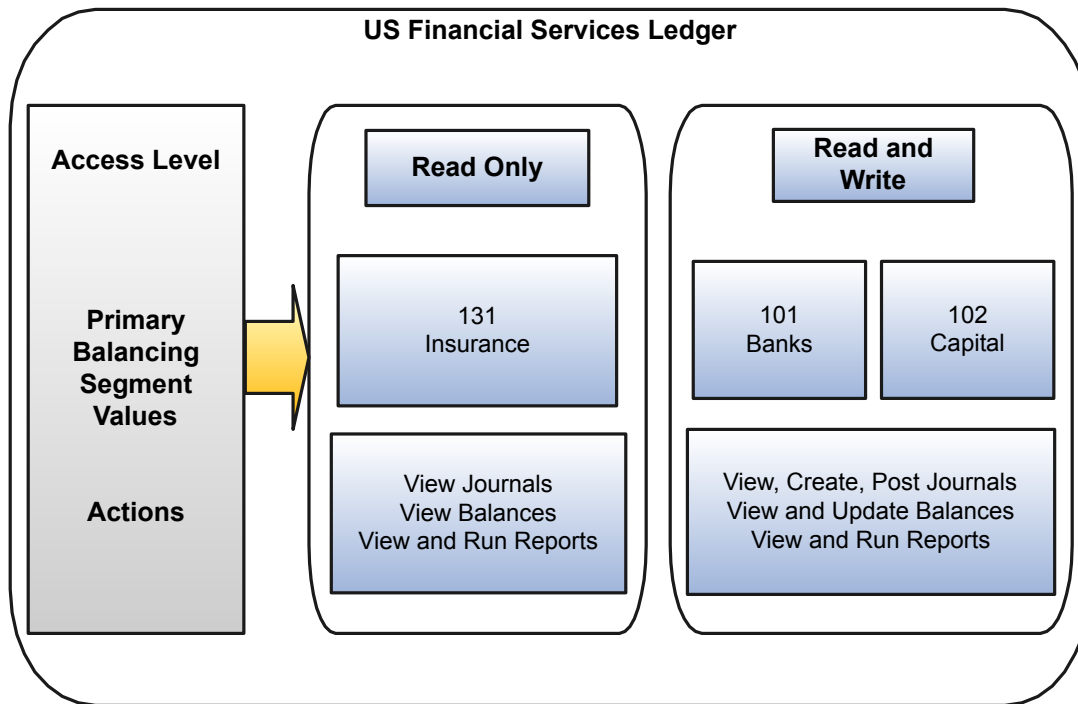
### Scenario

The following figure shows a data access set for the US Financial Services Ledger. The access set type is Primary Balancing Segment Value, with each primary balancing segment value representing different legal entities. Read-only access has been assigned to primary balancing segment value 131, which represents the Insurance legal entity. Read and write access has been assigned to primary balancing segment values 101 and 102, which represent the Banks and Capital legal entities.

For this data access set, the user can:

- View the journals, balances, and reports for primary balancing segment value 131 for the Insurance legal entity.

- Create journals and update balances, as well as view journals, balances and reports for primary balancing segment value 101 and 102 for legal entities Banks and Capital.



**Note:** In financial reporting, the list of ledgers isn't secured by data access sets when viewing a report in Preview mode. Users can view the names of ledgers they don't have privileges to view. However, the data from a secured ledger doesn't appear on the report.

## Segment Value Security: Explained

Set up segment value security rules on value sets to control access to parent or detail segment values for chart of accounts segments, also called flexfield segments. Segment value security rules restrict data entry, online inquiry, and reporting.

### Secured Value Sets

When you enable security on a value set, access to all values for that value set is denied. To control access to value set values, you enable security on the value set, create conditions, and then assign the conditions to roles. The roles should be created solely for the purpose of segment value security. The roles are then assigned to users.

If a value set is secured, every usage of that value set in a chart of accounts structure instance is secured. For example the same security applies if that value set is:

- Used for two or more segments in the same chart of accounts, such as the primary balancing and intercompany segments
- Shared across different segments of different charts of accounts




## Secured Segment Values

Segment value security applies mainly when data is created or updated, and when account combinations are queried. When you have access to secured account values, you can view and use those secured values across all modules of the applications where there are references to accounting flexfields including:

- Transaction entry pages
- Balances and transactions inquiry pages
- Setup pages
- Reports

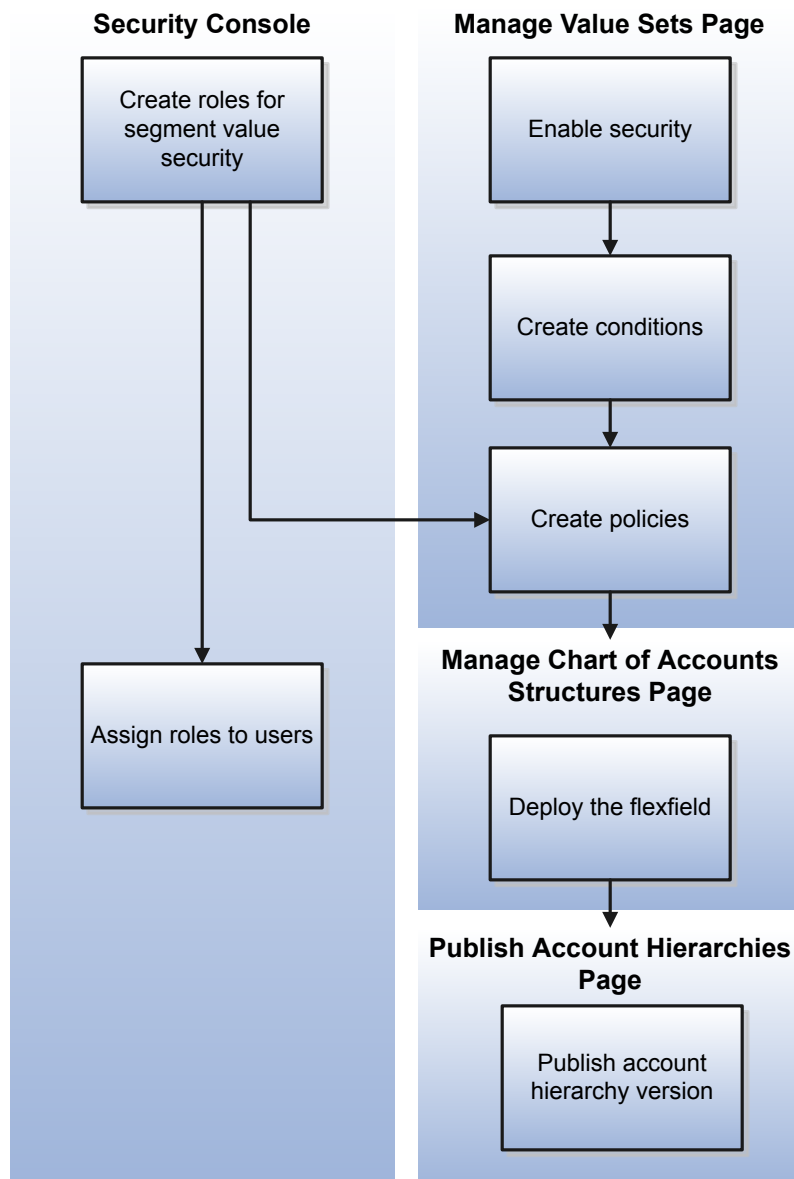
On setup pages, you can still view referenced account combinations with secured account values, even if you haven't been granted access to those secured values. However, if you try to update such references, you can't use those secured values. On reports, you can view balances for secured account values only if you have access to those secured values.

 **Note:** You can enforce segment value security for inquiries and reporting based on any hierarchy, even hierarchies that aren't published to the reporting cube.

## Segment Value Security Implementation


You implement segment value security using the Security Console and these pages: Manage Value Sets, Manage Chart of Accounts Structures, Publish Account Hierarchies.

The following figure shows the steps for defining and implementing security rules for segment values.



To define segment value security roles:

1. Create segment value security roles.
2. Enable security on the value set.

 **Note:** You can enable security only on value sets with a type of Independent.

3. Create conditions for the rule.
4. Create policies to associate the conditions with the role.
5. Deploy the accounting flexfield.
6. Publish the account hierarchies.

## 7. Assign the role to users.

Whenever you assign segment value security roles to a user, the rules from the user's assigned roles can be applied together. All of the segment value security roles assigned to a user pertaining to a given value set are simultaneously applied when the user works with that value set. For example, one rule provides access to cost center 110 and another rule provides access to all cost centers. A user with both of these segment value security rules has access to all cost centers when working in a context where that value set matters.

## Segment Value Security Conditions

When you create a condition, you specify an operator. The following table describes the operators that you can use.

Operator	Usage
Equal to	<ul style="list-style-type: none"><li>Provides access to a specific detail or child value.</li><li>Don't use to provide access to a parent value.</li></ul>
Not equal to	<ul style="list-style-type: none"><li>Provides access to all detail and child values, except the one that you specify.</li><li>Don't use to provide access to a parent value.</li></ul>
Between	<ul style="list-style-type: none"><li>Provides access to a detail range of values.</li></ul>
Is descendant of	<ul style="list-style-type: none"><li>Provides access to the parent value itself and all of its descendants including middle level parents and detail values.</li></ul>
Is last descendant of	<ul style="list-style-type: none"><li>Provides access to the last descendants for example, the detail values of a parent value.</li></ul>

 **Tip:** For the operators **Is descendant of** and **Is last descendant of**:

- Specify an account hierarchy (tree) and a tree version to use these operators.
- Understand that the security rule applies across all the tree versions of the specified hierarchy, as well as all hierarchies associated with the same value set of the specified hierarchy.

## Segment Value Security: Examples

You can set up segment value security rules on value sets to control access to parent or detail segment values for chart of accounts segments. Segment value security rules restrict data entry, online inquiry, and reporting.

The following example describes why and how you might want to use segment value security.

### Securing Values for the Cost Center and Account Segments

For this scenario, only certain users should have access to the **Accounting** cost center and the **US Revenue** account. To create a complete data security policy that restricts segment value access to those users:

- Plan for the number of roles that represent the unique segment value security profiles for your users. For this scenario, you can create two roles, one for the cost center segment and one for the account segment.
- Use the Security Console to create the roles. Append the text **SVS-role** to the role names so it's clear the roles are solely for segment value security. For this scenario, you create roles **Accounting Cost Center-SVS Role** and **US Revenue Account-SVS Role**.
- Use the Manage Segment Value Security Rules task to enable security on the cost center and account value sets associated with the chart of accounts.

4. Create a condition for each value set. For example, the condition for the **Accounting** cost center is that the cost center is equal to **Accounting**.
5. Create a policy to associate the conditions to the roles. For example, create a policy to assign the condition for the **Accounting** cost center to the role **Accounting Cost Center-SVS Role**.
6. Use the Security Console to assign the appropriate role to the appropriate user. For example, assign the role **Accounting Cost Center-SVS Role** to the users who should have access to the **Accounting** cost center.

## Enabling Security on a Chart of Accounts: Worked Example

This example demonstrates how to enable security on a chart of accounts to control access to specific segment values. The following table summarizes the key decisions for this scenario.

Decisions to Consider	In This Example
Which segment in the chart of accounts must be restricted?	Cost center
Which cost center values have to be granted to different users?	<ul style="list-style-type: none"> <li>• Child values 110 to 120</li> <li>• Child value 310</li> <li>• Parent value 400 and all its children</li> <li>• All cost centers</li> </ul>
What's the name of the value set for the Cost Center segment?	Cost Center Main
What's the name of the user who can access cost centers 110 to 120?	Casey Brown
What's the name of the tree for the accounting flexfield?	All Corporate Cost Centers
What version of the tree hierarchy does the condition apply to?	V5

## Summary of the Tasks and Prerequisites

This example includes details of the following tasks you perform when defining and implementing segment value security.

1. Define roles for segment value security rules.
2. Enable segment value security for the value set.
3. Define the conditions.
4. Define the policies.
5. Deploy the accounting flexfield.
6. Publish the account hierarchies.
7. Assign segment value security roles to users.

Perform the following prerequisites before enabling security on a chart of accounts:

- To work with the Security Console, you need the IT Security Manager role assigned to your user setup.
- To work with value sets and profile options, you need the Financial Application Administrator role.
- Set the Enable Data Security Polices and User Membership Edit profile to Yes.

## Defining Roles for Segment Value Security Rules

To create a complete data security policy, create the roles first so that they're available for assignment to the segment value security rules.

1. In the Tools work area, open the Security Console.
2. Perform the following steps four times to create four roles.
3. Click **Create Role**.
4. On the Create Role page, complete the fields as shown in this table, and then click **Next, Next, Next, Next, Next, Save and Close**.
5. Click **OK** and complete the fields, as shown in this table.

Field	Role 1	Role 2	Role 3	Role 4
<b>Role Name</b>	Cost Center 110-120 SVS Role	Cost Center 310 SVS Role	Cost Center 400 SVS Role	Cost Center All SVS Role
<b>Role Code</b>	CC_110_120_SVS_ROLE	CC_310_SVS_ROLE	CC_400_SVS_ROLE	CC_ALL_SVS_ROLE
<b>Role Category</b>	Default	Default	Default	Default
<b>Description</b>	Access to cost centers 110 to 120.	Access to cost center 310.	Access to parent cost center 400 and all its children.	Access to all cost centers.

The following figure shows the Create Role page for the first role, which is Cost Center 110-120 SVS Role. The role code, role category, and description fields are complete.

### Create Role Cost Center 110-120 SVS Role: Basic Information

\* Role Name

\* Role Code

\* Role Category

Default ▼

☐ Predefined role

Description

## Enabling Segment Value Security for the Value Set

1. In the Setup and Maintenance work area, search for and select the Manage Segment Value Security Rules task.
2. In the **Value Set Code** field, enter Cost Center Main and click **Search**.
3. In the Search Results section, click **Edit** to open the Edit Value Set page.
4. Select the **Security enabled** option.
5. In the **Data Security Resource Name** field, enter Secure\_Main\_Cost\_Center\_Values.
6. Click **Save**.

The following figure shows the Edit Value Set page for the Cost Center Main value set. Security is enabled and a data security resource name has been entered.

**Edit Value Set: Cost Center Main**

Value Set Code Cost Center Main

Description

\* Module General Ledger

Validation Type Independent

Value Data Type Character

☒ Security enabled

\* Data Security Resource Name Secure\_Main\_Cost\_Center\_Values [Edit Data Security](#)

**Definition**

Value Subtype Text

\* Maximum Length

Minimum Value

Maximum Value

☐ Uppercase only

☐ Zero fill

## Defining the Conditions


Use conditions to specify the segment values that require security.

Segment value security rules that provide access to all segment values, and segment value security rules that provide access to single nonparent segment values, don't need a condition. Instead, you can define the policy to cover all values, and you can define a policy to cover a single nonparent segment value provided that you know the internal ID for that segment value. If you don't know the internal ID, you can create a condition for that single segment value.

In this scenario, the internal ID for segment value 310 isn't known, so the following steps create all of the conditions, except for the access to all cost centers, which the policy definition can cover.

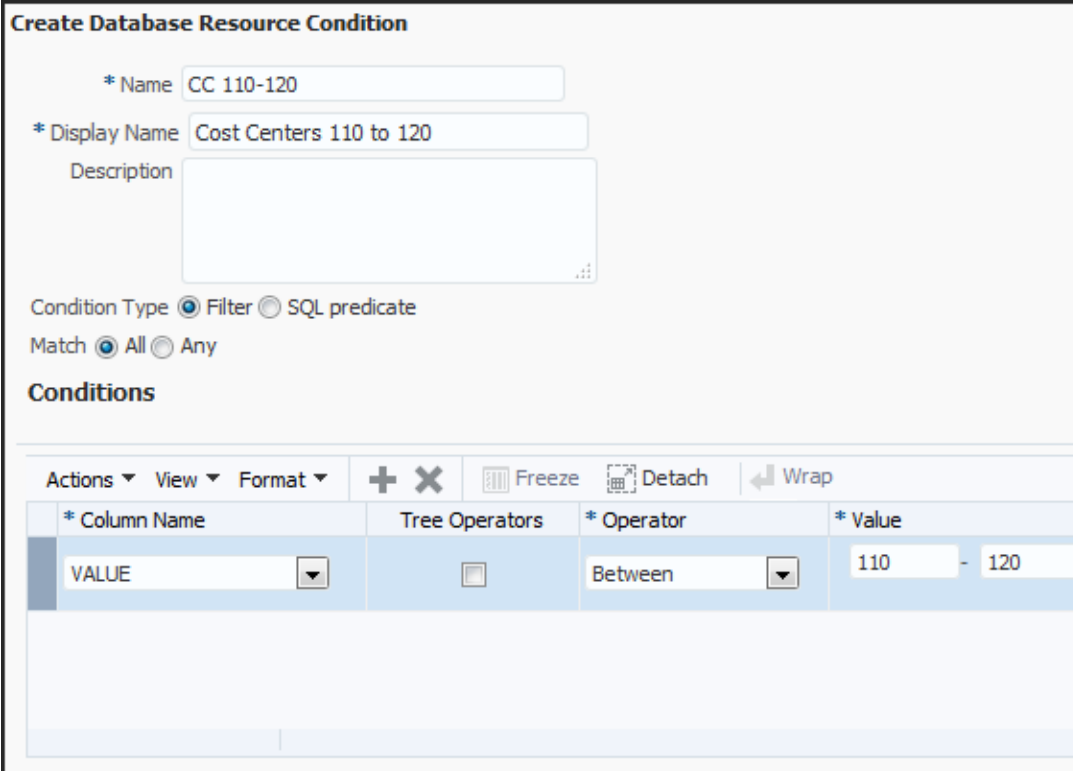
1. Click **Edit Data Security** to open the Edit Data Security page.
2. On the Condition tab, click **Create** to open the Create Database Resource Condition window.
3. Enter CC 110 - 120 in the **Name** field.
4. Enter Cost Centers 110 to 120 in the **Display Name** field.

5. Accept the default value of All for the **Match** field.  
Matching to all conditions means that all conditions apply simultaneously. Matching to any condition means that any of the conditions would apply.
6. Click **Add** in the Conditions section.
7. Select VALUE for the **Column Name** field.
8. Select Between for the **Operator** field.

 **Note:** You can select one of the following operators: Equal to, Not equal to, Between, Is descendant of, Is last descendant of.

9. Enter 110 in the first **Value** field and 120 in the second **Value** field.

The following figure shows the Create Database Resource Condition page for the condition named CC 110 - 120. The display name is Cost Centers 110 to 120, and one condition is defined. The condition has a column name of VALUE, an operator of Between, and the specified values are 110 and 120.



