

Oracle Fusion Cloud Customer Experience

Securing Sales and Fusion Service



Oracle Fusion Cloud Customer Experience
Securing Sales and Fusion Service

F77857-08

Copyright © 2011, 2025, Oracle and/or its affiliates.

Author: Carmen Myrick, Shannon Connaire, Dinesh Venugopal, Sekhar Pappu, Jiri Weiss

Contents

Get Help	i
1 About This Guide	1
Audience and Scope	1
Related Guides	1
2 Authentication	3
Authentication and Identity Management	3
Single Sign-On Authentication	3
3 Location Based Access	5
Overview	5
How Location-Based Access Works	5
Enable and Disable Location-Based Access	6
FAQs for Location Based Access	7
4 Single Sign-On (SSO)	11
Oracle Applications Cloud as the Single Sign-On (SSO) Service Provider	11
Configure Single Sign-On	12
FAQs on Single Sign-On	14
5 API Authentication	17
Configure Outbound API Authentication Using JWT Custom Claims	17
Configure Outbound API Authentication Using Three Legged OAuth Authorization Protocol	18
Configure Inbound Authentication	20
Is there a recommended format for the public certificate?	21
6 Export and Import of Security Setup Data	23
Overview of Security Data Import and Export	23
Export and Import of Security Console Data	23

Export and Import of Custom Roles, Role Hierarchies, and Role-to-Privilege Assignments	25
--	----

7 User and Role Reports 27

User and Role Access Audit Report	27
User Role Membership Report	29
User Password Changes Audit Report	31
Inactive Users Report	32
User History Report	34

8 Review and Analyze Roles on the Security Console 35

Overview of Reviewing Roles	35
Graphical and Tabular Role Visualizations	35
Review Role Hierarchies	36
Simulate Navigator Menus	37
Review Role Assignments	38
Compare Roles	39
Compare Users	40
Copy Roles from One User to Another	41
Analytics for Roles	42
Analytics for Data Resources	43
View Role Information Using Security Dashboard	44

9 Create and Edit Job, Abstract, and Duty Roles 45

Overview of Security Configuration	45
Guidelines for Copying Roles	45
Copy Job or Abstract Roles	48
Edit Job or Abstract Roles	49
Create Job and Abstract Roles	51
Copy and Edit Duty Roles	53
Create a Custom Role with Limited Access	55

10 Access Groups 57

Use Access Groups to Secure Data	57
----------------------------------	----

11 Data Security Policy to Access Group Rule Migration 59

Migration Overview	59
--------------------	----

Migrate from Data Security Policies to Access Group Rules	59
Account Object Mapping	66
Activity Object Mapping	69
Activity Assignee Object Mapping	75
Asset Object Mapping	80
Business Plan Object Mapping	85
Campaign Object Mapping	88
Contact Object Mapping	89
Contest Object Mapping	93
Deal Registration Object Mapping	94
Duplicate Identification Batch Object Mapping	98
Duplicate Resolution Request Object Mapping	98
Forecast Territory Details Object Mapping	99
Goal Object Mapping	101
Goal Participant Object Mapping	101
Household Object Mapping	102
KPI Object Mapping	105
Lead Object Mapping	106
MDF Budget Object Mapping	113
MDF Claim Object Mapping	114
MDF Request Object Mapping	118
Note Object Mapping	122
Opportunity Object Mapping	129
Partner Object Mapping	139
Price Book Header Object Mapping	141
Product Object Mapping	142
Product Group Object Mapping	142
Quote and Order Object Mapping	142
Resource Object Mapping	144
Sales Resource Quota Object Mapping	145
Sales Territory Object Mapping	148
Sales Territory Proposal Object Mapping	150

Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Some application pages have help icons  to give you access to contextual help. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons. If the page has contextual help, help icons will appear.

Get Support

You can get support at [My Oracle Support](#). For accessible support, visit [Oracle Accessibility Learning and Support](#).

Get Training

Increase your knowledge of Oracle Cloud by taking courses at [Oracle University](#).

Join Our Community

Use [Cloud Customer Connect](#) to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest [ideas](#) for product enhancements, and watch events.

Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program](#). Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to oracle_fusion_applications_help_ww_grp@oracle.com.

Thanks for helping us improve our user assistance!

1 About This Guide

Audience and Scope

This guide provides you with the concepts and procedures you need to implement and administer security.

You perform some of the tasks described in this guide only when you're implementing the sales applications. But most tasks can be performed at any time and as new requirements emerge. Use the guide to learn more about topics such as these:

- How role-based access control is implemented in the sales applications.
- How users gain visibility to object data.
- How to create and manage application users, and how to provision users with roles to provide them with access to application functions and data.
- How to set up, manage, and use the Security Console and the Sales and Service Access Management work areas.
- How to create security artifacts, such as security policies and roles.

During implementation, you perform security-related tasks from a functional area task list. Once the implementation is complete, you can perform most security-related tasks on the Security Console or the Sales and Service Access Management work area. Any exceptions are identified in relevant topics. For example, you create users in the Manage Users work area, not on the Security Console.

Related Guides

Refer to the following guides for additional information about implementing and administering Oracle Fusion Cloud Sales and Fusion Service.

Title	Description
Oracle Fusion Cloud Sales Automation: Implementing Sales	Explains how to implement a sales force automation solution using features of both Digital Sales (Next Gen Sales) and CX Sales. See the Implementation Reference guide for additional setups.
Oracle Fusion Cloud Sales Automation: Implementation Reference	Implementation reference guide for Oracle Sales.
Oracle Fusion Service: Implementing Service Center with the Classic User Experience	Describes how to set up service components and features of Oracle Fusion Service.
Oracle Fusion Service: Implementing Service Center with the Redwood User Experience	Describes implementing Service Center with the Redwood User Experience.

Title	Description
Oracle Fusion Cloud Applications: Configuring Applications Using Application Composer	Describes how to use Application Composer to configure and extend Oracle Applications Cloud.
Oracle Fusion Cloud Applications: Configuring and Extending Applications	Describes how to use runtime tools such as Page Composer or flexfields to configure and extend Oracle Applications Cloud.
Oracle Fusion Cloud Customer Experience: Understanding Import and Export Management for Sales and Fusion Service	Describes how to import legacy and other data into Oracle CX Sales and Fusion Service using Import and Export Management, and export data out of these applications.
Oracle Fusion Cloud Customer Experience: Security Reference for Sales and Fusion Service	Provides a reference to roles, role hierarchies, privileges, and policies as delivered for the Sales and Fusion Service offerings.
Oracle Fusion Cloud Customer Experience: Creating and Administering Analytics for Sales and Fusion Service	Explains how to create, edit, and embed analytics in Sales and Fusion Service applications.
Oracle Fusion Cloud Customer Experience: Subject Areas for Transactional Business Intelligence in Sales and Fusion Service	Provides descriptions, business questions, and security roles for the subject areas in Sales and Fusion Service.
Oracle Fusion Cloud Customer Experience: Implementing Customer Data Management	Describes tasks to configure and set up Oracle CX Customer Data Management capabilities, such as, duplicate identification, duplicate resolution, address verification, and data enrichment.
Oracle Fusion Cloud Sales Automation: Security Reference for Incentive Compensation	Provides a reference of roles, role hierarchies, privileges, and policies as delivered for Incentive Compensation.
Oracle Fusion Cloud Sales Automation: Implementing Incentive Compensation	Describes how to configure and set up Incentive Compensation.
Oracle Fusion Cloud Customer Experience: Understanding Scheduled Processes	Describes the scheduled processes for Oracle Fusion Cloud Sales and Oracle Fusion Service and contains guidance on how to use them.

Related Topics

- [Oracle Help Center](#)

2 Authentication

Authentication and Identity Management

Read this topic for a quick overview of the authentication and identity management services provided by Oracle for Cloud Applications.

Standard Authentication for Cloud Applications

Authentication, the process of verifying that a user is who they claim to be, is applied to all users, automated agents, or Web services that access an Oracle Cloud application. User credentials are checked at login and access is then granted or denied. In the standard method of authentication in Oracle Cloud environments, authentication providers validate user and application access based on a user name-password combination. Authentication providers also make user identity information available to other Cloud components when needed.

Identity Store

The Oracle Cloud authentication providers access the LDAP identity store, which is a logical repository of enterprise user identity data. Your LDAP directory stores definitions of LDAP user accounts.

In general, changes you make to user accounts are automatically synchronized between your sales application and your LDAP directory server. But you must also run processes on a daily basis to manage information exchange between your application and your LDAP directory server. For information, see the chapter about setting up application security.

Single Sign-On Authentication

You can opt to use single sign-on as your user authentication solution. Single sign-on enables users to sign in to a system using one set of credentials to access multiple applications.

You can set up Oracle Applications Cloud to operate as your single sign-on service provider. Doing so provides users with single sign-on access to applications and systems located across your enterprise network. Single sign-on also applies to signing out of the enterprise network. When users sign out from one application, they're automatically signed out from all applications on the network. For information on configuring single sign-on, see the chapter Single Sign-On.

3 Location Based Access

Overview

You can use location-based access to control user access to tasks and data based on their roles and computer IP addresses.

To enable location-based access and make a role public, you must have the IT Security Manager role. You can make a role public only when location-based access is enabled. To enable location-based access, you must register the IP addresses of computers from which the users usually sign in to the application.

Let's take an example to understand how location-based access is useful. You want your users to have complete access to tasks or features when they're signed in to the application from your office network. But you want to restrict the access if the users are signing in from a home computer or an internet kiosk. To control the user access, you must enable location-based access and register the IP addresses of your office computers on the Security Console. Users have complete access to the tasks or features if they sign in from office computers. If they sign in to the application from an unregistered computer, they can view and access only the generic tasks that aren't tied to any particular role. From an unregistered computer, they can't access the role-based tasks, which they could access from office.

What Happens When You Enable Location-Based Access

When you enable location-based access, users who sign in to the application from registered IP addresses have complete access to all tasks. On the other hand, users signing in from unregistered IP addresses have no access to their role-based tasks and data. However, you can grant complete access to these users too, when required. You can also grant public access (access from all IP addresses) to certain roles. The users associated with those roles can access all tasks, no matter which IP address they sign in from.

Prerequisite

To make sure that an administrator can regain access to Oracle Applications Cloud if an accidental account lock out occurs, the administrator must have the following settings configured:

- A valid email
- The IT Security Manager role
- Email notifications are enabled

Related Topics

- [How Location-Based Access Works](#)
- [Enable and Disable Location-Based Access](#)

How Location-Based Access Works

Location-based access combines the registered IP addresses of the computers and public roles to control access to the application.

Scenarios

To understand how location-based access works, consider the following scenarios and their effect on user access.

To avoid any access-related issue, carefully examine the given scenarios and plan well before you enable location-based access.

Scenario	Impact on User Access
You disable location-based access.	All users signing into the application from their respective computers continue to have the same level of access as they had earlier.
You enable location-based access and register few IP addresses, but don't grant public access to any role.	• Users who sign into the application from the registered IP addresses have access to their tasks as usual. • Users signing in from unregistered IP addresses can access only the generic tasks that aren't tied to any particular role.
You enable location-based access, register a few IP addresses, and grant public access to certain roles.	• Users signing in from the registered IP addresses have complete access. • Users signing in from unregistered IP addresses can't access any role-based tasks unless you grant public access to those roles. If you have made a role public, users can access all the tasks tied to that role.
You enable location-based access, but don't register any valid IP address, and don't grant public access to any role.	Users can sign in with valid credentials but can access only the generic tasks that aren't assigned to a specific role. CAUTION: Try and avoid this scenario. Register at least one valid IP address and grant public access (access from all IP addresses) to IT Security Manager role when you enable location-based access.

Related Topics

- [How can I make a role public?](#)
- [How can I ensure that I always have access to the Security Console?](#)

Enable and Disable Location-Based Access

You can enable location-based access so that you can allow users to access tasks and data based on their roles and registered IP addresses. By default, location-based access is disabled.

Before You Start

Configure location-based access in a test environment and try it out before you configure it in a production environment. You must have the IT Security Manager role to enable location-based access. Additionally, you must:

- Set up a valid email address. When required, the location-based access control reset or recovery notification is sent to that email address.

- Add yourself to the user category for which the notification template **ORA Administration Activity Request Template** is enabled.
- Keep the list of valid IP addresses ready.

Enable Location-Based Access

1. Click **Navigator > Tools > Security Console**.
2. On the Administration page, click the Location Based Access tab.
3. Select **Enable Location Based Access**.
4. In the **IP Address Allowlist** text box, enter one or more IP addresses separated by commas. For example, 192.168.10.12, 192.168.10.0. To indicate a range of IP addresses, you may follow the Classless Inter-Domain Routing (CIDR) notation, such as 192.168.10.0/24.

Note: You can enter the IP address (IPv4 only) range suffix only up to 32 in the **IP Address Allowlist** text box. For example, 168.1.192.0/32 to 168.1.192.32/32.

Tip: Your computer's IP address appears on the page. Add that IP address to the list so that your access to the application remains unaffected when you sign in from that computer.

5. Click **Save**.
6. Review the confirmation message and click **OK**.

After you enable location-based access, make the IT Security Manager's role public to access Security Console even from an unregistered IP address.

Disable Location-Based Access

To disable location-based access, deselect the **Enable Location Based Access** check box. The existing IP addresses remain in a read-only state so that you can reuse the same information when you enable the functionality again. At that point, you can add or remove IP addresses based on your need.

Related Topics

- [What is allowlisting?](#)
- [Why can't I see the Location Based Access tab on the Administration page?](#)

FAQs for Location Based Access

What is allowlisting?

Allowlisting is the process of granting trusted entities access to data or applications. When you enable location-based access and register the IP addresses of computers, you're storing those IP addresses as trusted points of access.

You can include IP Addresses of all computers hosting cloud applications that require access to Oracle Applications Cloud. In other words, you're allowlisting those IP addresses. Users signing in from those computers are considered as trusted users and have unrestricted access to the application.

Why can't I see the Location Based Access tab on the Administration page?

To prevent any incorrect configuration, the profile option Enable Access to Location Based Access Control associated with the Location Based Access tab is perhaps disabled. As a result, the tab isn't visible.

Contact your Application Implementation Consultant or Administrator to enable the profile option so that the Location Based Access tab appears on the Administration page.

How can I make a role public?

On the Security Console, identify the role that you want to make public. Except duty roles, you can make all roles public. On the Edit Role page, select the option Enable Role for Access from All IP Addresses and save the changes.

Note: You can make a role public only if location based access is enabled.

How can I ensure that I always have access to the Security Console?

If location-based access is enabled, you must add your computer's IP address to the allowlist. Also ensure that the IT Security Manager role is granted public access.

Even if you have to sign in from an unregistered computer, you can still access the Security Console and other tasks associated with the IT Security Manager role.

How can I disable Location-based Access when I am not signed in to the application?

You want to disable location-based access but you're locked out of the application and can't sign in to the Security Console. You must request access to the Administration Activity page using the URL provided to the administrators.

Make sure you have the following privileges:

- ASE_ADMINISTER_SSO_PRIV
- ASE_ADMINISTER_SECURITY_PRIV

After you request access to the Administration Activity page, you get an email at your registered email ID containing a URL with the following format:

```
https://<FA POD>/hcmUI/faces/AdminActivity
```

Click the URL and you're directed to a secure Administrator Activity page. Select the **Disable Location Based Access** option and click **Submit**. You receive a confirmation that location-based access is disabled. Immediately, you're redirected to the Oracle Applications Cloud page where you can sign in using your registered user name and password, and gain access to tasks and data as earlier.

How can I disable Location-based Access when I am locked out of the application?

If you're locked out of the application for some reason, use the following Administration Activity URL to disable location-based access. Only an administration user with the IT Security Manager job role can perform this unlock operation.

`https://<FA POD>/hcmUI/faces/AdminActivity`

Ensure that the following email notification templates are enabled:

- ORA Administration Activity Requested Template
- ORA Location Based Access Disabled Confirmation Template

How many IP Addresses can I enter in the IP Address Allowlist text box?

Ensure that the number of characters of the IP Address list that you enter in the IP Addresses Allowlist text box doesn't exceed 10000 characters.

If you want to include more IP addresses beyond the 10000 characters limit, then you must enable the profile option `ASE_EXTEND_LOCATION_BASED_ACCESS_CONTROL_IP_STORAGE`.

Here's how you enable the profile option:

1. In the Setup and Maintenance work area, open the task **Manage Administrator Profile Values**.
2. Search the following **Profile Option Code**:

`ASE_EXTEND_LOCATION_BASED_ACCESS_CONTROL_IP_STORAGE`

3. In the **Profile Value** drop-down list, select **Yes**.
4. Click **Save and Close**.

If your organization has a huge network of computers, then you can import a .csv file containing the list of IP addresses. If the number of characters in the file doesn't exceed 10000 characters, the import is successful. If the number of characters exceed the limit, the import completes with a warning.

Do these steps:

1. In the Setup and Maintenance work area, select **All Tasks** from the **Show** drop-down list in the Initial Users section.
2. Click **Actions** for the task **Manage Applications Security Preferences**.
3. Click **Import from CSV File, Create New**.
4. Click **Browse** to select the file.

5. Click **Submit**.

If the number of characters doesn't exceed 10000, the file is imported successfully. Else, the import completes with a warning.

4 Single Sign-On (SSO)

Oracle Applications Cloud as the Single Sign-On (SSO) Service Provider

Your users are likely to access different internal and external applications to perform their tasks. They might require access to different applications hosted by partners, vendors, and suppliers.

Certainly, users won't like authenticating themselves each time they access a different application. This is where you as the IT Manager can make a difference. You can provide your users with a seamless single sign-on experience, when you set up Oracle Applications Cloud as a single sign-on service provider.

Your users are registered with identity providers who store and manage their identity and credentials. In Security Console, you can add those identity providers so that you can verify those users without having to store that information.

Note: The identity service associated with your Oracle Fusion Cloud Applications is getting upgraded to the Oracle Cloud Infrastructure (OCI) Identity and Access Management (IAM) identity domain. If your environment is yet to be upgraded, you can continue to use the Security Console to configure the Single Sign-On settings with the information provided in this section. After your environment is upgraded, see *Federating with Identity Providers* to federate an Oracle Fusion Cloud Applications environment identity domain. See also *How do I find the identity domain for a Fusion Applications environment?*

Initial Sign-in

On a typical working day, when users sign in for the first time, they request access to an application or a web page. Oracle Applications Cloud, which is set up as a service provider, sends a verification request to the user's identity provider who's already added to the Security Console. The identity provider verifies the user credentials and sends the authorization and authentication response back to the service provider. After successful authentication, users are granted access to the required application or web page. Because the authentication is valid across your enterprise network, users don't have to sign in again when accessing different applications available on the same network. This entire trust chain between the service provider and the various identity providers is established using the Security Assertion Markup Language (SAML) 2.0 standards.

Final Sign-out

Single sign-on also applies to signing out of the enterprise network. When users sign out from one application, they're automatically signed out from all applications on the network. This is to prevent unauthorized access and to ensure that data remains secure all the time.

Prerequisite

To make sure that an administrator can regain access to Oracle Applications Cloud if an accidental account lock out occurs, the administrator must have the following settings configured:

- A valid email

- The IT Security Manager role
- Email notifications are enabled

Configure Single Sign-On

To enable single sign-on in your environment, complete the settings in the Single Sign-on Configuration section on the Security Console. This configuration lets you enable a login page and a page to which users must be redirected to after logging out of the application.

Do these steps:

1. On the Security Console, click the **Single Sign-On** tab.
2. In the Single Sign-On Configuration section, click **Edit**.
3. Enter the **Sign Out URL**. Users are redirected to this page once they sign out from the application.
Note: The Sign Out URL is the same for all the identity providers that you configure.
4. If **Enable Chooser Login Page** isn't enabled already, select it to display the service provider's single sign-on page along with your company's login page.
5. Click **Save**.

To configure Oracle Applications Cloud as the service provider, you must do the following:

- Review the service provider details
- Add an identity provider
- Test the identity provider
- Enable the identity provider

On the Security Console, go to the Single Sign-On tab and click **Create Identity Provider**.

Note: Oracle Cloud Applications support all SAML 2.0 compatible federation servers.

Review Service Provider Details

- Service provider metadata. The URL references to an XML file that you can download and view.
- Service provider signing certificate.
- Service provider encryption certificate.

You must share these details with the identity providers so that they can use them to configure your application as the associated service provider.

Add an Identity Provider

You can add as many identity providers as required to facilitate single sign-on for all your users. However, one of them must be the default identity provider.

Before you begin:

One of the important steps in adding an identity provider is to import the metadata content of the identity provider. The metadata file contains the authentication information and also the signed and encrypted certificates of the identity

provider. Make sure you have the metadata XML file or the URL readily available. Without the file, the setup isn't complete.

Note: Including encryption certificate in the metadata file is optional.

1. On the Security Console, click **Single Sign-On > Create Identity Provider**.
2. On the Identity Provider Details page, click **Edit** and enter the identity provider details:
 - Provide a **Name** and **Description** for the identity provider. Ensure that the identity provider name is unique for the partnership.
 - Select the relevant Name ID Format. If you have an email as the name of the identity provider, select **Email**. Otherwise, leave it as **Unspecified**.
 - Enter the **Relay State URL**. Users are directed to this URL to sign and authenticate irrespective of which application they want to access.
 - Select the **Default Identity Provider** check box to make this identity provider the default one.
3. Import the identity provider metadata:
 - If it's an XML file, click **Browse** and select it.
 - If it's available on a web page, select the **External URL** check box and enter the URL. External URL isn't stored in this configuration and is used only for importing the identity provider metadata during identity provider creation or modification.

Note: The metadata XML file must be Base64 encoded.

4. Click **Save and Close**.

Note: Oracle Applications Cloud can't be used as an identity provider.

Test the Identity Provider

Click the Diagnostics and Activation tab to verify if the identity provider that you added works as expected.

1. Click the **Test** button to run the diagnostics. The Initiate Federation SSO page appears.
2. Click the **Start SSO** button. You're prompted to enter the user credentials of any user registered with the identity provider. The test validates whether the federation single sign-on is successful or not. The result summary includes the following details:
 - Status of authentication: success or failure
 - The attributes passed in the assertion
 - The assertion message in XML

You can review the log messages that appear in the Federation Logs section to identify if there are any configuration issues with the identity provider.

Note: You must run the test whenever there's a change in the identity provider configuration.

Enable the Identity Provider

If everything looks fine, you can go ahead and enable the identity provider. While you're on the Diagnostics and Activation page, click **Edit** and select the **Enable Identity Provider** check box. The identity provider is now active.

Note: You can enable an identity provider only after you import service provider metadata into the identity provider.

FAQs on Single Sign-On

Does the service provider store user passwords?

No. Passwords are stored with the identity providers. When a user signs in, the identity provider authenticates the password, authorizes the request to access an application, and sends that confirmation back to the service provider.

The service provider then allows users to access the application or web page.

Can I set up an identity provider without enabling it?

Yes, you can set up an identity provider and test it thoroughly before enabling it. By default, an identity provider remains disabled. You can disable an identity provider at any time.

How can I allow my users to sign in using their company's credentials?

On the Security Console, go to Single Sign-On Identity Provider Details page and make sure that the Enable Chooser Login Page check box is selected.

When your users access the main portal page, they can sign in using one of the following options:

- The single sign-on credentials registered with the identity provider
- The single sign-on credentials registered with their company

What should I do to extend the validity of certificates provided by the identity provider?

Pay attention to the notifications you receive about certificate expiry. Request your identity provider to share with you the updated metadata file containing renewed certificate validity details.

Once you upload the metadata file, the validity of the certificate is automatically renewed. You will have to monitor this information at intervals to ensure that the certificates remain valid at all times.

How can the identity provider obtain renewed certificates from the service provider?

The identity provider can submit a service request to the service provider asking for the renewed signing and encryption certificates.

How can I disable Single Sign-On when I am not signed in to the application?

You must request access to the Administration Activity page using the URL provided to the administrators.

Make sure you have the following privileges:

- ASE_ADMINISTER_SSO_PRIV
- ASE_ADMINISTER_SECURITY_PRIV

After you request access to the Administration Activity page, you get an email at your registered email ID containing a URL with the following format:

```
https://<FA POD>/hcmUI/faces/AdminActivity
```

Click the URL and you're directed to a secure Administrator Activity page. Select the **Disable Single Sign On** option and click **Submit**. You receive a confirmation that single sign-on is disabled. Immediately, you're redirected to the Oracle Applications Cloud page where you can sign in using your registered user name and password.

How can I disable Single Sign-On when I am locked out of the application?

