

# Understanding Fusion HCM OTBI Security

Fusion HCM Release 11.1.1.8.0

**ORACLE WHITE PAPER | JULY 2014**

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## Overview

OTBI is the real-time transactional reporting tool for Fusion HCM. OTBI inherits Fusion HCM user roles and data security. Based on the assigned job role, a HCM user is assigned the corresponding OTBI duty roles and HCM reporting data roles, which allows the user to access OTBI subject areas and the underlying data within the user's security profile. How a job role is configured in Fusion HCM directly affects a user's reporting privilege and query result in OTBI.

This white paper clarifies how HCM security configuration affects reporting in OTBI and addresses common HCM security questions encountered during an OTBI implementation. This white paper addresses questions such as:

- How are OTBI subject areas secured?
- What are OTBI duty roles? How OTBI duty roles work with HCM Reporting duty roles to secure reporting data?
- Which HCM job roles are delivered with OTBI reporting access? What reporting privileges do they have?
- How to configure custom job roles for OTBI reporting?
- What is dimensional security?
- How to remove user access to create reports in OTBI?

This white paper is not a how-to user manual that teaches how to configure Fusion HCM user security. Fusion HCM security concepts and implementation steps are documented in Fusion HCM Cloud security guide.

This white paper applies to Fusion HCM Release 11.1.1.8.0

## Understanding Fusion HCM Security

Job roles, duty roles, data security privileges are key concepts for Fusion HCM security. Before you attempt to understand OTBI security, it is essential that you understand Fusion HCM security concepts that are documented in Fusion HCM security guides.

The following HCM security reference documents are good references for Fusion HCM security:

- [Securing Oracle HCM Cloud](#)

This is a primer on Fusion HCM role-based security. It discusses general role-based security concepts, the delivered job roles, duty roles, and role inheritance, how to create data roles and how to customize security. A '[Specialized Security](#)' chapter is dedicated to OTBI and BIP security.


- [Oracle HCM Security Reference Manual](#)

This is a reference document that describes the delivered Job roles, duty roles and the role hierarchy for a job role, privileges for a duty role and data security policy for a job or data role.

## Understanding OTBI Security

### OTBI Transaction Analysis Duty Roles

OTBI secures reporting objects and data through a set of delivered OTBI Transaction Analysis duty roles. These OTBI Transaction Analysis duty roles control the subject areas and analyses that a user can access and the data that a user can see in Fusion. Fusion HCM Cloud customers can not customize the delivered OTBI duty roles or



the associated security privileges. But Cloud customers can customize OTBI reporting security by assigning different OTBI duty roles to a job role according to their security needs.

These Fusion HCM job roles are provisioned with OTBI reporting privileges:

- Human Resource Analyst
- Line Manager
- Compensation Analyst
- Compensation Manager
- Payroll Manager
- Benefits Manager

OTBI Transaction Analysis duty roles secure OTBI reporting access in three layers.

- What Can I do in OTBI? (Access to BI privileges)

OTBI Transaction Analysis duty roles inherit BI Author that provides a user the ability to create, edit, run, download, schedule analyses or dashboards in Answers or create BI Publisher data model or create, edit, run, schedule BI Publisher reports.

- Which Subject Areas & Reports can I Access? (Access to OTBI subject areas and report catalog)

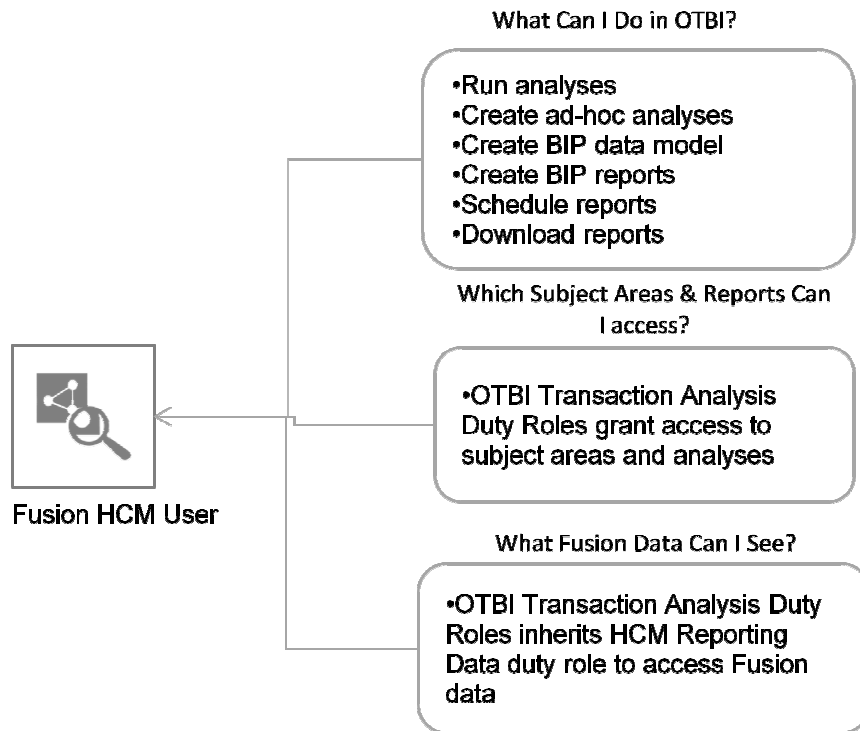
Fusion OTBI organizes HCM reporting metadata in functional subject areas that consist of business attributes and numeric measures. OTBI reports/analyses are organized by similar functional sub-folders. OTBI Transaction Analysis duty roles secure the subject areas and report catalog by business functions. For example, only Compensation Manager or Compensation Analyst can create or run reports in the Compensation subject areas.

Fusion HCM Cloud customers can't modify the subject area privileges delivered with an OTBI Transaction Analysis duty. Customers can add or remove OTBI subject area access by adding or removing the OTBI Transaction Analysis duty roles assigned to a custom job role.

- What Fusion Data Can I See? (Access to Fusion HCM data)

HCM Reporting Data duty roles control reporting data access in Fusion HCM. In addition to OTBI subject area access, OTBI Transaction Analysis duty roles are also assigned HCM Reporting Data duty roles that grant users access to the underlying Fusion HCM data.

This dual security assignment requires OTBI Transaction Analysis duty roles to be provisioned for both HCM and OBI applications in APM. It is a common oversight when configuring custom job roles that customers include OTBI Transaction Analysis duty roles for OBI application but not for HCM application. This will cause a user to see no data in a report even though the user can access the corresponding OTBI subject area(s).