**Create Database Resource Condition**

\* Name

\* Display Name

Description

Condition Type ☒ Filter ☐ SQL predicate

Match ☒ All ☐ Any

**Conditions**

* Column Name	Tree Operators	* Operator	* Value
VALUE		Between	110 - 120

10. Click **Save**.
  11. To create the next database resource condition for segment value 310, click **Create** on the Condition tab.
  12. Enter CC 310 in the **Name** field.
  13. Enter Cost Center 310 in the **Display Name** field.
  14. Click **Add** in the Conditions section.
  15. Select VALUE for the **Column Name** field.
  16. Select Equal to for the **Operator** field.
  17. In the **Value** field, enter 310.
- The following figure shows the definition of the second condition.

The following figure shows the Create Database Resource Condition page for the condition named CC 310. The display name is Cost Center 310, and one condition is defined. The condition has a column name of VALUE, an operator of Equal to, and the specified value is 310.

**Create Database Resource Condition**

\* Name

\* Display Name

Description

Condition Type ☒ Filter ☐ SQL predicate

Match ☒ All ☐ Any

**Conditions**

* Column Name	Tree Operators	* Operator	* Value
<input type="text" value="VALUE"/>	<input type="checkbox"/>	<input type="text" value="Equal to"/>	<input type="text" value="310"/>

18. Click **Save**.
19. To create the next database resource condition for parent value 400, click **Create** on the Condition tab.
20. Enter CC 400 in the **Name** field.
21. Enter Parent Cost Center 400 in the **Display Name** field.
22. In the Condition section, click **Add**.
23. Select VALUE for the **Column Name** field.
24. Select the **Tree Operators** option.
25. For the **Operator** field, select Is a last descendant of, which restricts access to the parent cost center 400 and all of its children, including intermediary parents.

**Note:** For the **Tree Operators** field, you can only select Is a last descendant of or Is a descendant of.

26. In the **Value** column, click the **Select Tree Node** icon to open the Select Tree Node window.



The following figure shows the Select Tree Node window. Values are required for the Tree Structure, Tree, and Active Tree Version fields. The window also includes these Tree Node options: Specify primary keys, Select from hierarchy.

The screenshot shows the 'Create Database Resource Condition' window in the background. The 'Name' field is 'CC 400' and the 'Display Name' is 'Parent Cost Center 400'. Overlaid on this is the 'Select Tree Node' dialog box. Inside the dialog, the 'Tree Structure' field is empty, the 'Tree' field is empty, and the 'Active Tree Version' field is empty. Below these fields are two radio buttons: 'Specify primary keys' (which is selected) and 'Select from hierarchy'. At the bottom of the dialog are 'OK' and 'Cancel' buttons. Below the dialog, a table is partially visible with columns: '\* Column Name', 'Tree Operators', '\* Operator', and '\* Value'. The first row shows 'VALUE' in the first column, a checkmark in the second, 'Is a last descendant of' in the third, and a magnifying glass icon in the fourth.

27. In the **Tree Structure** field, select Accounting Flexfield Hierarchy. This signifies that you are choosing among trees that are used as accounting flexfield, or charts of accounts, hierarchies.
28. In the **Tree** field, select All Corporate Cost Centers.
29. In the **Active Tree Version** field, select V5.
30. In the **Tree Node** field, select the **Select from hierarchy** button. The Tree Node section opens.
31. In the Tree Node section, expand the nodes and select 400.

The following figure shows the Select Tree Node window after completing the fields in steps 27 through 31.

**Select Tree Node**

\* Tree Structure: Accounting Flexfield Hierarchy

\* Tree: All Corporate Cost Centers

\* Active Tree Version: V5

Tree Node: ☐ Specify primary keys ☒ Select from hierarchy

**Tree Nodes**

Node	Label	Data Source
999		Accounting Flexfield Hierarchy Parent Values
000		Accounting Flexfield Hierarchy Detail Values
100		Accounting Flexfield Hierarchy Parent Values
200		Accounting Flexfield Hierarchy Parent Values
400		Accounting Flexfield Hierarchy Parent Values
460		Accounting Flexfield Hierarchy Parent Values
500		Accounting Flexfield Hierarchy Parent Values

32. Click **OK**.

The following figure shows the resulting Create Database Resource Condition page for the condition named CC 400. The display name is Parent Cost Center 400 and one condition is defined. The condition has a column name of VALUE, an enabled **Tree Operators** option, an operator called **Is a last descendant of**, and a value of 400.

Create Database Resource Condition

\* Name

CC400

\* Display Name

Parent Cost Center 400

Description

Condition Type

☒ Filter ☐ SQL predicate

Match

☒ All ☐ Any

Conditions

Actions ▾ View ▾ Format ▾ + × Freeze VALUE Wrap

Name	Tree Operators	* Operator	* Value
VALUE ▾	<input checked="" type="checkbox"/>	Is a last descendant of ▾	400

33. Click **Save**.

Defining the Policies

Create policies to assign conditions to segment value security roles.

- 1. On the Edit Data Security page, click the Policy tab.
- 2. Click **Create** to open the Create Policy window.
- 3. On the General Information tab, enter Policy for 110-120 in the **Name** field.
- 4. Accept the default value of General Ledger in the **Module** field.
- 5. Enter 9/1/16 in the **Start Date** field.

The following figure shows the General Information tab on the Create Policy page for the policy named Policy for 110-120. The start date for the policy is 9/1/16.

**Create Policy**

**General Information** | Role | Rule

Name: Policy for 110-120

\* Start Date: 9/1/16

End Date:

\* Module: General Ledger

Description:

6. Select the Role tab and click **Add** to open the Select and Add window.
7. Enter 110 in the **Role Name** field.
8. Select hcm in the **Application** field.  
Roles with the Default category are created in the hcm application.
9. Click **Search**.

The following figure shows the Select and Add Roles window with the search results. The role retrieved by the search results is named Cost Center 110-120 SVS Role.

**Select and Add: Roles**

**Search**

Role Name: 110 Application: hcm Search

Name	Description
Cost Center 110-120 SVS Role	Access to cost centers 110 to 120.

10. Select Cost Center 110-120 SVS Role and click **OK**.

The following figure shows the Role tab on the Create Policy page with the role that was populated by the search results.

Name	Description
CC_110_120_SVS_ROLE	Access to cost centers 110 to 120.

11. Select the Rule tab.
12. Accept the default setting of Multiple Values in the **Row Set** field.

- Note:** The **Row Set** field determines the range of value set values affected by the policy.
- If Multiple Values is selected, a condition must be specified.
  - If All Values is selected, then the policy grants access to all values in the value set and no condition is needed.
  - If Single Value is selected, then the internal Value ID for the segment value must be specified and no condition is needed.

13. Click **Search** on the **Condition** field.
14. Select Cost Centers 110 to 120 for the **Condition** field and click **OK**.

The following figure shows the Rule tab on the Create Policy page. The selected row set is Multiple Values and the condition is Cost Centers 110 to 120.

\* Row Set: Multiple Values

Condition: Cost Centers 110 to 120

Description:

15. Click **Save and Close**.
16. Click **OK** to confirm.
17. Repeat steps 2 through 13 to create the rest of the policies, using the values in the following table.

Field	Policy 2	Policy 3	Policy 4
General Information tab, Name	Policy for 310	Policy for 400	Policy for all cost centers
General Information tab, Start Date	9/1/16	9/1/16	9/1/16
Role tab, Role Name	Cost Center 310 SVS Role	Cost Center 400 SVS Role	Cost Center All SVS Role
Rule tab, Row Set	Multiple Values	Multiple Values	All Values
Rule tab, Condition	Cost Center 310	Parent Cost Center 400	Not Applicable

18. Click **Done**.

## Deploying the Accounting Flexfield

You must deploy the accounting flexfield for the segment value security changes to take effect.

1. In the Setup and Maintenance work area, search for and select the Manage Chart of Accounts Structures task.
2. In the **Module** field, select General Ledger and click **Search**.
3. Select the row for the Accounting Flexfield and click **Deploy Flexfield**.

The following figure shows the Manage Chart of Accounts Structure page after searching for General Ledger modules. The search results display a row with a key flexfield named Accounting Flexfield.

**Manage Chart of Accounts Structures**

**Search**

Key Flexfield Code

Key Flexfield Name

Module

**Search Results**

Actions View Format Freeze Detach Wrap Manage Structures Manage Structure Instances Deploy Flexfield

Application	Key Flexfield Name	Key Flexfield Code	Module
General Ledger	Accounting Flexfield	GL#	General Ledger

4. Click **OK**.

## Publishing the Account Hierarchies

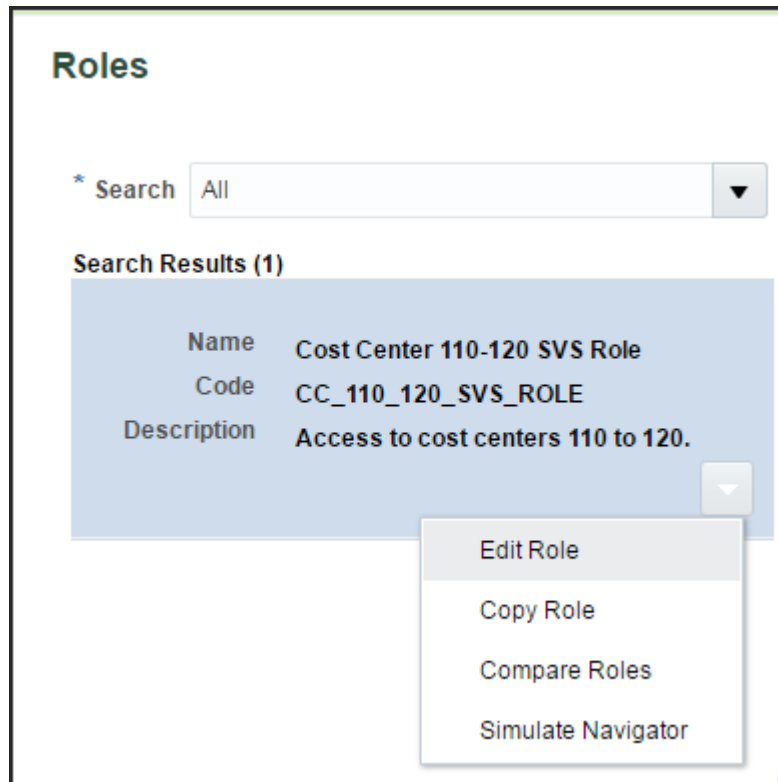
1. In the Setup and Maintenance work area, search for and select the Publish Account Hierarchies task.
2. In the **Hierarchy** field, select All Corporate Cost Centers.
3. In the **Hierarchy Version** field, select V5.
4. Click **Search**.
5. In the Search Results section, expand the hierarchy row.
6. Select the row for the hierarchy version V5.
7. Click **Publish**.

8. Click **OK**.

## Assigning Segment Value Security Roles to Users

1. In the Tools work area, open the Security Console.
2. Enter Cost Center 110-120 SVS Role in the **Search** field and click **Search**.
3. In the Search Results section, select the down arrow icon and select **Edit Role**.

The following figure shows the Roles page and the available menu options, including Edit Role, for the role named Cost Center 110-120 SVS Role.



4. Click **Next** four times to navigate to the Edit Role: Users page.
5. Click **Add User**.
6. Enter Casey in the **Search** field and click **Search**.
7. Click **Add User to Role** to add Casey Brown to the role.
8. Click **OK** to confirm.

The following figure shows the Edit Role page for the Cost Center 110-120 SVS Role with the user Casey Brown selected.

User Login	Display Name	Description
Casey brown	Casey Brown	This user is provisioned "Employee" Abstract Role, "Project A..."

- Repeat steps 2 through 8 to add the other roles to different users as needed.

## Difference in Data Security for GL Features Directly and Indirectly Based on the Balances Cube

When a user is assigned multiple data access sets for the same balances cube with different security specifications for ledger or primary balancing segment value access, a difference is manifested in the data security for those GL features based directly on the cube and those that are not.


General Ledger features based directly on the balances cube are:

- Inquire on Detail Balances
- Account Monitor
- Account Inspector
- Financial Reporting
- Smart View
- Allocations

All other General Ledger features are indirectly based on the balances cube.

- When working on features not directly related to the balances cube, you select a specific data access set and you only work with that one data access set at a time. The defined ledger and primary balancing segment value access for the selected data access set are enforced
- When working directly with the balances cube, the cumulative effects of your combined data access sets for that cube are enforced. From your combined data access sets of that cube, balances cube security separately constructs the access filter for the ledger dimension and primary balancing segment values dimension independently of the other dimensions. This means the specific combination of ledger and primary balancing segment values access as defined in each distinct data access set are not enforced as such. Instead, you have access simultaneously to all the ledgers and all the primary balancing segment values granted to you through your combined data access sets.



 **Note:** Balances cube security grants access to all values of the balancing segment value set for a data access set defined as either of the following:

- Full ledger
- All Values: Specific Balancing Segment Values Access Type

With segment value security rules assigned to you through your various roles, the security rules are in effect simultaneously whether working directly or indirectly with the balances cube.

Segment value security rules are specified for a particular value set. Therefore, as you are working on anything that references the secured value set, all segment value security rules for that value set that are assigned to you through any of your roles are in effect at the same time, regardless of the specific role the rule was assigned to or the particular role that you are working with at the moment. In other words, segment value security rules are cumulative or the union of all the segment value security rules you have assigned to you through your roles. If you have one role assigned to your user that only grants access to cost center 200, and another role that grants access to cost centers 300 through 500, then you can access to cost centers 200 and 300 through 500.

When working on features not directly based on the balances cube, such as journal entry pages, the primary balancing segment values you can access are based on the intersection of:

- Primary balancing segment values granted to you through your current selected data access set.
- All your assigned segment value security rules pertaining to the primary balancing segment value set across all your assigned roles.

So if a balancing segment value is only granted in either of the selected data access set or a segment value security rule, this balancing segment value is not available to you.

In contrast, for features directly based on the balances cube, your access is based on the cumulative union of:

- Primary balancing segment values granted to you through all your assigned data access sets related to the balances cube you are working with.
- Any segment value security rule grants to that primary balancing segment value set across all your role assignments.

## Example

In contrast with the preceding discussion about using separate segment value security roles for segment value security rule assignments, the following example shows the data access set and segment value security rules assignments both going to the same role. This setup is used to more easily illustrate the difference in how security works for features directly and indirectly related to the balances cube.

In this example, you are assigned the DAS1 and DAS2 roles with different data access sets primary balancing segment values.

The following table lists each role with its corresponding data set and primary balancing segment values.

Role	Data Access Set	Primary Balancing Segment Value
DAS1	Data Access Set 1	01
DAS2	Data Access Set 2	02
DAS3	Data Access Set 3	03

The following table shows the same roles and primary balancing segment values that are also assigned to you through a segment value security rule.

Role	Primary Balancing Segment Value
DAS1	01
DAS2	03
DAS3	02

### Select Data Access Set 1

- For features not directly based on balances cube: You can access Primary Balancing Segment 01 which is the intersection of values from:
  - Data access set for Role DAS1.
  - Security rules grants for Roles DAS1 and DAS2.
- For features directly based on balances cube: You can access Primary Balancing Segments 01, 02, and 03 which are the union of values from data access set and security rules for Roles DAS1 and DAS2

### Select Data Access Set 2

- For features not directly based on a balances cube: You can't access any primary balancing segment value because there is no intersection of values from:
  - Data access set for Role DAS2.
  - Security rules grants for Roles DAS1 and DAS2.
- For features directly based on balances cube: You can access primary balancing segments 01, 02, and 03, which are the union of values from data access set and security rules for Roles DAS1 and DAS2.

## FAQs for General Ledger

### What happens when changes are made to an account hierarchy that is referenced in segment value security rules?

The tree is set from an active to a draft state. The rules referencing the account hierarchy become ineffective.

After making changes to your hierarchy, you can submit the Process Account Hierarchies process to automatically run the required steps for processing account hierarchies updates in one submission, including:

- Tree audit
- Tree activation
- Row flattening
- Column flattening
- Maintain value set
- Maintain account hierarchy

- Publish hierarchy

With a successful audit process, the hierarchy is set back to an active status. The rules referencing the account hierarchy go back to being effective using the updated hierarchy.


Run the row and column flattening processes for the updated hierarchy as the flexfield component in the application as well as other hierarchy processes rely on the flattened hierarchy data to come up with the list of values available to the user to properly secure the correct account values.

Run the Maintain Value Sets and Maintain Chart of Account Hierarchies processes, particularly for hierarchy changes to the primary balancing segment value set if such values are referenced in your primary balancing segment value based data access sets. These processes update the data that is required to regulate ledger and data access security by storing:

- Primary balancing segment values assigned to a ledger.
- Specific child balancing segment values assigned to a data access set through parent value assignments.

## When does security take effect on chart of accounts value sets for balances cubes?

For new security policies to be effective, the security policies must be defined before the account hierarchies are published to the cube. When you create segment value security rules or change an existing rule that is based on a hierarchical filter, you must republish the tree version. Use the Publish Account Hierarchies page to republish the tree version and for the security to become effective.

 **Note:** Changes to an account hierarchy previously published to the balances cube require that the hierarchy be republished to the cube to reflect the updated hierarchy.

## How can I secure the data in GL balances cubes?

Use data access set and segment value security to secure dimension values such as ledger and chart of account values. For chart of accounts dimension values, security restricts the display of data associated with the secured values, but not the selection of the values themselves. For example, when submitting a report, you can select company value 100 in your report definition when selecting the Point of View, even if you weren't granted access to that company value. However, you can't see the data associated with company 100 in your report.

# Payables

## Payables Security: Explained

In Oracle Fusion Payables you secure access to invoices and payments by business unit. You can access invoices and payments for viewing or processing only in the business units to which you have permission. The permission must be explicitly granted to each user.

You assign users to the appropriate security context, such as a business unit, for job roles using the Manage Data Access for Users page.

Payables is integrated to the document repository for processing scanned invoices. Edit access to the document repository is granted to the following predefined roles:

- Accounts Payable Manager
- Accounts Payable Specialist
- Accounts Payable Supervisor

The following predefined roles have view-only access to the document repository:

- Financial Application Administrator
- Cost Accountant
- Project Accountant

## Subledger Accounting

### Security for Subledger Accounting: Explained

Oracle Fusion Subledger Accounting features require both function and data security privileges.

#### Overview

Security for Subledger Accounting includes:

- Setup task security
  - Security to configure accounting rules to define accounting treatments for transactions.
- Transaction task security
  - Security to create subledger journal entries (manual subledger journal entries or those generated by the Create Accounting process or Online Accounting).
  - Security to review and generate reports of subledger journal entries and lines.