If you're locked out of the application for some reason, use the following Administration Activity URL to disable single sign-on. Only an administrator user with the IT Security Manager job role can perform this unlock operation.

```
https://<FA POD>/hcmUI/faces/AdminActivity
```

Ensure that the following email notification templates are enabled:

- ORA Administration Activity Requested Template
- ORA Single Sign-On Disabled Confirmation Template

What are the different events and notifications associated with the Single Sign-On functionality?

Automatic notifications are sent for the following events associated with single sign-on.

- When an administrator requests access to the Administration Activity page to disable single sign-on
- When the single sign-on functionality is disabled using the Administration Activity page, notification is sent to that user who disabled SSO.
- When the external identity provider's signing certificate is about to expire
- When the service provider's signing certificate is about to expire
- When the service provider's encryption certificate is about to expire

Note: Notifications are sent to users who are assigned the **Administer SSO** (ASE_ADMINISTER_SSO_PRIV) privilege, according to the following schedule:

- First notification - 60 days before the expiry date
- Second notification - 30 days before the expiry date
- Last notification - 10 days before the expiry date.

How do I reimport Identity Provider metadata?

Whenever you get an updated metadata file from the Identity Provider you must reimport the file into the application to continue using SSO configuration.

1. On the Identity Provider Details page, click **Edit**.
2. Import the identity provider metadata:
 - If it's an XML file, click **Browse** and select it.
 - If it's available on a web page, select the **External URL** check box and enter the URL.

Note: The metadata XML file must be Base64 encoded.

3. Click **Save and Close**.

Note: Remember to test the Identity Provider after reimport.

5 API Authentication

Configure Outbound API Authentication Using JWT Custom Claims

A system account is an account used for integrating Oracle Applications Cloud with third-party applications. This account isn't associated with a user but it must have roles with access to REST APIs.

System account uses basic authentication to authenticate users even if single sign-on is enabled. Security Console's password policy applies to a system account and so the password of this account expires based on the password policy.

Critical tasks such as batch operations or data synchronizations must continue without any interruption or the need to re-authenticate at intervals. To support such tasks, you need to define custom parameters for authentication. Using Security Console, you can define a JSON Web Token (JWT) that can be used by REST APIs to automate system authentication without you having to authenticate manually.

JWT is an access token that contains custom claim name and claim values. Custom claims are name and value pairs that you can define in a JWT. To uniquely identify a user, you can add the user's email address to the token along with the standard user name and password.

Example, suppose you want to integrate Oracle Applications Cloud with a third-party application. This integration uses the JWT Custom Claims to authenticate the users who sign into Oracle Applications Cloud to access the third-party application.

Do these steps to define a JWT that will be used for integration with third-party application:

1. On the Security Console, click **API Authentication**.
2. Click **Create External Client Application, Edit**.
3. Enter a name and description for the external client application that you want to create.
4. In the **Select Client Type** drop-down list, select **JWT Custom Claims** and click **Save and Close**.
5. Click the JWT Custom Claims Details tab and click **Edit**.
6. In the Token Settings section, if required, update the **Token Expiration Time** and **Signing Algorithm**. Default values are 30 minutes and RS256 respectively.
7. Click **Save**.
8. In the JWT Custom Claims section, click **Add**. You can either select a name from the predefined values in the drop-down list or select **Other** and enter a name of your choice.
9. Select a value for the custom claim. If you select **Free-form**, enter the value in the following text box. You can add more JWT custom claims using the **Add** button.
10. Click **Save**. You can add more parameters as required.
11. Click **Done** to return to the JWT Custom Claims Details page.

You can view the token created for authentication using the **View JWT** button on the JWT Custom Claims Details page. The View JWT window displays the header and payload of the JWT.

12. Click **Done** again to return to the API Authentication page. You can view the newly created JWT Custom Claim in this page.

You can delete a JWT custom claim on the API Authentication page.

Configure Outbound API Authentication Using Three Legged OAuth Authorization Protocol

OAuth is an open industry standard protocol that allows applications access information from other third-party applications, on behalf of the users. The OAuth authorization protocol manages access securely without revealing any passwords to the client application, such as Oracle Applications Cloud.

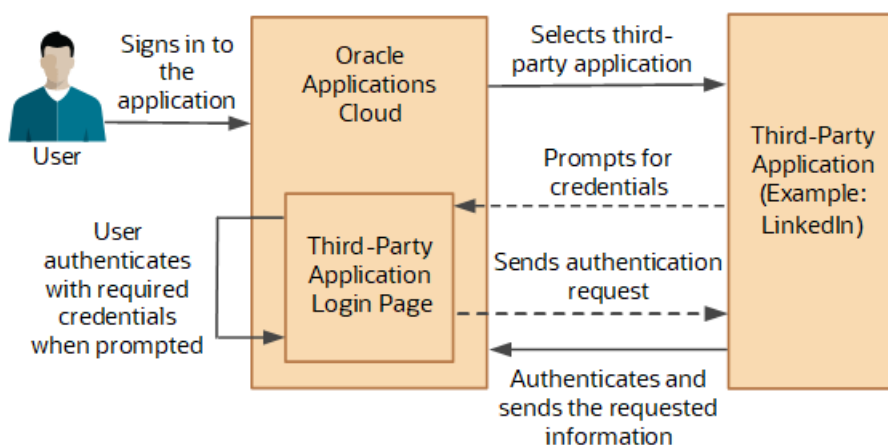
To understand the OAuth authorization protocol, let's take the example of a LinkedIn user who wants to access profile information from LinkedIn and display it in Oracle Applications Cloud. When Oracle Applications Cloud prompts for LinkedIn credentials, the user authenticates and provides the required permissions to Oracle Applications Cloud to access the information from LinkedIn.

As you notice, there are three parties involved in the entire authentication process: Oracle Applications Cloud, the user who owns information on LinkedIn, and LinkedIn's authorization server. This authorization protocol always requires three such parties for the authentication to complete. Therefore, this protocol is called three-legged OAuth authorization protocol.

Here's the sequential representation of the end-to-end authorization process between Oracle Applications Cloud and the LinkedIn server:

1. Oracle Applications Cloud registers the Client ID and Client Secret and other settings required for authorization.
2. When an Oracle Applications Cloud user wants to access profile information, the LinkedIn login page appears, where the user authenticates using the required credentials.
3. On successful authentication, LinkedIn's authorization server sends an authorization code to Oracle Applications Cloud.
4. Oracle Applications Cloud receives the authorization code and sends an access token request to LinkedIn. LinkedIn processes the access token request and returns an access token.
5. Oracle Applications Cloud uses the access token to call LinkedIn APIs on behalf of the user to access the required information. At runtime, Oracle Web Services Manager manages the entire authorization process.

The following graphic shows the entire authorization process between Oracle Applications Cloud and the LinkedIn server:



Using the Security Console, you configure the three-legged OAuth authorization settings for Oracle Applications Cloud. Once configured, users can access their information from a third-party application, within Oracle Applications Cloud.

Before you proceed, you must enable a profile option to get the OAuth Three-Legged option on the External Client Applications Details page. See the Related Information section for more information.

Here's how you configure three-legged OAuth authorization:

1. On the Security Console, click **API Authentication**.
2. Click **Create External Client Application**.
3. On the External Client Application Details page, click **Edit**.
4. Enter a name and description for the external client application that you want to create.
5. In the **Select Client Type** drop-down list, select **OAuth Three-Legged**.
6. Click **Save and Close** to return to the External Client Application Details page.
7. Click the OAuth Details tab.
8. On the Three-Legged OAuth Details page, click **Edit**.
9. Enter the appropriate values in the following required fields:
 - Authorization URL - The authorization code link that the authorization server sends to the application.
 - Redirect URL - The page to which the user is redirected to after successful authorization of application.
 - Access Token URL - The access token that's sent from the authorization server to the application.
 - Servlet Application URL - The access token that's sent from the authorization server to the application.
 - Client ID - The access token that's sent from the authorization server to the application.
 - Client Secret - The access token that's sent from the authorization server to the application.
 - Client Scope - The access token that's sent from the authorization server to the application.
10. Enter the appropriate values in the following optional fields, if required:
 - Server Scope - The access token that's sent from the authorization server to the application.
 - Federated Client Token - The access token that's sent from the authorization server to the application.
 - Include Client Credential - The access token that's sent from the authorization server to the application.
 - Client Credential Type - The access token that's sent from the authorization server to the application.
11. Click **Save and Close**.
12. Click **Done** to return to the Three-Legged OAuth Details page.
13. Click **Done** again to return to the API Authentication page. You can view the newly created three-legged OAuth configuration here.

Related Topics

- [Enable OAuth Three-Legged Authentication for Creating External Client Application](#)

Enable OAuth Three-Legged Authentication for Creating External Client Application

While creating an external client application using the Security Console, only the JWT custom claims authentication type is available in the Select Client Type list on the External Client Application Details page.

To display the OAuth three-legged authentication type for selection, you must enable it using a profile option.

Here are the steps:

1. In the Setup and Maintenance work area, go to the **Manage Administrator Profile Values** task.

2. Search for the **ORA_ASE_ENABLE_OAUTH_THREE_LEGGED_SETUP** profile option code
3. In the Profile Values section, click the **Profile Values** list for the Site profile level and select Yes.
4. Click **Save and Close**.

The OAuth three-legged authentication type is enabled now. Enabling the profile option displays the OAuth three-legged authentication type in the Select Client Type list on the External Client Application Details page.

Configure Inbound Authentication

Third-party application users can access a service of Oracle Applications Cloud if inbound authentication is configured for them. You can use an Oracle API Authentication Provider to configure inbound authentication for such users.

To configure inbound authentication, you need a public certificate and a trusted issuer which contains the tokens.

Oracle Applications Cloud supports the JSON Web Token (JWT), Security Assertion Markup Language (SAML), and Security Token Service (STS) tokens. Use the Security Console to configure the trusted issuer and public certificate details. The default trusted issuer is Oracle (www.oracle.com) and you can't delete it.

We recommend that you use JWT for inbound authentication for a system account that's created for a specific application. For authentication, JWT uses a combination of a public certificate and trusted issuer whereas a system account's password expires soon based on the security policy. In addition, you must ensure that the system account's credentials are valid.

Note: For more information about how to configure a JWT for inbound authentication, see [Configure JWT Authentication Provider](#) in the Related Topics section.

How Inbound Authentication Works

When a third-party application user sends an authentication request to access a service of Oracle Applications Cloud, these actions occur in the background:

1. The third-party application generates a JWT that includes trusted issuer and public certificate information.
2. Oracle Web Services Manager authenticates the generated JWT by verifying whether the trusted issuer and public certificate are valid.
3. On successful authentication, the third-party application gets access to the Oracle Applications Cloud service.

Here's how you configure an Oracle API Authentication Provider for inbound authentication:

1. On the Security Console, click **API Authentication**.
2. Click **Create Oracle API Authentication Provider**.
3. On the Oracle API Authentication Provider Details page, click **Edit**.
4. On the API Authentication Configuration Details page, enter a name for the **Trusted Issuer**. Ensure that the name of Trusted Issuer matches the value of ISS in the JWT token.
5. Select one or more token types that you want to include in the trusted issuer.
6. Click **Save and Close**.
7. On the Oracle API Authentication Provider Details page, click the Inbound API Authentication Public Certificates tab and click **Edit**. You can use the default Oracle public certificate or add a new one.
8. On the Inbound API Authentication Public Certificates page, click **Add New Certificate** to add a different public certificate.
9. Enter the **Certificate Alias** name

10. Click **Browse** and select the public certificate that you want to import.

Note: If the public certificate includes a certificate chain then import the complete chain.

11. Click **Save**. The newly added certificate alias is displayed on the Inbound API Authentication Public Certificates page.

12. Click **Done** to return to the API Authentication page.

Related Topics

- [Configure JWT Authentication Provider](#)
- [Reset User Password](#)
- [Use JSON Web Token for Authorization](#)

Is there a recommended format for the public certificate?

Yes. Oracle recommends that the public certificate you upload must contain only line feed (denoted by the code `\n`) to indicate separation of lines. Because carriage return isn't supported, make sure that the certificate doesn't contain carriage return along with the line feeds.

6 Export and Import of Security Setup Data

Overview of Security Data Import and Export

Oracle provides a number of tools that let you easily move your security setup data between environments. Depending on the type of security data you want to move, different options are available as shown in the table.

Data to Move	Tools to Use	Where to Get More Details
Security Console setup data Custom roles, role hierarchies, and functional security policies	CSV file export and import options in the Setup and Maintenance work area	Review the topics in this chapter.
Functional security policies for custom objects Predefined and custom data security policies for predefined and custom objects	Configuration Set Migration (CSM)	See the chapter about moving and troubleshooting configurations in the guide <i>Configuring and Extending Applications</i> .
Access groups objects (access groups, group members, group membership rules, and object sharing rules)	Standard export and import management functionality	Review the section <i>Import and Export Access Groups, Members, and Rules</i> in the <i>Access Groups</i> chapter of this guide.

Related Topics

- [Tools for Moving and Troubleshooting Configurations](#)
- [Overview of Importing and Exporting Access Group Objects](#)

Export and Import of Security Console Data

You can move the Security Console setup data from one environment to another using the CSV file export and import functionality.

Let's assume you have spent lot of time and effort in configuring and setting up the Security Console in your primary environment. You test the setup and find that everything's working as intended. You can now quickly replicate the same setup in another environment by exporting the setup data and then importing it into the other environment.

Export and Import the Data

Before you begin, learn how to export and import business object data using CSV files by following the instructions in the *Manage Setup Using CSV File Packages* chapter of the *Using Functional Setup Manager* guide.

To select your Security Console preference data for export or import, use the Manage Applications Security Preferences task in the Users and Security functional area of the Sales offering. Here are the steps to use:

1. Select **Navigator > My Enterprise > Setup and Maintenance**.
2. In the Setup and Maintenance work area, go to the following:
 - o Offering: Sales
 - o Functional Area: Users and Security
 - o Task: Manage Application Security Preferences
3. In the Tasks table, select **Columns > View > Actions** to make the applicable task actions visible.
4. From the corresponding **Actions** menu, select **Export to CSV File** or **Import from CSV file** as required.

What Gets Exported and Imported

The Security Console setup data consists of information that you see on the Administration and User Categories tabs of the Security Console. The following business objects help in packaging those details into CSV files so that the data can be easily exported and imported.

- Security Console Administration Settings
- Security Console User Category
- Security Console User Category Notifications

Note: Lists of users or information about any specific user is never a part of this export and import process.

In this table, you will find information about the contents of each business object.

Business Object	Information Included in Export and Import
Security Console Administration Settings	• General administration details • Role preferences • Location-based access settings Note: If location-based access isn't enabled (if the tab doesn't appear on the Security Console), nothing gets included in the export or import.
Security Console User Category	• User category details • Password policy information
Security Console User Category Notifications	Notification preferences. Note: For notifications, only the custom template information is exported from the default user category. The predefined notifications are excluded because they're available in the target environment.

When the export process successfully completes, you get the following CSV files:

- Administration Settings CSV
- User Category CSV
- User Category Notifications CSV

Note: If there are language packs installed on your application, additional CSV files may be generated containing the translated data.

To import data into another environment, bundle these files into a .zip file to create the CSV file package and follow the process for importing setup data.

Related Topics

- [Export and Import CSV File Packages](#)
- [Key Information About Setup Data Export and Import Processes](#)

Export and Import of Custom Roles, Role Hierarchies, and Role-to-Privilege Assignments

You can migrate your custom roles, role hierarchies, and privilege-to-role assignments from one environment to another by exporting and importing the business objects in the Users and Security functional area of the Sales offering.

Export and Import the Data

Before you begin, learn how to export and import business object data using CSV files by following the instructions in the Setup Data Export and Import chapter of the Using Functional Setup Manager guide.

To select your custom roles, role hierarchies and privilege-to-role assignments for export or import, use the Manage Job Roles task in the Users and Security functional area of the Sales offering. Here are the steps to use:

1. Select **Navigators > My Enterprise > Setup and Maintenance**.
2. In the Setup and Maintenance work area, go to the following:
 - Offering: Sales
 - Functional Area: Users and Security
 - Task: Manage Job Roles
3. In the Tasks table, select **Columns > View > Actions** to make the applicable task actions visible.
4. From the corresponding **Actions** menu, select **Export to CSV File** or **Import from CSV file** as required.

What Gets Exported and Imported

When you migrate job roles, the following business objects are exported in the configuration package generated from the Users and Security functional area within the Sales offering.

- Functional Security Custom Roles

- Functional Security Custom Role Hierarchy
- Functional Security Custom Role Privilege Membership

Let's closely examine each business object to know what it contains.

Business Object	Information Included in Export and Import
Functional Security Custom Roles	The custom role includes the following details: • Role Code • Role Name • Role Description • Role Category • All IP Address Access. Indicates that a role is granted access to the Security Control irrespective of the IP address from where it's signed in. Note: The scope is limited to User Assignable roles only.
Functional Security Custom Role Hierarchy	The role hierarchy includes the following details: • Parent Role • Member Role • Add or Remove Role Membership
Functional Security Custom Role Privilege Membership	The role privilege membership includes the following details: • Parent Role • Member Privilege • Add or Remove Privilege Membership

What's Not Included

Data security policies that have been manually created from the security console. Access groups, rules, and memberships aren't exported or imported.

Related Topics

- [Overview of Setup Data Export and Import](#)
- [Overview of Importing and Exporting Access Group Objects](#)
- [Overview of Migration](#)
- [Contents of the Migration Set](#)

7 User and Role Reports

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** process.
3. In the Process Details dialog box, set parameters and click **Submit**.
4. Click **OK** to close the confirmation message.

Note: Only the roles at the top of a role hierarchy are included in the Role Name column of the All roles report. If you want to review a role that is lower down the role hierarchy, then apply a filter for the role in which you're interested, to the Inherited Role Hierarchy column.

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 all 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 all 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 **Data Security Policies** to view the data security report for any population. If you leave the option deselected, then only the function security report is generated.

Note: If you don't need the data security report, then leave the option deselected to reduce the report processing time.

Debug

Select **Debug** to include the role GUID in the report. The role GUID is used to troubleshoot. Select this option only when requested to do so by Oracle Support.

Viewing the Report Results

The report produces either one or two .zip files, depending on the parameters you select. When you select **Data Security Policies**, two .zip files are generated, one for data security policies and one for 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 report 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 report 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

Report Type	File Suffix	File Format	File Contents
			roles. The data security policies file is generated only when Data Security Policies is selected. Note: Extract the data security policies only when necessary, as generating this report is time consuming.
Any	Hierarchical	CSV	Functional security policies in a hierarchical format. The .zip file contains one file for each user or role.
- Multiple users - All roles	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**
- **Diagnostic.zip**

User Role Membership Report

The User Role Membership Report lists role memberships for specified users.

To run the report process:

1. Open the Scheduled Processes work area.
2. Search for and select the **User Role Membership Report** process.

User Role Membership Report Parameters

You can specify any combination of the following parameters to identify the users whose role memberships are to appear in the report.

Note: The report might take a while to complete if you run it for all users, depending on the number of users and their roles.

User Name Begins With

Enter one or more characters of the user name.

First Name Begins With

Enter one or more characters from the user's first name.

Last Name Begins With

Enter one or more characters from the user's last name.

Department

Enter the department from the user's primary assignment.

Location

Enter the location from the user's primary assignment.

Viewing the Report

The process produces a **UserRoleMemberships_processID_CSV.zip** file and a **Diagnostics_processID.zip** file. The **UserRoleMemberships_processID_CSV.zip** file contains the report output in CSV format. The report shows the parameters that you specified, followed by the user details for each user in the specified population. The user details include the user name, first and last names, user status, department, location, and role memberships.

The following table lists a brief description of these columns:

Column Name	Description
User Name	User ID assigned to the user.
First Name	First name of the user.
Last Name	Last name of the user.
LDAP User	Indicates whether the user exists in the Identity Store.
Department	Department of the user.
Location	Location of the user.
Policy Stripe	The policy store's application stripe where the user to role membership exists.
Assigned Role Name	Role code of the role assigned to the user.
Assigned Role Display Name	Role display name of the role assigned to the user.
Assigned Role Description	Description of the role assigned to the user.

Tip: First Name, Last Name, Department, and Location column values are applicable only to users that are linked to a person/worker.

User Password Changes Audit Report

This report identifies users whose passwords were changed in a specified period. You must have the ASE_USER_PASSWORD_CHANGES_AUDIT_REPORT_PRIV function security privilege to run this report. The predefined IT Security Manager job role has this privilege by default.

To run the User Password Changes Audit Report:

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

User Password Changes Audit Report Parameters

Search Type

Specify whether the report is for all users, a single, named user, or a subset of users identified by a name pattern that you specify.

User Name

Search for and select the user on whom you want to report. This field is enabled only when **Search Type** is set to **Single user**.

User Name Pattern

Enter one or more characters that appear in the user names on which you want to report. For example, you could report on all users whose user names begin with the characters **SAL** by entering **SAL%**. This field is enabled only when **Search Type** is set to **User name** pattern.

Start Date

Select the start date of the period during which password changes occurred. Changes made before this date don't appear in the report.

To Date

Select the end date of the period during which password changes occurred. Changes made after this date don't appear in the report.

Sort By

Specify how the report output is sorted. The report can be organized by either user name or the date when the password was changed.

Viewing the Report Results

The report produces these files:

- **UserPasswordUpdateReport.csv**
- **UserPasswordUpdateReport.xml**

- **Diagnostics_[process ID].log**

For each user whose password changed in the specified period, the report includes:

- The user name.
- The first and last names of the user.
- The user name of the person who changed the password.
- How the password was changed:
 - ADMIN means that the change was made for the user by a line manager or the IT Security manager, for example.
 - SELF_SERVICE means that the user made the change by setting preferences or requesting a password reset, for example.
 - FORGOT_PASSWORD means that the user clicked the **Forgot Password** link when signing in.
 - REST_API means that the change was made for the user by SCIM REST APIs.
- The date and time of the change. The format of date and time of the change is "dd/MM/yyyy HH:mm:ss".

Inactive Users Report

Scheduling the Import User Login History process to run daily is a prerequisite to get a valid report about inactive users.

The Import User Login History process imports information that the Inactive Users Report process uses to identify inactive users. The Inactive Users Report process helps to identify users who haven't signed in for a specified period.

Before you run the inactive users report for a certain period, make sure that the Import User Login History data exists for that period. It's important to know when the user last signed in. That's why it's recommended to always run the Import User Login History process for a longer duration to offer greater flexibility with the date range.

1. In the Scheduled Processes work area, click **Schedule New Process**.
2. Search for and select the **Inactive Users Report** process.
3. In the Process Details dialog box, set parameters to identify one or more users.
4. 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

Note: The information in the report relating to the user's latest activity isn't based solely on actions performed by the user in the UI. Actions performed on behalf of the user, which create user sessions, also affect these values. For example, running processes, making web service requests, and running batch processes are interpreted as user activity.

Related Topics

- [Schedule the Import User Login History Process](#)

User History Report

This topic describes the User History report, which extracts and formats the history of a specified user account. Oracle Support might ask you to run this report to help diagnose user-related errors.

To run the report, you must inherit the ORA_PER_MANAGE_USER_AND_ROLES_DUTY_OBI (Manage Users) duty role. Several predefined job roles, including IT Security Manager, inherit this duty role.

Follow these steps to run the report.

1. Select **Navigator > My Team > Users and Roles**.
2. On the Search Person page, search for the person of interest.
3. In the search results, click the person name to open the Edit User page.
4. On the Edit User page, click **Print User History**. In the **User History** dialog box, you can review the report.

You can either print the report or download a PDF file by clicking relevant icons in the **User History** dialog box.

5. Click **Cancel** to close the **User History** dialog box.

Tip: You don't have to view the report. You can select **Print User History > Download** to download the PDF file. The file name is in the format **<person ID>_UserHistory.pdf**.

This report is identical to the HCM Person User Information report, which authorized users can run in the HCM Reports and Analytics work area. Information is provided in this report for sales resources who are also defined as users in HCM.

Report Contents

For the selected user, the report includes:

- Person information
- User history
- Provisioned roles and details of any associated role mappings
- Role delegation details
- LDAP request details
- Work relationship and assignment information

8 Review and Analyze Roles on the Security Console

Overview of Reviewing Roles

This chapter describes how you can use the Security Console to review and analyze role information. You perform these tasks from the Roles and Analytics tabs of the Security Console.

You can perform these tasks from the Roles tab:

- Visualize role hierarchies and role assignments to users.
- Review Navigator menus available to roles or users, identifying roles that grant access to Navigator items and the privileges required for that access.
- Compare roles.
- Copy roles, create roles, and edit custom job, abstract, and duty roles.

For information about copying roles and creating roles, see the chapter [Creating Job, Abstract, and Duty Roles](#).