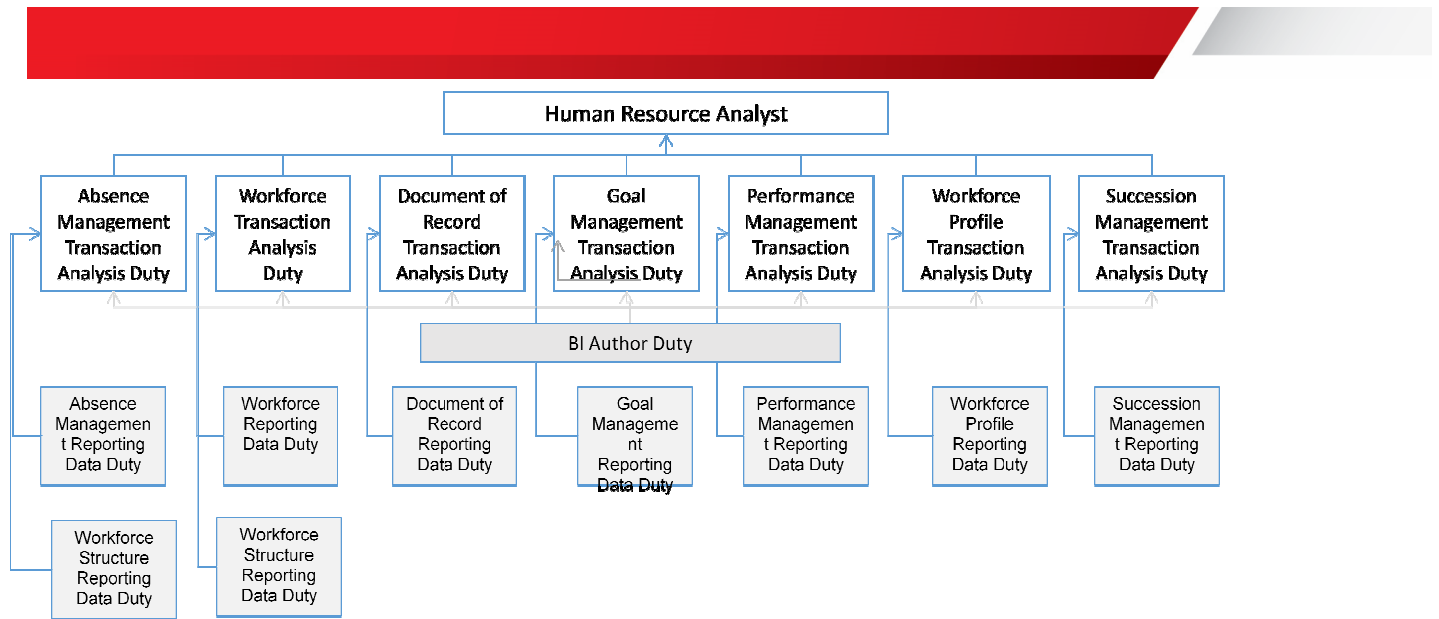


The following section explains OTBI security provisioning with the example of the delivered Human Resource Analyst job role.

#### OTBI Security Example: Human Resource Analyst

Among the delivered HCM job roles, Human Resource Analyst job role has the broadest reporting access in OTBI. It is assigned multiple OTBI Transaction Analysis duty roles that allow users to report personal, employment information, absence information, performance management and goal information and talent profile, etc.

Human Resource Analyst is assigned the following OTBI Transaction Analysis duty roles and the corresponding Fusion HCM Reporting Data duty roles:



## Security Provisioning for Human Resource Analyst

In APM, Human Resource Analyst job role is provisioned with OTBI Transaction Analysis duty roles in both HCM and OBI applications.

In APM, under **obi** Application, Human Resource Analyst is granted OTBI Transaction Analysis duty roles that provide user access to absence, workforce management and talent management subject areas and corresponding reports in OTBI.

### Human Resource Analyst

Performs duties of a human resources analyst.

General External Role Hierarchy Application Role Mapping

Mapping For: Human Resource Analyst

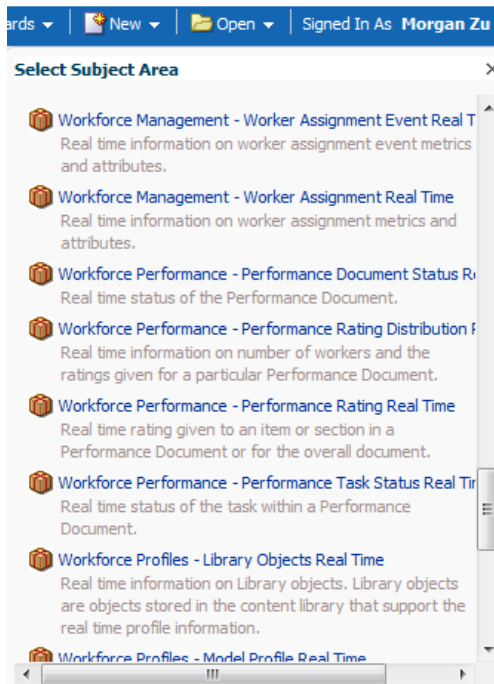
Each application in the table below can be expanded to see the corresponding Application Roles within their hierarchy. Select an Application Role below and click the Open button to launch a view details in a new tab.

Actions View Map Remove Roles Open Role Find Policies

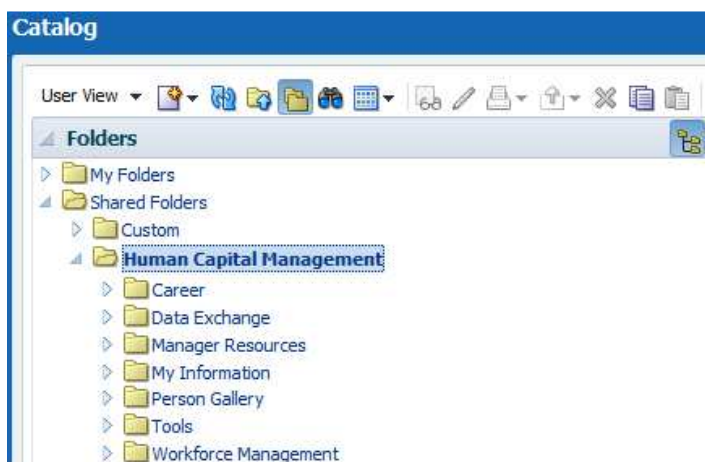
Display Name	Description
hcm	
obi	
Absence Analysis Duty(OBI)	Views employee related absence accrual data.
Absence Management Transaction Analysis Duty	Analyzes Workforce absences transactional information
Documents of Record Transaction Analysis Duty	Analyzes Documents of Records transactional information
Extract Management Duty(OBI)	Grants access to extract definition, extract processing, and extract analysis duties.
Goal Management Transaction Analysis Duty	Analyzes Workforce Goals transactional information
HCM Information Comparison Duty(OBI)	Compares workers, jobs, positions, and any combinations of these objects.
HR Analyst Compensation Review Duty(OBI)	Manages salary and off-cycle compensation awards and views total compensation statements for workers.
Human Resource Analyst Work Area Navigation Duty(OBI)	Grants navigation access to all HR analyst work areas.
Performance Management Transaction Analysis Duty	Analyzes Workforce Performance Management transactional information
Succession Management Transaction Analysis Duty	Fusion HCM Succession Management Transaction Analysis Duty Role
Talent Review Meeting Real Time Transaction Analysis Duty	Provides real-time transactional analysis on Talent Review meeting information
Total Compensation Statements Human Resources Duty(OBI)	Views generated total compensation statements for individuals within their security profile.
Worker Availability Analysis Duty(OBI)	Views resources covered by calendar events and workers' availability based on their work schedules.
Worker Reporting Duty(OBI)	Reports on worker data.
Workforce Profile Transaction Analysis Duty	Analyzes Workforce Profile transactional information
Workforce Transaction Analysis Duty	Analyzes Workforce transactional information
crm	
fscm	