#### Security to Perform Setup Tasks

Use the Define Subledger Accounting Rules task in the Setup and Maintenance work area to configure subledger accounting rules.

To configure subledger accounting rules, the setup user must be provisioned with a role that includes the Subledger Accounting Administration duty role.

- In the security reference implementation, the Financial Application Administrator job role hierarchy includes the Subledger Accounting Administration duty role. This role provides the access to configure your accounting rules.
- For more information about available setup job roles, duty roles and privileges, see the Oracle Financial Security Reference Manual.

#### Security to Perform Transactional Tasks

To create and view subledger journal entries, you must have the necessary access to perform the tasks in the relevant subledger work areas. Predefined subledger job roles include the entitlement to create and view subledger journal entries for subledger transactions you are authorized to access.

## Security for Accounting Transformations in Accounting Hub: Explained

Accounting transformations require both function and data security privileges.

Oracle Accounting Hub security for accounting transformations includes:

- Setup task security
  - Security to register source systems into Accounting Hub.
  - Security to configure accounting rules to define accounting treatments for transactions.
- Transactional task security
  - Security to create subledger journal entries (manual subledger journal entries or those generated by the Create Accounting process).
  - Security to review and generate reports of subledger journal entry headers and lines.

### Security to Perform Setup Tasks

Use the Define Accounting Transformation Configuration task in the Setup and Maintenance work area to integrate your external source system with the Accounting Hub.

To register your external source system and configure accounting rules, the setup user must be provisioned with a role that includes the following duty roles:

- Application Implementation Consultant
- Accounting Hub Integration
- In the security reference implementation, the Financial Application Administrator job role hierarchy includes the Accounting Hub Administration Duty role. This role provides the access to integrate your external source systems with accounting transformations.

### Security to Perform Transactional Tasks

To import transaction data for accounting and posting in general ledger, the user must be provisioned with a job role that is associated with the Accounting Hub Integration duty role.

- The Import Subledger Accounting Transactions privilege is assigned to the Accounting Hub Integration duty role. This role enables the user to submit the Import Subledger Accounting Transactions process. This process also creates accounting entries and posts them in the general ledger.

To create and view subledger journal entries as an independent task, you must have the access necessary to perform the tasks. These tasks can be opened from the Oracle General Ledger, Journals work area. You must have access to the work area, as well as all of the ledgers (primary, secondary and reporting currency) in which the journal entry is posted.

The following are defined in the security reference implementation:

- The General Accounting Manager job role hierarchy includes duty roles that provide the entitlement to manage general accounting functions. This entitlement provides access to the general ledger, Journals work area.

The following duty role must be assigned directly to the General Accounting Manager job role to provide access to create and view subledger journal entries:

- Accounting Hub Integration Duty

Alternatively, you can assign the Subledger Accounting Duty and Subledger Accounting Reporting Duty roles to any of the following general ledger job roles:

- Chief Financial Officer
- Controller
- Financial Analyst
- General Accountant

For more information about available setup job roles, duty roles, and privileges, see the Oracle Financials Cloud Security Reference guide on the Oracle Help Center.

#### *Related Topics*

- [Data Security: Explained](#)

## Cash Management

### Creating Accounts: Points to Consider

Banks, branches and accounts fit together on the premise of the Bank Account model. The Bank Account model enables you to define and keep track of all bank accounts in one place.

The Bank Account Model can explicitly grant account access to multiple business units, functions, and users. Consider the following when you set up bank accounts:

- Assign a unique general ledger cash account to each account, and use it to record all cash transactions for the account. This facilitates book to bank reconciliation.
- Grant bank account security. Bank account security consists of bank account use security, bank account access security, and user and role security.

### Account Use

Account Use refers to accounts created for:

- Oracle Fusion Payables
- Oracle Fusion Receivables
- Oracle Fusion Payroll


Select the appropriate use or uses when creating an account in one or more of these applications.

### Account Access

Payables and Receivables account access is secured by business unit. Before the bank account is ready for use by Payables or Receivables, you must:


1. Select the appropriate use for the application.

2. Grant access to one or more business units.

 **Note:** You can only assign access to the business units that use the same ledger as the bank accounts owning the legal entity,

## User and Role Security

You can further secure the bank account so that it can only be used by certain users and roles. The default value for secure bank account by users and roles is No. For Payables and Receivables, you must have the proper business unit assigned to access a bank account even if the secure bank account by users and roles is No. If the secure bank account by users and roles is set to Yes, you must be named or carry a role assigned to the bank account to use it.

 **Note:** You must assign the security duty role Cash Management Administration to the Cash Manager job role to provide access for setting up banks, branches, and accounts.

## Assets

### Assets Data Security Components: How They Work Together

In Oracle Fusion Assets, you can secure access to assets to perform transactions and view their information by asset book. Every asset book created in Assets is automatically secured. You can perform transactions or view asset data only in the books to which you have permission. The permission must be explicitly granted to each user based on his or her duty requirements.

#### Data Privileges

Each activity is individually secured by a unique data privilege. In other words, when you provide access to a book, you actually provide permission to perform a particular activity in that book. For example, you can allow user X to perform only tasks related to asset additions in book AB CORP and restrict the same user from performing asset retirements in this book.

The data accesses for different asset activities are secured for the book with the following data privileges:

- Add Fixed Asset Data
- Change Fixed Asset Data
- Retire Fixed Asset Data
- Track Fixed Asset Data
- Submit Fixed Assets Reports

#### Asset Book Security Context

After you have completed your Assets setup, you can assign job roles to users using the Security Console and then grant explicit data access for asset books using the Manage Data Access for Users task from the Setup and Maintenance work area.

#### Default Asset Books

Since the data access is secured by book, you must provide or select the book to perform transactions and view asset details. If you have access to only one book, you can set up this book as the default book. The default book value must be set using the Default Book profile option. You set the value at the site, product, or user level. Usually, the default book is

automatically entered in the Book field when you perform transactions and run reports. You can override the default value and enter another value from the list of values.

#### *Related Topics*


- [Oracle Fusion Assets Profile Options: Critical Choices](#)

## Payments

### System Security Options: Critical Choices

You can implement application security options on the Manage System Security Options page as part of a complete security policy that's specific to your organization. Security options can be set for encryption and tokenization of credit cards and bank accounts, as well as for payment instrument masking. Security options are used for both funds capture and disbursement processes.

 **Note:** Credit card services are currently not available in Oracle Financials Cloud implementations.

 **Note:** Before you can import credit cards into Expenses, you must enable encryption or tokenization of credit cards in Payments. If you are using credit card data anywhere other than Expenses, you must enable tokenization in Payments.

To secure your sensitive data, consider the following security questions:

- Which security practices do you want to employ?
- Do you want to tokenize your credit card data?
- Do you want to encrypt your bank account data?
- Do you want to encrypt your credit card data?
- How frequently do you want to rotate the master encryption key and the subkeys?
- Do you want to mask credit card and bank account numbers, and if so, how?

To set up application security options, follow these steps:

1. Click **Navigator > Setup and Maintenance**.
2. On the Setup page, select the Financials offering.
3. Select Payments.
4. Click the **Manage System Security Options** task.

### Best Security Practices

The following actions are considered best security practices for payment processing:

- Comply with the Payment Card Industry Data Security Standard (PCI DSS). PCI DSS is the security standard that is required for processing most types of credit cards.
  - Comply with all requirements for accepting credit card payments.
  - Minimize the risk of exposing sensitive customer data.



- Before importing or entering data into Payments, encrypt and mask the following:
  - Customer credit card numbers
  - Supplier bank account numbers
  - Cardholder names
- Create the master encryption key.
  - Rotate the master encryption key periodically.

## Implementation Process of Master Encryption Key and Encryption

Before you can enable encryption for credit card or bank account data, you must automatically create a master encryption key. The master encryption key exists on the file system of Oracle Platform Security Services (OPSS). OPSS stores your master encryption key. The application uses your master encryption key to encrypt your sensitive data.

Automatic creation of the master encryption key ensures that it is created and stored in the proper location and with all necessary permissions.

## Credit Card Tokenization

If you tokenize your credit card data, you are complying with PCI DSS requirements. PCI DSS requires companies to use payment applications that are PCI DSS compliant.

Tokenization is the process of replacing sensitive data, such as credit card data, with a unique number, or token, that isn't considered sensitive. The process uses a third-party payment system that stores the sensitive information and generates tokens to replace sensitive data in the applications and database fields. Unlike encryption, tokens can't be mathematically reversed to derive the actual credit card number.

You can set up your tokenization payment system by clicking **Edit Tokenization Payment System** on the Manage System Security Options page. Then, to activate tokenization for credit card data, click **Tokenize** in the Credit Card Data section.

## Credit Card Data Encryption

You can encrypt your credit card data to assist with your compliance of cardholder data protection requirements with the following:

- Payment Card Industry (PCI) Data Security Standard
- Visa's PCI-based Cardholder Information Security Program (CISP)

Credit card numbers entered in Oracle Receivables and Oracle Collections are automatically encrypted. Encryption is based on the credit card encryption setting you specify on the Manage System Security Options page.




**Note:** If you bring card numbers into Payments through import, it's advisable to run the Encrypt Credit Card Data program immediately afterward.

## Bank Account Data Encryption

You can encrypt your supplier and customer bank account numbers.

Bank account encryption doesn't affect internal bank account numbers. Internal bank accounts are set up in Oracle Cash Management. They are used as disbursement bank accounts in Oracle Payables and as remit-to bank accounts in Receivables.

Supplier, customer, and employee bank account numbers entered in Oracle applications are automatically encrypted. Encryption is based on the bank account encryption setting you specify on the Manage System Security Options page.


 **Note:** If you bring bank account numbers into Payments through import, it's advisable to run the Encrypt Bank Account Data program immediately afterward.

## Master Encryption Key and Subkey Rotation


For payment instrument encryption, Payments uses a chain key approach. The chain key approach is used for data security where A encrypts B and B encrypts C. In Payments, the master encryption key encrypts the subkeys and the subkeys encrypt the payment instrument data. This approach allows easier rotation of the master encryption key.

The master encryption key is stored on OPSS. OPSS stores data in an encrypted format. The master encryption key can be rotated, or generated, which also encrypts subkeys, but doesn't result in encrypting the bank account numbers again.

If your installation has an existing master encryption key, you can automatically generate a new one by clicking **Rotate**.

 **Note:** To secure your payment instrument data, you're advised to annually rotate the master encryption key or rotate it according to your company's security policy.

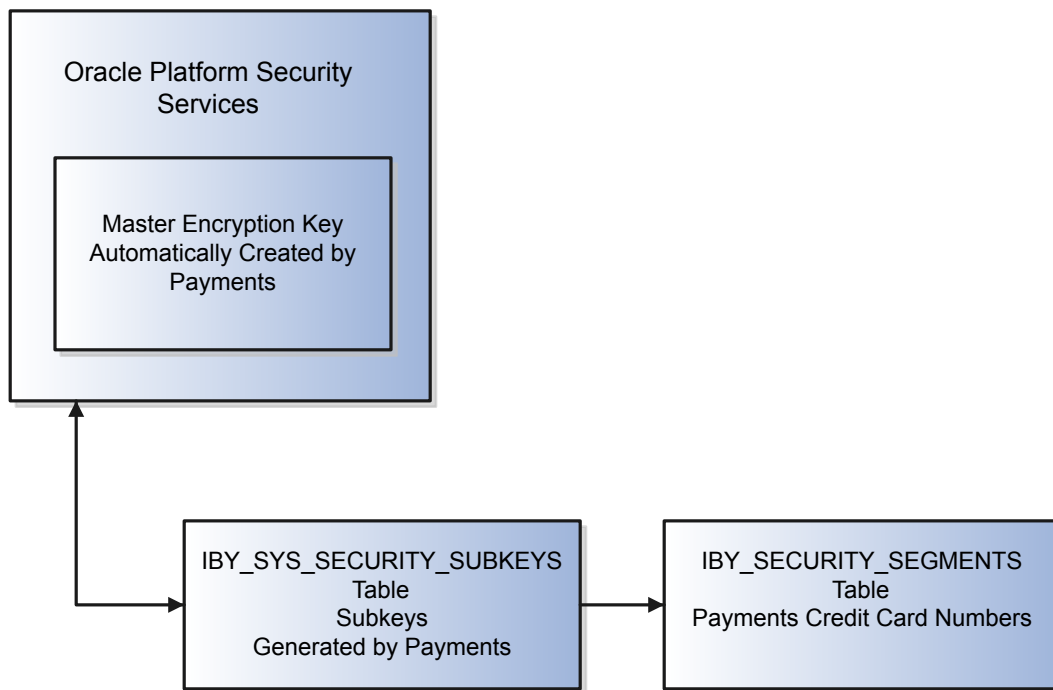
You can also select the frequency with which new subkeys are automatically generated, based on usage or on the maximum number of days. To specify a subkey rotation policy, click **Edit Subkey Rotation Policy**.

 **Note:** To secure your payment instrument data, you are advised to schedule regular rotation of the subkeys.

The security architecture for credit card data and bank account data encryption is composed of the following components:

- OPSS
- Payments master encryption key
- Payments subkeys
- Sensitive data encryption and storage

The following figure illustrates the security architecture of the OPSS repository, the master encryption key, and the subkeys.




## Credit Card and Bank Account Number Masking

Payments serves as a payment data repository for customer and supplier information. Payments stores all of the customer and supplier payment information and their payment instruments, such as credit cards and bank accounts. Payments provides data security by allowing you to mask bank account numbers.

On the Manage System Security Options page, you can mask credit card numbers and external bank account numbers. To do it, select the number of digits to mask and display. For example, a bank account number of XXXX8012 displays the last four digits and masks all the rest. These settings specify masking for payment instrument numbers in the user interfaces of multiple applications.

## Enabling Encryption of Sensitive Payment Information: Procedure

Financial transactions contain sensitive information, which must be protected by a secure, encrypted mode. To protect your credit card and external bank account information, you can enable encryption. Encryption encodes sensitive data, so it can't be read or copied. To enable encryption, you must create a master encryption key. Oracle Platform Security Services (OPSS) is a repository that stores your master encryption key. The application uses your master encryption key to encrypt your sensitive data.

 **Note:** Before you can import credit cards into Expenses, you must enable encryption or tokenization of credit cards in Payments. If you are using credit card data anywhere other than Expenses, you must enable tokenization in Payments.

To secure your credit card or bank account data, follow these steps:

1. Click **Navigator > Setup and Maintenance**.

2. On the Setup page, select the Financials offering.
3. Select Payments.
4. Click the **Manage System Security Options** task.
5. On the Manage System Security Options page, click **Apply Quick Defaults**.
6. Select all the check boxes:
  - **Automatically create wallet file and master encryption key**
  - Encrypt credit card data
  - **Encrypt bank account data**
7. Click **Save and Close**.

## Business Intelligence

### Security for Financial Reporting: Overview

Security for financial reporting uses Role Based Access Control, which has the following components:

- Users with roles.
- Roles that grant access to functions and data.
- Functions and data access that is determined by the combination of role.

 **Note:** Users can have any number of roles.

Data security, which controls what action can be taken against which data, can also be applied to financial reporting. Data security is managed using:

- Data Access Sets:
  - Are defined to grant access to a ledger, ledger set, or specific primary balancing segment values associated with a ledger.
  - Permit viewing of journals, balances, and reports.
- Segment Value Security Rules:
  - Are set up on value sets to control access to parent or detail segment value for chart of accounts segments.
  - Restrict data entry, online inquiry, and reporting.

 **Note:** For more information about security, see the Securing Oracle ERP Cloud guide.

### Oracle Fusion Transactional Business Intelligence Security: Explained

Oracle Fusion Transactional Business Intelligence is a real-time, self-service reporting solution. All application users with appropriate roles can use Transactional Business Intelligence to create analyses that support decision making. In addition, business users can perform current-state analysis of their business applications using a variety of tools. These include Oracle Business Intelligence Enterprise Edition as the standard query and reporting tool, Oracle Business Intelligence Answers,

and Oracle Business Intelligence Dashboard tools. This topic summarizes how access is secured to Transactional Business Intelligence subject areas, Business Intelligence Catalog folders, and Business Intelligence reports.

## Subject Areas

Subject areas are functionally secured using duty roles. The names of duty roles that grant access to subject areas include the words **Transaction Analysis Duty** (for example, **Payables Invoice Transaction Analysis Duty**).

The following table identifies the subject areas that predefined Financials job roles can access.

Financials Job Role	Subject Areas
Accounts Payable Manager	All Payables
Accounts Payable Specialist	All Payables
Accounts Payable Supervisor	Payables Invoices - Installments Real Time, Payables Payments - Disbursements Real Time, Payables Payments - Payment History Real Time
Accounts Receivable Manager	All Receivables
Accounts Receivable Specialist	All Receivables
Asset Accountant	Fixed Assets - Asset Depreciation Real Time, Fixed Assets - Asset Retirements and Reinstatements Real Time, Fixed Assets - Asset Source Lines Real Time, Fixed Assets - Asset Transactions Real Time, Fixed Assets - Asset Transfer Real Time
Asset Accounting Manager	All Fixed Assets
Budget Manager	Budgetary Control - Transactions Real Time
Cash Manager	All Cash Management
Expense Manager	All Expenses
Financial Analyst	All Financials
Financial Application Administrator	All Financials
Financial Integration Specialist	All Financials
General Accountant	General Ledger - Journals Real Time, General Ledger - Period Status Real Time
General Accounting Manager	All General Ledger, All Payables, All Receivables
Intercompany Accountant	Financials Common Module - Intercompany Transactions Real Time
Tax Accountant	Payables Invoices - Withholding Real Time, Receivables - Customer Account Site Tax Profile Real Time

Financials Job Role	Subject Areas
Tax Administrator	Payables Invoices - Withholding Real Time, Receivables - Customer Account Site Tax Profile Real Time
Tax Manager	Payables Invoices - Withholding Real Time, Receivables - Customer Account Site Tax Profile Real Time, Receivables - Customer Tax Profile Real Time
Tax Specialist	Payables Invoices - Withholding Real Time, Receivables - Customer Account Site Tax Profile Real Time, Receivables - Customer Tax Profile Real Time

Analyses fail if the user can't access all subject areas in a report.

## Business Intelligence Catalog Folders

Business Intelligence Catalog folders are functionally secured using the same duty roles that secure access to the subject areas.

The following table identifies the folders that predefined Financials job roles can access.