From the Analytics tab, you can perform these tasks:

- 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.

Note: You can also use the Security Dashboard to get an overview of the security roles and how they're provisioned in your environment. For information, see the topic describing the Security Dashboard in this chapter.

Graphical and Tabular Role Visualizations

You can review role hierarchy information using either a tabular or graphical view on the Roles tab of the Security Console. This topic describes how to use each of these views.

Note: The view you see by default depends on the setting of the **Enable default table view** option on the Administration tab.

Role hierarchies stretch from users at the top of the hierarchy to privileges at the bottom. In both graphical and tabular views, you can set the direction of the displayed hierarchy.

- To show from the selected user, role, or privilege up the hierarchy, set **Expand Toward** to **Users**.
- To show from the selected user, role, or privilege down the hierarchy, set **Expand Toward** to **Roles**.

The Tabular View

If the tabular view doesn't appear when you select a security artifact on the Roles tab, then you can click the **View as Table** icon. In the tabular view, you can:

- Review the complete role hierarchy for a selected user or role. The table shows roles inherited both directly and indirectly.
- Search for a security artifact by entering a search term in the column search field and pressing **Enter**.
- Set the contents of the table as follows:
 - If **Expand Toward** is set to **Privileges**, then you can set **Show** to either **Privileges** or **Roles**.
 - If **Expand Toward** is set to **Users**, then you can set **Show** to either **Roles** or **Users**.

The resulting contents of the table depend on the start point. For example, if you select a privilege, **Expand Toward** is set to **Privileges**, and **Show** is set to **Roles**, then the table is empty.

- Export the displayed details to a Microsoft Excel spreadsheet.

The Graphical View

If the graphical view doesn't appear when you select a security artifact on the Roles tab, then you can click the **Show Graph** icon. In the graphical view, users, privileges, and the various types of roles are represented by nodes and differentiated by both color and labels. These values are defined in the **Legend**. You can:

- Review roles inherited directly by the selected role or user. To see roles and privileges inherited indirectly, select a directly inherited role, right-click, and select either **Expand** or **Expand All**. Select **Collapse** or **Collapse All** to reverse the action. Alternatively, double-click a node to expand or collapse it.
- Use the **Set as Focus** action to make any selected node the center of the visualization.
- Use the Overview icon to manipulate the visualization. For example, clicking a node in the Overview moves the node to the center of the visualization. You can also use drag and drop.
- Hover on a legend entry to highlight the corresponding nodes in the visualization. Click a legend entry to add or remove corresponding nodes in the visualization.

In the Control Panel, you can:

- Switch the layout between radial and layered representations.
- Click the **Search** icon and enter a search term to find a security artifact among currently displayed nodes.
- Zoom in and out using either the **Zoom in** and **Zoom out** icons or the mouse wheel.
- Magnify areas of the visualization by clicking the **Magnify** icon and dragging it to the area of interest. Click the icon again to switch it off.
- Click the **Zoom to Fit** icon to center the image and fill the display area.

Review Role Hierarchies

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

To review a role's hierarchy:

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 is displayed.

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. To view the privileges inherited by the role, set the **Show** field 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.

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

Simulate Navigator Menus

You can simulate the Navigator for both users and roles. This feature can help you to identify how access is provided to specific work areas and tasks. You can then use this information when creating roles, for example.

Simulate the Navigator for a Role

Follow these steps:

1. On the Roles tab of the Security Console, search for the role, which can be of any type.
2. In the search results, select **Simulate Navigator** in the **Actions** menu for the role. The Simulate Navigator page opens. Icons may appear against Navigator entries. In particular:
 - The **Lock** icon indicates that the role can't access the entry.
 - The **Warning** icon indicates that the entry may not appear in the Navigator as the result of configuration, for example.

Entries without either of these icons are available to the role.

Tip: To view just the entries that the role can access, set **Show** to **Access granted**.

View Roles That Grant Access to a Navigator Entry

For any entry in the Navigator, regardless of whether it's available to the role, you can identify the roles that grant access. Follow these steps:

1. Click the entry.
2. Select **View Roles That Grant Access**.
3. In the Roles That Grant Access dialog box, review the list of roles. The roles can be of all types. After reviewing this list, you can decide how to enable this access, if appropriate. For example, you may decide to provision an abstract role to a user or add a duty to a custom role.
4. Click **OK** to close the Roles That Grant Access dialog box.

View Privileges Required for Menu

For any entry in the Navigator, regardless of whether it's available to the role, you can identify the privileges that grant access to:

- The Navigator entry
- Tasks in the associated work area

Follow these steps:

1. Click the entry.
2. Select **View Privileges Required for Menu**.
3. In the View Privileges for Work Area Access dialog box, review the list of privileges that grant access to:
 - The Navigator menu item.
 - Task panel entries in the associated work area. In the **Access Granted** column of this table, you can see whether the selected role can access these tasks.

You can use this information when creating roles, for example. You can identify how to both add and remove access to specific tasks and work areas.

4. Click **OK** to close the View Privileges for Work Area Access dialog box.
5. Click **Close** to close the Simulate Navigator page.

Simulate the Navigator for a User

Search for the user on the Roles tab of the Security Console and select **Simulate Navigator** in the **Actions** menu for the user. Follow the instructions for simulating the Navigator for a role.

Review Role Assignments

You can use the Security Console to either view the roles assigned to a user, or to identify the users who have a specific role.

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

View 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 this view.

Identify 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.

Compare Roles

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 isn't 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're adding the policies. This must be a custom role. You can't 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.

Compare Users

You can compare users to identify their access permissions and assign the missing permissions as required. This comparison includes both direct and inherited roles. From the results, you can find out if there are any discrepancies in roles.

Users with the following privileges can compare users:

- Create User Account (ASE_CREATE_USER_ACCOUNT_PRIV)

- Edit User Account (ASE_EDIT_USER_ACCOUNT_PRIV)
- View User Account (ASE_VIEW_USER_ACCOUNT_PRIV)
- Delete User Account (ASE_DELETE_USER_ACCOUNT_PRIV)
- Lock and Unlock User Account (ASE_LOCK_UNLOCK_USER_PRIV)
- Update Password for User Account (ASE_UPDATE_PASSWORD_FOR_USER_PRIV)

On the User Accounts page, you can compare users in two different ways:

- Use the Compare Users button.
- Search for a user and then click Compare Users from the Actions menu of that user.

Follow these steps:

1. On the Security Console, click **Users**.
2. Click **Compare Users**.
3. Search for and select both users one after another.
4. Click **Compare**. All the details of both the users are displayed.

In the comparison results, you can do the following actions:

- Click one of the **Show** options to view the corresponding details in the results.
- Click the Query By Example icon to enter the name of a specific role that you want to see from the search results.

You can then use the Export to Excel option to export the filtered search results.

Copy Roles from One User to Another

If the user you're creating must have the same set of roles that an existing user has, you can consider copying the required roles instead of manually assigning them.

Adding roles manually to replicate an existing user is a time-taking task. Instead, use the Copy User option in Security Console to create the user with all the roles assigned, at one go.

There are two ways in which you can copy the roles from an existing user to another user:

- Use the Copy User option in the Actions menu of the selected user on the User Accounts page. You can copy the user category and assigned roles of the selected user. Additionally, you can copy the Enable Administration Access for Sign In-Sign Out Audit REST API setting if the Enable access to Advanced User Management Settings profile option is enabled.
- Use the Add Role button on the Add User Account page.

If you have more than 20 roles to copy, then the application runs an asynchronous process in the background. You must wait for the asynchronous process to complete before you can edit, delete, copy, or compare roles on the target user. You can view the status of up to 25 recently run asynchronous processes at any time using the User-to-User Role Membership Transfer Status tab on the Administration page.

Note: You can search for an asynchronous process based on the user name or status.

Using the Copy User Option

1. On the Security Console, click **Users**.

2. On the User Accounts page, search for the user from which you want to copy the roles.
3. From the **Action** menu of that user, click **Copy User**. On the Add User Account page, the user category and assigned roles of the selected user appear. The Enable Administration Access for Sign In-Sign Out Audit REST API setting is selected if this setting is enabled for the source user.
4. Enter the details of the user and click **Save and Close**.

Using the Add Role Button

1. On the Security Console, click **Users**.
2. On the User Accounts page, click **Add User Account**.
3. On the Add User Account page, select a user category and enter the details of the user.
4. Click **Add Role**.
5. Select **Users** from the **Search** drop-down list and search for the user from which you want to copy the roles.
6. Select the user and click **Add Role Membership from User**. A confirmation message appears.
7. Click **OK** and click **Done**.
8. Click **Save and Close**.

Related Topics

- [Role Copying or Editing](#)

Analytics for Roles

You can review statistics about the roles that exist in your Oracle Cloud instance.

On the Analytics page, click the Roles tab. 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 to 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.

Analytics for Data Resources

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

1. On the Analytics page, click the Database Resources tab.
2. Select the resource that you want to review in the **Data Resource** field.
3. Click **Go**.

Results are presented in three tables.

Data Security Policies

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

Each row documents a policy, specifying by default:

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

For any given policy, this table might 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 data resource. Any given role might include the following:

- One or more data security policies that grant access to the data resource. The Authorized Roles table includes one row for each policy belonging to the role.
- Inherit access to the data 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 following:

- 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 data resource.

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

Authorized Users

The Authorized Users table documents users who are assigned roles with access to the selected data 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 data resource. For any given user, this table might 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 do the following actions:

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

View Role Information Using Security Dashboard

As an IT Security Manager, you can use the Security Dashboard to get a snapshot of the security roles and how those roles are provisioned in the Oracle Cloud Applications.

The information is sorted by role category and you can view details such as data security policy, function security policy, and users associated with a role. You can also perform a reverse search on a data security policy or a function security policy and view the associated roles.

You can search for roles using the Role Overview page. You can view the count of the roles which includes the inherited roles, data security policies, and function security policies on this page. Clicking the number in a tile on this page takes you to the corresponding page in the Role Dashboard. You can view role details either on the Role Overview page of the Security Dashboard or the Role Dashboard.

You can view role information such as the directly assigned function security policies and data security policies, roles assigned to users, directly assigned roles, and inherited roles list using the Role Dashboard. Clicking any role-related link on a page of the Security Dashboard takes you to the relevant page in the Role Dashboard. You can export the role information to a spreadsheet. The information on each tab is exported to a sheet in the spreadsheet. This dashboard supports a print-friendly view for a single role.

Here are the steps to view the Security Dashboard:

1. In the Reports and Analytics work area, click **Browse Catalog**.
2. On the Oracle BI page, open **Shared Folders > Security > Transaction Analysis Samples > Security Dashboard**.

All pages of the dashboard are listed.

3. To view the Role Category Overview page, click **Open**.

The page displays the number of roles in each role category in both tabular and graphical formats.

4. In the **Number of Roles** column, click the numeral value to view the role-related details.
5. Click **Role Overview** to view the role-specific information in the Role Dashboard.

9 Create and Edit Job, Abstract, and Duty Roles

Overview of Security Configuration

This chapter describes some of the ways in which you can configure the predefined sales security model.

The Oracle implementation of role-based access control is designed to handle a wide range of security requirements in different environments. As a result, most companies can use the standard security settings without modification. If necessary, though, you can configure the default settings to meet specific business requirements. Before making any changes to the security reference implementation, make sure you follow these steps:

- Clearly define the change that's required and review the proposed changes with Oracle Support.
- Make sure you understand the interrelationships of the various security components and the effect of the proposed change on user access.
- Document any changes you make.

This chapter describes how you can create your own roles and role hierarchies. For information about configuring data security, see the chapter [Configure and Troubleshoot Data Security](#).

For additional information about changing the standard security settings, go to the Security Resource Center, which is available at 1609084.1 (Document ID) on My Oracle Support. The Security Resource Center provides templates you can use to track the changes you make to standard settings. For information about the privileges or other security artifacts provided for new or updated functionality in each release, and the procedures to add these privileges to custom roles, see the [Upgrade Guide for Oracle Sales Cloud Application Security](#) article (Document ID 1989500.1) on My Oracle Support.

Related Topics

- [Overview of Data Security Configuration](#)

Guidelines for Copying Roles

Copying predefined roles and editing the copies is the recommended approach to creating roles. This topic describes some issues to consider when copying a role on the Security Console.

Note: You can copy the predefined roles but can't edit them. Predefined roles have role codes with the prefix **ORA_**.

Role-Copy Options

When you copy a role on the Security Console, you have the option of copying the top role only (shallow copy), or of copying the top role and its inherited roles (deep copy). The result of selecting each of these copy options is described in this section.

- Copying the Top Role

If you select the **Copy top role** option, 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. Subsequent changes to the inherited roles affect not only the source top role, but also your copy. The result of selecting the Copy top role option, therefore, is as follows:

- You can add roles directly to the copied role without affecting the source role.
- You can remove any role that's inherited directly by the copied role without affecting the source role.
- If you remove any role that's inherited indirectly by the copied role, then the removal affects both the copied role and any other role that inherits the removed role's parent role, including the source role.
- If you edit any inherited role, then the changes affect any role that inherits the edited role. The changes aren't limited to the copied role.

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

- Copying the Top Role and Inherited Roles

If you select the **Copy top role and inherited roles** option, 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 new copies of subordinate roles.

Note: Inherited duty roles are copied if a copy of the role with the same name doesn't already exist. Otherwise, the copied role inherits links to the existing **copies** of the duty roles.

When inherited duty roles are copied, you can edit them without affecting other roles. Equally, changes made subsequently to duty roles in the source role hierarchy aren't reflected in the copied role.

Reviewing the Role Hierarchy

When you copy a predefined job, abstract or duty role, it's recommended that you first review the role hierarchy to identify any inherited roles that you want to either copy, add, or delete in your custom role. You can review the role hierarchy on the Roles tab of the Security Console in either graphical or tabular format. You can also:

- Export the role hierarchy to a spreadsheet from the Roles tab.
- Review the role hierarchy and export it to a spreadsheet from the Analytics tab.
- Run the User and Role Access Audit Report.

Job and abstract roles inherit function security privileges and data security policies from the roles that they inherit. Function security privileges and data security policies may also be granted directly to a job or abstract role. Review these directly granted privileges on the Roles tab of the Security Console, as follows

- In the graphical view of a role, its inherited roles and function security privileges are visible at the same time.

- In the tabular view, you set the **Show** value to switch between roles and function security privileges. You can export either view to a spreadsheet.

Once your custom role exists, edit it to add or remove directly granted function security privileges.

Note: Data security policies are visible only when you edit your role; they don't display in the graphical or tabular role views. However, you can view the data security policies assigned to a role from the Analytics tab of the Security Console.

Naming Copied Roles

By default, a copied role has the same name as its source role with the suffix **Custom**. The role codes of copied roles have the suffix **_CUSTOM**. Copied roles lose the prefix **ORA_** automatically from their role codes. You can define a local naming convention for custom roles, with a prefix, suffix, or both, on the Roles subtab of the Security Console Administration tab.

Note: Copied roles take their naming pattern from the default values specified on the Roles subtab of the Security Console Administration tab. You can override this pattern on the Copy Role: Basic Information page for the role that you're copying. However, the names of roles inherited by the copied role are unaffected. For example, if you perform a deep copy of the Employee role, then duty roles inherited by that role take their naming pattern from the default values.

If any role in the hierarchy already exists when you copy a role, then no copy of that role is made. For example, if you make a second copy of the Employee role, then copies of the inherited duty roles might already exist. In this case, the copied role inherits links to the existing **copies** of the roles. To create unique copies of inherited roles, you must enter unique values on the Administration tab of the Security Console before you perform a deep copy. To retain links to the predefined job or abstract role hierarchy, perform a shallow copy of the predefined role.

Copying Roles and Access Groups

When you copy a job role, a custom job role is created that includes the same duty roles and the same function and data security policies as the original role. A system access group is also generated for the custom job role, but it isn't assigned any object sharing rules.

To provide your users with data access using the access group generated for the custom role, you must either add rules to the group manually, or copy the rules from the access group generated for the source role you copied, then edit the rules as required. For additional information, see the topics Overview of Managing System Access Groups and Copy Object Sharing Rules from One Access Group to Another in the Access Groups chapter.

Report and Analytics Roles

You can't copy roles that are used to secure sales analytics and reports. Therefore you can't copy any of the following types of roles:

- Transaction Analysis Duty roles
- Business Intelligence roles
- Any role with a role code prefix of OBIA, for example, OBIA_ANALYSIS_GENERIC_DUTY

You can however, add any of these roles to custom job roles that you create. When you create a custom job role, either from scratch or by copying an existing job role and editing it, make sure that the role is assigned the BI Consumer role

and BI Author role if the custom role is to provide access to analyses and reports. The BI Consumer role provides view-only access to analyses and reports; the BI Author role provides access to create and edit analyses and reports.

Related Topics

- [Role Preferences](#)

Copy Job or Abstract Roles

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 new role. You must have the IT Security Manager job role to perform this task.

CAUTION: While creating custom roles, make sure you assign only the required privileges. Assigning all the privileges may impact license usage. Before you proceed, see the topic [Guidance for Assigning Predefined Roles](#).

Copy a Role

To copy a job or abstract role:

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**, **Description**, and **Enable Role for Access from All IP Addresses** values, as appropriate. **Enable Role for Access from All IP Addresses** appears only if location-based access is enabled.

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

- [Guidelines for Copying Roles](#)
- [Guidance for Assigning Predefined Roles](#)

Edit Job or Abstract Roles

You can create a role by copying a predefined job role or abstract role and then 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.

Edit the Role

To edit a job or abstract role:

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. If location-based access is enabled, then you can also manage the **Enable Role for Access from All IP Addresses** option.
4. Click **Next**.

Manage Functional Security Privileges

On the Edit Role: Function Security Policies page, any function security privileges granted directly to the copied role appear on the Privileges tab. Click **Load Inherited Policies** to populate the table with privileges that the role inherits. To view details of the code resources that a privilege secures, select the privilege in the Details section of the page.

You can add or delete existing privileges from copied roles but can't create new functional security policies. To delete a privilege that's added directly to the copied role, select the privilege and click the Delete icon. You can't delete inherited privileges.

To add a privilege to the copied 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 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.

All the privileges you selected are listed on the Edit Role: Function Security Policies page.

7. Click **Next**.

The Resources tab, which is read-only, lists any resources granted to the role directly rather than through function security privileges. As you can't grant resources directly to roles on the Security Console, only resource grants created before Release 12 could appear on this tab. You can't edit these values.

Manage Data Security Privileges

On the Edit Role: Data Security Policies page, any data security policies granted to the copied role appear. You can add or remove policies from the copied role, or edit the existing policies. For information about creating, editing, and adding data security policies to a role, see the topic Edit Data Security Policies on the Security Console.

Click **Next** to continue to the next page.

Add and Remove Inherited Roles

The Edit Role: Role Hierarchy page shows the copied role and its inherited duty roles. The hierarchy is in tabular format by default but you can switch to graphical mode. 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**.

Assign the Role to Users

On the Edit Role: Users page you can assign the copied role to a user.

To remove user access to a role:

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

To add user access to a role:

1. Click the **Add User** button.
2. In the **Add User** dialog box, search for and select a user or role (job or abstract role).
3. If you select a role, then click **Add Selected Users** to add all the users assigned the role to your custom role. If you select a single user, then click **Add User to Role**.
4. Click **OK** to close the confirmation message.
5. Repeat from step 2 for additional users.
6. Close the **Add User** dialog box.

The Edit Role: User page shows the updated role membership.

7. Click **Next**.

Review the Role

On the Edit Role: Summary and Impact Report page, review the summary of changes. Then do the following:

1. Click **Back** to make corrections.

2. When you have completed any corrections required, click **Save and Close** to save the role.
3. Click **OK** to close the confirmation message.

The role is available immediately.

Related Topics

- [Copy Job or Abstract Roles](#)
- [Edit Data Security Policies on the Security Console](#)

Create Job and Abstract Roles

If the predefined job or abstract 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.

CAUTION: While creating custom roles, make sure you assign only the required privileges. Assigning all the privileges may impact license usage. Before you proceed, see the topic [Guidance for Assigning Predefined Roles](#).

Enter 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 **Digital Sales Manager**.
3. Enter a unique **Role Code**. For example, enter `DIGITAL_SALES_MGR_JOB`.
Abstract roles have the suffix **_ABSTRACT**, and job roles have the suffix **_JOB**.
4. In the **Role Category** field, select the appropriate role category, for example, **CRM - Job Roles**.
5. If you're using location-based access, then you see the **Enable Role for Access from All IP Addresses** option. If you select this option, users who have the role can access the tasks that the role secures from any IP address.
6. Click **Next**.

Add Functional Security Policies

When you create a role from scratch, you're most likely to add one or more duty roles to your role. You're less likely to grant function security privileges directly to the role. If you're not 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.
You can either add an individual privilege or copy all the privileges that belong to an existing role.
3. If you select a role, then click **Add Selected Privileges** to add all the function security privileges assigned to 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.

All the privileges you added are listed on the Create Role: Functional Security Policies page. You can:

- Click on a privilege to view details of the code resource that it secures.
- Delete any privilege by selecting the privilege and clicking the Delete icon.

7. Click **Next**.

Note: You can add existing privileges to the new role but can't create new functional security policies.

Add Data Security Policies

On the Create Role: Data Security Policies page, you can assign data security policies to your role. For information about creating and adding data security policies to a role, see the topic Edit Data Security Policies on the Security Console.

Click **Next** to continue to the next page.

Build 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 job, abstract, and duty roles to the new role. Typically, when creating a job or abstract role you add duty roles. 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. Close the **Add Role Membership** dialog box.

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

7. Click **Next**.

Assign the Role to Users

On the Create Role: Users page, you can assign the job or abstract role you're creating to selected users.

To assign the role to a user:

1. Click **Add User**.
2. In the **Add User** dialog box, search for and select a user or role.
3. If you select a role, then click **Add Selected Users** to add all the users assigned the role to the role you're creating. If you select a single user, then click **Add User to Role**.
4. Click **OK** to close the confirmation message.
5. Repeat from step 2 to add additional users.
6. Close the **Add User** dialog box.

The Create Role: Users page shows the updated role membership.

7. Click **Next**.

Review the Role

On the Create Role: Summary and Impact Report page, review the summary of the changes. Click **Back** to make any 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 on the Security Console.

Tip: Search for the job or abstract role on the Security Console and review its visualization. Edit the role to make any corrections.

Related Topics

- [Guidance for Assigning Predefined Roles](#)
- [Edit Data Security Policies on the Security Console](#)

Copy and Edit Duty Roles

The recommended way of creating a new duty role is to copy an existing role, then edit the copied role as needed. This topic explains how to do both tasks.

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

Copy a Duty Role

To copy a duty role:

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 is displayed in tabular format by default. 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.
 - If you select **Copy top role**, then only the selected role is copied. The copied role inherits the same role instances as the source role.
 - If you select **Copy top role and inherited roles**, then a copy is made of every role in the role hierarchy provided that a copy of the role with the same name doesn't already exist.
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 **Role Code** values are assigned the default prefix and suffix for copied roles specified on the Roles subtab of the Security Console Administration tab. The prefix **ORA_** is also removed from the role code. You can overwrite the default prefix and suffix 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.

Edit the Copied Duty Role

To edit the copied role, perform the following 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**.

Manage Functional Security Policies

On the Edit Role: Function Security Policies page, any functional security privileges granted directly to the copied role appear on the Privileges tab. Click **Load Inherited Policies** to populate the table with privileges that the role inherits. To view details of the code resources that a privilege secures, select the privilege in the Details section of the page.

You can add or delete existing privileges from copied duty roles but can't create new functional security policies. To delete a privilege that's added directly to the copied role, select the privilege and click the **Delete** icon. You can't delete inherited privileges.

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 Privilege** to grant all function security privileges from the 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.

All the privileges you selected are listed on the Edit Role: Function Security Policies page.

7. Click **Next**.

The Resources tab, which is read-only, lists any resources granted to the role directly rather than through function security privileges. As you can't grant resources directly to roles on the Security Console, only resource grants created before Release 12 could appear on this tab. You can't edit these values.

Manage Data Security Policies

On the Edit Role: Data Security Policies page, any data security policies granted to the copied role appear. You can edit or remove policies from the copied role, or create a new policy for the role. For information about creating, editing, and adding data security policies to a role, see the topic Edit Data Security Policies on the Security Console.

Click **Next** to continue to the next page.

Add and Remove Inherited Roles

The Edit Role: Role Hierarchy page shows the copied duty role and any duty roles that it inherits. The hierarchy is displayed 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**.

View Users Assigned the Role

On the Edit Role: Users page, click **Next**. You can't provision duty roles directly to users.