OTBI Transaction Analysis duty roles grants subject areas and report catalog access:



OTBI report catalog access:



In APM, under hcm Application, the same OTBI Transaction Analysis duty roles are also granted to Human Resource Analyst. Without these data reporting privileges, a user can't access HCM data even though the user can see these subject areas in OTBI. No data will be returned when the user attempts to run a report in the OTBI subject areas.

In HCM, Workforce Transaction Analysis Duty role is assigned Workforce Reporting Data Duty and Workforce Structure Reporting Data Duty. These two HCM Reporting Data duty roles grant the reporting data privileges for workforce management. Without Workforce Structure Reporting Data Duty, the user cannot see data in common dimensions e.g. job, grade, department, location, or position, etc. Without Workforce Reporting Data

Duty, the user cannot see personal attribute data e.g. person address, e-mail, contact, national ID, visa or passport etc.



## Delivered HCM Job Roles, OTBI Duty Roles and Reporting Data Roles

Fusion HCM delivers six job roles that have OTBI reporting access. Users in these job roles can run the delivered analyses or create ad-hoc analyses for the corresponding OTBI subject areas.

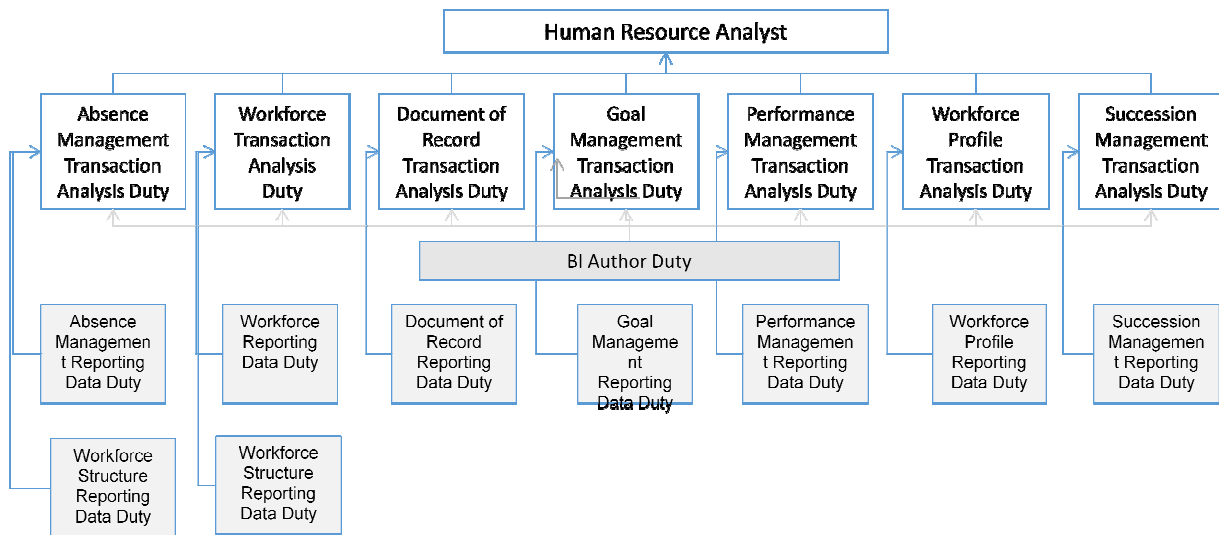
- Human Resource Analyst
- Line Manager
- Compensation Analyst
- Compensation Manager
- Payroll Manager
- Benefits Manager

The following section illustrates OTBI duty roles and reporting privileges assigned to each of the job roles seeded with OTBI access.

Human Resource Analyst

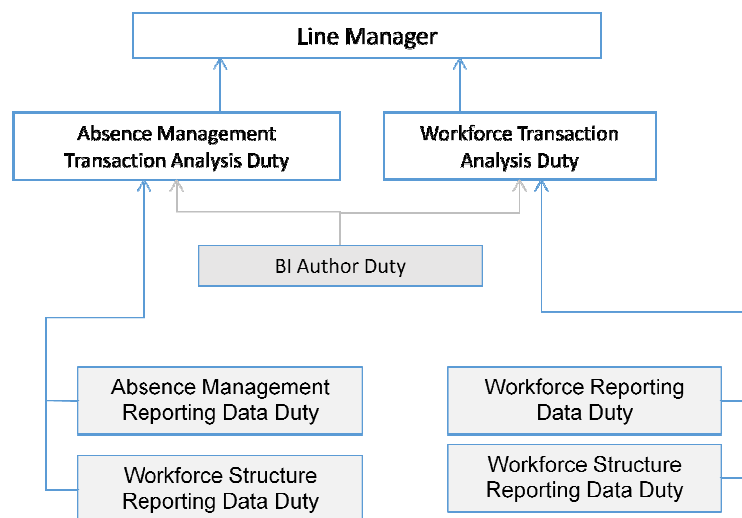


Human Resource Analyst is assigned the following OTBI Transaction Analysis duty and HCM Reporting Data Duty Roles:



Line Manager

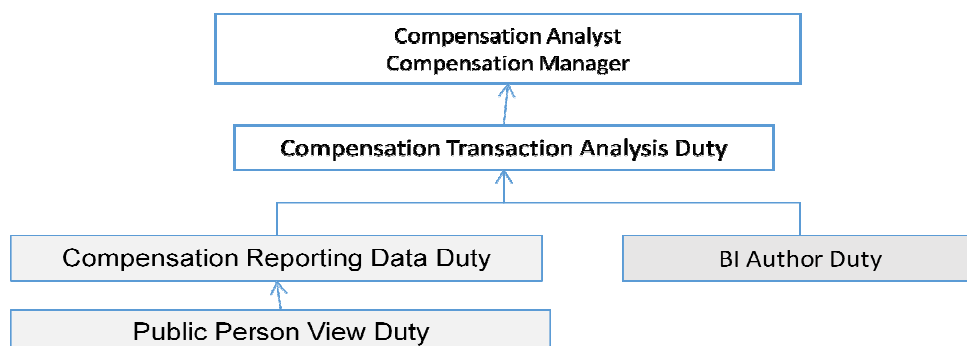
Line Manager is assigned the following OTBI Transaction Analysis duty and HCM Reporting Data Duty Roles:



Note: Line Manager has no access to compensation data. A custom job role needs to be created to grant Line Manager access to compensation information.