Financials Job Role	Business Intelligence Catalog Folders
Accounts Payable Manager	Transactional Business Intelligence Payables
Accounts Payable Specialist	Transactional Business Intelligence Payables
Accounts Payable Supervisor	Transactional Business Intelligence Payables
Accounts Receivable Manager	Transactional Business Intelligence Receivables
Accounts Receivable Specialist	Transactional Business Intelligence Receivables
Asset Accountant	Transactional Business Intelligence Fixed Assets
Asset Accounting Manager	Transactional Business Intelligence Fixed Assets
Budget Manager	Transactional Business Intelligence Budgetary Control
Cash Manager	Transactional Business Intelligence Cash Management
Expense Manager	Transactional Business Intelligence Expenses
Financial Analyst	Transactional Business Intelligence Financials
General Accountant	Transactional Business Intelligence General Ledger
General Accounting Manager	Transactional Business Intelligence General Ledger

Financials Job Role	Business Intelligence Catalog Folders
Intercompany Accountant	Transactional Business Intelligence Intercompany Accounting
Tax Accountant	Transactional Business Intelligence Transaction Tax
Tax Administrator	Transactional Business Intelligence Transaction Tax
Tax Manager	Transactional Business Intelligence Transaction Tax
Tax Specialist	Transactional Business Intelligence Transaction Tax

## Business Intelligence Reports

Analyses are secured based on the folders in which they're stored. If you haven't secured Business Intelligence reports using the report privileges, then they're secured at the folder level by default. You can set permissions against folders and reports for Application Roles, Catalog Groups, or Users.

You can set permissions to:

- Read, Execute, Write, or Delete
- Change Permissions
- Set Ownership
- Run Publisher Report
- Schedule Publisher Report
- View Publisher Output

## How Reporting Data Is Secured: Explained

The data that's returned in Oracle Transactional Business Intelligence reports is secured in a similar way to the data that's returned in application pages. Data access is granted by roles that are linked to security profiles. This topic describes the part played by Transaction Analysis Duty Roles in securing access to data in Transactional Business Intelligence reports. It also describes how to enable this access in custom job roles.

## Transaction Analysis Duty Roles

Each of the Transaction Analysis Duty roles providing access to subject areas and Business Intelligence Catalog folders is granted one or more data security policies. These policies enable access to the data.

## Custom Job Roles

If you create a custom job role with access to Transactional Business Intelligence reports, then you must give the role the correct duty roles. Your custom role must have both the **OBI** and **Financials** versions of the Transaction Analysis Duty roles. These duty roles ensure that your custom job role has the function and data security for running the reports.

For example, if your role must access the Fixed Asset Transaction Analysis subject areas, then it must inherit the duty roles described in the following table:

Duty Role	Version
Fixed Asset Transaction Analysis Duty	<b>OBI</b>
Fixed Asset Transaction Analysis	<b>Financials</b>

The Fixed Asset Transaction Analysis Duty role is granted relevant data security policies and inherits Business Intelligence Consumer Role.

## Business Intelligence Roles: Explained

Oracle Business Intelligence roles apply to both Oracle Business Intelligence Publisher and Oracle Fusion Transactional Business Intelligence. They grant access to Business Intelligence functionality, such as the ability to run or author reports. These roles are in addition to the roles that grant access to reports, subject areas, Business Intelligence catalog folders, and Financials data. This topic describes the Business Intelligence roles.


This table lists the Business Intelligence roles.

Business Intelligence Role	Description
Business Intelligence Consumer Role	Allows reporting from Business Intelligence Applications, Business Intelligence Publisher, Real Time Decisions, Enterprise Performance Management and Business Intelligence Office. This role allow you to run reports from the web catalog but it will not allow a report to be authored from a subject area.
Business Intelligence Authoring	Allows authoring within Business Intelligence Applications, Business Intelligence Publisher, Real Time Decisions, Enterprise Performance Management and Business Intelligence Office.
Business Intelligence Applications Analysis	Performs Business Intelligence Applications Analysis generic duty.
Fixed Asset Business Intelligence Management	Manages access to Fixed Assets OBIA Dashboard.
Business Intelligence Applications Administrator	Provides access to the BI Applications Configuration Manager and to the BI Data Warehouse Administration Console.

## Delivered Roles for Financials Subject Areas

Access to subject areas in the Oracle Business Intelligence Catalog is secured by OTBI Transactional Analysis Duty roles. The following table lists subject areas and the corresponding job role and OTBI Transactional Analysis duty role that are required for creating user-defined reports using the subject areas. The OTBI Transactional Analysis duty role is inherited by the job role. Use this table to verify that your users have the job roles necessary to create reports using subject areas.



 **Note:** The Business Intelligence Consumer role allows users to view reports, but not create new ones. All other job roles inherit the Business Intelligence Author role, enabling users with those job roles to create new reports. The following table lists subject areas for Financials and the default security roles needed for each one.

Subject Areas	Job Role	OTBI Transactional Analysis Duty Role
<ul style="list-style-type: none"> <li>Budgetary Control - Transactions Real Time</li> </ul>	Budget Manager	Budgetary Control Analysis Duty
<ul style="list-style-type: none"> <li>Cash Management - Bank Statement Balances Real Time</li> <li>Cash Management - Bank Statement Line Charges Real Time</li> <li>Cash Management - Bank Statements Real Time</li> <li>Cash Management - External Cash Transactions Real Time</li> </ul>	Cash Manager	<ul style="list-style-type: none"> <li>Cash Management Transaction Analysis Duty</li> </ul>
<ul style="list-style-type: none"> <li>Expenses - Employee Expense Overview Real Time</li> <li>Expenses - Expense Transactions Real Time</li> </ul>	Expense Manager	<ul style="list-style-type: none"> <li>Expenses Summary Transaction Analysis Duty</li> <li>Expense Transactions Transaction Analysis Duty</li> </ul>
<ul style="list-style-type: none"> <li>Financials Common Module - Intercompany Transactions Real Time</li> </ul>	<ul style="list-style-type: none"> <li>Intercompany Accountant</li> <li>General Accountant</li> </ul>	Inter Company Transaction Analysis Duty
<ul style="list-style-type: none"> <li>Fixed Assets - Asset Assignments Real Time</li> <li>Fixed Assets - Asset Balances Real Time</li> <li>Fixed Assets - Asset Depreciation Real Time</li> <li>Fixed Assets - Asset Financial Information Real Time</li> <li>Fixed Assets - Asset Retirements and Reinstatements Real Time</li> <li>Fixed Assets - Asset Source Lines Real Time</li> <li>Fixed Assets - Asset Transactions Real Time</li> <li>Fixed Assets - Asset Transfer Real Time</li> </ul>	Asset Accountant	<ul style="list-style-type: none"> <li>Fixed Asset Transaction Analysis Duty</li> <li>Fixed Asset Details Transaction Analysis Duty</li> <li>Fixed Depreciation Transaction Analysis Duty</li> <li>Fixed Asset Details Transaction Analysis Duty</li> </ul>
<ul style="list-style-type: none"> <li>General Ledger - Balances Real Time</li> <li>General Ledger - Journals Real Time</li> <li>General Ledger - Period Status Real Time</li> <li>General Ledger - Transactional Balances Real Time</li> </ul>	General Accountant	<ul style="list-style-type: none"> <li>General Ledger Transaction Analysis Duty</li> <li>Payables to Ledger Reconciliation Transaction Analysis Duty</li> <li>Receivables to Ledger Reconciliation Transaction Analysis Duty</li> </ul>
<ul style="list-style-type: none"> <li>Payables Invoices - Installments Real Time</li> <li>Payables Invoices - Prepayment Applications Real Time</li> <li>Payables Invoices - Transactions Real Time</li> </ul>	<ul style="list-style-type: none"> <li>Accounts Payable Manager</li> <li>Accounts Payable Specialist</li> <li>General Accountant</li> </ul>	<ul style="list-style-type: none"> <li>Payables to Ledger Reconciliation Transaction Analysis Duty</li> <li>Payables Invoice Transaction Analysis Duty</li> <li>Payables Payment Transaction Analysis Duty</li> </ul>

Subject Areas	Job Role	OTBI Transactional Analysis Duty Role
<ul style="list-style-type: none"> <li>• Payables Invoices - Trial Balance Real Time</li> <li>• Payables Invoices - Withholding Real Time</li> <li>• Payables Payments - Disbursements Real Time</li> <li>• Payables Payments - Payment History Real Time</li> </ul>		
<ul style="list-style-type: none"> <li>• Receivables - Adjustments Real Time</li> <li>• Receivables - Bills Receivable Real Time</li> <li>• Receivables - Credit Memo Applications Real Time</li> <li>• Receivables - Credit Memo Requests Real Time</li> <li>• Receivables - Customer Account Site Tax Profile Real Time</li> <li>• Receivables - Customer Real Time</li> <li>• Receivables - Customer Tax Profile Real Time</li> <li>• Receivables - Miscellaneous Receipts Real Time</li> <li>• Receivables - Payment Schedules Real Time</li> <li>• Receivables - Receipt Conversion Rate Adjustments Real Time</li> <li>• Receivables - Receipts Details Real Time</li> <li>• Receivables - Revenue Adjustments Real Time</li> <li>• Receivables - Standard Receipts Application Details Real Time</li> <li>• Receivables - Transactions Real Time</li> </ul>	<ul style="list-style-type: none"> <li>• Accounts Receivable Manager</li> <li>• Accounts Receivable Specialist</li> <li>• General Accountant</li> </ul>	<ul style="list-style-type: none"> <li>• Receivables to Ledger Reconciliation Transaction Analysis Duty</li> <li>• Receivables Customer Transaction Analysis Duty</li> <li>• Receivables Transaction Analysis Duty</li> <li>• Receivables Receipts Transaction Analysis Duty</li> </ul>
<ul style="list-style-type: none"> <li>• Subledger Accounting - Journals Real Time</li> <li>• Subledger Accounting - Payables Summary Reconciliation Real Time</li> <li>• Subledger Accounting - Receivables Summary Reconciliation Real Time</li> <li>• Subledger Accounting - Supporting References Real Time</li> </ul>	<ul style="list-style-type: none"> <li>• Cash Manager</li> <li>• Accounts Payable Manager</li> <li>• Accounts Receivable Manager</li> <li>• Asset Accountant</li> </ul>	Subledger Accounting Transaction Analysis Duty

## Viewing Reporting Roles and Permissions: Procedure

Viewing reporting roles and permissions can help you to understand how Oracle Transactional Business Intelligence security works.

This topic explains how to view:

- The reporting roles that a job role inherits
- The permissions for sample Oracle Transactional Business Intelligence reports in the Business Intelligence Catalog

## Viewing Inherited Reporting Roles on the Security Console

Sign in with the IT Security Manager job role and follow these steps:

1. Select **Navigator > Tools > Security Console**.
2. On the Security Console, search for and select a job role. For example, search for and select the Accounts Payable Manager job role.  
  
Depending on the enterprise setting, either a graphical or a tabular representation of the role appears. Switch to the tabular view if it doesn't appear by default.
3. Accounts Payable Manager inherits many duty roles, such as Payables Balance Analysis and Payables Invoice Processing. These roles (without the word Duty in their names) are **Financials** roles. Their role codes start with the characters **ORA\_**. Find these roles in the table.
4. Notice also the many Transaction Analysis Duty roles (with the word Duty in their names) that appear here. For example, Accounts Payable Manager inherits the Transactional Analysis Duty. These roles are **OBI** roles. Their role codes start with the characters **FBI\_**. Find these roles in the table.
5. Notice that the Payables Invoice Transaction Analysis Duty role inherits BI Consumer Role. Most of the **OBI** duty roles inherit BI Consumer Role.

 **Tip:** You can export the role hierarchy to a spreadsheet for offline review.

## Viewing Permissions in the Business Intelligence Catalog

To view these permissions, you must have a role that inherits BI Administrator Role. None of the predefined Financials job roles inherits BI Administrator Role.

1. Select **Navigator > Tools > Reports and Analytics** to open the Reports and Analytics work area.
2. In the Contents pane, click the **Browse Catalog** icon. The Business Intelligence Catalog page opens.
3. In the Folders pane, expand **Shared Folders**.

Expand the **Financials** folder and then the **Bill Management** folder.

4. Click the **Customers Export Report** folder.

A list of reports appears on the BI Catalog page.

5. Under **Costing Reports**, click **More > Permissions**.

The Permissions dialog box opens. Scroll if necessary to see the complete list of permissions, which includes the role BI Administrator Role.

6. Click the Oracle Applications tab to return to the home page.

## Configuring Security for Oracle Transactional Business Intelligence: Explained

Oracle Transactional Business Intelligence secures reporting objects and data through a set of delivered Transaction Analysis Duty roles. You can't configure the Transaction Analysis Duty roles provided with Oracle Financials Cloud, or the associated security privileges. However, you can configure reporting security according to your security requirements as described in this topic.

## Modifying Transaction Analysis Duty Role Assignments

To configure the subject areas that users have access to create a custom job role and provide the role with the Oracle Transactional Business Intelligence duty roles that provide the required access.

For example, you can create a role that provides access to both general ledger and fixed assets subject areas by assigning both the General Ledger Transaction Analysis Duty and the Fixed Asset Transaction Analysis Duty to the role.

## Modifying Business Intelligence Role Assignments

The Business Intelligence roles enable users to perform tasks within Business Intelligence tools such as Oracle Business Intelligence Publisher. The default Business Intelligence roles used in Oracle Financials Cloud are BI Consumer and BI Author.

The delivered Transaction Analysis Duty roles inherit the BI Consumer Role, which provides view-only access to analyses and reports. You assign the BI Author Role at the job role level, giving you flexibility in granting the BI Author privilege to only those job roles that you want to have access to create and edit analyses and reports.

All predefined Financials Cloud job roles that inherit a Transaction Analysis Duty role are also assigned the BI Author Role by default. You can optionally create copies of the predefined job roles and add or remove the BI Author Role from the roles as required.

## Business Intelligence Publisher Secured List Views: Explained

Oracle Business Intelligence Publisher is a set of tools for creating formatted reports based on data models. You can access Business Intelligence Publisher from Business Intelligence Composer or the Business Intelligence Catalog by clicking **New > Report**. This topic describes how you can use secured list views to secure access to data in Business Intelligence reports.

Some reporting tools combine the data model, layout, and translation in one report file. With that approach, business-intelligence administrators must maintain multiple copies of the same report to support minor changes. By contrast, Business Intelligence Publisher separates the data model, layout, and translation. Therefore, reports can be:

- Generated and consumed in many output formats, such as PDF and spreadsheet
- Scheduled for delivery to e-mail, printers, and so on
- Printed in multiple languages by adding translation files
- Scheduled for delivery to multiple recipients

## Business Intelligence Publisher Data Security and Secured List Views

When you create a Business Intelligence Publisher data model with physical SQL, you have two options.

You can:

1. Select data directly from a database table, in which case the data you return isn't subject to data-security restrictions. Because you can create data models on unsecured data, you're recommended to minimize the number of users who can create data models.
2. Join to a secured list view in your select statements. The data returned is determined by the security profiles that are assigned to the roles of the user who's running the report.

# 12 Implementing Security in Oracle Fusion Project Portfolio Management

## Implementing Project Portfolio Management Security: Overview

Oracle Project Portfolio Management Cloud predefines common job roles such as **Project Manager** and **Project Accountant**. You can use these roles or create new ones if the predefined roles don't fully represent your enterprise. For example, the predefined **Project Manager** role includes project budget management privileges. If some of your project managers don't manage budgets, you can create a custom role without those privileges. A user can have more than one role, so don't define a role that includes all the accesses needed for every user.

Refer to the Security Reference Manual for a description of predefined roles in Oracle Project Portfolio Management Cloud.

The aspects of security that are discussed in this topic include:

- Securing common functionality
- Securing Project Financial Management and Grants Management applications
- Securing Project Execution Management applications

## Securing Common Functionality

Common functionality that is not job-specific, such as creating time cards, expense reports, and purchase requisitions, are granted to the **Employee** abstract role that is automatically provisioned to each employee.

Oracle Project Portfolio Management Cloud provides the following roles that are designed for initial implementation and the ongoing management of setup and reference data:

- **Application Implementation Manager:** Manages implementation projects and assigns implementation tasks.
- **Application Implementation Consultant:** Accesses all setup tasks.
- **Project Integration Specialist:** Plans, coordinates, and supervises all activities related to the integration of project management information systems.
- **Project Application Administrator:** Accesses all Project Portfolio Management setup tasks for ongoing management of setup and reference data.

# Securing Project Financial Management and Grants Management Applications

Project Financial Management and Grants Management applications require both function and data security privileges. You can secure access to data in one of the following ways:

- **Explicit Using Data Roles**
  - Roles are explicitly provisioned to users.
  - Roles are created during implementation. Data role templates provide predefined rules for creating data roles.
  - For example, the **Project Accountant - US BU** role provides a project accountant with access to costing data in the US business unit.
- **Implicit Using Product-Specific Access**
  - Data security is determined by product-specific logic and not by the explicit provision of data roles.
  - For Project Financial Management and Grants Management applications, the role on the project determines the access.
  - For example, if you are assigned the **Project Manager** role on a project, you can edit budgets for that project.

During implementation you can be provisioned with one or more data roles. During the project life cycle you can be assigned to one or more projects. These data roles and project assignments authorize you to navigate, access, and perform business functions in work areas or dashboards.

The following table lists predefined enterprise roles and the type of security that grants the role access to data in a work area or dashboard.

Enterprise Role	Work Area or Dashboard	Data Security Based On
Project Accountant	Asset	Project business unit
Project Accountant	Costs	Project expenditure business unit
Project Accountant	Revenue	Contract business unit
Project Administrator	Project Financial Management	Project business unit Project organization
Project Billing Specialist	Invoices	Contract business unit
Project Creator	Project Financial Management	Project business unit Project organization
Project Management Duty	Project Management Infolet Dashboard	Project assignment

Enterprise Role	Work Area or Dashboard	Data Security Based On
Project Management Duty	Project Performance Dashboard	Project assignment
Project Manager	Project Management Infolet Dashboard	Project assignment
Project Manager	Project Performance Dashboard	Project assignment
Project Manager	Project Management	Project assignment
Project Manager	Project Manager Dashboard	Project assignment
Project Team Member	Project Financial Management	Project assignment
Grants Accountant	Invoices	Contract business unit
Grants Accountant	Revenue	Contract business unit
Grants Administrator	Awards	Contract business unit
Grants Administrator	Contracts	Contract business unit
Grants Administrator	Project Financial Management	Project business unit
Principal Investigator	Awards	Award assignment
Principal Investigator	Contracts	Award assignment
Principal Investigator	Project Financial Management	Project assignment


## Securing Project Execution Management Applications

Project Execution Management applications use implicit, product-specific logic to authorize access to data in various business functions.

During the project life cycle you can be assigned to one or more projects or tasks. These assignments authorize you to navigate, access, and perform business functions in work areas or dashboards.

The following table lists predefined enterprise roles and the type of security that grants the roles access to data in a work area or dashboard.