Review 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

- [Guidelines for Copying Roles](#)
- [Edit Data Security Policies on the Security Console](#)

Create a Custom Role with Limited Access

To delegate some of the IT security management tasks to a help desk member within your company without assigning the IT Security Manager role, create a custom role with specific privileges.

These privileges are exclusively meant for controlling user management access. You can assign these privileges directly to a custom role.

Users without the IT Security Manager role who are assigned custom roles with these privileges have limited access to the Security Console. These users can only lock or unlock other users, reset their password, or view user details. They can't create users or edit user details.

The following table lists the privileges and the associated access controls. It also includes details of pages where the user does the task:

Table with Privileges, Access Control Details, and Pages Where User Does the Task

Privilege Name and Code	Access Control Details	Page Where You Do this Task
Lock and Unlock User Account (ASE_LOCK_UNLOCK_USER_PRIV)	Lock or unlock a user account	User Accounts
Update Password for User Account (ASE_UPDATE_PASSWORD_FOR_USER_PRIV)	Reset the password for a user account	User Accounts and User Account Details
View User Account (ASE_VIEW_USER_ACCOUNT_PRIV)	View the details of a user account	User Account Details

Related Topics

- [View Locked Users and Unlock Users](#)
- [Reset Passwords](#)

10 Access Groups

Use Access Groups to Secure Data

For information on using access groups to secure data to your Oracle CX applications, see the *How do I create and manage security access groups in CX?* playbook on the *Playbooks* page in the *Oracle Sales Help Center*.

11 Data Security Policy to Access Group Rule Migration

Migration Overview

You can use the predefined object sharing rules available with access groups to give users the same access to object data that the predefined data security policies provide.

If you want to replace data security policies with access group rules as the method used to provide your users with access to object data, this chapter provides all the information you need. It includes:

- The steps to follow to migrate from data security policies to access group rules.
- Tables for each object that list the predefined rule or rules that correspond to each of the data security policies defined for the object. Use these tables to identify:
 - The data security policies you need to deactivate
 - The corresponding predefined rules you need to enable

Note: If you're using the sales application for the first time in release 22B or later, your database resources are secured using system access groups and rules by default. You don't need to perform the steps described in this chapter.

Migrate from Data Security Policies to Access Group Rules

You can provide users with access to sales and service data using data security policies, access group rules, or a combination of both.

If you started using Oracle Sales before Update 22B, the predefined job roles and any custom job roles you create gives users data access using data security policies. But you can supplement or refine the access each type of role provides using either data security policies or access groups rules.

You can also configure custom job roles so that the data access they provide is achieved using only, or primarily, access group rules. For example, you might decide that you want users assigned a custom Sales Representative job role to access object records using access group rules. To do this, you deactivate the data security policies assigned to the custom job role, then assign access group rules that provide the same access to the system access group generated for the custom role.

Note: Data security policies for the predefined job roles are locked and can't be deactivated.

There are five steps in the process of migrating a custom role to provide data access primarily through access group rules:

1. *Identify the Data Security Policies to Deactivate*
2. *Identify the Access Group Rules that Correspond to Data Security Policies*
3. *Add Rules to the Access Group Generated for the Custom Role*
4. *Deactivate Data Security Policies*
5. *Verify User Access to Data*

Tip: It's a good idea to devise a few use cases that you can use to compare users' data access before and after the migration process. That way, you can identify any gaps and avoid potential user access issues.

Identify the Data Security Policies to Deactivate

The first step in the process of migrating a custom job role to use access group rule data access is to identify the data security policies assigned to the custom role, then determine which policies you can deactivate and replace with access group rules.

1. Sign in to the application as a user with the IT Security Manager job role and select **Navigator > Tools > Sales and Service Access Management**.
2. Click the Manage Data Policies tab on the Sales and Service Access Management page.
3. On the Manage Data Policies page, select the custom role you want to migrate in the **Role** field.
For this example, let's say the role is called **Sales Representative Custom**.
4. Select an object in the **Object** field. For example, select the **Opportunity** object to view the opportunity data security policies assigned to the role.
5. Click **Find Policies**.
The Active Policies table lists all the active data security policies for the opportunity object that are assigned to the Sales Representative Custom job role.
6. Click the Edit icon.
The Active Policies edit page for the selected role and object is displayed.
7. Review the policies listed and identify active data security policies that are unlocked and can be edited.
Some policies might be locked and can't be deactivated. For example, you can't deactivate policies that are inherited from predefined duty roles because predefined roles can't be edited. The permissions for these policies are grayed out.

8. Identify data security policies that are eligible for deactivation.

Don't edit any policy where the Condition name of the policy includes a reference to `access group`. These policies, shown in the screenshot, are required for users to get access to object data through access groups and must remain associated with the custom role.

ORACLE
Sales and Service Access Management ?

Active Policies : Sales Representative Custom : Opportunity

Access Policies

View ▾ Show Conditions All ▾

Condition
Access the opportunity for table MOO_OPTY a member of an access group associated to the opportunity
Access the opportunity for table MOO_OPTY a member of an access group associated to the opportunity with delete access
Access the opportunity for table MOO_OPTY a member of an access group associated to the opportunity with full access

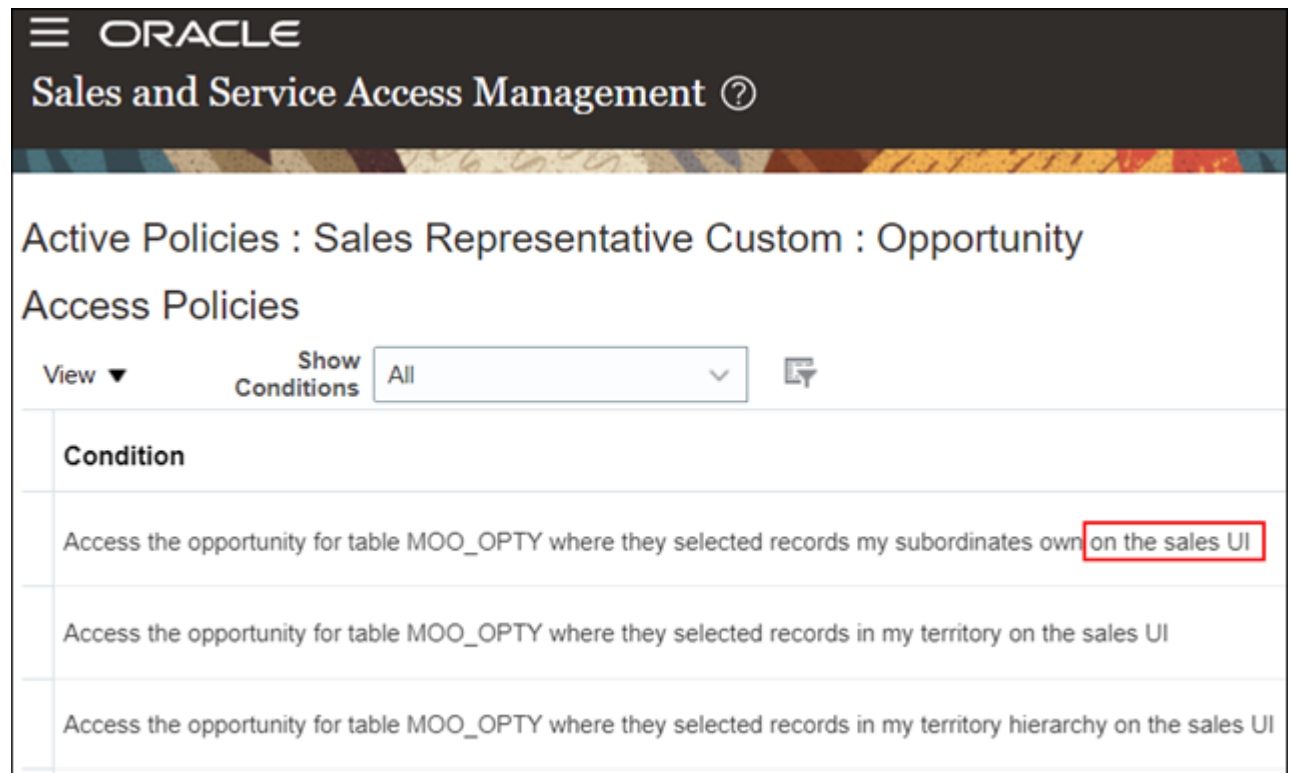
9. Check if all of the active, unlocked policies that are eligible for deactivation are required:

- a. Make a note of each of the required policies and, for each policy, note the current permission levels selected.

You'll need to activate corresponding access group rules that provide the same access levels as these policies.

- b. Make a note of each policy that isn't required. You can deactivate these policies without having to activate a corresponding access group rule.

You can deactivate any policies that grant access based on sales UI privileges. These policies are redundant. The Condition name of these privileges contains a reference to `sales ui` as shown in the screenshot.



10. Repeat steps 3-8 for each object associated with the Sales Representative Custom role that you want to migrate to using access group rule data access. You can migrate a custom role to use access group rules for all objects, or just for specific objects.

Results:

At the end of the process, for your custom role and object, you should have identified and noted:

- All the data security policies to be deactivated
- All the policies marked for deactivation for which you have to assign a corresponding access group rule
- The access levels you need to set for each rule you assign

Identify the Access Group Rules that Correspond to Data Security Policies

To replace data security policies with access group rules as a way of providing data access for a custom job role, identify the rule or rules that provide the same data access as each policy you're going to deactivate for the role. This chapter includes a table for each object that supports access groups. Each table lists the access group rules that correspond to each of the data security policies defined for the object.

1. Review the relevant table for the object you want to migrate and make a note of the object sharing rule that provides the same access as each policy you intend to deactivate.
2. Repeat step 1 for each object that you're switching to use access group rules data access.

For example, to see how each data security policy defined for the Opportunity object maps to access group rules defined for that object, review the *Opportunity Object Mapping* table. Then repeat the process for Leads, Accounts, Contacts, and so on as required.

A data security policy can map to more than one access group rule. When you deactivate a policy, make sure you enable all the rules the policy maps to for the relevant access group. For example, the Opportunity Object Mapping table includes these rows:

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Opportunity	MOOOPITYZBS9	Access the opportunity for table MOO_OPTY where they are member or in management chain of opportunity account team, account territory team or upward territory hierarchy	Opportunity	Account Territory Team	AccountPR9	Accounts where the access group member is a member of the territory associated with the account	ACCOUNTTERRITORY
Opportunity	MOOOPITYZBS9	Access the opportunity for table MOO_OPTY where they are member or in management chain of opportunity account team, account territory team or upward	Opportunity	Account Territory Team Hierarchy	AccountPR10	Accounts where the access group member is a member of the territory that is an ancestor of the territory associated with the account	ACCOUNTTERRITORYHIER

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		territory hierarchy					

In this case, one data security policy (shown in column 3) provides data access based on territory team and territory-team hierarchy membership. But two access group rules, Account Territory Team and Account Territory Team Hierarchy (shown in column 5), must be assigned to provide the same access.

Add Rules to the Access Group Generated for the Custom Role

Once you've identified the access group rule or rules that correspond to each policy you intend to deactivate for a custom job role, you then assign the rules to the system access group generated for the custom role when the role was created. This way, you don't lose your existing access paths to object data.

When you create a custom job role, a system access group is generated for the role but it isn't assigned any access group rules. You can add the rules you identified in the previous step to your custom access group manually but it's generally easier to copy the object sharing rules from another access group that provides similar access, then edit the rules as required.

For example, when you created the Sales Representative Custom job role, a system group, Sales Representative Custom Group, was generated. You can copy the object sharing rules from the group generated for the predefined Sales Representative job role (Sales Representative Group), then edit the rules as required for the Sales Representative Custom Group. Here are the steps to use.

1. Navigate to the Sales and Service Access Management work area.
2. On the Access Groups page, select **System Groups-Role** from the **List** menu.
3. Select the access group whose rules you want to copy. For this example, select **Sales Representative Group**.
4. On the Edit Access Group: Overview page, select the **Copy Rules** option from the **Actions** menu. The Copy Object Sharing Rules dialog is displayed.
5. From the Copy to Group drop-down list, select the group you want to copy the rules to. In this example, select the **Sales Representative Custom Group**.
6. Click **Save**. The rules are copied to your selected group.
7. Click **Save and Close** on the Edit Access Group: Overview subtab.
8. Once the rules are copied, on the Access Groups page, select the access group you've just copied the rules to, in this case, the **Sales Representative Custom Group**.
9. On the Edit Access Group: Overview page, click the Object Rules subtab.
10. Review the new rules assigned to the group against the list of rules you noted in the previous step (Identify the Access Group Rules that Correspond to Data Security Policies).
11. Delete any rules that aren't required by your access group by clicking the Delete icon for the rule.
12. Add any additional rules needed by clicking **Add Rule**, then selecting the rules to add.

13. For rules that are required:

- a. Verify that the access levels defined for the rule are correct.

The access levels for a rule should be the same as those defined for the corresponding data security policy. Change the access levels as needed.

- b. Click the **Enable** check box for each rule you want to enable for the group.
- c. Activate any rule that's inactive by clicking the rule name link.

On the Edit Object Sharing Rule page, click the **Active** check box to activate the rule, then click **Save and Close**.

14. On the Object Sharing Rules page, click **Save and Close** to save your changes.

15. Publish the new rules you copied and enabled for your custom access group by navigating to the Access Groups page, selecting the Object Rules tab, then selecting **Publish Rules** from the **Actions** menu.

Related Topics

- [Identify the Access Group Rules that Correspond to Data Security Policies](#)

Deactivate Data Security Policies

Once you've added the required access group rules to your custom access group, in this case, the Sales Representative Custom group, deactivate the policies you identified as candidates for deactivation in the step Identify the Data Security Policies to Deactivate.

You can deactivate a policy by removing all the permissions assigned to the policy. Alternatively, you can enter an end-date for the policy and specify a date in the past using these steps.

1. Navigate to the Sales and Service Access Management work area.
2. Click the Manage Data Policies tab.
3. Search for the custom job role, for example, **Sales Representative Custom**, in the **Role** field.
4. Select an object, for example **Opportunity**, in the **Object** field, then click **Find Policies**.
5. Click the Edit icon for the Active Policies table.

The Active Policies edit page for the selected role and object is displayed.

6. In the Active Policies table, for each policy you want to deactivate for the object, select a date that has passed in the policy's **End Date** field. For example, select yesterday's date.
7. Repeat steps 3-5 for all the other objects assigned to the role that you want migrate to using access group rules data access.
8. Click **Save and Close**.

Related Topics

- [Identify the Data Security Policies to Deactivate](#)

Verify User Access to Data

Verify that the migration process didn't impact users access to object data.

Test users' access to each type of object data that you migrated to access group rules. Make sure that users assigned your custom role have the same access to data after the migration as they did before the migration.

Account Object Mapping

For each of the data security policies available for the Account object, this topic shows the access group rules that provide equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Trading Community Party	HZPARTIESZBS10	Access the sales party for table HZ_PARTIES where they are the account owner	Account	Account Owner	AccountPR1	Accounts where the access group member is the account owner	ACCOUNTOWNER
Trading Community Party	HZPARTIESZBS10	Access the sales party for table HZ_PARTIES where they are in the management chain of the account owner	Account	Account Owner Hierarchy	AccountPR2	Accounts where the access group member is in the management chain of the account owner	ACCOUNTOWNERHIER
Trading Community Party	HZPARTIESZCM1	Access the sales party for table HZ_PARTIES where user is in the sales account team	Account	Account Team	AccountPR3	Accounts where the access group member is on the account team	ACCOUNTTEAM
Trading Community Party	HZPARTIESZCM4	Access the sales party for table HZ_PARTIES where user is in the sales account team with edit access	Account	Account Team with Edit Access	AccountPR5	Accounts where the access group member is on the account team with edit access	ACCOUNTTEAMWITHEDIT

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Trading Community Party	HZPARTIESZCM4	Access the sales party for table HZ_PARTIES where user is in the sales account team with full access	Account	Account Team with Full Access	AccountPR7	Accounts where the access group member is on the account team with full access	ACCOUNTTEAMWITHFULL
Trading Community Party	HZPARTIESZCM3	Access the sales party for table HZ_PARTIES where user is in the management chain of a resource who is on the sales account team	Account	Account Team Hierarchy	AccountPR4	Accounts where the access group member is in the management chain of a resource who is on the account team	ACCOUNTTEAMHIER
Trading Community Party	HZPARTIESZCM4	Access the sales party for table HZ_PARTIES where user is in the management chain of a resource who is on the sales account team with edit access	Account	Account Team Hierarchy with Edit Access	AccountPR6	Accounts where the access group member is in the management chain of a resource who is on the account team with edit access	ACCOUNTTEAMHIERWITH
Trading Community Party	HZPARTIESZCM4	Access the sales party for table HZ_PARTIES where user is in the management chain of a resource who is on the sales account team with full access	Account	Account Team Hierarchy with Full Access	AccountPR8	Accounts where the access group member is in the management chain of a resource who is on the account team with full access	ACCOUNTTEAMHIERWITH
Trading Community Party	HZPARTIESZCM3	Access the sales party for table HZ_PARTIES where user is a member of the territory associated with the sales account	Account	Account Territory Team	AccountPR9	Accounts where the access group member is a member of the territory associated with the account	ACCOUNTTERRITORY

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Trading Community Party	HZPARTIESZCM4	Access the sales party for table HZ_PARTIES where user is a member of the territory that is an ancestor of the territory associated with the sales account	Account	Account Territory Team Hierarchy	AccountPR10	Accounts where the access group member is a member of the territory that is an ancestor of the territory associated with the account	ACCOUNTTERRITORYHIER
Trading Community Party	HZPARTIESZCM5	Access the sales party for table HZ_PARTIES where user is the owner of the territory associated with the sales account	Account	Account Territory Owner	AccountPR11	Accounts where the access group member is the owner of the territory associated with the account	ACCOUNTTERRITORYOWN
Trading Community Party	HZPARTIESZCM5	Access the sales party for table HZ_PARTIES where user is the owner of the territory that is an ancestor of the territory associated with the sales account	Account	Account Territory Owner Hierarchy	AccountPR12	Accounts where the access group member is the owner of the territory that is an ancestor of the territory associated with the account	ACCOUNTTERRITORYOWN
Trading Community Party	HZPARTIESZCM8	Access the sales party for table HZ_PARTIES for all sales parties in the enterprise	Account	All Parties	AccountPR13	Access all parties	GLOBAL_ACCOUNT
Trading Community Party	HZPARTIESHZ54	Access the trading community party for table HZ_PARTIES all accounts in the enterprise	Account	All Accounts	AccountPR14	Access all accounts	ALLACCOUNTS
Trading Community Party	HZPARTIESZCM1	Access the sales party for table HZ_PARTIES for all prospects in the enterprise	Account	All Prospects	AccountPR15	Access all prospects	ALLPROSPECTS

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Trading Community Party	HZPARTIESZCM1	Access the sales party for table HZ_PARTIES for all customers in the enterprise	Account	All Customers	AccountPR16	Access all customers	ALLCUSTOMERS

Activity Object Mapping

For each of the data security policies available for the Activity object, this topic shows the access group rules that provide equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
ACTIVITY	ZMMACTYACTIV	Access the activity for table ZMM_ACTY_ACTIVITIES where they are only an owner of an activity	ACTIVITY	Activity Owner	ActivityPR1	Activities where the access group member is the activity owner	ACTIVITYOWNER
ACTIVITY	ZMMACTYACTIV	Access the activity for table ZMM_ACTY_ACTIVITIES where they are only a delegator of an activity	ACTIVITY	Activity Delegator	ActivityPR2	Activities where the access group member is a delegator	ACTIVITYDELEGATOR
ACTIVITY	ZMMACTYACTIV	Access the activity for table ZMM_ACTY_ACTIVITIES where they are in the management chain of an owner only of an activity	ACTIVITY	Activity Owner Hierarchy	ActivityPR3	Activities where the access group member is in the management chain of the activity owner	ACTIVITYOWNERHIER
ACTIVITY	ZMMACTYACTIV	Access the activity for table ZMM_ACTY_ACTIVITIES	ACTIVITY	Activity Delegator Hierarchy	ActivityPR4	Activities where the access group member is in the	ACTIVITYDELEGATORHIER

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		where they are in the management chain of a delegator only of an activity				management chain of a delegator on the activity	
ACTIVITY	ZMMACTYACTIV	Access the activity for table ZMM_ACTY_ACTIVITIES where they are only a resource of an activity	ACTIVITY	Activity Resource	ActivityPR5	Activities where the access group member is an activity resource	ACTIVITYRESOURCE
ACTIVITY	ZMMACTYACTIV	Access the activity for table ZMM_ACTY_ACTIVITIES where they are in the management chain of a resource only of an activity	ACTIVITY	Activity Resource Hierarchy	ActivityPR11	Activities where the access group member is in the management chain of a resource on the activity	ACTIVITYTASKRESOURCE
ACTIVITY	ZMMACTYACTIV	Access the activity for table ZMM_ACTY_ACTIVITIES for all template activities in the enterprise.	ACTIVITY	All Activity Templates	ActivityPR6	Access to all activity templates	ALLACTIVITYTEMPLATES
ACTIVITY	ZMMACTYACTIV	Access the activity for table ZMM_ACTY_ACTIVITIES where they are either a resource or a delegator of a task or an owner or a delegator of an appointment or an owner or a delegator of a call report activity.	ACTIVITY	Activity Task Resource	ActivityPR7	Tasks where the access group member is a resource on the task	ACTIVITYTASKRESOURCE
ACTIVITY	ZMMACTYACTIV	Access the activity for table ZMM_ACTY_ACTIVITIES where they are	ACTIVITY	Activity Task Delegator	ActivityPR8	Tasks where the access group member is a delegator on the task	ACTIVITYTASKDELEGATOR

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		either a resource or a delegator of a task or an owner or a delegator of an appointment or an owner or a delegator of a call report activity.					
ACTIVITY	ZMMACTYACTIV	Access the activity for table ZMM_ACTY_ACTIVITIES where they are either a resource or a delegator of a task or an owner or a delegator of an appointment or an owner or a delegator of a call report activity.	ACTIVITY	Activity Appointment and Call Report Owner	ActivityPR9	Call reports and appointments where the access group member is the owner	ACTIVITYAPPTANDCROWN
ACTIVITY	ZMMACTYACTIV	Access the activity for table ZMM_ACTY_ACTIVITIES where they are either a resource or a delegator of a task or an owner or a delegator of an appointment or an owner or a delegator of a call report activity.	ACTIVITY	Activity Appointment and Call Report Delegator	ActivityPR10	Call reports and appointments where the access group member is the delegator	ACTIVITYAPPTANDCRDELE
ACTIVITY	ZMMACTYACTIV	Access the activity for table ZMM_ACTY_ACTIVITIES where they are either the owner or a delegator of an activity.	ACTIVITY	Activity Delegator	ActivityPR2	Tasks where the access group member is a delegator on the task	ACTIVITYDELEGATOR
ACTIVITY	ZMMACTYACTIV	Access the activity for table ZMM_ACTY_ACTIVITIES	ACTIVITY	Activity Owner	ActivityPR1	Activities where the access group member	ACTIVITYOWNER

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		where they are either the owner or a delegator of an activity.				is the activity owner	
ACTIVITY	ZMMACTYACTIV	Access the activity for table ZMM_ACTY_ACTIVITIES where they are in the management chain of an activity resource.	ACTIVITY	Activity Resource Hierarchy	ActivityPR11	Activities where the access group member is in the management chain of a resource on the activity	ACTIVITYRESOURCEHIER
ACTIVITY	ZMMACTYACTIV	Access the activity for table ZMM_ACTY_ACTIVITIES where they are in the management chain for a task activity or they are an owner for an appointment activity.	ACTIVITY	Activity Appointment and Call Report Owner	ActivityPR9	Call reports and appointments where the access group member is the owner	ACTIVITYAPPTANDCROWN
ACTIVITY	ZMMACTYACTIV	Access the activity for table ZMM_ACTY_ACTIVITIES where they are in the management chain for a task activity or they are an owner for an appointment activity.	ACTIVITY	Activity Task Resource Hierarchy	ActivityPR12	Tasks where the access group member is the management chain of a resource on the activity	ACTIVITYTASKRESOURCEHIER
ACTIVITY	ZMMACTYACTIV	Access the activity for table ZMM_ACTY_ACTIVITIES for all activities in the enterprise	ACTIVITY	Activity Resource	ActivityPR5	Activities where the access group member is an activity resource	ACTIVITYRESOURCE
ACTIVITY	ZMMACTYACTIV	Access the activity for table ZMM_ACTY_ACTIVITIES for all activities in the enterprise	ACTIVITY	All Nonprivate Activities	ActivityPR13	Access to all nonprivate activities	ALLNONPRIVATEACTIVITIES