#### Compensation Analyst and Compensation Manager

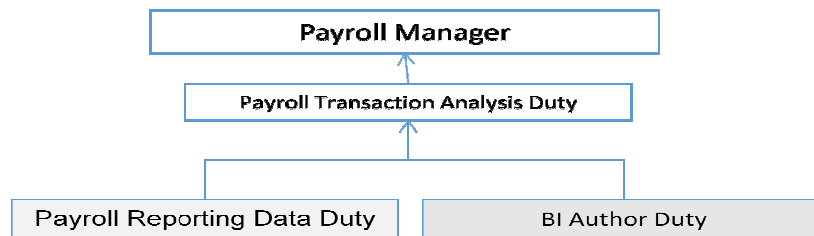
Compensation Analyst and Compensation Manager are the only job roles that have access to compensation information. They are granted the following OTBI Transaction Analysis duty and HCM Reporting Data Duty Roles:



Please note: To view a report that includes Payroll Element information linked to the salary basis, the user job role must be granted Payroll Reporting Data Duty.

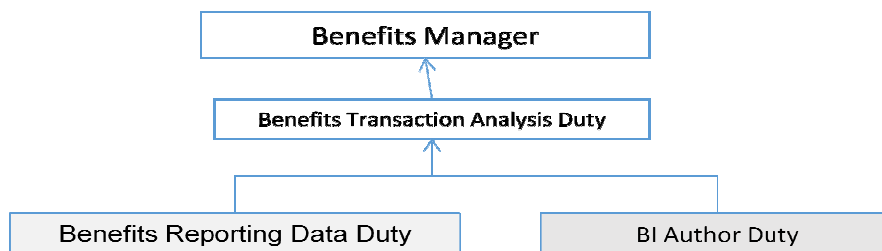
### Payroll Manager

Payroll Manager is granted the following OTBI Transaction Analysis Duty and HCM Reporting Data Duty Roles:



### Benefits Manager

Benefits Manager is granted the following OTBI Transaction Analysis Duty and HCM Reporting Data Duty Roles:



## Customize OTBI Security

Customers can customize the delivered OTBI security in the following areas:

- Create a job role that has different subject area access than what is delivered out of box , e.g. grant line manager access to compensation data; allow employees to report their own Person Profile data
- Restrict OTBI report authoring privileges to power users
- Modify BIP security to allow power users to create BIP data model and BIP reports

Create a Custom Job Role with OTBI Access

You can customize OTBI security by granting different OTBI Transaction Analysis duty roles to a custom job role. If you create a custom job role with access to OTBI reports, you must give the role both the **obi** and **hcm** versions of the Transaction Analysis Duty roles. These duty roles ensure that your custom job role has the subject area and data security for running the reports.

For example, if your custom role needs access to the subject areas secured by Workforce Transaction Analysis duty role, you must grant the following OTBI duty roles for both OBI and HCM applications in APM otherwise users will not see data in OTBI.

Duty Role	APM Location
Workforce Transaction Analysis Duty	Under the <b>obi</b> application
Workforce Transaction Analysis Duty(HCM)	Under the <b>hcm</b> application

Workforce Transaction Analysis Duty in OBI grants users OTBI object access to Answers and OTBI reporting objects (subject areas and report catalog):

- BI Author Role provide access to the ad-hoc reporting tool Oracle Business Intelligence Answers
- Workforce Transactional Analysis Duty provides access to OTBI subject areas and report catalog:
  - OTBI Subject Areas:
    - Workforce Management - Employment Contract Real Time
    - Workforce Management - Grade Rate Real Time
    - Workforce Management - Person Real Time
    - Workforce Management - Position Real Time
    - Workforce Management - Work Relationship Real Time
    - Workforce Management - Worker Assignment Event Real Time
    - Workforce Management - Worker Assignment Real Time
  - OTBI Report Catalog:
    - /Shared Folders/Human Capital Management/Workforce Management
- Workforce Transaction Analysis Duty in HCM is assigned HCM data security privileges granting user access to Fusion data
  - Workforce Reporting Data Duty, providing access to person and assignment data
  - Workforce Structures Reporting Data Duty, providing access to workforce structures

### BI Admin, BI Author and BI Consumer

BI Admin, BI Author and BI Consumer are the default BI roles that allow users to perform tasks in Oracle Business Intelligence. These BI job roles have no direct access to OTBI subject areas but they grant a user different access levels within BI, e.g. run, edit, create a report, create a BI dashboard, create a BIP data model, etc.

What OBIEE features are enabled for Fusion Cloud Services and OBIEE security privileges by roles are documented in the Appendix: Fusion HCM Cloud OBIEE Security Privileges by Roles

Out of box, OTBI Transaction Analysis duty roles inherit BI Author role. BI Administrator and BI Consumers roles are not provisioned for HCM job roles. This security provisioning has the following ramifications for custom security configuration:

- Out of box HCM job roles don't have BI Administrator privilege to create BI Publisher data model. Customers need to grant BI Administrator duty role to a user or to a custom job role to create BIP data models.
- All OTBI users can create and edit OTBI analyses. To remove the report authoring privilege, the delivered OTBI Transaction Analysis duty role needs to be modified by replacing BI Author duty with BI Consumer duty role. Beginning with Fusion HCM Release 9, Line Manager will have BI Consumer instead of BI Author duty role. This will restrict Line Managers to only run reports but not create reports.

OTBI Duty Role inherits BI Author role that allows users to create or edit reports:

Goal Management Transaction Analysis Duty

Analyzes Workforce Goals transactional information

General

Application Role Hierarchy

External Role Mapping

External User Mapping

Inherits

Is Inherited By

Goal Management Transaction Analysis Duty inherits permission from the following roles.

Actions

View

+ Add

✖ Remove

Open

Find Policies

Display Name	Name	Description
BI Author Role	BIAuthor	
BI Consumer Role	BIConsumer	

OTBI Duty Role is modified to grant BI Consumer role to restrict reporting authoring access:

Goal Management Transaction Analysis Duty

Analyzes Workforce Goals transactional information

General

Application Role Hierarchy

External Role Mapping

External User Mapping

Inherits

Is Inherited By

Goal Management Transaction Analysis Duty inherits permission from the following roles.