Enterprise Role	Work Area or Dashboard	Data Security Based On
Project Execution	Project Management	Project assignment
Project Execution	Project Management Infolet Dashboard	Project assignment

Enterprise Role	Work Area or Dashboard	Data Security Based On
Project Execution	Project Manager Dashboard	Project assignment
Project Execution	Requirements	No data security required
Team Collaborator	My Work - Tasks	Task assignment or task follower
 <b>Note:</b> If you change a to do task to a project task, security is based on project assignment.		
Team Collaborator	My Work - Change Orders	Change order role
Team Collaborator	My Work - Deliverables and Issues	No data security required
Team Collaborator	Team Member Dashboard	Task assignment
Project Executive	Project Hierarchy	Project hierarchy element assignment
Resource Manager	Project Resources	No data security required
Resource Manager	Resource Manager Dashboard	No data security required

## Mapping Enterprise Roles to Project Roles: Explained


When you assign a project role to a project team member, the associated enterprise role determines the operations, such as viewing or managing, that the team member can perform in pages and task flows. Each project role is associated with an enterprise role.

If the predefined security reference implementation doesn't fully represent your enterprise, then you can make changes. For example, your enterprise may require additional roles with specific constraints on accessing application functions.

Rather than create a role from scratch, you can copy a role, then edit the copy to create a new role.

1. Use the Security Console to:
  - o Copy an existing enterprise role
  - o Modify the function security policies
  - o Modify the data security policies
  - o Modify the role hierarchy
2. Then use the Manage Project Roles page to associate the new enterprise role with a project role.



 **Tip:** Never edit the predefined roles. Instead, either copy the predefined roles and edit the copies, or create custom roles from scratch. You can perform both tasks on the Security Console.

## Example: Project Manager Role in Project Financial Management

For example, the predefined Project Manager role in Project Financial Management includes project budget management privileges. If some of your project managers don't manage budgets:

1. In the Security Console:
  - Copy the role that is the closest to the role that you want to create, such as the Project Management Duty role. Give the role a unique name, such as Junior Project Manager.
  - Edit the functional policies to remove budget management.
  - Edit the data security policies to remove any policy that refers to budget management.
  - Save the role to create the new security grants.
2. On the Manage Project Roles page, create a Junior Project Manager project role and map it to the new Junior Project Manager enterprise role.

Now any person who is added to the project as a Junior Project Manager can perform the functions based on the duties under the new enterprise role.

## Project Execution Management

### Provisioning Access to Project Execution Management Applications: Overview

Use the Manage Project User Provisioning page to request user accounts and assign enterprise roles for project enterprise labor resources. This action enables resources to sign into Project Execution Management applications to plan projects, manage resources, review, track, and collaborate on work.

You can also request user accounts and assign enterprise roles when you create or edit resources on the Manage Project Enterprise Resources page.


During implementation you can provision a set of users and assign the Project Application Administrator role so that these administrators can initiate the provisioning process for the rest of the project enterprise labor resources.

### Resources to Provision

A resource that you provision typically falls into one of these categories:

- Resource is an employee or contingent worker in Oracle Fusion HCM and is a project enterprise labor resource in Oracle Fusion Project Management.

User accounts for these resources are typically created in Oracle Fusion HCM. You can associate the employee or contingent worker with a project enterprise labor resource and assign project-related roles when you create the resource in Oracle Fusion Project Management.

 **Note:** You can't create a user account in Oracle Fusion Project Management for an existing HCM employee or contingent worker. HCM persons are registered in Oracle Fusion HCM.

- Resource is a project enterprise labor resource in Oracle Fusion Project Management, but isn't an HCM employee or contingent worker.

You can maintain resource details and add resources to projects even if the resources aren't HCM employees or contingent workers. Create user accounts to register the resources in Oracle Identity Management, and assign project-related enterprise roles to the resources.

- Resource is an HCM employee or contingent worker, but isn't a project enterprise labor resource in Oracle Fusion Project Management.

You can assign project-related enterprise roles to resources who have user accounts that were created in Oracle Fusion HCM. However, you must create the resources in Oracle Fusion Project Management before you can assign them to projects, or before the resources can open project or resource management pages in the application.

## Enterprise Roles

You can provision the following predefined enterprise roles to resources:

- **Project Application Administrator:** Collaborates with project application users to maintain consistent project application configuration, rules, and access.
- **Project Execution:** Manages projects in Project Execution Management applications. Manages issues, deliverables, changes, and the calendar.

 **Note:** The Project Manager job role doesn't include the Project Execution enterprise role by default.

- **Resource Manager:** Manages a group of project enterprise labor resources. Monitors the utilization of resources and manages the assignment of resources to work on projects. Collaborates with project managers to find suitable resources to fulfill project resources requests.
- **Team Collaborator:** Performs, tracks, and reports progress on project and nonproject work. Collaborates with other team members or project managers to perform project tasks and to-do tasks. Manages issues, deliverables, changes, and the calendar.
- **Project Executive:** Establishes key performance indicators and other project performance criteria for a business area or organization. Manages business area performance. Owns profit and loss results for an organization, service line, or region.

In addition, you can provision custom job roles for resources. For example, you can provision a Custom Team Member role that contains a different set of security permissions than the Project Team Member role.

## Default Role Assignments

You can select project-related predefined and custom roles to provision by default. The application assigns the default roles to project enterprise labor resources that you create using any of the following methods:

- Import Project Enterprise Resource process for Oracle Cloud
- Project Enterprise Resource External Service
- Import HCM Persons as Project Enterprise Resources process

- Export Resources and Rates process that moves resources from the planning resource breakdown structure in Project Financial Management applications to Oracle Fusion Project Management
- Maintain Project Enterprise Labor Resources process in Oracle Fusion Project Resource Management

Go to the **Manage Project User Provisioning page > Default Provisioning Attributes tab > Default Role Assignments section** to select the default roles. Then select the option to **Automatically provision roles when mass creating project enterprise labor resources**.

## Project User Account and Role Provisioning Statuses: Explained

This topic describes project user account and role provisioning statuses in Project Execution Management applications.

### Project User Account Statuses

The user account status indicates whether a project enterprise labor resource can access Project Execution Management applications based on assigned roles. The following table lists the project user account statuses.

User Account Status	Description
Active	<p>The user is active and can access the application.</p> <p>A project user account is active for a resource in either of these scenarios:</p> <ul style="list-style-type: none"> <li>• You create a user account for the resource in Oracle Fusion Project Management.</li> <li>• The resource is an employee or contingent worker with an active account in Oracle Fusion Human Capital Management (HCM).</li> </ul>
Inactive	<p>The user is inactive and cannot access the application.</p> <p>A project user account is inactive for a resource in either of these scenarios:</p> <ul style="list-style-type: none"> <li>• The resource is an employee or contingent worker who is no longer active in HCM, such as when the employee is terminated.</li> <li>• The resource isn't an employee or contingent worker and you disable the resource in Oracle Identity Management.</li> </ul>

### Role Provisioning Statuses

When you create a user account in Oracle Fusion Project Management and assign project enterprise roles to the resource, the application sends a provisioning request to Oracle Identity Management. The role provisioning status indicates the processing status of the request. The following table lists the role provisioning statuses.

Role Provisioning Status	Description
Requested	Role provisioning is requested for a resource.
Completed	Role provisioning completed without errors or warnings.
Failed	Role provisioning failed because of errors or warnings.

Role Provisioning Status	Description
Partially completed	Role provisioning is partially complete.
Pending	Role provisioning is in progress.
Provisioned	The role is provisioned in Oracle Identity Management.
Rejected	The role provisioning request is rejected by Oracle Identity Management.
Suppressed	Status used in HCM for user accounts aren't created automatically.

You can view project user account and role provisioning statuses on the Manage Project User Provisioning page and Manage Project Enterprise Resources page.

## Provisioning Project Resources on the Manage Project User Provisioning Page: Procedure

Use the Manage Project User Provisioning page to create and update project users, request user accounts, and assign enterprise roles to resources. This action enables resources to sign into Project Execution Management applications to plan projects, manage resources, and review, track, and collaborate on work.

### Creating and Provisioning a User

Perform these steps to create a project user, request a user account, and provision roles on the Manage Project User Provisioning page.

1. Navigate to the Setup and Maintenance work area and search for the Manage Project User Provisioning task.
2. On the Search page, click the Manage Project User Provisioning link to open the **Manage Project User Provisioning page > User Provisioning tab**.
3. Click the **Create** icon to open the Create Project User window.
4. Enter the required fields and click the **Request user account** option.

When you select the **Request user account** option, the roles that you specified to provision by default appear in the Role Details table for the resource.

5. Select the **Assign administrator role** option to assign the Project Application Administrator role to the resource. This action adds the Project Application Administrator role to the Role Details table.
6. Add predefined or custom roles to the Role Details table, as needed. The following table lists the predefined roles.

Role	Description
Project Application Administrator	Collaborates with project application users to maintain consistent project application configuration, rules, and access.
Project Execution	Manages projects in project management applications and is not assigned the project manager job role. Manages issues, deliverables, changes, and the calendar.
Resource Manager	Performs functions in Oracle Fusion Project Resource Management.

Role	Description
Team Collaborator	Performs, tracks, and reports progress on project and nonproject work. Manages issues, deliverables, changes, and the calendar.
Project Executive	Establishes key performance indicators and other project performance criteria for a business area or organization. Manages business area performance. Owns profit and loss results for an organization, service line, or region.

 **Tip:** The Team Collaborator and Project Execution roles appear in the Role Details table by default. You can change the default roles on the **Manage Project User Provisioning page > Default Provisioning Attributes tab**.


7. Click **Save and Create Another** or **Save and Close**.

This action:

- Sends a request for a user account to Oracle Identity Management
- Sends the resource an e-mail notification when the provisioning process is successful

Additional points to consider:

- You can add or remove roles for a resource with an existing user account. Use the **Edit** feature to add roles. Use the **Actions** menu to remove roles.

 **Note:** You must wait until the previous provisioning request is complete for a resource before you add or remove roles for the resource.

- Use the **Assign Resource as Project Manager** action in the Search Results region to add a resource to a project as a project manager. When you add a project manager with the **Assign Resource as Project Manager** action, the application provisions the Project Execution role for the resource.
- Click the link in the **Last Request Status** column to view the details of the most recent provisioning action for a resource.
- On the **Manage Project User Provisioning page > Default Provisioning Attributes tab**, you can:
  - Select project-related predefined and custom roles to provision by default when you create project users.
  - Select the **Automatically provision roles when mass creating project enterprise labor resources** option to assign the default roles when creating users with import processes and services for employees and contingent workers.

## Provisioning Project Resources on the Manage Project Enterprise Resources Page: Explained

You can provision a resource on the Manage Project Enterprise Resources page when you create or edit a resource who is not an employee or contingent worker in Oracle Fusion Human Capital Management.

## Provisioning a Resource

You can request a user account from the Create Project Enterprise Resource window or Edit Project Enterprise Resource window.

- On the Create Project Enterprise Resource window, select the **Request user account** option.
- On the Edit Project Enterprise Resource window, click **Activate User Account**.

When you request a user account from the Create or Edit Project Enterprise Resource window, the application:

- Provisions the default role assignments for the resource
- Sends a request for a user account to Oracle Identity Management
- Sends the resource an e-mail notification when the provisioning process is successful

Click the link in the **User Account Status** column to view the role provisioning status of the most recent provisioning action for a resource.

## Project Roles in Project Execution Management Applications: Explained

A project role is a classification of the relationship that a person has to a project, such as project manager, functional consultant, or technical lead.

Following are examples of predefined project roles that you can't edit or delete:

- Project manager
- Project team member
- Staffing owner

You can create additional project roles to meet the needs of your organization. However, you can't delete a project role that's designated as a resource's primary project role, specified on a project resource request, or assigned to a resource on a project.

Use project roles for the following purposes:

- To identify the type of work that a person performs on project assignments
- To set up default resource qualifications
- As criteria when searching for resources to fulfill project resource requests
- As a resource's primary project role
- To allow access to project management information for project managers
- To identify the default staffing owner of project resource requests for a project

## Project Assignments

You select a project role when you add a resource to a project. The primary project role for a project enterprise resource is the default project role when you add the resource to the Manage Project Resources page.

When you fulfill a project resource request in the Project Resources work area and create an assignment for the resource, the project role specified on the request is the default project role on the assignment. You can change the project role on the Confirm Resource for Assignment or Reserve Resource for Assignment page before you submit the assignment for approval.

## Default Resource Qualifications

On the Manage Project Roles page, select a set of default qualifications, proficiencies, and keywords for each project role. Default qualifications, proficiencies, and keywords that you associate with a project role automatically appear as requirements on a project resource request when you select the project role for the request.

## Project Resource Requests

When searching for resources to fulfill a project resource request on the Search and Evaluate Resources page, you can filter the resource search results by the resource's primary project role to focus the results.

## Primary Project Roles

You can designate a primary project role for a resource that represents the work that the resource typically performs on project assignments.

You can use the resource's primary project role in the following areas in Oracle Fusion Project Resource Management:

- As a resource search option filter when viewing resources on the Search and Evaluate Resources page
- When viewing resource information on the Resource Details page
- When comparing the attributes of multiple resources against the requirements specified in the project resource request on the Compare Resources page
- As an attribute value to assign to new resources that the Maintain Project Enterprise Labor Resources process creates
- As search criteria when searching for a project enterprise labor resource to designate as a resource pool owner on the Manage Resource Pools page
- As advanced search criteria when searching for resource pool members on the Manage Resource Pools page
- When sorting open project resource requests on the Resource Manager Dashboard

## FAQs for Project Roles

### How can I assign project roles by default when I import project enterprise labor resources?

Go to the Manage Project User Provisioning page, Default Provisioning Attributes tab, Default Project Role Provisioning for Project Execution Management Labor Resources section. Select the option to **Automatically provision roles when mass creating project enterprise labor resources**. The application automatically assigns the predefined and custom roles that you selected on the Define Role Assignments table to each resource when you create project users using any of these methods:

- Import HCM Persons as Project Enterprise Resources process
- Import Project Enterprise Resource process for Oracle Cloud
- Project Enterprise Resource External Service
- Maintain Project Enterprise Labor Resources
- Export Resources and Rates process from the planning resource breakdown structure in Oracle Project Financial Management to Oracle Fusion Project Management

Why can't I view project management or resource management pages?

To view project management or resource management pages, you must be a project enterprise labor resource with an active user account. In addition, you must have an enterprise role with the security privilege to access specific pages in Project Execution Management applications.

For more information, refer to the Securing Project Execution Management Applications section in the Implementing Project Portfolio Management Security: Overview topic.

Project Financial Management

Budgeting and Forecasting Security: Explained



Budget and forecast security is determined by a combination of project role, security roles (job and duty roles) and entitlements, and workflow setup.

The following sections describe the entitlements required to perform various steps in the budget creation, submission, and approval process. They also describe the impact of using workflow to manage status changes.

 **Note:** The entitlements and workflow setup for forecasting mirrors that for budgeting.

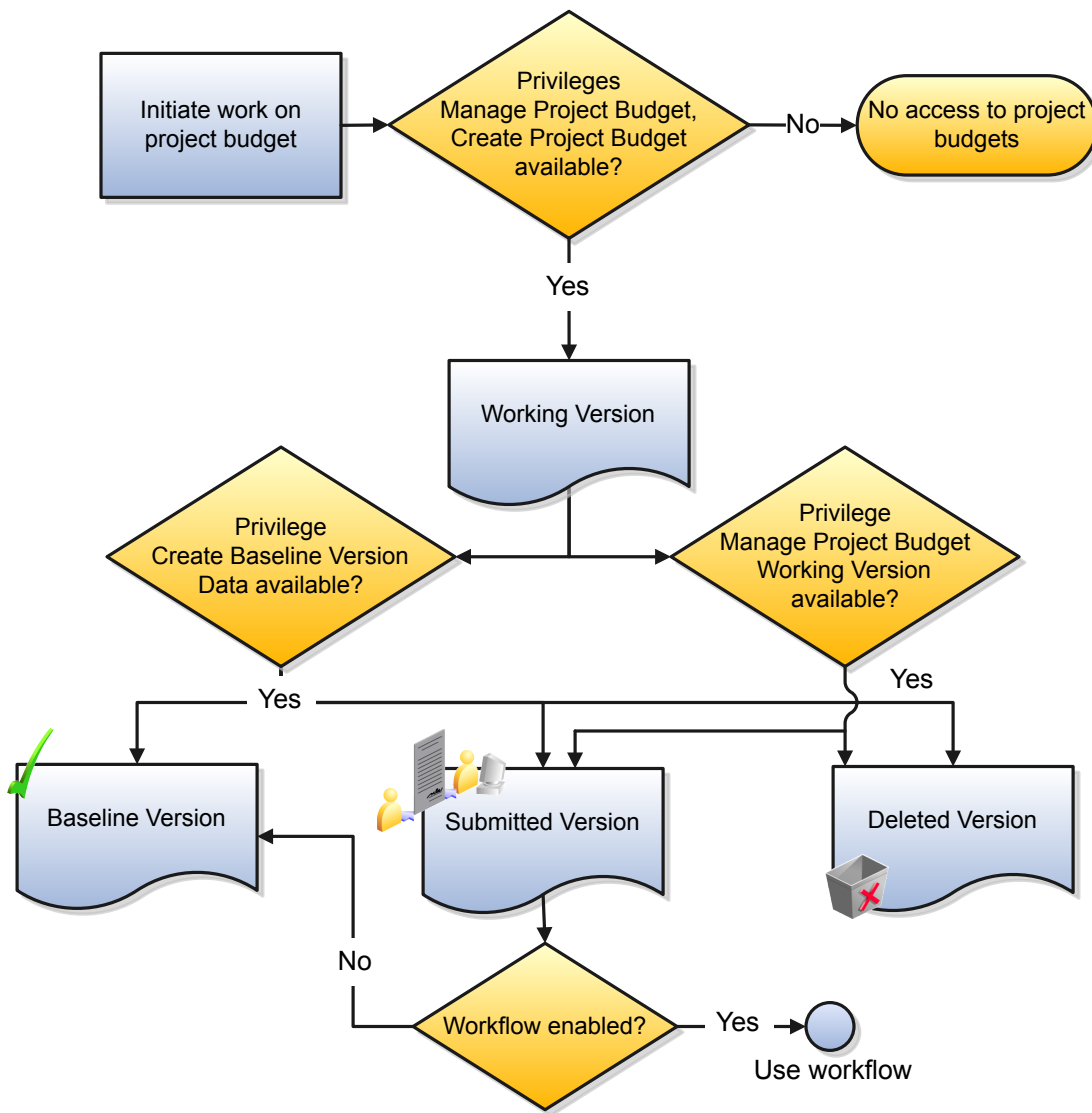
Creating and Submitting a Budget Version

The following table describes the access required to create and submit a budget version.