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
ACTIVITY	ZMMACTYACTIV	Access the activity for table ZMM_ACTY_ACTIVITIES where they are a member of the partner territory	ACTIVITY	Activity Partner Territory	ActivityPR15	Activities where the access group member is a partner on the territory for the activity	ACTIVITYPARTNERTERRIT
ACTIVITY	ZMMACTYACTIV	Access the activity for table ZMM_ACTY_ACTIVITIES where they are a member of the partner territory	ACTIVITY	Activity Partner Territory Hierarchy	ActivityPR16	Activities where the access group member is in the partner territory hierarchy for the activity	ACTIVITYPARTNERTERRIT
ACTIVITY	ZMMACTYACTIV	Access the activity for table ZMM_ACTY_ACTIVITIES where partner users are resources in the activity	ACTIVITY	Activity Nonprivate Partner Company	ActivityPR17	Activities where the access group member is in the partner company on the activity	ACTIVITYNONPRIVATEPAR
ACTIVITY	ZMMACTYACTIV	Access the activity for table ZMM_ACTY_ACTIVITIES where partner users are resources in the activity	ACTIVITY	All Nonprivate Activities for Child Partner Companies	ActivityPR18	Activities where the access group member is a member of an ancestor partner company related to the activity	ACTIVITYNONPRIVATEPAR
ACTIVITY	ZMMACTYACTIV	Access the activity for table ZMM_ACTY_ACTIVITIES where they are only a delegator of an activity	ACTIVITY	Activity Delegator	ActivityPR2	Activities where the access group member is a delegator	ACTIVITYDELEGATOR
ACTIVITY	ZMMACTYACTIV	Access the activity for table ZMM_ACTY_ACTIVITIES where they are only a delegator of an activity	ACTIVITY	Activity Resource	ActivityPR5	Activities where the access group member is an activity resource	ACTIVITYRESOURCE
ACTIVITY	ZMMACTYACTIV	Access the activity for table	ACTIVITY	Activity Delegator	ActivityPR2	Activities where the access	ACTIVITYDELEGATOR

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		ZMM_ACTY_ACTIVITIES where they are a participant on the activity.				group member is a delegator	
ACTIVITY	ZMMACTYACTIV	Access the activity for table ZMM_ACTY_ACTIVITIES where they are a participant on the activity.	ACTIVITY	Activity Resource	ActivityPR5	Activities where the access group member is an activity resource	ACTIVITYRESOURCE
ACTIVITY	ZMMACTYACTIV	Access the activity for table ZMM_ACTY_ACTIVITIES where they are either a resource or a delegator of a task or an owner or a delegator of an appointment or a call report activity.	ACTIVITY	Activity Appointment and Call Report Owner	ActivityPR9	Call reports and appointments where the access group member is the owner	ACTIVITYAPPTANDCROWN
ACTIVITY	ZMMACTYACTIV	Access the activity for table ZMM_ACTY_ACTIVITIES where they are either a resource or a delegator of a task or an owner or a delegator of an appointment or a call report activity.	ACTIVITY	Activity Appointment and Call Report Delegator	ActivityPR10	Call reports and appointments where the access group member is the delegator	ACTIVITYAPPTANDCRDELE
ACTIVITY	ZMMACTYACTIV	Access the activity for table ZMM_ACTY_ACTIVITIES where they are either a resource or a delegator of a task or an owner or a delegator of an appointment or a call report activity.	ACTIVITY	Activity Task Resource	ActivityPR7	Tasks where the access group member is a resource on the task	ACTIVITYTASKRESOURCE

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
ACTIVITY	ZMMACTYACTIV	Access the activity for table ZMM_ACTY_ACTIVITIES where they are either a resource or a delegator of a task or an owner or a delegator of an appointment or a call report activity.	ACTIVITY	Activity Task Delegator	ActivityPR8	Tasks where the access group member is a delegator on the task	ACTIVITYTASKDELEGATOR
ACTIVITY	ZMMACTYACTIV	Access the activity for table ZMM_ACTY_ACTIVITIES where they are in the management chain of the activity owner	ACTIVITY	Activity Owner Hierarchy	ActivityPR3	Activities where the access group member is in the management chain of the activity owner	ACTIVITYOWNERHIER

Activity Assignee Object Mapping

For each of the data security policies available for the Activity Assignee object, this topic shows the access extension rules that provide equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Access Extension Rule Name	Predefined Access Extension Rule Number	Predefined Access Extension Rule Description	Relationship Name
ACTIVITYASSIGN	ZMMACTYASSIG	Access the activity for table ZMM_ACTY_ASSIGNEES where they are either a resource or a delegator of an activity	Activity Assignee	Delegator of Related Activity	ActivityAssignee/	Predefined rule for delegator of related activity.	ActivityToActivityAssignee
ACTIVITYASSIGN	ZMMACTYASSIG	Access the activity for table ZMM_ACTY_ASSIGNEES where they are	Activity Assignee	Resource of Related Activity	ActivityAssignee/	Predefined rule for resource of related activity.	ActivityToActivityAssignee

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Access Extension Rule Name	Predefined Access Extension Rule Number	Predefined Access Extension Rule Description	Relationship Name
		either a resource or a delegator of an activity					
ACTIVITYASSIGN	ZMMACTYASSIG	Access the activity for table ZMM_ACTY_ASSIGNEES where they are either a resource or a delegator of a task or an owner or a delegator of an appointment or an owner or a delegator of a call report activity	Activity Assignee	Resource of Related Task	ActivityAssignee/	Predefined rule for resource of related task.	ActivityToActivityAssignee
ACTIVITYASSIGN	ZMMACTYASSIG	Access the activity for table ZMM_ACTY_ASSIGNEES where they are either a resource or a delegator of a task or an owner or a delegator of an appointment or an owner or a delegator of a call report activity	Activity Assignee	Delegator of Related Task	ActivityAssignee/	Predefined rule for delegator of related task.	ActivityToActivityAssignee
ACTIVITYASSIGN	ZMMACTYASSIG	Access the activity for table ZMM_ACTY_ASSIGNEES where they are either a resource or a delegator of a task or an owner or a delegator of an appointment or an owner or a delegator of a call report activity	Activity Assignee	Owner or Delegator of Related Appointment	ActivityAssignee/	Predefined rule for owner or delegator of related appointment.	ActivityToActivityAssignee
ACTIVITYASSIGN	ZMMACTYASSIG	Access the activity for table ZMM_ACTY_ASSIGNEES	Activity Assignee	Owner or Delegator of Related Call Report	ActivityAssignee/	Predefined rule for owner or delegator	ActivityToActivityAssignee

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Access Extension Rule Name	Predefined Access Extension Rule Number	Predefined Access Extension Rule Description	Relationship Name
		where they are either a resource or a delegator of a task or an owner or a delegator of an appointment or an owner or a delegator of a call report activity				of related call report.	
ACTIVITYASSIGN	ZMMACTYASSIG	Access the activity for table ZMM_ACTY_ASSIGNEES where they are either the owner or a delegator of an activity	Activity Assignee	Delegator of Related Activity	ActivityAssignee/	Predefined rule for delegator of related activity.	ActivityToActivityAssignee
ACTIVITYASSIGN	ZMMACTYASSIG	Access the activity for table ZMM_ACTY_ASSIGNEES where they are either the owner or a delegator of an activity	Activity Assignee	Owner of Related Activity	ActivityAssignee/	Predefined rule for owner of related activity.	ActivityToActivityAssignee
ACTIVITYASSIGN	ZMMACTYASSIG	Access the activity for table ZMM_ACTY_ASSIGNEES where they are in the management chain of an activity resource	Activity Assignee	Resource Hierarchy of Related Activity	ActivityAssignee/	Predefined rule for resource hierarchy of related activity.	ActivityToActivityAssignee
ACTIVITYASSIGN	ZMMACTYASSIG	Access the activity for table ZMM_ACTY_ASSIGNEES where they are in the management chain for a task activity or they are an owner for an appointment activity	Activity Assignee	Resource Hierarchy of Related Task	ActivityAssignee/	Predefined rule for resource hierarchy of related task.	ActivityToActivityAssignee
ACTIVITYASSIGN	ZMMACTYASSIG	Access the activity for table	Activity Assignee	Owner or Delegator	ActivityAssignee/	Predefined rule for owner	ActivityToActivityAssignee

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Access Extension Rule Name	Predefined Access Extension Rule Number	Predefined Access Extension Rule Description	Relationship Name
		ZMM_ACTY_ASSIGNEES where they are in the management chain for a task activity or they are an owner for an appointment activity		of Related Appointment		or delegator of related appointment.	
ACTIVITYASSIGN	ZMMACTYASSIG	Access the activity for table ZMM_ACTY_ASSIGNEES where they are in the management chain of the activity owner	Activity Assignee	Owner Hierarchy of Related Activity	ActivityAssignee/	Predefined rule for owner hierarchy of related activity.	ActivityToActivityAssignee
ACTIVITYASSIGN	ZMMACTYASSIG	Access the activity for table ZMM_ACTY_ASSIGNEES for all activities in the enterprise	Activity Assignee	Resource of Related Activity	ActivityAssignee/	Predefined rule for resource of related activity.	ActivityToActivityAssignee
ACTIVITYASSIGN	ZMMACTYASSIG	Access the activity for table ZMM_ACTY_ASSIGNEES for all activities in the enterprise	Activity Assignee	Assignees of Nonprivate Activities	ActivityAssignee/	Predefined rule for assignees of all non-private activities.	ActivityToActivityAssignee
ACTIVITYASSIGN	ZMMACTYASSIG	Access the activity resource for table ZMM_ACTY_ASSIGNEES where they are a resource for an activity	Activity Assignee	Delegator of Related Activity	ActivityAssignee/	Predefined rule for delegator of related activity.	ActivityToActivityAssignee
ACTIVITYASSIGN	ZMMACTYASSIG	Access the activity resource for table ZMM_ACTY_ASSIGNEES where they are a resource for an activity	Activity Assignee	Resource of Related Activity	ActivityAssignee/	Predefined rule for resource of related activity.	ActivityToActivityAssignee

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Access Extension Rule Name	Predefined Access Extension Rule Number	Predefined Access Extension Rule Description	Relationship Name
ACTIVITYASSIGN	ZMMACTYASSIG	Access the activity for table ZMM_ACTY_ASSIGNEES where they are either a resource or a delegator of a task or an owner or a delegator of an appointment or a call report activity	Activity Assignee	Resource of Related Task	ActivityAssignee/	Predefined rule for resource of related task.	ActivityToActivityAssignee
ACTIVITYASSIGN	ZMMACTYASSIG	Access the activity for table ZMM_ACTY_ASSIGNEES where they are either a resource or a delegator of a task or an owner or a delegator of an appointment or a call report activity	Activity Assignee	Delegator of Related Task	ActivityAssignee/	Predefined rule for delegator of related task.	ActivityToActivityAssignee
ACTIVITYASSIGN	ZMMACTYASSIG	Access the activity for table ZMM_ACTY_ASSIGNEES where they are either a resource or a delegator of a task or an owner or a delegator of an appointment or a call report activity	Activity Assignee	Owner or Delegator of Related Appointment	ActivityAssignee/	Predefined rule for owner or delegator of related appointment.	ActivityToActivityAssignee
ACTIVITYASSIGN	ZMMACTYASSIG	Access the activity for table ZMM_ACTY_ASSIGNEES where partner users are resources in the activity	Activity Assignee	Owner or Delegator of Related Call Report	ActivityAssignee/	Predefined rule for owner or delegator of related call report.	ActivityToActivityAssignee
ACTIVITYASSIGN	ZMMACTYASSIG	Access the activity for table ZMM_ACTY_ASSIGNEES where partner	Activity Assignee	Partner Resource of Related Activity	ActivityAssignee/	Predefined rule for partner resource of related activity.	ActivityToActivityAssignee

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Access Extension Rule Name	Predefined Access Extension Rule Number	Predefined Access Extension Rule Description	Relationship Name
		users are resources in the activity					

Asset Object Mapping

For each of the data security policies available for the Asset object, this topic shows the access extension rules that provide equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Access Extension Rule Name	Predefined Access Extension Rule Number	Predefined Access Extension Rule Description	Relationship Name
Asset	ZCAASSETZCM2	Access the CRM Asset for table ZCA_ASSET where user is a sales party team member of the asset owner party	Asset	Assets of Related Asset Owner Account Team	AccountAssetRule	Predefined rule for assets of Related Asset Owner Account Team.	AccountToAssets
Asset	ZCAASSETZCM2	Access the CRM Asset for table ZCA_ASSET where user is a sales party team member of the asset owner party with edit access	Asset	Assets of Related Asset Owner Account Team with Edit Access	AccountAssetRule	Predefined rule for assets of Related Asset Owner Account Team with Edit Access.	AccountToAssets
Asset	ZCAASSETZCM2	Access the CRM Asset for table ZCA_ASSET where user is a sales party team member of the asset owner party with full access	Asset	Assets of Related Asset Owner Account Team with Full Access	AccountAssetRule	Predefined rule for assets of Related Asset Owner Account Team with Full Access.	AccountToAssets
Asset	ZCAASSETZCM2	Access the CRM Asset for table ZCA_ASSET where user is in the	Asset	Assets of Related Asset Owner Account Team Hierarchy	AccountAssetRule	Predefined rule for assets of Related Asset Owner Account Team Hierarchy.	AccountToAssets

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Access Extension Rule Name	Predefined Access Extension Rule Number	Predefined Access Extension Rule Description	Relationship Name
		management chain of a resource who is a sales party team member of the asset owner party					
Asset	ZCAASSETZCM2	Access the CRM Asset for table ZCA_ASSET where user is in the management chain of a resource who is a sales party team member of the asset owner party with edit access	Asset	Assets of Related Asset Owner Account Team Hierarchy with Edit Access	AccountAssetRule	Predefined rule for assets of Related Asset Owner Account Team Hierarchy with Edit Access.	AccountToAssets
Asset	ZCAASSETZCM2	Access the CRM Asset for table ZCA_ASSET where user is in the management chain of a resource who is a sales party team member of the asset owner party with full access	Asset	Assets of Related Asset Owner Account Team Hierarchy with Full Access	AccountAssetRule	Predefined rule for assets of Related Asset Owner Account Team Hierarchy with Full Access.	AccountToAssets
Asset	ZCAASSETZCM2	Access the CRM Asset for table ZCA_ASSET where user is owner of the territory associated with the asset owner party	Asset	Assets of Related Asset Owner Account Territory Owner	AccountAssetRule	Predefined rule for assets of Related Asset Owner Account Territory Owner.	AccountToAssets
Asset	ZCAASSETZCM2	Access the CRM Asset for table ZCA_ASSET where user is a owner of the territory that is an ancestor of the territory associated with	Asset	Assets of Related Asset Owner Account Territory Owner Hierarchy	AccountAssetRule	Predefined rule for assets of Related Asset Owner Account Territory Owner Hierarchy.	AccountToAssets

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Access Extension Rule Name	Predefined Access Extension Rule Number	Predefined Access Extension Rule Description	Relationship Name
		the asset owner party					
Asset	ZCAASSETZCM2	Access the CRM Asset for table ZCA_ASSET where user is a member of the territory associated with the asset owner party	Asset	Assets of Related Asset Owner Account Territory Team	AccountAssetRule	Predefined rule for assets of Related Asset Owner Account Territory Team.	AccountToAssets
Asset	ZCAASSETZCM2	Access the CRM Asset for table ZCA_ASSET where user is a member of the territory that is an ancestor of the territory associated with the asset owner party	Asset	Assets of Related Asset Owner Account Territory Team Hierarchy	AccountAssetRule	Predefined rule for assets of Related Asset Owner Account Territory Team Hierarchy.	AccountToAssets
Asset	ZCAASSETZCM2	Access the CRM Asset for table ZCA_ASSET all assets in the enterprise where asset owner party is a customer	Asset	Assets of Related All Asset Owner Account Customers	AccountAssetRule	Predefined rule for assets of Related All Asset Owner Account Customers.	AccountToAssets
Asset	ZCAASSETZCM2	Access the CRM Asset for table ZCA_ASSET all assets in the enterprise where asset owner party is a prospect	Asset	Assets of Related All Asset Owner Account Prospects	AccountAssetRule	Predefined rule for assets of Related All Asset Owner Account Prospects.	AccountToAssets
Asset	ZCAASSETZCM2	Access the CRM Asset for table ZCA_ASSET where user is a sales party team member of the asset owner party	Asset	Assets of Related Asset Owner Contact Team	ContactAssetRule	Predefined rule for assets of Related Asset Owner Contact Team.	ContactToAssets
Asset	ZCAASSETZCM2	Access the CRM Asset for table	Asset	Assets of Related Asset	ContactAssetRule	Predefined rule for assets of	ContactToAssets

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Access Extension Rule Name	Predefined Access Extension Rule Number	Predefined Access Extension Rule Description	Relationship Name
		ZCA_ASSET where user is a sales party team member of the asset owner party with edit access		Owner Contact Team with Edit Access		Related Asset Owner Contact Team with Edit Access.	
Asset	ZCAASSETZCM2	Access the CRM Asset for table ZCA_ASSET where user is a sales party team member of the asset owner party with full access	Asset	Assets of Related Asset Owner Contact Team with Full Access	ContactAssetRule	Predefined rule for assets of Related Asset Owner Contact Team with Full Access.	ContactToAssets
Asset	ZCAASSETZCM2	Access the CRM Asset for table ZCA_ASSET where user is in the management chain of a resource who is a sales party team member of the asset owner party	Asset	Assets of Related Asset Owner Contact Team Hierarchy	ContactAssetRule	Predefined rule for assets of Related Asset Owner Contact Team Hierarchy.	ContactToAssets
Asset	ZCAASSETZCM2	Access the CRM Asset for table ZCA_ASSET where user is in the management chain of a resource who is a sales party team member of the asset owner party with edit access	Asset	Assets of Related Asset Owner Contact Team Hierarchy with Edit Access	ContactAssetRule	Predefined rule for assets of Related Asset Owner Contact Team Hierarchy with Edit Access.	ContactToAssets
Asset	ZCAASSETZCM2	Access the CRM Asset for table ZCA_ASSET where user is in the management chain of a resource who is a sales party team member of the asset owner	Asset	Assets of Related Asset Owner Contact Team Hierarchy with Full Access	ContactAssetRule	Predefined rule for assets of Related Asset Owner Contact Team Hierarchy with Full Access.	ContactToAssets

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Access Extension Rule Name	Predefined Access Extension Rule Number	Predefined Access Extension Rule Description	Relationship Name
		party with full access					
Asset	ZCAASSETZCM2	Access the CRM Asset for table ZCA_ASSET where user is owner of the territory associated with the asset owner party	Asset	Assets of Related Asset Owner Contact Territory Owner	ContactAssetRule	Predefined rule for assets of Related Asset Owner Contact Territory Owner.	ContactToAssets
Asset	ZCAASSETZCM2	Access the CRM Asset for table ZCA_ASSET where user is a owner of the territory that is an ancestor of the territory associated with the asset owner party	Asset	Assets of Related Asset Owner Contact Territory Owner Hierarchy	ContactAssetRule	Predefined rule for assets of Related Asset Owner Contact Territory Owner Hierarchy.	ContactToAssets
Asset	ZCAASSETZCM2	Access the CRM Asset for table ZCA_ASSET where user is a member of the territory associated with the asset owner party	Asset	Assets of Related Asset Owner Contact Territory Team	ContactAssetRule	Predefined rule for assets of Related Asset Owner Contact Territory Team.	ContactToAssets
Asset	ZCAASSETZCM2	Access the CRM Asset for table ZCA_ASSET where user is a member of the territory that is an ancestor of the territory associated with the asset owner party	Asset	Assets of Related Asset Owner Contact Territory Team Hierarchy	ContactAssetRule	Predefined rule for assets of Related Asset Owner Contact Territory Team Hierarchy.	ContactToAssets
Asset	ZCAASSETZCM2	Access the CRM Asset for table ZCA_ASSET all assets in the enterprise where asset owner party is a customer	Asset	Assets of Related All Asset Owner Contact Customers	ContactAssetRule	Predefined rule for assets of Related All Asset Owner Contact Customers.	ContactToAssets

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Access Extension Rule Name	Predefined Access Extension Rule Number	Predefined Access Extension Rule Description	Relationship Name
Asset	ZCAASSETZCM2	Access the CRM Asset for table ZCA_ASSET all assets in the enterprise where asset owner party is a prospect	Asset	Assets of Related All Asset Owner Contact Prospects	ContactAssetRule	Predefined rule for assets of Related All Asset Owner Contact Prospects.	ContactToAssets

Business Plan Object Mapping

For each of the data security policies available for the Business Plan object, this topic shows the access group rules that provide equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Business Plan	NA	NA	Business Plan	All Business Plans	BusinessPlanPR1	Access all business plans	GLOBAL_BusinessPlan
Business Plan	ZCABPBUSINESS	Access the sales business plan for table ZCA_BP_BUSINESS_PLANS where user is member of business plan team	Business Plan	Business Plan Team	BusinessPlanPR2	Business plans where the access group member is a resource on the business plan team	BPTEAM
Business Plan	ZCABPBUSINESS	Access the sales business plan for table ZCA_BP_BUSINESS_PLANS where user is member of business plan team, with access level of edit or full	Business Plan	Business Plan Team with Edit or Full Access	BusinessPlanPR3	Business plans where the access group member is a resource on the business plan team with edit or full access	BPTEAMEDITORFULL
Business Plan	ZCABPBUSINESS	Access the sales business plan for table ZCA_BP_BUSINESS_PLANS where user is member of business plan team, with access level of edit or full	Business Plan	Draft Business Plan Team with Edit or Full Access	BusinessPlanPR4	Business plans where the access group member is a	BPDRAFTTEAMEDITORFULL

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		PLANS where user is member of business plan team, with access level of edit or full, and business plan status is draft or in revision				resource on the business plan team with edit or full access and business plan status is draft or in revision	
Business Plan	ZCABPBUSINESS	Access the sales business plan for table ZCA_BP_BUSINESS_PLANS where user is member of business plan team, with access level of full, and business plan status is draft or in revision	Business Plan	Draft Business Plan Team with Full Access	BusinessPlanPR5	Business plans where the access group member is a resource on the business plan team with full access and business plan status is draft or in revision	BPDRAFTTEAMFULL
Business Plan	ZCABPBUSINESS	Access the sales business plan for table ZCA_BP_BUSINESS_PLANS where their subordinate is member of business plan team	Business Plan	Business Plan Team Member in Resource Hierarchy	BusinessPlanPR6	Business plans where the access group member is in the management chain of a resource on the business plan team	BPTEAMRESHIER
Business Plan	ZCABPBUSINESS	Access the sales business plan for table ZCA_BP_BUSINESS_PLANS where their subordinate is member of business plan team, with access level of edit or full	Business Plan	Business Plan Team Member with Edit or Full Access in Resource Hierarchy	BusinessPlanPR7	Business plans where the access group member is in the management chain of a resource on the business plan team with edit or full access	BPTEAMEDITORFULLRESH
Business Plan	ZCABPBUSINESS	Access the sales business plan for table ZCA_BP_BUSINESS_PLANS where their subordinate is member of	Business Plan	Draft Business Plan Team Member with Edit or Full Access in Resource Hierarchy	BusinessPlanPR8	Business plans where the access group member is in the management chain of a resource on the	BPDRAFTTEAMEDITORFUL

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		business plan team, with access level of edit or full, and business plan status is draft or in revision				business plan team with edit or full access and business plan status is draft or in revision	
Business Plan	ZCABPBUSINESS	Access the sales business plan for table ZCA_BP_BUSINESS_PLANS where their subordinate is member of business plan team, with access level of full, and business plan status is draft or in revision	Business Plan	Draft Business Plan Team Member with Full Access in Resource Hierarchy	BusinessPlanPR9	Business plans where the access group member is in the management chain of a resource on the business plan team with full access and business plan status is draft or in revision	BPDRAFTTEAMFULLRESH
Business Plan	ZCABPBUSINESS	Access the sales business plan for table ZCA_BP_BUSINESS_PLANS where the business plan class is partner and user is member of business plan team	Business Plan	Partner Business Plan Team	BusinessPlanPR10	Business plans where the access group member is a resource on the business plan team and business plan class is partner	BPPARTNERBPTEAM
Business Plan	ZCABPBUSINESS	Access the sales business plan for table ZCA_BP_BUSINESS_PLANS where the business plan class is partner, user is member of business plan team, with access level of edit or full, and status is submitted to partner	Business Plan	Partner Business Plan Team with Edit or Full Access	BusinessPlanPR11	Business plans where the access group member is a resource on the business plan team with edit or full access and business plan class is partner and business plan status is submitted to partner	BPARTNERSUBMITBPTEAM
Business Plan	ZCABPBUSINESS	Access the sales business plan for table ZCA_	Business Plan	Business Plans for Partner Resources	BusinessPlanPR12	Business plans where the access group	BPFORPARTNERRES