Actions

View

+ Add

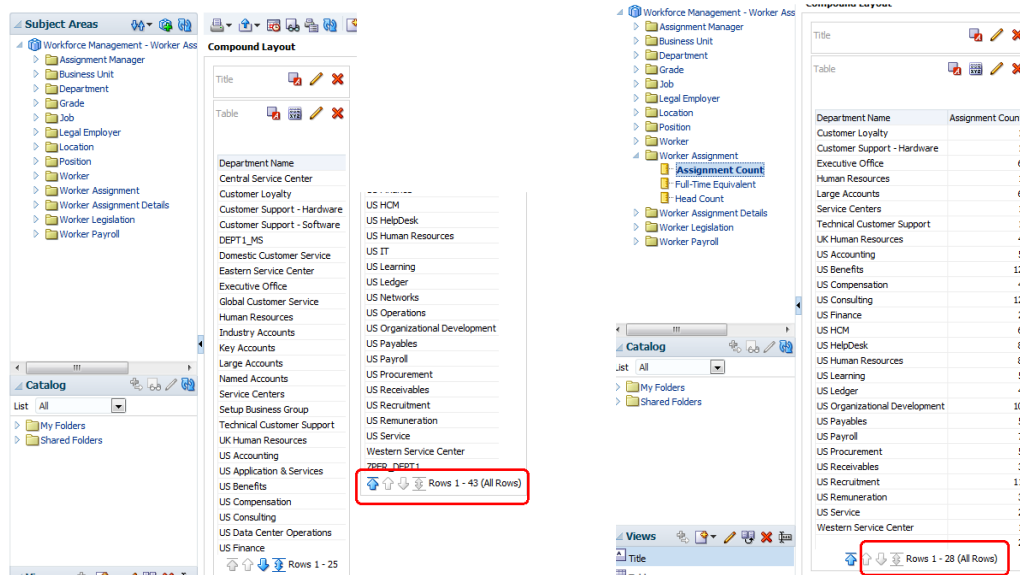
✖ Remove

Open

Find Policies

Display Name	Name	Description
BI Consumer Role	BIConsumer	

For example, when selecting Department Name from Workforce Management – Worker Assignment subject area, you see all 43 departments configured in HCM. When you add Assignment Count to the report, your security profile is then applied and you can only see workers in the 28 departments that you are allowed to see.




Assignment Manager is a hierarchical structure representing the worker/manager reporting relationship. This is the only secured HCM dimension in OTBI. Assignment Manager hierarchy is restricted to line managers based on the user login. A line manager can only see people below the supervisor reporting chain. If the logged-in user doesn't have any direct reports, he will not see data returned when Assignment Manager is included in the report. You should reserve the use of Assignment Manager for line managers only. For other job roles who are not line managers but need to view supervisor information, e.g. HR Analyst, you can use Manager Name in the Worker dimension instead of Assignment Manager hierarchy.

## Commonly Asked OTBI Security Questions

**Answer:** When only one dimension is selected in an analysis, the dimension is not secured by the user's data security and all dimension values will return. When one more dimension or metric is added to the analysis, the result will be filtered by the user's security profile.





**Question:** Why don't I see any data in my report when my user is assigned the delivered Compensation Manager job role?

**Answer:** Instead of assigning Compensation Manager job role (CMP\_COMPENSATION\_MANAGER\_JOB) directly to the user, you need to create a data role that combines Compensation Manager job role with the user's data security profile, e.g. 'Compensation Manager – View All' and assign this Data role to the user. The Data role inherits Compensation Manager Job role that grants OTBI access to compensation subject areas.

**Question:** I have created a custom job role for Compensation Manager, I have also assigned a data role that gives the users access to UK data but the users are not able to see any data from Compensation – Salary Details Real Time subject area.

**Answer:** Payroll Element attributes in the Compensation – Salary Details Real Time subject area are secured by Payroll Reporting Data duty role. The delivered Compensation Analyst and Compensation Manager Job roles do not inherit Payroll Reporting Data duty. The user must be granted the Payroll Reporting Data Duty to view Payroll Element attributes. You need to map Payroll Reporting duty role to your custom role and then regenerate the data role.

**Question:** Why an OTBI reports run for the author but getting error message or no data when the report is viewed by any user other than the author?

**Answer:** If a custom job role is used, please check the custom job role has been granted the proper OTBI Transaction Analysis duty roles in both **hcm** and **obi applications** in APM. And the job role is assigned with a proper data role e.g. XX\_HR\_Analyst\_View All.

**Question:** How do I give Line Mgr access to Compensation subject areas?

**Answer:** Out of box, Line Manager does not have access to the compensation subject areas. Create a custom Line Manager job role and map the Compensation Transaction Analysis Duty for both the HCM and OBI applications, and then regenerate the data role. (Refer to Michele Chung's security doc)

**Question:** how do I grant Line Manager access to talent management subject areas?

**Answer:** Out of box, Line Manager does not have access to talent management subject areas. You need to create a custom job role and grant the OTBI talent management analysis duty roles to this custom job role.

**Example:** Create a custom job role that grants OTBI reporting access to worker assignment, performance management, goal management and talent profile information

## Custom View Talent OTBI Analysis

General External Role Hierarchy **Application Role Mapping**

**Mapping For: Custom View Talent OTBI Analysis**  
Each application in the table below can be expanded to see the corresponding Application Roles within their hierarchy. Select an Application Role below and click the Open button to launch a view details in a new tab.

Actions View Map Remove Roles Open Role Find Policies

Display Name	Description
hcm	
Goal Management Transaction Analysis Duty	Analyzes Workforce Goals transactional information
Performance Management Transaction Analysis Duty	Analyzes Workforce Performance Management transactional i
Workforce Profile Transaction Analysis Duty	Analyzes Workforce Profile transactional information
Workforce Transaction Analysis Duty	Analyzes Workforce transactional information
obi	
Goal Management Transaction Analysis Duty	Analyzes Workforce Goals transactional information
Performance Management Transaction Analysis Duty	Analyzes Workforce Performance Management transactional i
Workforce Profile Transaction Analysis Duty	Analyzes Workforce Profile transactional information
Workforce Transaction Analysis Duty	Analyzes Workforce transactional information

**Question:** How do I grant Line Manager read-only access to OTBI reports?

**Answer:** You can modify the delivered OTBI Transaction Analysis duty roles by removing BI Author and adding BI Consumer duty role. This will remove all job roles that inherit these OTBI transaction analysis duty roles the ability to create or edit analyses in Answers. For the job roles that still need OTBI report authoring access, you can then add BI Author role to the job/abstract roles.

Example: Remove BI Author role for 'Goal Management Transaction Analysis Duty' and Add BI Consumer role.