Step	Action	Entitlement
1	Access budget versions for a project	Manage Project Budget
2	Create a budget version	Create Project Budget
 <b>Note:</b> The entitlement required for editing budget versions in Excel is Manage Project Budget Excel Integration.		
3	Submit working version	Manage Project Budget Working Version
4	Create baseline directly	Create Baseline Version Data
 <b>Note:</b> Project managers may select to create a baseline directly instead of submitting a version for approval first.		



This following figure describes the steps for creating and submitting a budget version for creation of a baseline.



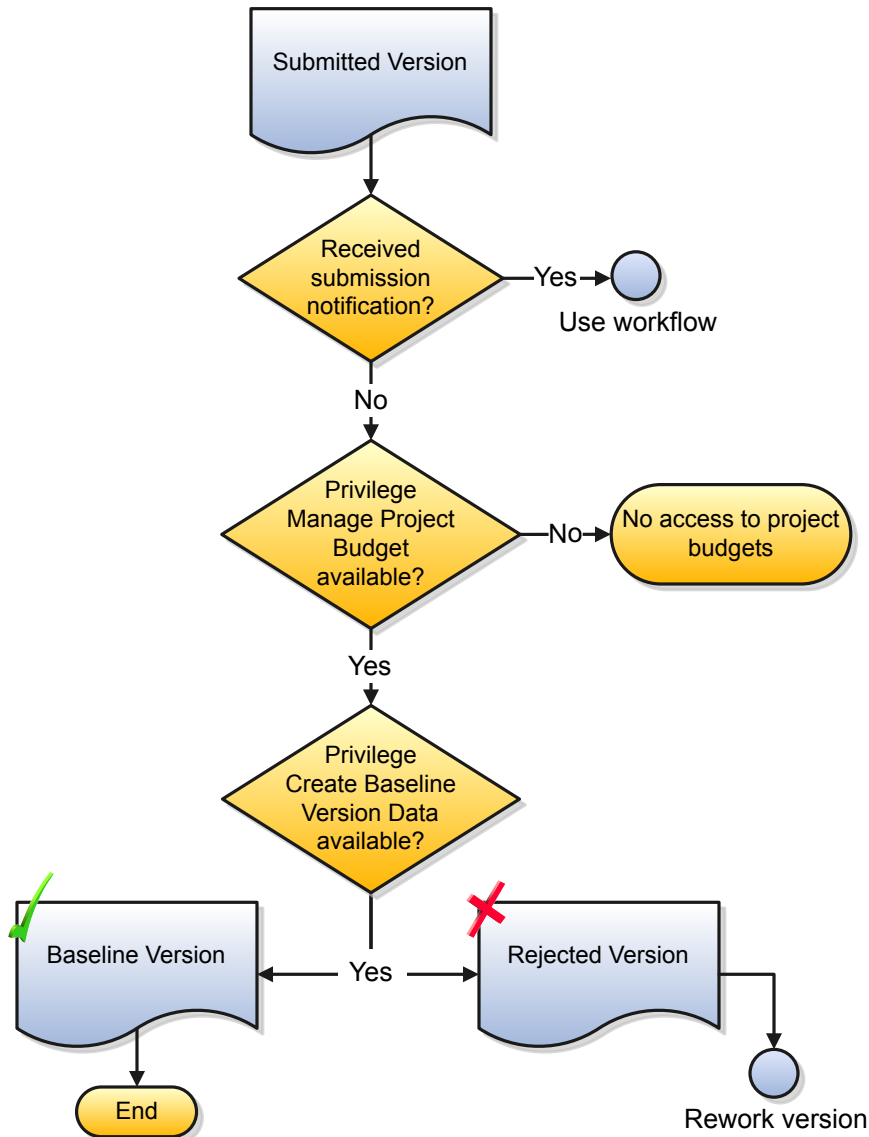
## Creating a Baseline for a Budget Version

The following table describes the access required to create a baseline for a budget version or reject it.

Step	Action	Entitlement
1	If using workflow, receive notification of budget submission	NA (Approver e-mail ID is entered manually by users)

Step	Action	Entitlement
2	Access budget versions for a project	Manage Project Budget
3	Create baseline or reject budget	Create Baseline Version Data

This following figure describes the steps for creating a baseline for a budget version.

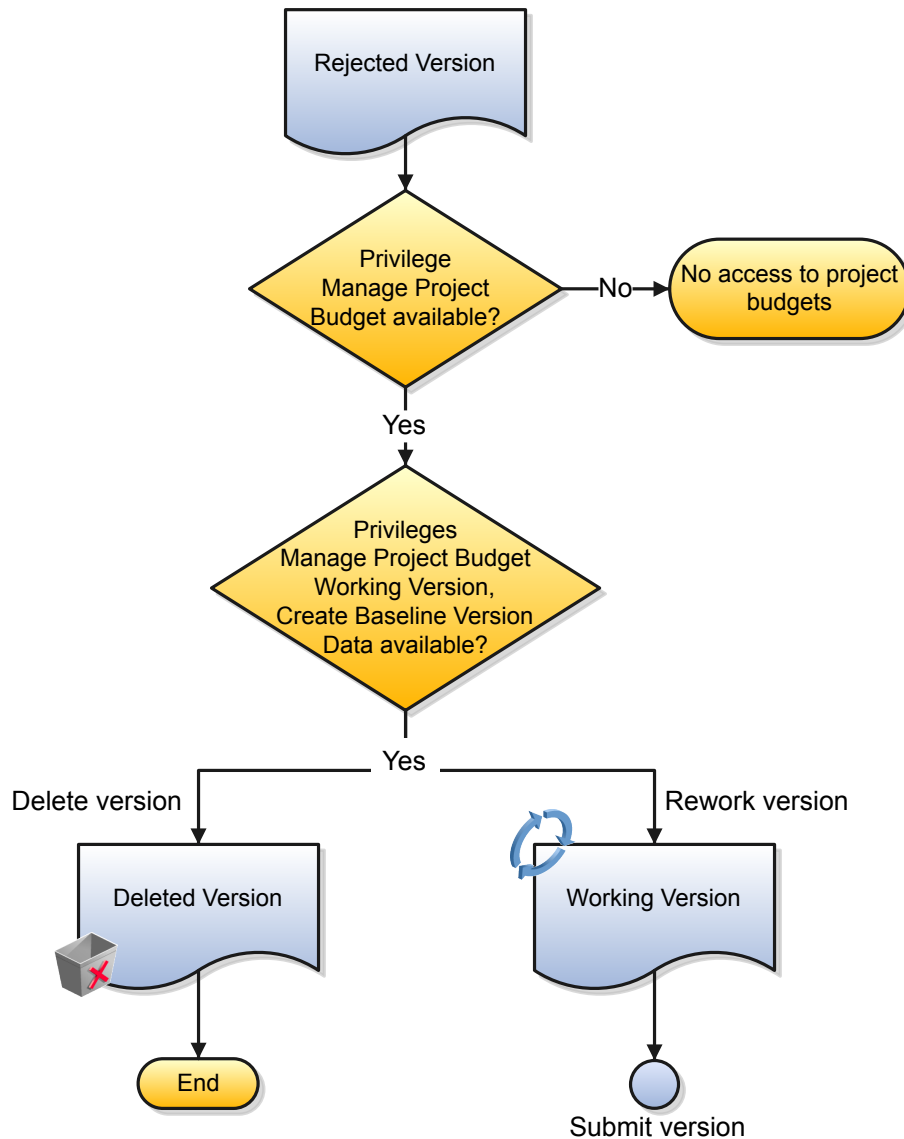


## Reworking a Rejected Budget Version

The following table describes the access required to required to rework a rejected version (set it back to Working status) or delete it, if it is no longer required.

Step	Action	Entitlement
1	Access budget versions for a project	Manage Project Budget
2	Rework working version	Manage Project Budget Working Version
3	Delete working version	Manage Project Budget Working Version

The following figure describes the steps for reworking a rejected budget version.



#### Related Topics

- [Budget and Forecast Workflow: Explained](#)

## Project Roles in Budgeting and Forecasting: Explained

Default project roles, including project application administrator, project manager, and project administrator can perform specific budgeting and forecasting tasks.

## Default Access for Roles

The following table describes the default access for each role.

Entitlement Area	Project Application Administrator	Project Manager	Project Administrator	Notes
Edit budget and forecast planning options	Yes	No	No	Project application administrators set planning options for financial plan types.  Project managers and accountants can view planning options at the version level.
Create versions	No	Yes	Yes	None
Generate versions	No	Yes	Yes	Applies to budgets generated when setting a baseline for the project plan.  Project administrators can't generate forecasts from progress (they don't have access to publish progress.)
Edit versions in Excel	No	Yes	Yes	None
Submit versions	No	Yes	Yes	None
Approve versions	No	Yes	No	A team member with project manager security role access must be manually designated as the project manager for the project.  If workflow is enabled, then approval occurs through a notification. Menu actions aren't available on the budgeting and forecasting pages.
Review versions	No	Yes	Yes	None

## FAQs for Project Roles

### What's a project role?

Project roles represent either a requirement or an assignment on a project, such as a project manager or project team member.

You associate an enterprise role with each project role. When you assign a project role to a project team member, the associated enterprise role determines the type of access the team member has to project information. For example, project managers can manage project progress or create budgets and forecasts. Project team members may only have access to view progress or financial plans.

When you create a project role, you assign it to one or more reference data sets so that only project roles that are relevant to the project unit are available to assign to project team members.

Persons who are directly assigned enterprise roles such as **Project Manager** or **Project Application Administrator** may have access to certain project information even if they aren't project team members or don't have a specific project role assignment.

### What's the difference between a job title and a project role?

A job title represents the function of a person within an organization and the position within a reporting hierarchy. For example, your organization may have designations or job titles such as software developer, sales representative, or accounts manager.

Project roles represent either a requirement or an assignment on a particular project, for example, project manager. Project roles may differ from project to project.

## Business Intelligence

### Securing Oracle Project Portfolio Management Subject Areas: Explained

Oracle Project Portfolio Management OTBI organizes reporting metadata into functional areas called subject areas. Subject areas contain folders that include metrics and attributes which are secured by the Oracle Business Intelligence Applications duty roles. Oracle Project Portfolio Management application job roles are mapped to these business intelligence application duty roles. This ensures that you see only the subject areas based on their business functions. For example, a project billing specialist sees only the Project Billing - Invoices Real Time subject area.

The following table lists the subject area and the corresponding Business Intelligence Applications duty role that is used to secure the subject area:

Subject Area	Business Intelligence Applications Duty Role	Additional Information
Project Billing - Event Real Time	Project Contract Billing Event Transaction Analysis Duty	You must have business unit access to view the data for this subject area.
Project Billing - Funding Real Time	Project Contract Invoice Transaction Analysis Duty	You must have business unit access to view the data for this subject area.

Subject Area	Business Intelligence Applications Duty Role	Additional Information
	Project Contract Revenue Transaction Analysis Duty	
Project Billing - Invoices Real Time	Grants Management Transaction Analysis Duty  Project Contract Invoice Transaction Analysis Duty	The folders Award, Primary Sponsor, and Institution within this subject area are visible only if you have access to the Grants Management Transaction Analysis Duty role.  You must have business unit access to view the data for this subject area.
Project Billing - Revenue Real Time	Grants Management Transaction Analysis Duty  Project Contract Revenue Transaction Analysis Duty	The folders Award, Primary Sponsor, and Institution within this subject area are visible only if you have access to the Grants Management Transaction Analysis Duty role.  You must have business unit access to view the data for this subject area.
Project Control - Budgets Real Time	Grants Management Transaction Analysis Duty  Project Budget Transaction Analysis Duty	The folders Award, Primary Sponsor, and Institution within this subject area are visible only if you have access to the Grants Management Transaction Analysis Duty role.  You must have access to the business unit or projects to view data for this subject area.
Project Control - Forecasts Real Time	Project Forecast Transaction Analysis Duty	You must have access to the business unit or projects to view data for this subject area.
Project Control - Progress Real Time	Project Progress Transaction Analysis Duty	You must have access to the business unit or projects to view data for this subject area.
Project Costing - Actual Costs Real Time	Grants Management Transaction Analysis Duty  Project Costing Transaction Analysis Duty  Project Journals Transaction Analysis Duty	The folders Award, Primary Sponsor, and Institution within this subject area are visible only if you have access to the Grants Management Transaction Analysis Duty role.  You must have access to the business unit or projects to view data for this subject area.
Project Costing - Assets Real Time	Project Costing Transaction Analysis Duty  Project Journals Transaction Analysis Duty	You must have business unit access to view the data for this subject area.
Project Costing - Commitments Real Time	Grants Management Transaction Analysis Duty  Project Costing Transaction Analysis Duty	The folders Award, Primary Sponsor, and Institution within this subject area are visible only if you have access to the Grants Management Transaction Analysis Duty role.  You must have access to the business unit or projects to view data for this subject area.
Project Costing - Expenditure Item Performance Real Time	Project Costing Transaction Analysis Duty	You must have access to the business unit or projects to view data for this subject area.

Subject Area	Business Intelligence Applications Duty Role	Additional Information
	Project Journals Transaction Analysis Duty	
Project Costing - Unprocessed Transactions Real Time	Grants Management Transaction Analysis Duty  Project Costing Transaction Analysis Duty	You must have access to the business unit or projects to view data for this subject area.
Project Management - Opportunity Integration Real Time	Project Planning Transaction Analysis Duty	You can view the projects data for which you are the project manager on the Manage Project Resources page for the project.
Project Management - Planning Real Time	Project Planning Transaction Analysis Duty	You can view the projects data for which you are the project manager on the Manage Project Resources page for the project.
Project Management - Change Management Real Time	Project Change Management Transaction Analysis Duty	You can view all the data in this subject area if you are the creator or owner of the change order.
Project Management - Project Hierarchy Real Time	Project Hierarchy Transaction Analysis Duty	You can view all the data in this subject area for the projects connected to elements that you own or for which you can delegate rights.
Project Management - Project Resources Real Time	Project Planning Transaction Analysis Duty	You can view all the data in this subject area if you access to the subject area.
Project Management - Project Work Items Real Time	Project Work Items Transaction Analysis Duty	You can view the projects data for which you are the project manager on the Manage Project Resources page for the project.
Project Management - Requirements Real Time	Project Requirements Transaction Analysis Duty	You can view all the data in this subject area if you access to the subject area.
Project Management - Task Management Real Time	Task Management Transaction Analysis Duty	You can view data in this subject area if you are the owner or the creator of the tasks.
Project Resource Management - Resource Management Real Time	Project Resource Management Transaction Analysis Duty	You can view all the data in this subject area if you access to the subject area.
Projects - Cross Subject Area Analysis Real Time	Project Budget Transaction Analysis Duty  Project Contract Invoice Transaction Analysis Duty  Project Contract Revenue Transaction Analysis Duty  Project Costing Transaction Analysis Duty  Project Foundation Transaction Analysis Duty  Grants Management Transaction Analysis Duty	You must have access to the business unit or projects to view data for this subject area.



Subject Area	Business Intelligence Applications Duty Role	Additional Information
Projects - Grants Management - Award Analysis Real Time	Grants Management Transaction Analysis Duty	You must have access to the contract or award business unit, or awards to view data for this subject area.
Projects - Grants Management - Award Funding Real Time	Grants Management Funding Analysis Duty	You must have access to the contract or award business unit, or awards to view data for this subject area.
Project Management - Project Issues Real Time	Project Issue Transaction Analysis Duty	You can view all the data in this subject area if you access to the subject area.
Project Resource Management - Resource Pool Real Time	Project Resource Management Transaction Analysis Duty	You can view all the data in this subject area if you access to the subject area.
Project Management - Baseline Versions Real Time	Project Planning Transaction Analysis Duty	You can view the projects data for which you are the project manager on the Manage Project Resources page for the project.

## Mapping Business Intelligence Duty Roles and Oracle Application Job Roles

Oracle Project Portfolio Management application job roles inherit Oracle Transactional Business Intelligence application duty roles so that correct data is visible to relevant users. For example, project accountants can view project cost data for the expenditure organization that they're responsible for.

The following table lists the Oracle Transactional Business Intelligence application duty roles and corresponding Oracle Project Portfolio Management application job roles that inherit these duties.

Business Intelligence Application Duty Role	Oracle Application Job Role
Grants Management Funding Analysis Duty	Grants Accountant
	Grants Administrator
	Principal Investigator
Grants Management Transaction Analysis Duty	Grants Accountant
	Grants Administrator
	Principal Investigator
Project Budget Transaction Analysis Duty	Grants Accountant
	Grants Administrator
	Principal Investigator
	Project Accountant
	Project Administrator
	Project Manager


Business Intelligence Application Duty Role	Oracle Application Job Role
Project Change Management Transaction Analysis Duty	Project Execution
	Team Collaborator
Project Contract Invoice Transaction Analysis Duty	Grants Accountant
	Grants Administrator
	Principal Investigator
	Project Accountant
	Project Administrator
	Project Billing Specialist
Project Contract Revenue Transaction Analysis Duty	Project Manager
	Grants Accountant
	Grants Administrator
	Principal Investigator
	Project Accountant
	Project Administrator
Project Costing Transaction Analysis Duty	Project Manager
	Grants Accountant
	Grants Administrator
	Principal Investigator
	Project Accountant
	Project Administrator
Project Foundation Transaction Analysis Duty	Project Manager
	Grants Accountant
	Grants Administrator
	Principal Investigator
	Project Accountant
	Project Administrator
Project Hierarchy Transaction Analysis Duty	Project Executive

Business Intelligence Application Duty Role	Oracle Application Job Role
Project Journals Transaction Analysis Duty	Grants Accountant Project Accountant
Project Planning Transaction Analysis Duty	Project Execution
Project Progress Transaction Analysis Duty	Grants Administrator Principal Investigator Project Administrator Project Manager Team Collaborator
Project Requirements Transaction Analysis Duty	Project Manager
Project Resource Management Transaction Analysis Duty	Resource Manager
Project Work Items Transaction Analysis Duty	Project Execution
Task Management Transaction Analysis Duty	Team Collaborator
Project Contract Billing Event Transaction Analysis Duty	Grants Accountant Grants Administrator Principal Investigator Project Accountant Project Administrator Project Billing Specialist Project Manager
Project Issue Transaction Analysis Duty	Project Execution Team Collaborator Project Executive

## Setting Up Security Profile to View Employee Names in Analyses: Procedure

Use the Manage Data Role and Security Profiles task to gain access to employee names in your analysis. Following steps help you to get the required access.