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		BP_BUSINESS_PLANS where the business plan class is partner and user is a contact of partner account				member is a member of the partner company related to the business plan and the business plan class is partner	
Business Plan	ZCABPBUSINESS	Access the sales business plan for table ZCA_BP_BUSINESS_PLANS where the business plan class is partner and user is a contact of partner account and status is submitted to partner	Business Plan	Submitted for Partner Business Plans for Partner Resources	BusinessPlanPR1	Business plans where the access group member is a member of the partner company related to the business plan and the business plan class is partner and status is submitted to partner	BPSUBMITFORPARTNERRE
Business Plan	ZCABPBUSINESS	Access the sales business plan for table ZCA_BP_BUSINESS_PLANS where the sales business plan class is partner	Business Plan	Partner Business Plans	BusinessPlanPR1	Business plans where class is partner	BPPARTNER

Campaign Object Mapping

For the data security policy available for the Campaign object, this topic shows the access group rule that provides equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Campaigns	NA	Access all marketing integration campaigns	Campaigns	All Campaigns	CampaignPR1	Access all campaigns	GLOBAL_CAMPAIGN

Contact Object Mapping

For each of the data security policies available for the Contact object, this topic shows the access group rules that provide equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Trading Community Party	HZPARTIESZBS10	Access the sales party for table HZ_PARTIES where they are the account owner	Contact	Contact Owner	ContactPR1	Contacts where the access group member is the contact owner	CONTACTOWNER
Trading Community Party	HZPARTIESZBS10	Access the sales party for table HZ_PARTIES where they are in the management chain of the account owner	Contact	Contact Owner Hierarchy	ContactPR2	Contacts where the access group member is in the management chain of the contact owner	CONTACTOWNERHIER
Trading Community Party	HZPARTIESZCM1	Access the sales party for table HZ_PARTIES where user is in the sales account team	Contact	Contact Team	ContactPR3	Contacts where the access group member is on the contact team	CONTACTTEAM
Trading Community Party	HZPARTIESZCM4	Access the sales party for table HZ_PARTIES where user is in the sales account team with edit access	Contact	Contact Team with Edit Access	ContactPR5	Contacts where the access group member is on the contact team with edit access	CONTACTTEAMWITHEDIT
Trading Community Party	HZPARTIESZCM4	Access the sales party for table HZ_PARTIES where user is in the sales account team with full access	Contact	Contact Team with Full Access	ContactPR7	Contacts where the access group member is on the contact team with full access	CONTACTTEAMWITHFULL
Trading Community Party	HZPARTIESZCM3	Access the sales party for table HZ_PARTIES where	Contact	Contact Team Hierarchy	ContactPR4	Contacts where the access group member is in the	CONTACTTEAMHIER

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		user is in the management chain of a resource who is on the sales contact team				management chain of a resource who is on the contact team	
Trading Community Party	HZPARTIESZCM4	Access the sales party for table HZ_PARTIES where user is in the management chain of a resource who is on the sales account team with edit access	Contact	Contact Team Hierarchy with Edit Access	ContactPR6	Contacts where the access group member is in the management chain of a resource who is on the contact team with edit access	CONTACTTEAMHIERWITH
Trading Community Party	HZPARTIESZCM4	Access the sales party for table HZ_PARTIES where user is in the management chain of a resource who is on the sales account team with full access	Contact	Contact Team Hierarchy with Full Access	ContactPR8	Contacts where the access group member is on the contact team with full access	CONTACTTEAMHIERWITH
Trading Community Party	HZPARTIESZCM3	Access the sales party for table HZ_PARTIES where user is a member of the territory associated with the sales contact	Contact	Contact Territory Team	ContactPR9	Contacts where the access group member is a member of the territory associated with the contact	CONTACTTERRITORY
Trading Community Party	HZPARTIESZCM4	Access the sales party for table HZ_PARTIES where user is a member of the territory that is an ancestor of the territory associated with the sales account	Contact	Contact Territory Team Hierarchy	ContactPR10	Contacts where the access group member is a member of the territory that is an ancestor of the territory associated with the contact	CONTACTTERRITORYHIER

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Trading Community Party	HZPARTIESZCM5	Access the sales party for table HZ_PARTIES where user is the owner of the territory associated with the sales account	Contact	Contact Territory Owner	ContactPR11	Contacts where the access group member is the owner of the territory associated with the contact	CONTACTTERRITORYOWN
Trading Community Party	HZPARTIESZCM5	Access the sales party for table HZ_PARTIES where user is the owner of the territory that is an ancestor of the territory associated with the sales account	Contact	Contact Territory Owner Hierarchy	ContactPR12	Contacts where the access group member is the owner of the territory that is an ancestor of the territory associated with the contact	CONTACTTERRITORYOWN
Trading Community Party	HZPARTIESZCM1	Access the sales party for table HZ_PARTIES for all standalone contacts in the enterprise	Contact	All Standalone Contacts	ContactPR13	Access all standalone contacts	ALLSTANDALONECONTACT
Trading Community Party	HZPARTIESHZ54	Access the trading community party for table HZ_PARTIES all contacts in the enterprise	Contact	All Contacts	ContactPR14	Access all contacts	ALLCONTACTS
Trading Community Party	HZPARTIESHZ41	Access the trading community person for table HZ_PARTIES for all trading community persons in the enterprise except contacts created by partners	Contact	Internal Contacts	ContactPR15	Access internal contacts	INTERNALCONTACTS
Trading Community Party	HZPARTIESHZ19	Access the trading community person for table HZ_PARTIES for	Contact	Person Social Security Number	ContactPR16	Access person social security number	SOCIAL

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		all people in the enterprise					
Trading Community Party	HZCITIZENSHIPZ	Access the trading community citizenship for table HZ_CITIZENSHIP for all people in the enterprise	Contact	Person Citizenship Number	ContactPR17	Access person citizenship number	CITIZENSHIP
Trading Community Party	HZPARTYSITESZ	Access the trading community person address for table HZ_PARTY_SITES for personal addresses	Contact	Person Address	ContactPR18	Access person address	ADDRESS
Trading Community Party	HZCONTACTPOINT	Access the trading community person phone for table HZ_CONTACT_POINTS for personal phone numbers	Contact	Person Mobile Phone Number	ContactPR19	Access person mobile phone number	MOBILE
Trading Community Party	HZCONTACTPOINT	Access the trading community person e-mail for table HZ_CONTACT_POINTS for personal e-mail	Contact	Person Home Phone and Personal Email	ContactPR20	Access person home phone and personal email	EMAILPHONE
Trading Community Party	HZADDTNLPART	Access the trading community person additional identifier for table HZ_ADDTNL_PARTY_IDS for all identifiers in the enterprise	Contact	Person Additional Identifier	ContactPR21	Access person additional identifier	ADDITIONAL

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Trading Community Party	HZPARTIESZCM1	Access the sales party for table HZ_PARTIES for all prospects in the enterprise	Contact	All Prospects	ContactPR22	Access all prospects	ALLCONTACTSPROSPECTS
Trading Community Party	HZPARTIESZCM1	Access the sales party for table HZ_PARTIES for all customers in the enterprise	Contact	All Customers	ContactPR23	Access all customers	ALLCONTACTSCUSTOMER

Contest Object Mapping

For each of the data security policies available for the Contest object, this topic shows the access group rules that provide equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Contest	NA	NA	Contest	All Contests	ContestPR1	Access all contests	GLOBAL_CONTEST
Contest	ZCACONTESTSZ	Access the sales contests for table ZCA_CONTESTS where user is owner or creator of contest	Contest	Contest Owner	ContestPR2	Contests where the access group member is the owner of the contest	CONTESTOWNER
Contest	ZCACONTESTSZ	Access the sales contests for table ZCA_CONTESTS where user is owner or creator of contest	Contest	Contest Creator	ContestPR3	Contests where the access group member is the creator of the contest	CONTESTCREATOR
Contest	ZCACONTESTSZ	Access the sales contests for table ZCA_CONTESTS where user is	Contest	Contest Resource	ContestPR4	Contests where the access group member is a contest	CONTESTRESOURCE

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		participant or observer of contest				participant or observer	
Contest	ZCACONTESTSZ	Access the sales contests for table ZCA_CONTESTS where their subordinate is a participant or observer of contest	Contest	Contest Resource Hierarchy	ContestPR5	Contests where the access group member is in the management chain of a contest participant or observer	CONTESTRESHIER

Deal Registration Object Mapping

For each of the data security policies available for the Deal Registration object, this topic shows the access group rules that provide equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Deal Registration Summary	MKLDMDEALSM	Access the deal registration summary for table MKL_DM_DEALS for all deal registrations in the enterprise	Deal Registration	All Deal Registrations	DealRegistrationF	Access all deal registrations	GLOBAL_DEALREGISTRATION
Deal Registration Summary	MKLDMDEALSM	Access the deal registration summary for table MKL_DM_DEALS for all deal registrations in the enterprise and deal status is Draft, Return or Withdrawn	Deal Registration	All Deal Registrations that are in Draft or Returned or Withdrawn status	DealRegistrationF	Access all Deal Registrations where deal is in draft or returned or withdrawn status	DEALREGISTRATIONOPEN
Deal Registration Summary	MKLDMDEALSM	Access the deal registration summary for	Deal Registration	All Deal Registrations that are in Draft	DealRegistrationF	Access all Deal Registrations where deal is in	DEALREGISTRATIONOPEN

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		table MKL_DM_DEALS for all deal registrations in the enterprise and deal status is Draft, Return or Withdrawn and deal is created by internal resource		or Returned or Withdrawn status		draft or returned or withdrawn status	
Deal Registration Summary	MKLDMDDEALSM	Access the deal registration summary for table MKL_DM_DEALS for all deal registrations in the enterprise and deal status is Pending Approval	NA	NA	NA	NA	NA
Deal Registration Summary	MKLDMDDEALSM	Access the deal registration summary for table MKL_DM_DEALS for all deal registrations in the enterprise and deal status is Pending Approval or Approved	NA	NA	NA	NA	NA
Deal Registration Summary	MKLDMDDEALSM	Access the deal registration summary for table MKL_DM_DEALS where they are a resource on the deal team with view, edit or full access	Deal Registration	Deal Registration Team	DealRegistrationF	Deal Registrations where the access group member is a resource on the deal registration team	DEALREGISTRATIONTEAM
Deal Registration Summary	MKLDMDDEALSM	Access the deal registration summary for table MKL_DM_DEALS where they are a resource on the	Deal Registration	Deal Registration Team with Edit or Full Access	DealRegistrationF	Deal Registrations where the access group member is a resource on the deal registration	DEALREGISTRATIONTEAM

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		deal team with view, edit or full access				team with edit or full access	
Deal Registration Summary	MKLDMDEALSM	Access the deal registration summary for table MKL_DM_DEALS where they are a resource on the deal team with edit or full access and deal status is Draft, Return or Withdrawn	Deal Registration	Deal Registration Team with Edit or Full Access	DealRegistrationF	Deal Registrations where the access group member is a resource on the deal registration team with edit or full access	DEALREGISTRATIONTEAM
Deal Registration Summary	MKLDMDEALSM	Access the deal registration summary for table MKL_DM_DEALS where they are a resource on the deal team with full access and deal status is Draft, Return or Withdrawn and deal is created by internal resource	Deal Registration	Deal Registration Team with Edit or Full Access	DealRegistrationF	Deal Registrations where the access group member is a resource on the deal registration team with edit or full access	DEALREGISTRATIONTEAM
Deal Registration Summary	MKLDMDEALSM	Access the deal registration summary for table MKL_DM_DEALS where they are a resource on the deal team with full access and deal status is Pending Approval	Deal Registration	Deal Registration Team with Edit or Full Access	DealRegistrationF	Deal Registrations where the access group member is a resource on the deal registration team with edit or full access	DEALREGISTRATIONTEAM
Deal Registration Summary	MKLDMDEALSM	Access the deal registration summary for table MKL_DM_DEALS where they are a resource on the deal team with edit	Deal Registration	Deal Registration Team with Edit or Full Access	DealRegistrationF	Deal Registrations where the access group member is a resource on the deal registration team with edit or full access	DEALREGISTRATIONTEAM

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		or full access and deal status is Pending Approval or Approved					
Deal Registration Summary	MKLDMDDEALSM	Access the deal registration summary for table MKL_DM_DEALS where they are in the partner organization and deal status is Draft, Return or Withdrawn	Deal Registration	All Deal Registrations for Partner Company	DealRegistrationF	Deal registrations where the access group member is a member of the partner company related to the deal registration	DEALREGISTRATIONFORPA
Deal Registration Summary	MKLDMDDEALSM	Access the deal registration summary for table MKL_DM_DEALS where they are in the partner organization	Deal Registration	All Deal Registrations for Partner Company	DealRegistrationF	Deal registrations where the access group member is a member of the partner company related to the deal registration	DEALREGISTRATIONFORPA
NA	NA	NA	Deal Registration	Deal Registration Owner	DealRegistrationF	Deal Registrations where the access group member is the deal registration owner	DEALREGISTRATIONOWNE
NA	NA	NA	Deal Registration	All Deal Registrations for Child Partner Companies	DealRegistrationF	Deal registrations where the access group member is a member of an ancestor partner company related to the deal registration	DEALREGISTRATIONFORPA

Duplicate Identification Batch Object Mapping

For each of the data security policies available for the Duplicate Identification Batch object, this topic shows the access group rules that provide equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Duplicate Identification Batch	ZCHDATAMGMT	Access the trading community duplicate identification batch for table ZCH_DATA_MGMT_BATCHES_B for self	Duplicate Identification Batch	Duplicate Identification Batch Assignee	DuplicateIdentification	Duplicate identification batches where the access group member is the assignee	DUPIDENTIFICATIONASSIGN
Duplicate Identification Batch	ZCHDATAMGMT	Access the trading community duplicate identification batch for table ZCH_DATA_MGMT_BATCHES_B for all duplicate identification batches in the enterprise	Duplicate Identification Batch	All Duplicate Identification Batches	DuplicateIdentification	Access all duplicate identification batches	GLOBAL_DUPLICATEIDENTIFICATION

Duplicate Resolution Request Object Mapping

For each of the data security policies available for the Duplicate Resolution Request object, this topic shows the access group rules that provide equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Duplicate Resolution Request	ZCHDEDUPHEAD	Access the trading community duplicate resolution request for table ZCH_DEDUP_HEADERS_B for self	Duplicate Resolution Request	Resolution Request Assignee	ResolutionReque	Duplicate resolution requests where the access group member is the assignee	RESOLUTIONREQUESTASS
Duplicate Resolution Request	ZCHDEDUPHEAD	Access the trading community duplicate resolution request for table ZCH_DEDUP_HEADERS_B for all duplicate resolution requests in the enterprise	Duplicate Resolution Request	All Resolution Requests	ResolutionReque	Access all duplicate resolution requests	GLOBAL_RESOLUTIONREQUEST

Forecast Territory Details Object Mapping

For each of the data security policies available for the Forecast Territory Details object, this topic shows the access group rules that provide equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Forecast Participant	ZSFFCSTPARTICI	Access the sales forecast participant for table ZSF_FCST_PARTICIPANT for the territory hierarchy that they own or delegated to currently	Forecast Territory Details	Territory Forecast Delegate	TerritoryForecast	Territory Forecast where the access group member is a delegate of the territory	FCSTDELEGATE
Forecast Participant	ZSFFCSTPARTICI	Access the sales forecast participant	Forecast Territory Details	Territory Forecast	TerritoryForecast	Territory Forecast where the access	FCSTDELEGATEHIER

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		for table ZSF_FCST_PARTICIPANT for the territory hierarchy that they own or delegated to currently		Delegate Hierarchy		group member is the delegate of a parent territory in the territory hierarchy	
Forecast Participant	ZSFFCSTPARTICI	Access the sales forecast participant for table ZSF_FCST_PARTICIPANT for the territory hierarchy that they own or delegated to currently	Forecast Territory Details	Territory Forecast Owner	TerritoryForecast	Territory Forecast where the access group member is the territory owner	FCSTOWNER
Forecast Participant	ZSFFCSTPARTICI	Access the sales forecast participant for table ZSF_FCST_PARTICIPANT for the territory hierarchy that they own or delegated to currently	Forecast Territory Details	Territory Forecast Owner Hierarchy	TerritoryForecast	Territory Forecast where the access group member is the owner of a parent territory in the territory hierarchy	FCSTOWNERHIER
Forecast Participant	ZSFFCSTPARTICI	Access the sales forecast participant for table ZSF_FCST_PARTICIPANT for the territory hierarchy that they owned previously for the active forecast	Forecast Territory Details	Territory Forecast Old Owner	TerritoryForecast	Territory Forecast where the access group member is the previous owner	FCSTPREVOWNER
NA	NA	NA	Forecast Territory Details	All Territory Forecasts	TerritoryForecast	Access all Territory Forecasts	GLOBAL_TERRITORYFORECAST

Goal Object Mapping

For each of the data security policies available for the Goal object, this topic shows the access group rules that provide equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Goal	NA	NA	Goal	All Goals	GoalPR1	Access all goals	GLOBAL_GOAL
Goal	ZCAGOALSZBS10	Access the sales goals for table ZCA_GOALS where user is owner or creator of goal	Goal	Goal Owner	GoalPR2	Goals where the access group member is the owner of the goal	GOALOWNER
Goal	ZCAGOALSZBS10	Access the sales goals for table ZCA_GOALS where user is owner or creator of goal	Goal	Goal Creator	GoalPR3	Goals where the access group member is the creator of the goal	GOALCREATOR
Goal	ZCAGOALSZBS10	Access the sales goals for table ZCA_GOALS where user is participant of goal	Goal	Goal Resource	GoalPR4	Goals where the access group member is a goal participant	GOALRESOURCE
Goal	ZCAGOALSZBS10	Access the sales goals for table ZCA_GOALS where their subordinate is a participant of goal	Goal	Goal Resource Hierarchy	GoalPR5	Goals where the access group member is in the management chain of a goal participant	GOALRESHIER

Goal Participant Object Mapping

For each of the data security policies available for the Goal Participant object, this topic shows the access group rules that provide equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Goal Participant	NA	NA	Goal Participant	All Goal Participants	GoalParticipantPi	Access all goal participants	GLOBAL_GOALPARTICIPANT
Goal Participant	ZCAGOALPARTIC	Access the sales goal participants for table ZCA_GOAL_PARTICIPANTS where user is owner or creator of goal	Goal Participant	Goal Participant Owner	GoalParticipantPi	Goal participants where the access group member is the owner of the goal	GOALPARTICIPANTOWNER
Goal Participant	ZCAGOALPARTIC	Access the sales goal participants for table ZCA_GOAL_PARTICIPANTS where user is owner or creator of goal	Goal Participant	Goal Participant Creator	GoalParticipantPi	Goal participants where the access group member is the creator of the goal	GOALPARTICIPANTCREATOR
Goal Participant	ZCAGOALPARTIC	Access the sales goal participants for table ZCA_GOAL_PARTICIPANTS where user is participant of goal	Goal Participant	Goal Participant	GoalParticipantPi	Goal participants where the access group member is the goal participant	GOALPARTICIPANT
Goal Participant	ZCAGOALPARTIC	Access the sales goal participants for table ZCA_GOAL_PARTICIPANTS where their subordinate is a participant of goal	Goal Participant	Goal Participant Resource Hierarchy	GoalParticipantPi	Goal participants where the access group member is in the management chain of the goal participant	GOALPARTICIPANTRESHIE

Household Object Mapping

For each of the data security policies available for the Household object, this topic shows the access group rules that provide equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Trading Community Party	HZPARTIESZBS10	Access the sales party for table HZ_PARTIES where they are the account owner	Household	Household Owner	HouseholdPR1	Households where the access group member is the households owner	HOUSEHOLDOWNER
Trading Community Party	HZPARTIESZBS10	Access the sales party for table HZ_PARTIES where they are in the management chain of the account owner	Household	Household Owner Hierarchy	HouseholdPR2	Households where the access group member is in the management chain of the households owner	HOUSEHOLDOWNERHIER
Trading Community Party	HZPARTIESZCM1	Access the sales party for table HZ_PARTIES where user is in the sales account team	Household	Household Team	HouseholdPR3	Households where the access group member is on the households team	HOUSEHOLDTEAM
Trading Community Party	HZPARTIESZCM3	Access the sales party for table HZ_PARTIES where user is in the management chain of a resource who is on the sales account team	Household	Household Team Hierarchy	HouseholdPR4	Households where the access group member is in the management chain of a resource who is on the households team	HOUSEHOLDTEAMHIER
Trading Community Party	HZPARTIESZCM4	Access the sales party for table HZ_PARTIES where user is in the sales account team with edit access	Household	Household Team with Edit Access	HouseholdPR5	Households where the access group member is on the households team with edit access	HOUSEHOLDTEAMWITHED
Trading Community Party	HZPARTIESZCM4	Access the sales party for table HZ_PARTIES where user is in the management chain of a resource who is on the sales account team with edit access	Household	Household Team Hierarchy with Edit Access	HouseholdPR6	Households where the access group member is in the management chain of a resource who is on the households	HOUSEHOLDTEAMHIERWI

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
						team with edit access	
Trading Community Party	HZPARTIESZCM4	Access the sales party for table HZ_PARTIES where user is in the sales account team with full access	Household	Household Team with Full Access	HouseholdPR7	Households where the access group member is on the households team with full access	HOUSEHOLDTEAMWITHFU
Trading Community Party	HZPARTIESZCM4	Access the sales party for table HZ_PARTIES where user is in the management chain of a resource who is on the sales account team with full access	Household	Household Team Hierarchy with Full Access	HouseholdPR8	Households where the access group member is in the management chain of a resource who is on the households team with full access	HOUSEHOLDTEAMHIERWI
Trading Community Party	HZPARTIESZCM3	Access the sales party for table HZ_PARTIES where user is a member of the territory associated with the sales contact	Household	Household Territory Team	HouseholdPR9	Households where the access group member is a member of the territory associated with the household	HOUSEHOLDTERRITORY
Trading Community Party	HZPARTIESZCM4	Access the sales party for table HZ_PARTIES where user is a member of the territory that is an ancestor of the territory associated with the sales account	Household	Household Territory Team Hierarchy	HouseholdPR10	Households where the access group member is a member of the territory that is an ancestor of the territory associated with the household	HOUSEHOLDTERRITORYH
Trading Community Party	HZPARTIESZCM5	Access the sales party for table HZ_PARTIES where user is the owner of the territory associated with the sales account	Household	Household Territory Owner	HouseholdPR11	Households where the access group member is the owner of the territory associated with the household	HOUSEHOLDTERRITORYO

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Trading Community Party	HZPARTIESZCM5	Access the sales party for table HZ_PARTIES where user is the owner of the territory that is an ancestor of the territory associated with the sales account	Household	Household Territory Owner Hierarchy	HouseholdPR12	Households where the access group member is the owner of the territory that is an ancestor of the territory associated with the household	HOUSEHOLDTERRITORYOWN
Trading Community Party	HZPARTIESZCM1	Access the sales party for table HZ_PARTIES for all prospects in the enterprise	Household	Household of Type Prospects	HouseholdPR13	Access all households which are sales prospects	ALLHOUSEHOLDPROSPECT
Trading Community Party	HZPARTIESZCM1	Access the sales party for table HZ_PARTIES for all customers in the enterprise	Household	Household of Type Customers	HouseholdPR14	Access all households which are sales customers	ALLHOUSEHOLDCUSTOMER
Trading Community Party	HZPARTIESHZ54	Access the trading community party for table HZ_PARTIES all accounts in the enterprise	Household	All Households	HouseholdPR15	Access all households	ALLHOUSEHOLDS

KPI Object Mapping

For each of the data security policies available for the KPI object, this topic shows the access group rules that provide equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
KPI	ZCAKPIZBS1000	Access the sales KPI for table ZCA_KPI	KPI	All KPIs	KpiPR1	Access all KPIs	GLOBAL_KPI

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
KPI	ZCAKPIZBS10000	Access the sales KPI for table ZCA_KPI where user is the creator of KPI	KPI	KPI Creator	KpiPR2	KPIs where the access group member is the creator of the KPI	KPICREATOR