You need to remove BI Author role for all affected OTBI Transaction Analysis duty roles. If the BI Author is remaining in any of the Transaction Analysis Duty roles in the job role, the user will have BI Author access to all Transaction Analysis Duty roles.

Starting in Fusion release 9, Line Manager will no longer have BI Author privilege to create reports; instead they will be granted BI Consumer read-only access to run reports.

## Goal Management Transaction Analysis Duty

Analyzes Workforce Goals transactional information

General **Application Role Hierarchy** External Role Mapping External User Mapping

**Inherits** | Is Inherited By

Goal Management Transaction Analysis Duty inherits permission from the following roles.

Actions View Add Remove Open Find Policies

Display Name	Name	Description
BI Author Role	BIAuthor	
BI Consumer Role	BIConsumer	

**Goal Management Transaction Analysis Duty**

Analyzes Workforce Goals transactional information

General **Application Role Hierarchy** External Role Mapping External User Mapping

**Inherits** | Is Inherited By

Goal Management Transaction Analysis Duty inherits permission from the following roles.

Actions View Add Remove Open Find Policies

Display Name	Name	Description
BI Consumer Role	BIConsumer	

## Appendix

### Delivered OTBI Transaction Analysis Duty Roles

#### Fusion Job Role to OTBI Duty Role Matrix

Fusion Job Roles	Absence Management Transaction Analysis Duty	Benefits Transaction Analysis Duty	Compensation Transaction Analysis Duty	Documents of Record Transaction Analysis Duty	Goal Management Transaction Analysis Duty	Payroll Transaction Analysis Duty	Performance Management Transaction Analysis Duty	Workforce Profile Transaction Analysis Duty	Workforce Transaction Analysis Duty	Talent Review Meeting Analysis Duty
Benefits Manager		X								
Compensation Analyst			X							
Compensation Manager			X							
Human Resource Analyst	X			X	X		X	X	X	X
Line Manager	X								X	
Payroll Manager						X				

#### OTBI Duty Role Subject Area Security Matrix

OTBI Subject Areas	Absence Management Transaction Analysis Duty	Benefits Transaction Analysis Duty	Compensation Transaction Analysis Duty	Documents of Record Transaction Analysis Duty	Goal Management Transaction Analysis Duty	Payroll Transaction Analysis Duty	Performance Management Transaction Analysis Duty	Workforce Profile Transaction Analysis Duty	Workforce Transaction Analysis Duty	Talent Review Meeting Analysis Duty
Benefits - Action Items Real Time Benefits - Enrollment Opportunities Real Time Benefits - Enrollments Real Time Benefits - Potential Life Events Real Time Benefits - Setup Real Time		X								
Compensation - Salary Details Real Time Compensation - Stock Details Real Time Compensation - Workforce Compensation Budgets Real Time Compensation - Workforce Compensation Real Time			X							
Payroll - Element Entries Real Time Payroll - Payments Costing Real Time Payroll - Payments Distribution Real Time Payroll - Payroll Run Costing Real Time						X				

OTBI Subject Areas	Absence Management Transaction Analysis Duty	Benefits Transaction Analysis Duty	Compensation Transaction Analysis Duty	Documents of Record Transaction Analysis Duty	Goal Management Transaction Analysis Duty	Payroll Transaction Analysis Duty	Performance Management Transaction Analysis Duty	Workforce Profile Transaction Analysis Duty	Workforce Transaction Analysis Duty	Talent Review Meeting Analysis Duty
Payroll - Payroll Run Results Real Time Payroll - Retroactive Pay Real Time										
Workforce Goals - Goal Alignments Real Time Workforce Goals - Goal Status Overview Real Time Workforce Goals - Goal Tasks Real Time Workforce Goals - Target Outcomes Real Time					X					
Workforce Management - Absence Real Time	X									
Workforce Management - Documents of Record Real Time				X						
Workforce Management - Employment Contract Real Time Workforce Management - Grade Rate Real Time Workforce Management - Person Real Time Workforce Management - Position Real Time Workforce Management - Work Relationship Real Time Workforce Management - Worker Assignment Event Real Time Workforce Management - Worker Assignment Real Time									X	
Workforce Performance - Performance Document Status Real Time Workforce Performance - Performance Rating Distribution Real Time Workforce Performance - Performance Rating Real Time Workforce Performance - Performance Task Status Real Time							X			
Workforce Profiles - Library Objects Real Time Workforce Profiles - Model Profile Real Time Workforce Profiles - Person Profile Real Time								X		
Workforce Talent Review - Talent Review Meeting Real Time										X

The out-of-box OTBI reports reside in the shared folder: /Shared Folders/Human Capital Management/

Report catalog access is secured by OTBI Transaction Analysis duty roles at each functional sub-folder levels:

OTBI Web Catalog Sub-folders	Absence Management Transaction Analysis Duty	Benefits Transaction Analysis Duty	Compensation Transaction Analysis Duty	Goal Management Transaction Analysis Duty	Payroll Transaction Analysis Duty	Performance Management Transaction Analysis Duty	Workforce Profile Transaction Analysis Duty	Workforce Transaction Analysis Duty	BI Administrator
Benefits		Read Only							Full Control
Career						Read Only			Full Control
Compensation			Read Only						Full Control
Payroll					Read Only				Full Control
Workforce Management	Read Only						Read Only	Read Only	Full Control

#### Fusion HCM Cloud OBIEE Security Privileges by Roles

OBIEE version 11.1.1.7.0

Component	Privilege	Description	Default Role Granted
Access	Access to Administration	Allows users to access the administration pages in Presentation Services.	BI Administrator
Admin: General	Manage Sessions	Shows the Manage Sessions link on the Presentation Services Administration page, which displays the Manage Sessions page in which users manage sessions.	BI Administrator
Admin: General	Manage Dashboards	Allows users to create and edit dashboards, including editing their properties.	BI Administrator
Admin: General	See Session IDs	Allows users to see session IDs on the Manage Sessions page.	BI Administrator
Admin: General	Issue SQL Directly	Shows the Issue SQL link on the Presentation Services Administration page, which displays the Issue SQL page in which users enter SQL statements.	BI Administrator
Admin: General	View System Information	Allows users to view information about the system at the top of the Administration page in Presentation Services.	BI Administrator
Admin: General	Manage Agent Sessions	Shows the Manage Agent Sessions link on the Presentation Services Administration page, which displays the Manage Agent Sessions page in which users manage agent sessions.	BI Administrator
Admin: General	Manage Device Types	Shows the Manage Device Types link on the Presentation Services Administration page, which displays the Manage Device Types page in which users manage device types for agents.	BI Administrator