### Setting Up Security Profile

 **Note:** Only an application administrator can access the Manage Data Role and Security Profiles task.

1. Navigate to the Setup and Maintenance work area and click **Search**.
2. On the Search page, search for the Manage Data Role and Security Profiles task.
3. Click the **Manage Data Role and Security Profiles** link.
4. Search for the user role, such as project manager or project accountant, to grant the access.
5. In the Search Results region, select the role and click **Edit**.
6. Select **View All People** or **View All Workers** when prompted for a Public Person security profile.
7. Click **Review**.
8. Click **Submit**.

# 13 Implementing Security in Oracle Fusion Procurement

## Implementing Security for Procurement: Overview

Oracle Procurement Cloud applications use the standard role-based security model. Predefined security roles are delivered for in the security reference implementation.

Some types of delivered roles are:

- Common job roles.
- Abstract roles, for common functionality that is not job-specific.
- Duty roles, that can carry both function and data security grants.
- Discretionary roles, are like duty roles but can be provisioned to users independent of job or abstract roles.

For each of the predefined roles, the included or inherited duties grant access to application functions that correspond to their responsibilities. In some areas of Procurement you must also grant data access directly to specific users. For example, you must directly set up users such as buyers, category managers and procurement managers as procurement agents.

## Predefined Roles for Procurement

Predefined roles for Procurement are provided in the security reference implementation for these functional areas:

- Requisitioning
- Purchasing
- Supplier
- Supplier Portal
- Sourcing
- Supplier Qualification
- Setup and Administration
- Business Intelligence

The following table lists predefined requisitioning security roles and their descriptions.

Role	Type	Description
Advanced Procurement Requester	Abstract	Creates requests for goods or services for themselves and for others. Also has access to the Add Requisition Lines function which supports the quick creation of multiple requisition lines. This role must be directly assigned to a user.

Role	Type	Description
Procurement Catalog Administrator	Abstract	Manages agreements and catalog content. This includes catalogs, category hierarchies, content zones, information templates, map sets, public shopping lists and smart forms.
Procurement Preparer	Abstract	Creates requests for goods or services for themselves and for others. This role must be directly assigned to a user.
Procurement Requester	Abstract	Creates requests for goods or services for themselves. This role is inherited by users whose primary worker assignment is Employee or Contingent Worker.

The following table lists predefined purchasing security roles and their descriptions.

Role	Type	Description
Buyer	Job	Performs transactional functions in procurement applications, such as for processing purchase agreements and purchase orders.
Category Manager	Job	Identifies savings opportunities. Determines negotiation strategies. Creates requests for quote, information, proposal or auction events on behalf of their organization. Awards future business, typically in the form of agreements and orders with suppliers.
Procurement Contracts Administrator	Job	Creates, manages and administers procurement contracts.
Procurement Manager	Job	Manages a group of buyers in an organization.

The following table lists predefined buying organization supplier security roles and their descriptions.

Role	Type	Description
Supplier Administrator	Abstract	Manages supplier information and user provisioning.
Supplier Manager	Abstract	Manages supplier information and authorizes promotion of prospective suppliers to spend authorized status.

The following table lists predefined supplier portal security roles and their descriptions.

Role	Type	Description
Supplier Accounts Receivable Specialist	Job	Submits invoices and tracks invoice and payment status for the supplier organization.
Supplier Bidder	Abstract	Represents a potential supplier. Responds to requests for quote, proposal, information and reverse auctions.
Supplier Customer Service Representative	Job	Manages inbound purchase orders. Communicates shipment activities for the supplier organization. Tracks, acknowledges or requests changes to new orders. Monitors the receipt activities performed by the buying organization.
Supplier Demand Planner	Job	Manages supplier scheduling, supplier managed inventory, and consigned inventory for the supplier organization.
Supplier Inventory Manager	Job	Manages inventory process control from beginning to end. Monitors available supplies, materials and products to ensure that customers, employees and production have access to the materials they need.
Supplier Product Administrator	Job	Uses retail external portal, and uploads and maintains supplier product and catalog data with the retailer. This catalog data is for both sell-side and buy-side transactions.
Supplier Product Design Engineer	Job	Views items and their related details such as a bill of material, attachments or approved manufacturers list. Reviews and acknowledges change orders, and initiates change requests against items they are providing or manufacturing for the customer.
Supplier Sales Representative	Job	Manages agreements and deliverables for the supplier organization. Acknowledges or requests changes to agreements. Adds catalog line items with customer-specific pricing and terms. Updates contract deliverables that are assigned to the supplier. Updates progress on contract deliverables for which the supplier is responsible.
Supplier Self Service Administrator	Abstract	Manages the profile information for the supplier company. Primary tasks include updating supplier profile information and requesting user accounts to grant employees access to the supplier application.
Supplier Self Service Clerk	Abstract	Manages the profile information for the supplier company. Primary tasks include updating supplier profile information and

Role	Type	Description
		requesting user accounts to grant employees access to the supplier application.

The following table lists predefined sourcing security roles and their descriptions.

Role	Type	Description
Category Manager	Job	Identifies savings opportunities. Determines negotiation strategies. Creates requests for quote, information, proposal or auction events on behalf of their organization. Awards future business, typically in the form of contracts or purchase orders to suppliers.
Sourcing Project Collaborator	Abstract	Helps determine negotiation strategies, award decision criteria, and perform objective scoring. The role can be assigned to a key organization member helping to do these tasks.

The following table lists predefined supplier qualification security roles and their descriptions.

Role	Type	Description
Supplier Qualification	Discretionary	Allows a user to define the requirements a supplier should meet. Can qualify a supplier by performing verification and audits. Can assess and maintain supplier qualifications.

The following table lists predefined setup and administration security roles and their descriptions.

Role	Type	Description
Procurement Application Administrator	Job	Performs most setup tasks. Performs the technical aspects of keeping the procurement application functions available. Configures the applications to meet the business needs of the organization.
Procurement Catalog Administrator	Abstract	Manages agreements and catalog content. This includes catalogs, category hierarchies, content zones, information templates, map sets, public shopping lists and smart forms.
Procurement Contract Administrator	Job	Creates, manages and administers procurement contracts.
Procurement Integration Specialist	Job	Plans, coordinates, and supervises all activities related to the integration of the procurement applications.



Role	Type	Description
Procurement Manager	Job	Manages a group of buyers in an organization.
Supplier Administrator	Abstract	Manages supplier profile and user provisioning.
Supplier Manager	Abstract	Manages supplier information and authorizes promotion of prospective suppliers to spend authorized status.

The following table lists predefined business intelligence security roles and their descriptions.

Role	Type	Description
Purchase Analysis	Abstract	<p>Allows a user to perform line-of-business analysis on requisitions, purchase orders and suppliers. This role is only used to grant access to Oracle Business Intelligence, not the Oracle Procurement Cloud applications. The user is not a procurement agent. They are a person who owns the line-of-business and wants to do business intelligence analysis on procurement data.</p> <p>The user who has this role has data access to the business unit associated with their primary worker assignment. You can assign additional business units to their data access. Use the Manage Data Access for Users task, in the Setup and Maintenance work area.</p>

## Procurement Requester

### Procurement Requester Data Security: Explained

Your ability to create or view purchase requisitions is controlled by role-based data security.

Three abstract roles define procurement requester security:

- Procurement Requester
- Procurement Preparer
- Advanced Procurement Requester

## Procurement Requester

With the Procurement Requester role you can create requests for goods or services for yourself. This abstract role is inherited by the Employee and Contingent Worker job roles. As a procurement requester you can:

- Create purchase requisitions.
- View requisitions that have your name listed as the requester on the requisition line.
- Edit requisitions that have your name listed as the person who entered the requisition.

With the Procurement Requester role you have implicit access to data for the business unit associated with your primary worker assignment. This determines the requisitioning business unit you belong to.

## Procurement Preparer

With the Procurement Preparer role you can create requests for goods or services for yourself and for others. This role must be provisioned directly to you.

## Advanced Procurement Requester

With the Advanced Procurement Requester role you can create requests for goods or services for yourself and for others. You also have access to the Add Requisition Lines function, which supports the quick creation of multiple requisition lines. This role must be provisioned directly to you.

## Additional Business Units

To provide you requester access to additional business units, beyond your primary worker assignment, you must be provisioned explicit data access to them. A security administrator can do this using the Manage Data Access for Users page, in the Setup and Maintenance work area, Procurement offering. For example, consider the following scenario:

- Your primary employee assignment is to US business unit.
- You have also been directly provisioned with data access to the France business unit.

As a result, you have access to data for both the US and France business units.

## View Requisitions Owned by Other Users


By default, you can only see:

- Requisitions you create.
- Requisitions you did not create, in which you are listed as the requester on one of the lines.

A security administrator can use function security to provide you the ability to view requisitions owned by other users. They can assign you the privilege View Requisitions - All. This provides you access to requisitions for which you are not the preparer or requester, in the business units you have access to.

Some additional purchase requisition-related privileges are available in the security reference implementation, are not assigned to predefined roles, but can be assigned as needed.

- Edit Requisition as Approver: Allows you to modify requisitions as an approver.
- Reassign Requisition: Allows you to reassign requisitions entered by others.
- Reassign Requisition Data: Allows you data access for reassigning requisitions entered by others.

 **Note:** Never edit the predefined roles. You can make a copy of a predefined role to create your own custom role, if needed.

For more information about procurement requester security roles refer to the Oracle Procurement Cloud Security Reference guide in the Oracle Help Center.

## Procurement Agent

### Procurement Agent Security: Explained

Use the Manage Procurement Agents task to create and maintain a procurement agent's access to procurement functionality for a business unit. You can find the task in the Purchase Agreements and Purchase Orders work areas.

You can implement document security for individual document types such as purchase orders, purchase agreements, and requisitions. You can also control a procurement agent's access to manage activities for suppliers, negotiations, catalog content, and business intelligence spend data.

Key aspects for managing procurement agents are:

- Understanding what a procurement agent is.
- Implementing document security.
- Navigating to the Manage Procurement Agents task.

### What is a Procurement Agent?

Procurement agents are typically users with procurement roles such as:

- Buyer
- Catalog Administrator
- Category Manager
- Procurement Contract Administrator
- Procurement Manager
- Supplier Administrator
- Supplier Manager
- Supplier Qualification

They have procurement job responsibilities in the buying organization, such as creating purchase agreements, purchase orders, and related procurement functions. You must set up these users as procurement agents for them to manage procurement documents and perform other procurement actions.

### Implement Document Security

The key elements for setting up procurement agent document security are:

- Assigning the agent to a procurement business unit.
- Enabling the agent's access to procurement actions.
- Defining the agent's access levels to other agents' documents.

## Locate the Manage Procurement Agents Task

Depending on your role and permissions, you can use the Manage Procurement Agents task in the following work areas:

- Setup and Maintenance work area, Procurement offering, Procurement Foundation functional area.
- Purchase Agreements and Purchase Orders work areas.

## Create Procurement Agent: Critical Choices

Use the Manage Procurement Agents page to create or edit a procurement agent. With this task you can define an agent's access to procurement functionality within a procurement business unit.

You can find the page from the following work areas:

- Setup and Maintenance work area, in the Procurement Offering, Procurement Foundation functional area, Manage Procurement Agents task.
- Purchasing work area, Manage Procurement Agents task.

The following predefined procurement roles are controlled by procurement agent access configuration:

- Buyer
- Catalog Administrator
- Category Manager
- Procurement Contracts Administrator
- Procurement Manager
- Supplier Administrator
- Supplier Manager
- Supplier Qualification

## Procurement BU

Assign the agent to one or more procurement business units (BU).


## Action

Enable the agent with access to one or more procurement actions for each procurement business unit.

- Manage Requisitions: Enable access to purchase requisitions.
- Manage Purchase Orders: Enable access to purchase orders.
- Manage Purchase Agreements: Enable access to blanket purchase agreements and contract agreements.
- Manage Negotiations: Enable access to Sourcing negotiations, if implemented by your organization.
- Manage Sourcing Programs: Enable access to track and manage sourcing programs.
- Manage Catalog Content: Enable access to catalog content. This includes local catalogs, punchout catalogs, content zones, smart forms, information templates, and collaborative authoring.
- Manage Suppliers: Enable access to create and update supplier information.
- Manage Supplier Qualifications: Enable access to initiatives, qualifications, and assessments, if Supplier Qualification is implemented by your organization.
- Manage Approved Supplier List Entries: Enable access to create and update approved supplier lists.
- Analyze Spend: Used by the business intelligence functionality to enable access to view invoice spend information.

## Access to Other Agents' Documents

Assign an access level to documents owned by other procurement agents for each procurement business unit.

 **Note:** An agent can perform all actions on their own documents as long as they have procurement BU access.

- None: The agent has no access to documents owned by other agents.
- View: Permits the agent to search and view other agents' documents.
- Modify: Permits the agent to view, modify, delete, and withdraw other agents' documents.
- Full: Permits the agent full control of other agents' documents. This includes the view, modify, delete, withdraw, freeze, hold, close, cancel, and finally close actions.

## Supplier User

### Supplier User Provisioning: How It Works

Supplier user provisioning refers to the process of establishing supplier users with access to the Supplier Portal work area. Your buying organization can create and maintain user accounts, job roles, and data access controls for supplier contacts.

The content supplier users can access, and tasks they can perform, are controlled by your buying organization. You can allow trusted supplier users to request and manage user accounts for their fellow employees that require access to the Supplier Portal work area.

### User Provisioning Job Roles

You provision supplier users with job roles, giving them the ability to perform business tasks and functions using the Supplier Portal work area. The predefined job roles that can perform supplier user provisioning are:

- **Supplier Administrator:** This is a buying organization job role. Users with this role are responsible for maintaining supplier profile information as well as administering user accounts for supplier contacts.
- **Supplier Manager:** This is a buying organization job role. Users with this role are responsible for authorizing new suppliers for spending. They control the addition of new spend authorized suppliers into the supply base. In smaller organizations, you can assign this job role and the Supplier Administrator role to the same individual.
- **Supplier Self Service Administrator:** This is a supplier organization job role. Supplier users with this role can maintain company profiles and request user accounts for their fellow employees. All profile changes and user account requests made by the supplier self service administrator require approval by the buying organization.
- **Supplier Self Service Clerk:** This is a supplier organization job role. Supplier users with this role can maintain company profiles and request user accounts for their fellow employees. All profile changes and user account requests made by the supplier self service clerk require approval by the buying organization.

You can perform user provisioning from the following procurement flows:

- Supplier registration review and approval.
- Supplier profile change request review and approval.
- Suppliers work area, Manage Suppliers task, Edit Supplier flow where supplier profiles are maintained.
- Supplier Portal work area where suppliers can perform user provisioning on behalf of their company using the Manage Profile task.

In each of these flows a user with one of the appropriate job roles can:

- Create or request a user account.
- Assign job roles.
- Set data security access for supplier contacts.

## Manage Supplier User Roles Setup Page

The IT Security Manager and the Procurement Application Administrator can use the Manage Supplier User Roles page. They can find the page in the Setup and Maintenance work area, Procurement offering, Supplier Portal functional area. They can open the page from the following respective setup tasks:

- Manage Supplier User Roles
- Manage Supplier User Roles Usages

Your buying organization uses the Manage Supplier User Roles page to perform the following setup actions. These actions are performed by two different job roles: IT Security Manager, and Procurement Application Administrator.

- IT Security Manager: Define the list of roles that can be granted to supplier users in Supplier Portal provisioning flows. Only the IT Security Manager job role can add and remove roles. This helps your organization avoid the risk of adding an internal application job role inadvertently. It prevents suppliers from gaining unauthorized access to internal data. The supplier roles are added from the central Oracle LDAP roles repository which stores all Oracle Fusion application job roles. Once they add a role to the table, the role is immediately available for provisioning to supplier contacts by the Supplier Administrator.
- Procurement Application Administrator: Define the supplier role usages. The Procurement Application Administrator is responsible for this setup task. They manage settings for how the supplier job roles are exposed in provisioning flows.

The IT Security Manager can also set supplier role usages, as they can access all functions on the setup page. However, this task is typically performed by the Procurement Application Administrator. The Procurement Application Administrator cannot add or remove roles from the table.

Your buying organization can establish default roles which expedite supplier user account requests. To do this, identify the minimum set of job roles that a supplier contact can be granted. Use default roles so that approvers don't have to explicitly review and assign job roles for each user account request.

When the role default setup is done correctly, the Supplier Administrator (or approver) can review supplier contact user account requests. This allows them to:

- Review requests with job roles selected based on the source of the request.
- Approve user account requests with appropriate role assignments.

The two role usages relevant to supplier user provisioning are:

- Default for Oracle Fusion Supplier Portal: If selected, the role is automatically added to supplier user requests in the core user provisioning flows, such as supplier profile maintenance.
- Default for Oracle Fusion Sourcing: If selected, the role is automatically added to supplier user requests generated in sourcing flows such as Create Negotiation.

A role in the table can be marked for one or more of the two usages.

### Related Topics


- [Request Supplier User Account: Explained](#)

## Supplier User Account Administration: Explained

The buying organization's supplier administrator provisions user accounts to provide supplier contacts access to the Supplier Portal work area. The administrator performs user account maintenance for a specific supplier contact in the Suppliers work area, on the Edit Supplier page, Contacts tab. The administrator assigns a user account with roles that determine what functions the supplier contact can perform in the Supplier Portal work area.

The following are Oracle Procurement Cloud flows where a supplier administrator can request and manage a user account for a supplier contact:

- **Create Supplier Contact:** When creating a supplier contact, the administrator can also request to create a user account for the contact, request roles and grant data access. A supplier user can also request for a supplier contact and user account to be created.
- **Edit Supplier Contact:** The supplier administrator can make changes to supplier contact information as well as create or maintain the user account for the contact. A supplier user can also request a user account to be created for an existing contact.
- **Approve supplier registration request:** When approving a supplier registration, an approver can create and edit supplier contacts. A user account is part of a supplier contact. The approver has the ability to create a user account and assign roles within this flow.

 **Note:** Creating a user account for a supplier contact cannot be reversed. Once a user account is created it cannot be deleted, but it can be inactivated.

The Supplier Administrator is responsible for:

- Creating and inactivating supplier user accounts.
- Assigning job roles.
- Assigning data access.

### Create and Inactivate Supplier User Accounts

Select the Create User Account option for a contact to send a request to the identity management system to provision the account. Status is displayed to communicate provisioning status during this process. When the process is complete, the identity management system sends notification to the supplier contact with the user name and temporary password for the Supplier Portal work area. If the process fails, a notification is sent to the Supplier Administrator that a user account was not successfully provisioned.

### Assign Job Roles

Use the Roles subtab to control function security. This determines the business objects and task flows the supplier user can access. Supplier job roles should be assigned based on the job that the contact performs within the supplier organization. For example, Customer Service Representative or Accounts Receivable Specialist.