Lead Object Mapping

For each of the data security policies available for the Lead object, this topic shows the access group rules that provide equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Sales Lead	MKLLMLEADSMI	Access the sales lead for table MKL_LM_LEADS where they are a resource in the lead sales team	Lead	Lead Team	LeadPR4	Leads where the access group member is on the lead team	LEADTEAM
Sales Lead	MKLLMLEADSMI	Access the sales lead for table MKL_LM_LEADS where they are a resource in the territory assigned to the sales lead	Lead	Lead Territory Team	LeadPR8	Leads where the access group member is a member of a territory associated with the lead	LEADTERR
Sales Lead	MKLLMLEADSMI	Access the sales lead for table MKL_LM_LEADS where they are an administrator of the resource organization in the primary assignment of the owner	Lead	Lead Owner Organization Administrator	LeadPR2	Leads where the access group member is the administrator of the resource organization of the lead owner	LEADOWNERORGADMIN

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Sales Lead	MKLLMLEADSMI	Access the sales lead for table MKL_LM_LEADS where they are the owner of the sales lead	Lead	Lead Owner	LeadPR1	Leads where the access group member is the lead owner	LEADOWNER
Sales Lead	MKLLMLEADSMI	Access the sales lead for table MKL_LM_LEADS where they are a resource in the lead sales team with full access	Lead	Lead Team with Full Access	LeadPR5	Leads where the access group member is on the lead team with full access	LEADTEAMWITHFULL
Sales Lead	MKLLMLEADSMI	Access the sales lead for table MKL_LM_LEADS for all sales leads in the enterprise	Lead	All Leads	LeadPR12	Access all leads	GLOBAL_LEAD
Sales Lead	MKLLMLEADSMI	Access the sales lead for table MKL_LM_LEADS for all retired, qualified, unqualified leads in the enterprise	Lead	All Leads	LeadPR12	Access all leads	GLOBAL_LEAD
Sales Lead	MKLLMLEADSMI	Access the sales lead for table MKL_LM_LEADS where they are a territory resource in the sales lead territory team or a territory resource with a descendant territory in the sales lead territory team	Lead	Lead Territory Team	LeadPR8	Leads where the access group member is a member of a territory associated with the lead	LEADTERRITORY
Sales Lead	MKLLMLEADSMI	Access the sales lead for table MKL_	Lead	Lead Territory Team Hierarchy	LeadPR9	Leads where the access group member is a	LEADTERRITORYHIER

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		LM_LEADS where they are a territory resource in the sales lead territory team or a territory resource with a descendant territory in the sales lead territory team				member of a territory that is an ancestor of a territory associated with the lead	
Sales Lead	MKLLMLEADSMI	Access the sales lead for table MKL_LM_LEADS for all retired leads in the enterprise	Lead	All Nonconverted Leads	LeadPR10	Access all nonconverted leads	ALLNONCONVERTEDLEAD
Sales Lead	MKLLMLEADSMI	Access the sales lead for table MKL_LM_LEADS for all partner leads in the enterprise	Lead	All Partner Leads	LeadPR11	Access all partner leads	ALLPARTNERLEADS
Sales Lead	MKLLMLEADSMI	Access the sales lead for table MKL_LM_LEADS where they are a manager in the management hierarchy of a resource in the lead sales team with full access	Lead	Lead Team Hierarchy with Full Access	LeadPR7	Leads where the access group member is in the management chain of a resource who is on the lead team with full access	LEADTEAMHIERWITHFULL
Sales Lead	MKLLMLEADSMI	Access the sales lead for table MKL_LM_LEADS where they are a manager in the management hierarchy of the owner of the sales lead	Lead	Lead Owner Hierarchy	LeadPR3	Leads where the access group member is in the management chain of the lead owner	LEADOWNERHIER
Sales Lead	MKLLMLEADSMI	Access the sales lead for table MKL_LM_LEADS where they are a	Lead	Lead Team Hierarchy	LeadPR6	Leads where the access group member is in the management	LEADTEAMHIER

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		manager in the management hierarchy of a resource in the lead sales team				chain of a resource who is on the lead team	
Sales Lead	MKLLMLEADSMI	Access the sales lead for table MKL_LM_LEADS where they are in the management hierarchy of the owner of the lead	Lead	Lead Team Hierarchy	LeadPR6	Leads where the access group member is in the management chain of a resource who is on the lead team	LEADTEAMHIER
Sales Lead	MKLLMLEADSMI	Access the sales lead for table MKL_LM_LEADS where they are a member of the lead sales account team or in the management chain of an lead sales account team member	Lead	Account Team	AccountPR3	Accounts where the access group member is on the account team	ACCOUNTTEAM
Sales Lead	MKLLMLEADSMI	Access the sales lead for table MKL_LM_LEADS where they are a member of the lead sales account team or in the management chain of an lead sales account team member	Lead	Account Team Hierarchy	AccountPR4	Accounts where the access group member is in the management chain of a resource who is on the account team	ACCOUNTTEAMHIER
Sales Lead	MKLLMLEADSMI	Access the sales lead for table MKL_LM_LEADS where they are a territory resource in the lead sales account territory team or a territory resource with	Lead	Account Territory	AccountPR9	Accounts where the access group member is a member of the territory associated with the account	ACCOUNTTERRITORY

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		a descendant territory in the lead sales account territory team					
Sales Lead	MKLLMLEADSMI	Access the sales lead for table MKL_LM_LEADS where they are a territory resource in the lead sales account territory team or a territory resource with a descendant territory in the lead sales account territory team	Lead	Account Territory Hierarchy	AccountPR10	Accounts where the access group member is a member of the territory that is an ancestor of the territory associated with the account	ACCOUNTTERRITORYHIER
Sales Lead	MKLLMLEADSMI	Access the sales lead for table MKL_LM_LEADS for all sales leads in the business units that they are authorized within	Lead	Business Unit Leads	LeadPR13	Leads in the business units that the access group member is associated with	BULEADS
Sales Lead	MKLLMLEADSMI	Access the sales lead for table MKL_LM_LEADS where they are member or in management chain of lead sales account team, account territory team or upward territory hierarchy	Lead	Account Team	AccountPR3	Accounts where the access group member is on the account team	ACCOUNTTEAM
Sales Lead	MKLLMLEADSMI	Access the sales lead for table MKL_LM_LEADS where they are member or in management chain of lead	Lead	Account Team Hierarchy	AccountPR4	Accounts where the access group member is in the management chain of a resource who is	ACCOUNTTEAMHIER

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		sales account team, account territory team or upward territory hierarchy				on the account team	
Sales Lead	MKLLMLEADSMI	Access the sales lead for table MKL_LM_LEADS where they are member or in management chain of lead sales account team, account territory team or upward territory hierarchy	Lead	Account Territory	AccountPR9	Accounts where the access group member is a member of the territory associated with the account	ACCOUNTTERRITORY
Sales Lead	MKLLMLEADSMI	Access the sales lead for table MKL_LM_LEADS where they are member or in management chain of lead sales account team, account territory team or upward territory hierarchy	Lead	Account Territory Hierarchy	AccountPR10	Accounts where the access group member is a member of the territory that is an ancestor of the territory associated with the account	ACCOUNTTERRITORYHIER
Sales Lead	MKLLMLEADSZE	Access the sales lead for table MKL_LM_LEADS where they are member or in management chain of lead sales team, member of territory team or upward territory hierarchy	Lead	Lead Team	LeadPR4	Leads where the access group member is on the lead team	LEADTEAM
Sales Lead	MKLLMLEADSZE	Access the sales lead for table MKL_LM_LEADS where they are member or in management chain of lead	Lead	Lead Team Hierarchy	LeadPR6	Leads where the access group member is in the management chain of a resource who	LEADTEAMHIER

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		sales team, member of territory team or upward territory hierarchy				is on the lead team	
Sales Lead	MKLLMLEADSZE	Access the sales lead for table MKL_LM_LEADS where they are member or in management chain of lead sales team, member of territory team or upward territory hierarchy	Lead	Lead Territory Team	LeadPR8	Leads where the access group member is a member of a territory associated with the lead	LEADTERRITORY
Sales Lead	MKLLMLEADSZE	Access the sales lead for table MKL_LM_LEADS where they are member or in management chain of lead sales team, member of territory team or upward territory hierarchy	Lead	Lead Territory Team Hierarchy	LeadPR9	Leads where the access group member is a member of a territory that is an ancestor of a territory associated with the lead	LEADTERRITORYHIER

Advanced permissions are defined for some of the Lead data security policies. Advanced permissions let you refine the access provided by a data security policy. This table shows how the advanced permissions available with Lead data security policies map to predefined access group rules.

Data Security Policy Business Object	Data Security Policy Advanced Permission Name	Access Group Object	Predefined Rule Name	Access Level
Sales Lead	View Sales Lead	Lead	Any predefined rule	Read, Update, Delete, Full
Sales Lead	Update Sales Lead	Lead	Any predefined rule	Update, Full
Sales Lead	Delete Sales Lead	Lead	Any predefined rule	Delete, Full
Sales Lead	Convert Sales Lead	Lead	Any predefined rule	Full

MDF Budget Object Mapping

For each of the data security policies available for the MDF Budget object, this topic shows the access group rules that provide equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
MDF Budget	NA	All Values	MDF Budget	All MDF Budgets	MDFBudgetPR1	Access all MDF budgets	GLOBAL_MDFBUDGETS
MDF Budget	MKTBDTBUDGET	Access the MDF budget for table MKT_BDT_BUDGETS_B for all MDF budgets in the enterprise, and the MDF budget is in draft status	MDF Budget	All MDF Budgets with Status-Based Access Level	MDFBudgetPR2	Access all MDF budgets where access level is status based	ALLMDFBUDGETS
MDF Budget	MKTBDTBUDGET	Access the MDF budget for table MKT_BDT_BUDGETS_B where they are an MDF budget team member	MDF Budget	MDF Budget Team	MDFBudgetPR3	MDF budgets where the access group member is a resource on the MDF budget team	MDFBUDGETTEAM
MDF Budget	MKTBDTBUDGET	Access the MDF budget for table MKT_BDT_BUDGETS_B where they are an MDF budget team member with edit or full access	MDF Budget	MDF Budget Team with Edit or Full Access	MDFBudgetPR4	MDF budgets where the access group member is a resource on the MDF budget team with edit or full access	MDFBUDGETTEAMEDITOR
MDF Budget	MKTBDTBUDGET	Access the MDF budget for table MKT_BDT_BUDGETS_B where they are an MDF budget team member, or in the management chain of an MDF budget team member	MDF Budget	MDF Budget Team Hierarchy	MDFBudgetPR5	MDF budgets where the access group member is in the management chain of a resource who is on the MDF budget team	MDFBUDGETTEAMHIER

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
MDF Budget	MKTBDTBUDGET	Access the MDF budget for table MKT_BDT_BUDGETS_B where they are an MDF budget team member with edit or full access, or in the management chain of a resource on the MDF budget team member with edit or full access	MDF Budget	MDF Budget Team Hierarchy with Edit or Full Access	MDFBudgetPR6	MDF budgets where the access group member is a resource on the MDF budget team with edit or full access or is in the management chain of a resource who is on the MDF budget team with edit or full access	MDFBUDGETTEAMHIERED

MDF Claim Object Mapping

For each of the data security policies available for the MDF Claim object, this topic shows the access group rules that provide equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
MDF Claim	NA	All Values	MDF Claim	All MDF Claims	MDFClaimsPR1	Access all MDF claims	GLOBAL_MDFCLAIMS
MDF Claim	NA	NA	MDF Claim	All MDF Claims for Child Partner Companies	MDFClaimsPR10	MDF claims where the access group member is a member of an ancestor partner company related to the MDF claim	MDFCLAIMPARTHIER
MDF Claim	MKTBDTCLAIMS	Access the MDF claim for table MKT_BDT_CLAIMS where they are a resource on the MDF claim team	MDF Claim	MDF Claim Team	MDFClaimsPR2	MDF claims where the access group member is a resource on the MDF claim team	MDFCLAIMTEAM

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
MDF Claim	MKTBDTCLAIMS	Access the MDF claim for table MKT_BDT_CLAIMS where they are a resource on the MDF claim team with edit or full access, and the MDF claim status is draft or returned or failed or withdrawn	MDF Claim	MDF Claim Team with Edit Access	MDFClaimsPR3	MDF claims where the access group member is a resource on the MDF claim team with edit access	MDFCLAIMTEAMEDIT
MDF Claim	MKTBDTCLAIMS MKTBDTCLAIMS	Access the MDF claim for table MKT_BDT_CLAIMS where they are a resource on the MDF claim team with edit or full access, and the MDF claim status is draft or returned or failed or withdrawn Access the MDF claim for table MKT_BDT_CLAIMS where they are a resource on the MDF claim team with edit or full access, and the MDF claim status is draft	MDF Claim	MDF Claim Team with Full Access	MDFClaimsPR4	MDF claims where the access group member is a resource on the MDF claim team with full access	MDFCLAIMTEAMFULL
MDF Claim	MKTBDTCLAIMS	Access the MDF claim for table MKT_BDT_CLAIMS where they are a resource on the MDF claim team, or they are in the management chain of a resource on the MDF claim team	MDF Claim	MDF Claim Team Hierarchy	MDFClaimsPR5	MDF claims where the access group member is in the management chain of a resource who is on the MDF claim team	MDFCLAIMTEAMHIER

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
MDF Claim	MKTBDTCLAIMS	Access the MDF claim for table MKT_BDT_CLAIMS where they are a resource on the MDF claim team with edit or full access, or in the management chain of a resource on the MDF claim team with edit or full access, and the MDF claim status is draft or returned or failed or withdrawn	MDF Claim	MDF Claim Team Hierarchy with Edit Access	MDFClaimsPR6	MDF claims where the access group member is a resource on the MDF claim team with edit access or is in the management chain of a resource who is on the MDF claim team with edit access	MDFCLAIMTEAMHIEREDIT
MDF Claim	MKTBDTCLAIMS	Access the MDF claim for table MKT_BDT_CLAIMS where they are a resource on the MDF claim team with edit or full access, or in the management chain of a resource on the MDF claim team with edit or full access, and the MDF claim status is draft	MDF Claim	MDF Claim Team Hierarchy with Full Access	MDFClaimsPR7	MDF claims where the access group member is a resource on the MDF claim team with full access or is in the management chain of a resource who is on the MDF claim team with full access	MDFCLAIMTEAMHIERFULL
MDF Claim	MKTBDTCLAIMS MKTBDTCLAIMS MKTBDTCLAIMS	Access the MDF claim for table MKT_BDT_CLAIMS for all MDF claims in the enterprise, and the MDF claim status is draft or returned or failed or withdrawn Access the MDF claim for table MKT_BDT_CLAIMS for all	MDF Claim	All MDF Claims with Status-Based Access Level	MDFClaimsPR8	Access all MDF claims where access level is status based	ALLMDFCLAIMS

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		MDF claims in the enterprise, and the MDF Claim status is draft Access the MDF claim for table MKT_BDT_CLAIMS for all MDF claims in the enterprise, and the MDF claim status is draft or returned or failed or withdrawn, and the MDF claim is created by an internal resource					
MDF Claim	MKTBDTCLAIMS MKTBDTCLAIMS MKTBDTCLAIMS	Access the MDF claim for table MKT_BDT_CLAIMS for all MDF claims in the partner organization, and the MDF claim status is draft Access the MDF claim for table MKT_BDT_CLAIMS for all MDF claims in the partner organization, and the MDF claim status is draft or returned or failed or withdrawn Access the MDF claim for table MKT_BDT_CLAIMS for all MDF claims in the partner organization	MDF Claim	All MDF Claims for Partner Company	MDFClaimsPR9	MDF claims where the access group member is a member of the partner company related to the MDF claim	MDFCLAIMPARTCOMP

MDF Request Object Mapping

For each of the data security policies available for the MDF Request object, this topic shows the access group rules that provide equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
MDF Request	MKTBDTFUNDRE MKTBDTFUNDRE MKTBDTFUNDRE	Access the MDF request for table MKT_BDT_FUND_REQUESTS for all MDF requests in the enterprise, and the MDF request status is draft or returned or failed or withdrawn Access the MDF request for table MKT_BDT_FUND_REQUESTS for all MDF requests in the enterprise, and the MDF request status is draft Access the MDF request for table MKT_BDT_FUND_REQUESTS for all MDF requests in the enterprise, and the MDF request status is draft or returned or failed or withdrawn, and the MDF request is created by an internal resource	MDF Request	All MDF Requests with Status-Based Access Level	MDFRequestsPR	Access all MDF requests where access level is status based	ALLMDFREQUESTS
MDF Request	NA	NA	MDF Request	All MDF Requests for Child Partner Companies	MDFRequestsPR	MDF requests where the access group member is a	MDFREQUESTPARTHIER

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
						member of an ancestor partner company related to the MDF request	
MDF Request	MKTBDTFUNDRE	Access the MDF request for table MKT_BDT_FUND_REQUESTS where they are a resource on the MDF request team	MDF Request	MDF Request Team	MDFRequestsPR	MDF requests where the access group member is a resource on the MDF request team	MDFREQUESTTEAM
MDF Request	MKTBDTFUNDRE	Access the MDF request for table MKT_BDT_FUND_REQUESTS where they are a resource on the MDF request team with edit or full access, and the MDF request status is draft or returned or failed or withdrawn	MDF Request	MDF Request Team with Edit Access	MDFRequestsPR	MDF requests where the access group member is a resource on the MDF request team with edit access	MDFREQUESTTEAMEDIT
MDF Request	MKTBDTFUNDRE	Access the MDF request for table MKT_BDT_FUND_REQUESTS where they are a resource on the MDF request team, or they are in the management chain of a resource on the MDF request team	MDF Request	MDF Request Team Hierarchy	MDFRequestsPR	MDF requests where the access group member is in the management chain of a resource on the MDF request team	MDFREQUESTTEAMHIER
MDF Request	MKTBDTFUNDRE	Access the MDF request for table MKT_BDT_FUND_REQUESTS where they are a resource on the MDF	MDF Request	MDF Request Team Hierarchy with Edit Access	MDFRequestsPR	MDF requests where the access group member is in the management chain of a resource on the	MDFREQUESTTEAMHIERE

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		request team with edit or full access, or in the management chain of a resource on the MDF request team with edit or full access, and the MDF request status is draft or returned or failed or withdrawn				MDF request team with edit access	
MDF Request	MKTBDTFUNDRE MKTBDTFUNDRE	Access the MDF request for table MKT_BDT_FUND_REQUESTS where they are a resource on the MDF request team with edit or full access, and the MDF request status is draft or returned or failed or withdrawn Access the MDF request for table MKT_BDT_FUND_REQUESTS where they are a resource on the MDF request team with edit or full access, and the MDF request status is draft	MDF Request	MDF Request Team with Full Access	MDFRequestsPR	MDF requests where the access group member is a resource on the MDF request team with full access	MDFREQUESTTEAMFULL
MDF Request	MKTBDTFUNDRE MKTBDTFUNDRE	Access the MDF request for table MKT_BDT_FUND_REQUESTS where they are a resource on the MDF request team with edit or full access, or in the management chain of a	MDF Request	MDF Request Team Hierarchy with Full Access	MDFRequestsPR	MDF requests where the access group member is in the management chain of a resource on the MDF request team with full access	MDFREQUESTTEAMHIERF

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		resource on the MDF request team with edit or full access, and the MDF request status is draft or returned or failed or withdrawn Access the MDF request for table MKT_BDT_FUND_REQUESTS where they are a resource on the MDF request team with edit or full access, or in the management chain of a resource on the MDF request team with edit or full access, and the MDF request status is draft					
MDF Request	NA	All Values	MDF Request	All MDF Requests	MDFRequestsPR	Access all MDF requests	GLOBAL_MDFREQUESTS
MDF Request	MKTBDTFUNDRE MKTBDTFUNDRE MKTBDTFUNDRE	Access the MDF request for table MKT_BDT_FUND_REQUESTS for all MDF requests in the partner organization Access the MDF request for table MKT_BDT_FUND_REQUESTS for all MDF requests in the partner organization, and the MDF request status is draft or returned or failed or withdrawn	MDF Request	All MDF Requests for Partner Company	MDFRequestsPR	MDF requests where the access group member is a member of the partner company related to the MDF request	MDFREQUESTPARTCOMP

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		Access the MDF request for table MKT_BDT_FUND_REQUESTS for all MDF requests in the partner organization, and the MDF request status is draft					

Note Object Mapping

For each of the data security policies available for the Note object, this topic shows the access group rules that provide equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
NOTE	ZMM_NOTES_AUTHOR	Notes Instance set for Author	Note	Note Author	NotePR1	Note author	NOTEAUTHOR
NOTE	ZMM_NOTES_AUTHOR_PRIVATE	Private Notes Instance set for Author	Note	Note Author	NotePR1	Note author	NOTEAUTHOR
NOTE	ZMM_NOTES_CMPTR_USER_IS_AUTHOR	Access the competitor note for table ZMM_NOTES where they are the author of the note	Note	Note Author	NotePR1	Note author	NOTEAUTHOR
NOTE	ZMM_NOTES_OPTY_USER_IS_AUTHOR	Access the opportunity note for table ZMM_NOTES where they are the author of the note	Note	Note Author	NotePR1	Note author	NOTEAUTHOR

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
NOTE	ZMM_NOTES_REF_USER_IS_AUTHOR	Access the reference customer note for table ZMM_NOTES where they are the author of the note	Note	Note Author	NotePR1	Note author	NOTEAUTHOR
NOTE	ZMM_NOTES_MANAGE_REF_ALL	Access the competitor note for table ZMM_NOTES for all notes that are not private	Note	All Nonprivate Notes	NotePR2	All nonprivate notes visible to internal users	ALLNONPRIVATENOTE
NOTE	ZMM_NOTES_INTERNAL	Internal Notes Instance set	Note	All Nonprivate Notes	NotePR2	All nonprivate notes visible to internal users	ALLNONPRIVATENOTE
NOTE	ZMM_NOTES_ADMIN_SALES_ADMIN	Access the opportunity note for table ZMM_NOTES for all notes that are not private	Note	All Nonprivate Notes	NotePR2	All nonprivate notes visible to internal users	ALLNONPRIVATENOTE
NOTE	ZMM_NOTES_EXTERNAL	External Notes Instance set	Note	All External Notes	NotePR3	All external notes visible to channel and partner users	ALLEXTERNALNOTE
NOTE	ZMM_NOTES_OPTY_EXT	Access the opportunity note for table ZMM_NOTES for all external opportunity notes in the enterprise	Note	All External Notes	NotePR3	All external notes visible to channel and partner users	ALLEXTERNALNOTE
NOTE	ZMMNOTESZMM	Access the deal registration note for table ZMM_NOTES where they are the author of the note or notes that are not private created by their organization or external notes created by	Note	All Notes Created by Partner Company	NotePR4	Notes created by partner company	ALLNONPVTMYPARTNERO

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		the deploying company or external notes created by partner where they belong to the deploying company					
NOTE	ZMM_NOTES_DEFAULT	Notes Default Instance Set	Note	Note Author	NotePR1	Note author	NOTEAUTHOR
NOTE	ZMM_NOTES_DEFAULT	Notes Default Instance Set	Note	All Nonprivate Notes	NotePR2	All nonprivate notes visible to internal users	ALLNONPRIVATENOTE
NOTE	ZMM_NOTES_ALL	All Notes Instance set	Note	Note Author	NotePR1	Note author	NOTEAUTHOR
NOTE	ZMM_NOTES_ALL	All Notes Instance set	Note	All Nonprivate Notes	NotePR2	All nonprivate notes visible to internal users	ALLNONPRIVATENOTE
NOTE	ZMM_NOTES_ALL	All Notes Instance set	Note	All External Notes	NotePR3	All external notes visible to channel and partner users	ALLEXTERNALNOTE
NOTE	ZMM_NOTES_AUTHOR_AND_PUBLIC	Access the Opportunity Note for table ZMM_NOTES Where they are the author of the note or the note is not a private note	Note	Note Author	NotePR1	Note author	NOTEAUTHOR
NOTE	ZMM_NOTES_AUTHOR_AND_PUBLIC	Access the Opportunity Note for table ZMM_NOTES Where they are the author of the note or the note is not a private note	Note	All Nonprivate Notes	NotePR2	All nonprivate notes visible to internal users	ALLNONPRIVATENOTE