Component	Privilege	Description	Default Role Granted
Admin: General	See Privileged Errors	Allows users to see privileged error messages. Users can see detailed error messages about database connections or other details when lower level components fail.	BI Administrator
Admin: Security	Manage Catalog Groups	Shows the Manage Catalog Groups link on the Presentation Services Administration page, which displays the Manage Catalog Groups page in which users edit Catalog groups.	BI Administrator
Admin: Security	Manage Privileges	Shows the Manage Privileges link on the Presentation Services Administration page, which displays the Manage Privileges page in which users manage the privileges that are described in this table.	BI Administrator
Admin: Security	Set Ownership of Catalog Objects	Allows users to take ownership of catalog items that they did not create and do not own. Shows the "Set ownership of this item" link for individual objects and the "Set ownership of this item and all subitems" link for folders on the Properties page.	BI Administrator
Answers	Save Content with HTML Markup	In addition to allowing HTML markup in Answers, this also allows users to save mission and vision statements in Oracle Scorecard and Strategy Management.	BI Administrator
Answers	Create Analysis from Simple SQL	Allows users to select the Create Analysis from Simple SQL option in the Select Subject Area list.	BI Administrator
Catalog	Reload Metadata	Allows users to click the Reload Server Metadata link from the Refresh menu in the toolbar of the Subject Areas pane.	BI Administrator
Catalog	Archive Catalog	Allows users to archive the folders and objects in the catalog.	BI Administrator
Catalog	Unarchive Catalog	Allows users to unarchive catalog objects that have been archived previously.	BI Administrator
Delivers	Deliver Agents to Specific or Dynamically Determined Users	Allows users to deliver agents to other users.	BI Administrator
Delivers	Modify Current Subscriptions for Agents	Allows users to modify the current subscriptions for agents, including unsubscribing users.	BI Administrator
Formatting	Save SystemWide Column Formats	Allows users to save systemwide defaults when specifying formats for columns.	BI Administrator
Scorecard	Create/Edit Perspectives	Allows users to create and edit perspectives.	BI Administrator
Access	Access to Answers	Allows users to access the analysis editor.	BI Author
Access	Access to BI Composer	Allows users to access the BI Composer wizard.	BI Author
Access	Access to Delivers	Allows users to create and edit agents.	BI Author
Access	Access to KPI Builder	Allows users to create KPIs.	BI Author
Actions	Create Navigate Actions	Set the privileges that determine whether Actions functionality is available to users and specify which user types can create Actions.	BI Author
Actions	Create Invoke Actions	Set the privileges that determine whether Actions functionality is available to users and specify which user types can create Actions.	BI Author
Admin: Catalog	Change Permissions	Allows users to modify permissions for catalog objects.	BI Author
Answers	Create Views	Allows users to create views.	BI Author

Component	Privilege	Description	Default Role Granted
Answers	Create Prompts	Allows users to create prompts.	BI Author
Answers	Access Advanced Tab	Allows users to access the Advanced tab in the Analysis editor.	BI Author
Answers	Edit Column Formulas	Allows users to edit column formulas.	BI Author
Answers	Enter XML and Logical SQL	Allows users to use the Advanced SQL tab.	BI Author
Answers	Create Advanced Filters and Set Operations	Allows users access to the following components:	BI Author
Answers	Save Filters	Allows users to save filters.	BI Author
Briefing Book	Add To or Edit a Briefing Book	Allows users to see the Add to Briefing Book link on dashboard pages and analyses and the Edit link in briefing books.	BI Author
Catalog	See Hidden Items	Allows users to see hidden items in catalog folders. Users can also select the Show Hidden Items box on the Catalog page.	BI Author
Catalog	Create Folders	Allows users to create folders in the catalog.	BI Author
Catalog	Perform Global Search	Allows user to search the catalog using the basic catalog search, which is included by default with the Oracle BI Enterprise Edition installation.	BI Author
Catalog	Perform Extended Search	Allows users to search the catalog using the full-text search. To provide full-text search, the administrator must have integrated Oracle BI Enterprise Edition with Oracle Secure Enterprise Search.	BI Author
Conditions	Create Conditions	Allows users to create or edit named conditions.	BI Author
Dashboards	Assign Default Customizations	Allows users to save and view later dashboard pages in their current state with their most frequently used or favorite choices for items.	BI Author
Delivers	Create Agents	Allows users to create agents.	BI Author
Delivers	Publish Agents for Subscription	Allows users to publish agents for subscription.	BI Author
Delivers	Chain Agents	Allows users to chain agents.	BI Author
RSS Feeds	Access to RSS Feeds	Allows users to subscribe to and receive RSS feeds with alerts and contents of folders.	BI Author
Scorecard	Create/Edit Scorecards	Allows users to create and edit scorecards.	BI Author
Scorecard	Create/Edit Objectives	Allows users to create and edit objectives.	BI Author
Scorecard	Create/Edit Initiatives	Allows users to create and edit initiatives.	BI Author
Scorecard	Create Views	Allows users to create and edit scorecard objects that present and analyze corporate strategy, such as vision and mission statements, strategy maps, cause & effect maps, and so on.	BI Author
Scorecard	Create/Edit Causes and Effects Linkages	Allows users to create and edit cause and effect relationships.	BI Author
Scorecard	Create/Edit KPIs	Allows users to create and edit KPIs and KPI watchlists.	BI Author
Subject Area (by its name)	Access within Oracle Business Intelligence	Allows users to access the specified subject area within the Oracle Business Intelligence editor.	BI Author
Views	Add/Edit AnalyzerView	Allows users to access the Analyzer view.	BI Author
Views	Add/Edit Column SelectorView	Allows users to create and edit column selector views.	BI Author
Views	Add/Edit CompoundView	Allows users to create and edit compound layout views.	BI Author
Views	Add/Edit GraphView	Allows users to create and edit graph views.	BI Author
Views	Add/Edit FunnelView	Allows users to create and edit funnel graph views.	BI Author