### Assign Data Access

Use the Data Access tab to control data security. This determines which transactions the user can access for the specific business objects their job role is associated with. The two levels of data security are: Supplier and Supplier Site. By default, all supplier user accounts start with Supplier level, meaning they can access all transactions belonging to their supplier company only. For more restrictive access, the Supplier Site level limits user access to transactions for specific supplier sites only.

## Set Up Supplier Roles: Examples

The following simple examples illustrate selecting and managing roles for supplier user provisioning.

### Selecting Roles for Supplier User Provisioning:

Vision Corporation decides to expand their Supplier Portal work area deployment and allow supplier customer service representatives to access orders and agreements.

The IT security manager navigates to the Manage Supplier User Roles page. They locate it in the Setup and Maintenance work area, Procurement offering, Supplier Portal functional area, Manage Supplier User Roles task. They search for the supplier job role Supplier Customer Service Representative, and add the role to the table.

The Procurement Application Administrator then navigates to the Manage Supplier User Role Usages task. They locate it in the Setup and Maintenance work area, Procurement offering, Supplier Portal functional area. For the Supplier Customer Service Representative role, they select the following option: Default for Supplier Portal.

### Managing Default Roles for Supplier Users and Supplier Bidders:

Vision Corporation decides the Supplier Sales Representative role should not be marked as a default role for the Supplier Portal work area. The Procurement Application Administrator navigates to the Manage Supplier User Role Usages task. They ensure the Default for Supplier Portal option is not selected for that role.

Vision Corporation also recently implemented Oracle Fusion Sourcing. They must provision the Supplier Bidder role to suppliers invited to sourcing events. The IT Security Manager navigates to the Manage Supplier User Roles page. They add the Supplier Bidder role to the table. For the newly added role, they select the Default for Sourcing option.

#### *Related Topics*

- [Request Supplier User Account: Explained](#)

## Supplier Administration

### Security for Individual Supplier Information: Explained

Use the Personally Identifiable Information (PII) framework to protect tax identifiers for suppliers classified as individuals.

PII refers to the framework in Oracle Fusion Applications for protecting sensitive data for an individual. Additional security privileges are required for users to view and maintain such data.

The predefined job roles Supplier Administrator and Supplier Manager include data security policies to maintain tax identifiers for suppliers classified as individuals. Only users with these roles can view and maintain the following tax identifiers for individual suppliers:

- Taxpayer ID
- Tax Registration Number
- National Insurance Number

Individual suppliers are defined as suppliers with a Tax Organization Type of Individual or Foreign Individual.



Other users without these roles can still search and access individual suppliers. They are restricted from viewing or updating the tax identifiers for these suppliers.

Similar PII data security is also enforced in the Supplier Registration flows. Only users with the Supplier Administrator and Supplier Manager roles can view or maintain the tax identifier information for an individual supplier's registration approval request.

## How can I view and update a supplier contact's mobile phone?

To view, but not edit, a supplier contact's mobile phone, you must have the View Trading Community Person Mobile Phone Number data security privilege. To view and edit a supplier contact's mobile phone, you must have the Manage Trading Community Person Mobile Phone Number data security privilege.

If you have neither privilege, and if there is a mobile phone, the number is masked with asterisks. If there is no mobile phone, the field is blank.

## Business Intelligence

### Security for Oracle Procurement Cloud Business Intelligence: Overview

Users with the appropriate roles can view, create or edit business intelligence analytics and reports in Oracle Procurement Cloud.

Security for viewing, creating, and editing business intelligence analytics and reports includes these concepts:

- Access to business intelligence functionality
- Access to the data that you want an analytic or report to return
- Access to the folders where the analytics or reports are stored
- Secured list views
- Personally identifiable information (PII)

### Business Intelligence Roles

Business intelligence security roles apply to both Oracle Business Intelligence Publisher and Oracle Transactional Business Intelligence. They grant access to business intelligence functionality, such as the ability to run or author analytics and reports. Users need one or more of these roles. In addition, users need the roles that grant access to the following:

- Functional folders, analytics and reports
- Subject areas
- Oracle Procurement Cloud data

## Access to Subject Areas in the Business Intelligence Catalog

Access to subject areas in the Business Intelligence Catalog is secured by OTBI Transactional Analysis Duty roles. The following table lists the procurement subject areas by functional area, and the corresponding job roles and OTBI Transactional Analysis Duty role needed for each subject area.

Subject Area	Job Role	OTBI Transactional Analysis Duty Role
Procurement - Implemented Change Orders Real Time	<ul style="list-style-type: none"> <li>Category Manager</li> <li>Buyer</li> <li>Procurement Contract Administrator</li> <li>Procurement Manager</li> </ul>	Implemented Change Order Transaction Analysis Duty
Procurement - Pending Change Orders Real Time	<ul style="list-style-type: none"> <li>Category Manager</li> <li>Buyer</li> <li>Procurement Contract Administrator</li> <li>Procurement Manager</li> </ul>	Pending Change Order Transaction Analysis Duty
Procurement - Purchasing Agreements Real Time	<ul style="list-style-type: none"> <li>Category Manager</li> <li>Buyer</li> <li>Procurement Contract Administrator</li> <li>Procurement Manager</li> </ul>	Agreement Transaction Analysis Duty
Procurement - Purchasing Real Time	<ul style="list-style-type: none"> <li>Category Manager</li> <li>Buyer</li> <li>Procurement Contract Administrator</li> <li>Procurement Manager</li> <li>Purchase Analysis</li> </ul>	Purchase Order Transaction Analysis Duty
Procurement - Requisitions Real Time	<ul style="list-style-type: none"> <li>Buyer</li> <li>Procurement Contract Administrator</li> <li>Procurement Manager</li> <li>Purchase Analysis</li> </ul>	Purchase Requisitions Transaction Analysis Duty
Procurement - Spend Real Time	<ul style="list-style-type: none"> <li>Accounts Payable Manager</li> <li>Accounts Payable Specialist</li> <li>Accounts Payable Supervisor</li> <li>Buyer</li> <li>Procurement Manager</li> </ul>	Spend Transaction Analysis Duty Role
Sourcing - Supplier Awards Real Time	<ul style="list-style-type: none"> <li>Category Manager</li> <li>Procurement Contract Administrator</li> <li>Procurement Manager</li> </ul>	Sourcing Transaction Analysis Duty
Sourcing - Supplier Negotiations Real Time	<ul style="list-style-type: none"> <li>Category Manager</li> <li>Procurement Contract Administrator</li> <li>Procurement Manager</li> </ul>	Sourcing Transaction Analysis Duty
Sourcing - Supplier Responses Real Time	<ul style="list-style-type: none"> <li>Category Manager</li> <li>Procurement Contract Administrator</li> <li>Procurement Manager</li> </ul>	Sourcing Transaction Analysis Duty
Supplier - Supplier Real Time	<ul style="list-style-type: none"> <li>Purchase Analysis</li> <li>Supplier Administrator</li> </ul>	Supplier Master Data Transaction Analysis Duty

Subject Area	Job Role	OTBI Transactional Analysis Duty Role
	<ul style="list-style-type: none"> <li>Supplier Manager</li> </ul>	
Supplier Import - Supplier Real Time	<ul style="list-style-type: none"> <li>Purchase Analysis</li> <li>Supplier Administrator</li> <li>Supplier Manager</li> </ul>	Supplier Master Data Transaction Analysis Duty
Supplier Qualification - Qualifications and Assessments Real Time	<ul style="list-style-type: none"> <li>Supplier Qualification</li> </ul>	Supplier Qualification Analysis Duty
Supplier Qualification - Question Responses Real Time	<ul style="list-style-type: none"> <li>Category Manager</li> <li>Supplier Qualification</li> </ul>	Supplier Question and Responses Analysis Duty
Supplier Registration - Supplier Real Time	<ul style="list-style-type: none"> <li>Purchase Analysis</li> <li>Supplier Administrator</li> <li>Supplier Manager</li> </ul>	Supplier Master Data Transaction Analysis Duty

## Access to Reports in the Business Intelligence Catalog

Access to functional folders in the Business Intelligence Catalog is secured using the same duty roles that secure access to the subject areas. Functional folders contain delivered analytics and reports. For example, a user who inherits the Purchase Order Transaction Analysis Duty has access to the:

- Purchasing folder in the Business Intelligence Catalog
- Procurement-Purchasing Real Time subject area

Reports are secured based on the folders in which they're stored. You can set permissions against folders and reports for Application Roles, Catalog Groups, or Users. The following table lists the procurement functional area folders, and the corresponding job roles and OTBI Transactional Analysis Duty role for each folder..

Functional Area Folder	Job Role	OTBI Transactional Analysis Duty Role
Purchasing	<ul style="list-style-type: none"> <li>Category Manager</li> <li>Buyer</li> <li>Procurement Contract Administrator</li> <li>Procurement Manager</li> <li>Purchase Analysis</li> </ul>	Purchase Order Transaction Analysis Duty
Sourcing	<ul style="list-style-type: none"> <li>Category Manager</li> <li>Buyer</li> <li>Procurement Manager</li> </ul>	Sourcing Transaction Analysis Duty
Spend	<ul style="list-style-type: none"> <li>Accounts Payable Manager</li> <li>Accounts Payable Specialist</li> <li>Accounts Payable Supervisor</li> <li>Buyer</li> <li>Procurement Manager</li> </ul>	Spend Transaction Analysis Duty Role
Supplier	<ul style="list-style-type: none"> <li>Supplier Administrator</li> <li>Supplier Manager</li> </ul>	Supplier Master Data Transaction Analysis Duty

Functional Area Folder	Job Role	OTBI Transactional Analysis Duty Role
Supplier Qualification	<ul style="list-style-type: none"> <li>Category Manager</li> </ul>	Supplier Question and Responses Analysis Duty
	<ul style="list-style-type: none"> <li>Supplier Qualification</li> </ul>	Supplier Question and Responses Analysis Duty, and Supplier Qualification Analysis Duty

For a list of predefined analytics and reports, see Oracle Procurement Cloud View Procurement Reports and Analyses on the Oracle Help Center.

## Reporting Data

The data that's returned in reports is secured in a similar way to the data that's returned in Oracle Procurement Cloud pages. Each of the transaction analysis duty roles grants access to subject areas and Business Intelligence Catalog folders. To view the roles click **Navigator > Security Console**.

If you cannot see buyer or requester names in analyses or reports, add the View All Workers security profile to your user role. Use the Assign Security Profiles to Role task, in the Setup and Maintenance work area.

## Secured List Views

You have two options to obtain access to data using a data model that uses a SQL Query as the data source:

- Select data directly from a database table. The data you return isn't subject to data-security restrictions. Because you can create data models on unsecured data, you should minimize the number of users who can create data models.
- Join to a secured list view in your select statements. The data returned is determined by the security profiles that are assigned to the roles of the user who's running the report.

## PII Data

Personally identifiable information (PII) tables are secured at the database level using virtual private database policies. Only authorized users can report on data in PII tables. This restriction also applies to Business Intelligence Publisher analytics and reports. The data in PII tables is protected using data security privileges that are granted by means of duty roles in the usual way.

For more information about delivered roles, see the Oracle Procurement Cloud Security Reference guide in the Oracle Help Center.

For more information about business intelligence, see the Oracle Procurement Cloud Creating and Administering Analytics and Reports guide in the Oracle Help Center.

## Setting Up Security Profile to View Employee Names in Procurement Analyses: Procedure

Use the Assign Security Profiles to Role task to obtain access to buyer and requester names in your analyses.

## Setting Up Security Profile

If you create or run a report and cannot see buyer or requester names in the report, check your person data security profile. Follow these steps to add the View All Workers security profile to your user role.

 **Note:** A Security Manager can open and use the Assign Security Profiles to Role task.

1. From the Navigator, click **Setup and Maintenance**.
2. In the Setup and Maintenance work area, search for and open the **Assign Security Profiles to Role** task.
3. On the Manage Data Roles and Security Profiles page, search for the user role to which you want to grant access. For example, Buyer.
4. In the Search Results region, select the role and click **Edit**.
5. On the Edit Data Role: Role Details page, click Next.
6. Select **View All Workers** when prompted for a Public Person security profile.
7. Click **Review**.
8. Click **Submit**.



# Glossary

## **abstract role**

A description of a person's function in the enterprise that is unrelated to the person's job (position), such as employee, contingent worker, or line manager.

## **action**

The kind of access, such as view or edit, named in a security policy.

## **aggregate privilege**

A predefined role that combines one function security privilege with related data security policies.

## **assignment**

A set of information, including job, position, pay, compensation, managers, working hours, and work location, that defines a worker's or nonworker's role in a legal employer.

## **business object**

A resource in an enterprise database, such as an invoice or purchase order.

## **business unit**

A unit of an enterprise that performs one or many business functions that can be rolled up in a management hierarchy.

## **condition**

The part of a data security policy that specifies what portions of a database resource are secured.

## **contingent worker**

A self-employed or agency-supplied worker. Contingent worker work relationships with legal employers are typically of a specified duration. Any person who has a contingent worker work relationship with a legal employer is a contingent worker.

## **dashboard**

A collection of analyses and other content, presented on one or more pages to help users achieve specific business goals. Each page is a separate tab within the dashboard.

## **data dimension**

A stripe of data accessible by a user. Sometimes referred to as data security context.

## **data instance set**

The set of HCM data, such as one or more persons, organizations, or payrolls, identified by an HCM security profile.

### **data role**

A role for a defined set of data describing the job a user does within that defined set of data. A data role inherits job or abstract roles and grants entitlement to access data within a specific dimension of data based on data security policies. A type of enterprise role.

### **data security**

The control of access and action a user can take against which data.

### **data security policy**

A grant of entitlement to a role on an object or attribute group for a given condition.

### **database resource**

An applications data object at the instance, instance set, or global level, which is secured by data security policies.

### **department**

A division of a business enterprise dealing with a particular area of activity.

### **duty role**

A group of function and data privileges representing one duty of a job. Duty roles are specific to applications, stored in the policy store, and shared within an application instance.

### **duty role**

A group of function and data privileges that represents one of the duties of a job.

### **effective start date**

For a date-effective object, the start date of a physical record in the object's history. A physical record is available to transactions between its effective start and end dates.

### **enterprise**

An organization with one or more legal entities under common control.

### **enterprise role**

Enterprise roles provide users with access both to the application functions they need to perform their jobs as well as the permissions to access the data where they need to perform those functions. There are two types of enterprise roles: job roles and abstract roles. Job roles permit users to perform activities specific to their job. Abstract roles permit users to perform functions that span the different jobs in the enterprise.



### **entitlement**

Grant of access to functions and data. Oracle Fusion Middleware term for privilege.

### **flexfield**

A flexible data field that you can configure such that it contains one or more segments or stores additional information. Each segment has a value and a meaning.

### **flexfield segment**

An extensible data field that represents an attribute and captures a value corresponding to a predefined, single extension column in the database. A segment appears globally or based on a context of other captured information.

### **function security**

The control of access to a page or a specific use of a page. Function security controls what a user can do.

### **HCM data role**

A job role, such as benefits administrator, associated with instances of HCM data, such as all employees in a department.

### **identity**

A person representing a worker, supplier, or customer.

### **job**

A generic role that is independent of any single department or location. For example, the jobs Manager and Consultant can occur in many departments.

### **job role**

A role, such as an accounts payable manager or application implementation consultant, that usually identifies and aggregates the duties or responsibilities that make up the job.

### **keyword**

A word or phrase, entered as free-form, unstructured text on a project resource request, that does not exist as a predefined qualification content item. Keywords are matched against the resource's qualifications and the results are included in the qualification score calculation.

### **LDAP**

Abbreviation for Lightweight Directory Access Protocol.

### **party**

A physical entity, such as a person, organization or group, that the deploying company has an interest in tracking.

### **person number**

A person ID that is unique in the enterprise, allocated automatically or manually, and valid throughout the enterprise for all of a person's work and person-to-person relationships.

### **person type**

A subcategory of a system person type, which the enterprise can define. Person type is specified for a person at the assignment level.

### **personally identifiable information**

Any piece of information that can be used to uniquely identify, contact, or locate a single person. Within the context of an enterprise, some PII data, such as a person's name, can be considered public, while other PII data, such as national identifier or passport number is confidential.

### **privilege**

A grant of access to functions and data; a single, real world action on a single business object.

### **privilege cluster**

In the output of the Role Optimization Report, a group of privileges that you can map to a duty role.

### **project resource request**

List of criteria used to find a qualified resource to fulfill an open resource demand on a project. Project resource requests include qualifications, keywords, requested date range, and other assignment information, such as project role and work location.

### **qualification**

Items in structured content types such as competencies, degrees, and language skills that have specific values and proficiency ratings.

### **resource**

People designated as able to be assigned to work objects, for example, service agents, sales managers, or partner contacts. A sales manager and partner contact can be assigned to work on a lead or opportunity. A service agent can be assigned to a service request.

### **role**

Controls access to application functions and data.

### **role hierarchy**

Structure of roles to reflect an organization's lines of authority and responsibility. In a role hierarchy, a parent role inherits all the entitlement of one or more child roles.

### **role mapping**

A relationship between one or more roles and one or more assignment conditions. Users with at least one assignment that matches the conditions qualify for the associated roles.

### **role provisioning**

The automatic or manual allocation of a role to a user.

### **security profile**

A set of criteria that identifies HCM objects of a single type for the purposes of securing access to those objects. The relevant HCM objects are persons, organizations, positions, countries, LDGs, document types, payrolls, and payroll flows.

### **security reference implementation**

Predefined function and data security that includes role based access control, and policies that protect functions, and data. The reference implementation supports identity management, access provisioning, and security enforcement across the tools, data transformations, access methods, and the information life cycle of an enterprise.

### **SQL predicate**

A type of condition using SQL to constrain the data secured by a data security policy.

### **subledger journal entry**

A detailed journal entry generated for a transaction in a subledger application.

### **subledger journal entry line**

An individual debit or credit line that is part of a subledger journal entry.

### **transaction**

A logical unit of work such as a promotion or an assignment change. A transaction may consist of several components, such as changes to salary, locations, and grade, but all the components are handled as a unit to be either approved or rejected.

### **URL**

Abbreviation for Uniform Resource Locator.

### **work area**

A set of pages containing the tasks, searches, and other content you need to accomplish a business goal.

### **work relationship**

An association between a person and a legal employer, where the worker type determines whether the relationship is a nonworker, contingent worker, or employee work relationship.

### **worker type**

A classification selected on a person's work relationship, which can be employee, contingent worker, pending worker, or nonworker.

### **XML filter**

A type of condition using XML to constrain the data secured by a data security policy.