Component	Privilege	Description	Default Role Granted
Views	Add/Edit GaugeView	Allows users to create and edit gauge views.	BI Author
Views	Add/Edit Micro Chart View	Allows users to create and edit microcharts.	BI Author
Views	Add/Edit FiltersView	Allows users to create and edit filter views.	BI Author
Views	Add/Edit Dashboard PromptView	Allows users to create and edit dashboard prompt views.	BI Author
Views	Add/Edit Performance TileView	Allows users to create and edit performance tile views.	BI Author
Views	Add/Edit Static TextView	Allows users to create and edit static text views.	BI Author
Views	Add/Edit Legend View	Allows users to create and edit legend views.	BI Author
Views	Add/Edit MapView	Allows users to create and edit map views.	BI Author
Views	Add/Edit NarrativeView	Allows users to create and edit narrative views.	BI Author
Views	Add/Edit No ResultsView	Allows users to create and edit no result views.	BI Author
Views	Add/Edit Pivot TableView	Allows users to create and edit pivot table views.	BI Author
Views	Add/Edit Report PromptView	Allows users to create and edit prompt views.	BI Author
Views	Add/Edit Create SegmentView	Allows users to create and edit segment views.	BI Author
Views	Add/Edit SelectionStepsView	Allows users to create and edit selection steps views.	BI Author
Views	Add/Edit Logical SQLView	Allows users to create and edit logical SQL views.	BI Author
Views	Add/Edit TableView	Allows users to create and edit table views.	BI Author
Views	Add/Edit Create Target ListView	Allows users to create and edit target list views.	BI Author
Views	Add/Edit TickerView	Allows users to create and edit ticker views.	BI Author
Views	Add/Edit TitleView	Allows users to create and edit title views.	BI Author
Views	Add/Edit TrellisView	Allows users to create and edit trellis views.	BI Author
Views	Add/Edit View SelectorView	Allows users to create and edit view selector views.	BI Author
Views	Add/Edit Treemap View	Note: This privilege applies to Oracle BI EE 11.1.1.7.10 and later versions, and might not be available in earlier versions. For more information about Oracle BI EE 11.1.1.7.10, see "New Features for 11.1.1.7.10."	BI Author
Access	Access to Dashboards	Allows users to view dashboards.	BI Consumer
Access	Access to Briefing Books	Allows users to view and download briefing books.	BI Consumer
Access	Access to Mobile	Allows users to access Presentation Services from the Oracle Business Intelligence Mobile application.	BI Consumer
Access	Access to Oracle BI for Microsoft Office	Shows the Download BI Desktop Tools link with the Oracle BI for MS Office option.	BI Consumer
Access	Access to Oracle BI Client Installer	Allows users to download the Oracle BI Client Tools installer, which installs the Business Intelligence Administration Tool and the Oracle Business Intelligence Job Manager.	BI Consumer
Access	Catalog Preview Pane UI	Allows users access to the catalog preview pane, which shows a preview of each catalog object's appearance.	BI Consumer
Access	Access to Export	Allows users access to all export functionality, such as the Export link.	BI Consumer
Access	Access to Scorecard	Allows users access to Oracle BI Scorecard, and this also allows users access to KPI watchlists.	BI Consumer
Admin: General	See SQL Issued in Errors	Allows users to see SQL statements that are returned by the BI Server in error messages.	BI Consumer



Component	Privilege	Description	Default Role Granted
Admin: Security	Access to Permissions Dialog	Allows users to access the Permissions dialog, where they can set permissions for a catalog object.	BI Consumer
Briefing Book	Add to snapshot briefing book	Allows users to add content to a briefing book as a snapshot (that is, the Snapshot option for Content Type is available in the Save Briefing Book Content dialog and in the Page Properties dialog).	BI Consumer
Briefing Book	Download Briefing Book	Allows users to download briefing books.	BI Consumer
Catalog	Personal Storage	Allows users to have write access to their own My Folders folders and create content there. If users do not have this privilege, then they can receive email alerts but cannot receive dashboard alerts.	BI Consumer
Dashboards	Save Customizations	Allows users to save and view later dashboard pages in their current state with their most frequently used or favorite choices for items.	BI Consumer
Dashboards	Create Bookmark Links	Allows users to create bookmark links by showing the Create Bookmark Link option on the Page Options menu on a dashboard page, but only if the ability to create bookmark links has been enabled.	BI Consumer
Dashboards	Create Prompted Links	Allows users to create prompted links by showing the Create Prompted Link option on the Page Options menu on a dashboard page, but only if the ability to create prompted links has been enabled.	BI Consumer
Dashboards	Export Entire Dashboard To Excel	Allows users to download an entire dashboard to Excel by showing the Export entire dashboard option on the Page Options menu on a dashboard page.	BI Consumer
Dashboards	Export Single Dashboard Page To Excel	Allows users to download a single dashboard page to Excel by showing the Export current page option on the Page Options menu on a dashboard page.	BI Consumer
Home and Header	Access Home Page	Allows users to access the home page from the global header.	BI Consumer
Home and Header	Access Catalog UI	Allows users to access the catalog from the global header.	BI Consumer
Home and Header	Access Catalog Search UI	Allows users to access the search fields from the global header.	BI Consumer
Home and Header	Simple Search Field	Allows users to access the Search field in the global header.	BI Consumer
Home and Header	Advanced Search Link	Allows users to access the Advanced link in the global header.	BI Consumer
Home and Header	Open Menu	Allows users to access the Open menu from the global header.	BI Consumer
Home and Header	New Menu	Allows users to access the New menu from the global header.	BI Consumer
Home and Header	Help Menu	Allows users to access the Help menu from the global header.	BI Consumer
Home and Header	Dashboards Menu	Allows users to access the Dashboards menu from the global header.	BI Consumer
Home and Header	Favorites Menu	Allows users to access the Favorites menu from the global header.	BI Consumer
Home and Header	My Account Link	Allows users to access the My Account link when they click on their Signed In As name in the global header.	BI Consumer
Home and Header	Custom Links	Allows users to access the custom links that the administrator added to the global header.	BI Consumer
Mobile	Enable Local Content	Allows users of Oracle Business Intelligence Mobile to save local copies of BI content to their mobile devices.	BI Consumer
Mobile	Enable Search	Allows users of Oracle Business Intelligence Mobile to search the catalog.	BI Consumer
My Account	Access to My Account	Allows users to access the My Account dialog.	BI Consumer

Component	Privilege	Description	Default Role Granted
My Account	Change Preferences	Allows users to access the Preferences tab of the My Account dialog.	BI Consumer
My Account	Change Delivery Options	Allows users to access the Delivery Options tab of the My Account dialog.	BI Consumer
Scorecard	View Scorecards	Allows users to view scorecards. A user needs either this privilege or the Scorecard - Create/Edit Scorecards privilege to access the KPI watchlist editor to either view or edit KPI watchlists.	BI Consumer
Scorecard	Add Annotations	Allows users to add comments to KPIs and scorecard components.	BI Consumer
Scorecard	Override Status	Allows users to override statuses of KPIs and scorecard components.	BI Consumer
Scorecard	Write Back to Database for KPI	Allows users to enter and submit a KPI's actual and target settings values to the repository.	BI Consumer
Scorecard	Add Scorecard Views to Dashboards	Allows users to add scorecard views (such as strategy trees) and KPI watchlists to dashboards.	BI Consumer
Admin: Security	User Population - Can List Users	Allows users to see the list of users for which they can perform tasks such as assigning privileges and permissions.	BI Consumer, BI System
Admin: Security	User Population - Can List Groups	Allows users to see the list of groups for which they can perform tasks such as assigning privileges and permissions.	BI Consumer, BI System
Admin: Security	User Population - Can List Application Roles	Allows users to see the list of application roles for which they can perform tasks such as assigning privileges and permissions.	BI Consumer, BI System



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