Access Extension Rules for Note

For each of the data security policies available for the Note object, this table shows the access extension rules that provide equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Access Extension Rule Name	Predefined Access Extension Rule Number	Predefined Access Extension Rule Description	Relationship Name
Note	ZMM_NOTES_DEFAULT	Notes Default Instance Set	Note	Nonprivate Notes of Activity	ActivityNoteRule	Predefined rule for nonprivate notes of an activity.	ActivityToNonPrivateNote
NA	NA	NA	Note	Nonprivate Notes of Account	AccountNoteRule	Predefined rule for nonprivate notes of an account.	AccountToNonPrivateNote
Note	ZMM_NOTES_OPTY_TERR_HIER_RES	Access the opportunity note for table ZMM_NOTES where they are a territory resource in the opportunity territory team or a territory resource with a descendant territory in the opportunity territory team and the note is not private	Note	Nonprivate Opportunity Notes of Account Territory Team	AccountNoteRule	Predefined rule for nonprivate opportunity notes of an account territory team.	AccountToOpportunityNote
Note	ZMM_NOTES_OPTYACCTERR_HIER_RES	Access the opportunity note for table ZMM_NOTES where they are a territory resource in the opportunity sales account territory team or a territory resource with a descendant territory in the opportunity sales account territory team and the note is not private	Note	Nonprivate Opportunity Notes of Account Territory Team	AccountNoteRule	Predefined rule for nonprivate opportunity notes of an account territory team.	AccountToOpportunityNote

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Access Extension Rule Name	Predefined Access Extension Rule Number	Predefined Access Extension Rule Description	Relationship Name
Note	ZMM_NOTES_MANAGE_OPTYTEAM_REP	Access the opportunity note for table ZMM_NOTES where they are an opportunity sales team member with full access and the note is not private	Note	Nonprivate Notes of Opportunity	OpportunityNote	Predefined rule for nonprivate notes of an opportunity.	OpportunityToNonPrivateN
Note	ZMM_NOTES_MANAGE_OPTYTEAM_MGR	Access the opportunity note for table ZMM_NOTES where they are in the management chain of an opportunity sales team member with full access and the note is not private	Note	Nonprivate Notes of Opportunity	OpportunityNote	Predefined rule for nonprivate notes of an opportunity.	OpportunityToNonPrivateN
Note	ZMM_NOTES_MANAGE_OPTYTEAM_REP	Access the opportunity note for table ZMM_NOTES where they are an opportunity sales team member with full access and the note is not private	Note	Nonprivate Notes of Opportunity	OpportunityNote	Predefined rule for nonprivate notes of an opportunity.	OpportunityToNonPrivateN
Note	ZMM_NOTES_MANAGE_OPTYTEAM_MGR	Access the opportunity note for table ZMM_NOTES where they are in the management chain of an opportunity sales team member with full access and the note is not private	Note	Nonprivate Notes of Opportunity	OpportunityNote	Predefined rule for nonprivate notes of an opportunity.	OpportunityToNonPrivateN

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Access Extension Rule Name	Predefined Access Extension Rule Number	Predefined Access Extension Rule Description	Relationship Name
NA	NA	NA	Note	Nonprivate Notes of Opportunity	OpportunityNote	Predefined rule for nonprivate notes of an opportunity.	OpportunityToNonPrivateNote
Note	ZMM_NOTES_MANAGE_PRTNR_SLS_REP	Access the opportunity note for table ZMM_NOTES where they are an opportunity sales team member with full access and the note is external	Note	External Notes of Opportunity	OpportunityNote	Predefined rule for external notes of an opportunity.	OpportunityToExternalNote
Note	ZMM_NOTES_MANAGE_PRTNR_SLS_MGR	Access the opportunity note for table ZMM_NOTES where they are an opportunity sales team member with full access and the note is external	Note	External Notes of Opportunity	OpportunityNote	Predefined rule for external notes of an opportunity.	OpportunityToExternalNote
Note	ZMM_NOTES_PRTNR_ADMIN	Access the opportunity note for table ZMM_NOTES where they are a member of a partner resource organization whose partner organization is on the opportunity and the note is external	Note	External Opportunity Notes of Opportunity Revenue Partner	OpportunityNote	Predefined rule for external opportunity notes of an opportunity revenue partner.	OpportunityRevenuePartner
Note	ZMM_NOTES_PRTNR_EXT	Access the opportunity note for table ZMM_NOTES for all opportunities having a partner organization and the note is external	Note	External Opportunity Notes of Opportunity Revenue Partner	OpportunityNote	Predefined rule for external opportunity notes of an opportunity revenue partner.	OpportunityRevenuePartner

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Access Extension Rule Name	Predefined Access Extension Rule Number	Predefined Access Extension Rule Description	Relationship Name
Note	ZMM_NOTES_PRTNR_NOT_PRV	Access the opportunity note for table ZMM_NOTES for all opportunities having a partner organization and the note is not private	Note	Nonprivate Opportunity Notes of Partner Account Team	OpportunityNote	Predefined rule for nonprivate opportunity notes of a partner account team.	OpportunityRevenueToNonPrivateNote
Note	ZMM_NOTES_EDIT_ZPM_ENR_NOTES	Edit enrollment notes for table ZMM_NOTES which are not private if user is in the partner account team with edit access	Note	Nonprivate Notes of Program Enrollments	ProgramEnrollment	Predefined rule for nonprivate notes of program enrollment.	ProgramEnrollmentToNonPrivateNote
NA	NA	NA	Note	Nonprivate Notes of Contact	ContactNoteRule	Predefined rule for nonprivate notes of a contact.	ContactToNonPrivateNote
Note	ZMMNOTESHZ12	Access the trading community resource note for table ZMM_NOTES for all resource notes	Note	All Notes of Resource	ResourceNoteRule	Predefined rule for all notes of a resource.	ResourceToAllNote
Note	ZMM_NOTES_VIEW_CHNL_ACCT_MGR	Access the opportunity note for table ZMM_NOTES where they are a member of the account team of a partner organization on the opportunity and the note is not private	Note	Nonprivate notes of Partner	PartnerNoteRule	Predefined rule for nonprivate notes of a partner.	PartnerToNonPrivateNote
NA	NA	NA	Note	Nonprivate notes of Partner	PartnerNoteRule	Predefined rule for nonprivate notes of a partner.	PartnerToNonPrivateNote

Opportunity Object Mapping

For each of the data security policies available for the Opportunity object, this topic shows the access group rules that provide equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Opportunity	MOOOPITYMOO1	Access the opportunity for table MOO_ OPTY where they selected records where I am on the team on the sales UI	Opportunity	Opportunity Team	OpportunityPR3	Opportunities where the access group member is on the opportunity team	OPITYTEAM
Opportunity	MOOOPITYMOO1	Access the opportunity for table MOO_ OPTY where they selected records I own on the sales UI	Opportunity	Opportunity Owner	OpportunityPR1	Opportunities where the access group member is the opportunity owner	OPITYOWNER
Opportunity	MOOOPITYMOO1	Access the opportunity for table MOO_ OPTY where they selected records my subordinates own on the sales UI	Opportunity	Opportunity Owner Hierarchy	OpportunityPR2	Opportunities where the access group member is in the management chain of the opportunity owner	OPITYOWNERHIER
Opportunity	MOOOPITYMOO1	Access the opportunity for table MOO_ OPTY where they selected records where my subordinates are on the team on the sales UI_1	Opportunity	Opportunity Team Hierarchy	OpportunityPR6	Opportunities where the access group member is in the management chain of a resource who is on the opportunity team	OPITYTEAMHIER
Opportunity	MOOOPITYMOO1	Access the opportunity for table MOO_ OPTY where they selected	Opportunity	Opportunity Territory Owner	OpportunityPR9	Opportunities where the access group member is the owner	OPITYTERRITORYOWNER

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		records in my territory on the sales UI				of a territory associated with the opportunity	
Opportunity	MOOOPTYM001	Access the opportunity for table MOO_OPTY where they selected records in my territory hierarchy on the sales UI	Opportunity	Opportunity Territory Owner Hierarchy	OpportunityPR10	Opportunities where the access group member is the owner of a territory that is an ancestor of a territory associated with the opportunity	OPTYTERRITORYOWNERH
Opportunity	MOOOPTYM008	Access the opportunity for table MOO_OPTY for all opportunities in the enterprise	Opportunity	All Opportunities	OpportunityPR14	Access all opportunities	GLOBAL_OPPORTUNITY
Opportunity	MOO_OPTYACCTERR_HIER_RES	Access the opportunity for table MOO_OPTY where they are a territory resource in the opportunity sales account territory team or a territory resource with a descendant territory in the opportunity sales account territory team	Opportunity	Account Territory Team	AccountPR9	Accounts where the access group member is a member of the territory associated with the account	ACCOUNTTERRITORY
Opportunity	MOO_OPTYACCTERR_HIER_RES	Access the opportunity for table MOO_OPTY where they are a territory resource in the opportunity sales account territory team or a territory resource with a descendant territory in the opportunity	Opportunity	Account Territory Team Hierarchy	AccountPR10	Accounts where the access group member is a member of the territory that is an ancestor of the territory associated with the account	ACCOUNTTERRITORYHIER

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		sales account territory team					
Opportunity	MOO_OPTY_ADMIN_SALES_ADMIN	Access the opportunity for table MOO_OPTY for all opportunities in the business units that they are authorized within	Opportunity	Business Unit Opportunities	OpportunityPR15	Opportunities in the business units that the access group member is associated with	BUOPPORTUNITIES
Opportunity	MOO_OPTY_EDIT_OPTYTEAM_MGR	Access the opportunity for table MOO_OPTY where they are in the management chain of an opportunity sales team member with edit or full access	Opportunity	Opportunity Team Hierarchy with Edit or Full Access	OpportunityPR7	Accounts where the access group member is in the management chain of a resource who is on the opportunity team with edit or full access	OPTYTEAMHIERWITHEDIT
Opportunity	MOO_OPTY_EDIT_OPTYTEAM_REPS	Access the opportunity for table MOO_OPTY where they are an opportunity sales team member with edit or full access	Opportunity	Opportunity Team with Edit Or Full Access	OpportunityPR4	Opportunities where the access group member is on the opportunity team with edit or full access	OPTYTEAMWITHEDITORF
Opportunity	MOO_OPTY_FOR_ANY_PRTORG	Access the opportunity for table MOO_OPTY for all opportunities having a partner organization	Opportunity	Opportunity Partner	OpportunityPR13	Opportunities associated with a partner organization	OPTYANYPARTNERORG
Opportunity	MOO_OPTY_FOR_MYPRACNT_PRTORG	Access the opportunity for table MOO_OPTY where they are a member of the account team of a partner organization on the opportunity	Opportunity	Partner Team	PartnerPR4	Partners where the access group member is a resource on the partner team	PARTNERTEAM

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Opportunity	MOO_OPTY_FOR_MY_PRTORG	Access the opportunity for table MOO_OPTY where they are a member of a partner resource organization whose partner organization is on the opportunity	Opportunity	Opportunity Partner Company	OpportunityPR16	Opportunities where the access group member is a member of the partner company associated with the opportunity	OPTYPARTNERCOMP
NA	NA	NA	Opportunity	Opportunity Partner Company Hierarchy	OpportunityPR17	Opportunities where the access group member is a member of the child partner company associated with the opportunity	OPTYPARTNERHIER
Opportunity	MOO_OPTY_FULL_OPTYTEAM_MGR	Access the opportunity for table MOO_OPTY where they are in the management chain of an opportunity sales team member with full access	Opportunity	Opportunity Team Hierarchy with Full Access	OpportunityPR8	Opportunities where the access group member is in the management chain of a resource who is on the opportunity team with full access	OPTYTEAMHIERWITHFULL
Opportunity	MOO_OPTY_FULL_OPTYTEAM_REPS	Access the opportunity for table MOO_OPTY where they are an opportunity sales team member with full access	Opportunity	Opportunity Team with Full Access	OpportunityPR5	Opportunities where the access group member is on the opportunity team with full access	OPTYTEAMWITHFULL
Opportunity	MOO_OPTY_TERR_HIER_RES	Access the opportunity for table MOO_OPTY where they are a territory resource in the opportunity	Opportunity	Opportunity Territory Team	OpportunityPR11	Opportunities where the access group member is a member of a territory associated with the opportunity	OPTYTERRITORY

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		territory team or a territory resource with a descendant territory in the opportunity territory team					
Opportunity	MOO_OPTY_TERR_HIER_RES	Access the opportunity for table MOO_OPTY where they are a territory resource in the opportunity territory team or a territory resource with a descendant territory in the opportunity territory team	Opportunity	Opportunity Territory Team Hierarchy	OpportunityPR12	Opportunities where the access group member is a member of a territory that is an ancestor of a territory associated with the opportunity	OPTYTERRITORYHIER
Opportunity	MOO_OPTY_VIEW_ACCTTEAM_MGR	Access the opportunity for table MOO_OPTY where they are in the management chain of an opportunity sales account team member	Opportunity	Account Team	AccountPR3	Accounts where the access group member is on the account team	ACCOUNTTEAM
Opportunity	MOO_OPTY_VIEW_OPTYTEAM_MGR	Access the opportunity for table MOO_OPTY where they are in the management chain of an opportunity sales team member with view, edit, or full access	Opportunity	Opportunity Owner Hierarchy	OpportunityPR2	Opportunities where the access group member is in the management chain of the opportunity owner	OPTYOWNERHIER
Opportunity	MOO_OPTY_VIEW_OPTYTEAM_REPS	Access the opportunity for table MOO_OPTY where they are an opportunity sales team member with	Opportunity	Opportunity Team	OpportunityPR3	Opportunities where the access group member is on the opportunity team	OPTYTEAM

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		view, edit, or full access					
Opportunity	MOOOPITYZBS9%	Access the opportunity for table MOO_OPTY where they are member or in management chain of opportunity sales team with view, edit or full access, member of territory team or upward territory hierarchy	Opportunity	Opportunity Team	OpportunityPR3	Opportunities where the access group member is on the opportunity team	OPITYTEAM
Opportunity	MOOOPITYZBS9%	Access the opportunity for table MOO_OPTY where they are member or in management chain of opportunity sales team with view, edit or full access, member of territory team or upward territory hierarchy	Opportunity	Opportunity Team Hierarchy	OpportunityPR6	Opportunities where the access group member is in the management chain of a resource who is on the opportunity team	OPITYTEAMHIER
Opportunity	MOOOPITYZBS9%	Access the opportunity for table MOO_OPTY where they are member or in management chain of opportunity sales team with view, edit or full access, member of territory team or upward territory hierarchy	Opportunity	Opportunity Territory Team	OpportunityPR11	Opportunities where the access group member is a member of a territory associated with the opportunity	OPITYTERRITORY

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Opportunity	MOOOPITYZBS9	Access the opportunity for table MOO_OPTY where they are member or in management chain of opportunity sales team with view, edit or full access, member of territory team or upward territory hierarchy	Opportunity	Opportunity Territory Team Hierarchy	OpportunityPR12	Opportunities where the access group member is a member of a territory that is an ancestor of a territory associated with the opportunity	OPITYTERRITORYHIER
Opportunity	MOOOPITYZBS9	Access the opportunity for table MOO_OPTY where they are member or in management chain of opportunity account team, account territory team or upward territory hierarchy	Opportunity	Account Team	AccountPR3	Accounts where the access group member is on the account team	ACCOUNTTEAM
Opportunity	MOOOPITYZBS9	Access the opportunity for table MOO_OPTY where they are member or in management chain of opportunity account team, account territory team or upward territory hierarchy	Opportunity	Account Team Hierarchy	AccountPR4	Accounts where the access group member is in the management chain of a resource who is on the account team	ACCOUNTTEAMHIER
Opportunity	MOOOPITYZBS9	Access the opportunity for table MOO_OPTY where they are member or in management chain of opportunity account team,	Opportunity	Account Territory Team	AccountPR9	Accounts where the access group member is a member of the territory associated with the account	ACCOUNTTERRITORY

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		account territory team or upward territory hierarchy					
Opportunity	MOOOPTYZBS95	Access the opportunity for table MOO_OPTY where they are member or in management chain of opportunity account team, account territory team or upward territory hierarchy	Opportunity	Account Territory Team Hierarchy	AccountPR10	Accounts where the access group member is a member of the territory that is an ancestor of the territory associated with the account	ACCOUNTTERRITORYHIER
Opportunity	MOOOPTYZBS95	Access the opportunity for table MOO_OPTY where they are member or in management chain of opportunity account team, account territory team or upward territory hierarchy	Opportunity	Contact Team	ContactPR3	Contacts where the access group member is on the contact team	CONTACTTEAM
Opportunity	MOOOPTYZBS95	Access the opportunity for table MOO_OPTY where they are member or in management chain of opportunity account team, account territory team or upward territory hierarchy	Opportunity	Contact Team Hierarchy	ContactPR4	Contacts where the access group member is in the management chain of a resource who is on the contact team	CONTACTTEAMHIER
Opportunity	MOOOPTYZBS95	Access the opportunity for table MOO_OPTY where they are member or in	Opportunity	Contact Territory	ContactPR9	Contacts where the access group member is a member of the territory	CONTACTTERRITORY

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		management chain of opportunity account team, account territory team or upward territory hierarchy				associated with the contact	
Opportunity	MOOPTYZBS9S	Access the opportunity for table MOO_OPTY where they are member or in management chain of opportunity account team, account territory team or upward territory hierarchy	Opportunity	Contact Territory Hierarchy	ContactPR10	Contacts where the access group member is a member of the territory that is an ancestor of the territory associated with the contact	CONTACTTERRITORYHIER

Advanced permissions are defined for some of the Opportunity data security policies. Advanced permissions let you refine the access provided by a data security policy. This table shows how the advanced permissions available with Opportunity data security policies map to predefined access group rules.

Data Security Policy Business Object	Data Security Policy Advanced Permission Name	Access Group Object	Predefined Rule Name	Access Level
Opportunity	Manage Opportunity General Profile	Opportunity	Any predefined rule	Update, Full
Opportunity	Manage Opportunity Restricted Profile	Opportunity	Any predefined rule	Delete, Full
Opportunity	Manage Opportunity Revenue	Opportunity	Any predefined rule	Full
Opportunity	Manage Opportunity Team	Opportunity	Any predefined rule	Full
Opportunity	View Opportunity	Opportunity	Any predefined rule	Read, Update, Delete, Full

Access Extension Rules for Opportunity

For each of the data security policies available for the Opportunity object, this table shows the access extension rules that provide equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Access Extension Rule Name	Predefined Access Extension Rule Number	Predefined Access Extension Rule Description	Relationship Name
Opportunity	MOO_OPTY_VIEW_ACCTTEAM_REPS	Access the opportunity for table MOO_OPTY where they are a member of the opportunity sales account team	Opportunity	Opportunities of Related Household of Type Account (Consumer) Team	AccountOpportun	Predefined rule for opportunities of related household of type account (consumer) team.	HouseholdToOpportunity
Opportunity	MOO_OPTY_VIEW_ACCTTEAM_MGR	Access the opportunity for table MOO_OPTY where they are in the management chain of an opportunity sales account team member	Opportunity	Opportunities of Related Household of Type Account (Consumer) Team Hierarchy	AccountOpportun	Predefined rule for opportunities of related household of type account (consumer) team hierarchy.	HouseholdToOpportunity
Opportunity	MOO_OPTYACCTERR_HIER_RES	Access the opportunity for table MOO_OPTY where they are a territory resource in the opportunity sales account territory team or a territory resource with a descendant territory in the opportunity sales account territory team	Opportunity	Opportunities of Related Household of Type Account (Consumer) Territory	AccountOpportun	Predefined rule for opportunities of related household of type account (consumer) territory.	HouseholdToOpportunity
Opportunity	MOO_OPTYACCTERR_HIER_RES	Access the opportunity for table MOO_OPTY where they are a territory resource in the opportunity sales account territory team or a territory	Opportunity	Opportunities of Related Household of Type Account (Consumer) Territory Hierarchy	AccountOpportun	Predefined rule for opportunities of related household of type account (consumer) territory hierarchy.	HouseholdToOpportunity

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Access Extension Rule Name	Predefined Access Extension Rule Number	Predefined Access Extension Rule Description	Relationship Name
		resource with a descendant territory in the opportunity sales account territory team					

Partner Object Mapping

For each of the data security policies available for the Partner object, this topic shows the access group rules that provide equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Partner	HZPARTIESHZ52	Access the trading community organization party for table HZ_PARTIES all partner profiles of all partner accounts in the enterprise	Partner	All Partners	PartnerPR1	Access all partners	GLOBAL_PARTNER
Partner	HZPARTIESHZ52	Access the trading community organization party for table HZ_PARTIES all partner profiles where I am the partner account owner	Partner	Partner Owner	PartnerPR2	Partners where the access group member is the partner owner	PARTNEROWNER
Partner	HZPARTIESHZ52	Access the trading community organization party for table HZ_PARTIES all partner profiles where I am on the management	Partner	Partner Owner Hierarchy	PartnerPR3	Partners where the access group member is in the management chain of the partner owner	PARTNEROWNERHIER

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		chain of the partner account owner					
Partner	HZPARTIESHZ52	Access the trading community organization party for table HZ_PARTIES all partner profiles where I am on the partner account team	Partner	Partner Team	PartnerPR4	Partners where the access group member is a resource on the partner team	PARTNERTEAM
Partner	HZPARTIESHZ52	Access the trading community organization party for table HZ_PARTIES all partner profiles where my subordinates are on the partner account team	Partner	Partner Team Hierarchy	PartnerPR7	Partners where the access group member is in the management chain of a resource who is on the partner team	PARTNERTEAMHIER
Partner	HZPARTIESHZ52	Access the trading community organization party for table HZ_PARTIES all partner profiles where I am the owner or a member of the partner account territory	Partner	Partner Territory Team	PartnerPR10	Partners where the access group member is a member of the territory associated with the partner	PARTNERTERRITORY
Partner	HZPARTIESHZ52	Access the trading community organization party for table HZ_PARTIES all partner profiles where I am the owner or a member of a territory that is an ancestor of the partner account territory	Partner	Partner Territory Team Hierarchy	PartnerPR11	Partners where the access group member is a member of the territory that is an ancestor of the territory associated with the partner	PARTNERTERRITORYHIER

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Partner	HZPARTIESHZ52	Access the trading community organization party for table HZ_PARTIES all partner profiles where I am on an ancestor partner organization in the partner hierarchy	Partner	Child Partner Companies	PartnerPR13	Partners where the access group member is a member of an ancestor partner company	PARTNERHIER
Partner	HZPARTIESHZ52	Access the trading community organization party for table HZ_PARTIES all partner profiles where I am on the partner organization	Partner	Partner Company	PartnerPR12	Partner where the access group member is member of the partner company	PARTNERORG

Note: When you provide users with access to partner records using access groups, users automatically receive the same access to the partner contact records. So to give users access to partner contact data, you must grant them access to the associated partner through access group membership.

Price Book Header Object Mapping

For the data security policy available for the Price Book Header object, this topic shows the access group rule that provides equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Price Book Header	QSCPRICEBOOKH	Access the price book for table QSC_PRICEBOOK_HEADERS_B for all price books in the enterprise	Price Book Header	All Price Book Headers	PriceBookHeader	Access all price book headers	GLOBAL_PRICEBOOKHEADER

Product Object Mapping

For the data security policy available for the Product object, this topic shows the access group rule that provides equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Product	QSCPRODUCTSB	Access the products for table QSC_PRODUCTS_B for all products in the enterprise	Product	All Products	ProductPR1	Access all products	GLOBAL_PRODUCT

Product Group Object Mapping

For the data security policy available for the Product Group object, this topic shows the access group rule that provides equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Product Group	QSCPRODGRPDE	Access the product group for table QSC_PROD_GRP_DETAILS for all product groups in the enterprise	Product Group	All Product Groups	ProductGroupPR1	Access all product groups	GLOBAL_PRODUCTGROUP

Quote and Order Object Mapping

For each of the data security policies available for the Quote and Order object, this topic shows the access extension rules that provide equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Access Extension Rule Name	Predefined Access Extension Rule Number	Predefined Access Extension Rule Description	Relationship Name
Quotes and Orders	ZCASALESORDE	Access the sales order for table ZCA_SALES_ORDER_HEADERS where they are member or in management chain of associated opportunity account team, account territory team or upward territory hierarchy	Quote and Order	Quotes and Orders of Related Opportunity Household of Type Account (Consumer) Team	OpptySalesOrder	Predefined rule for quotes and orders of related opportunity household of type account (consumer) team.	HouseholdToSalesOrderHe
Quotes and Orders	ZCASALESORDE	Access the sales order for table ZCA_SALES_ORDER_HEADERS where they are member or in management chain of associated opportunity account team, account territory team or upward territory hierarchy	Quote and Order	Quotes and Orders of Related Opportunity Household of Type Account (Consumer) Team Hierarchy	OpptySalesOrder	Predefined rule for quotes and orders of related opportunity household of type account (consumer) team hierarchy.	HouseholdToSalesOrderHe
Quotes and Orders	ZCASALESORDE	Access the sales order for table ZCA_SALES_ORDER_HEADERS where they are member or in management chain of associated opportunity account team, account territory team or upward territory hierarchy	Quote and Order	Quotes and Orders of Related Opportunity Household of Type Account (Consumer) Territory	OpptySalesOrder	Predefined rule for quotes and orders of related opportunity household of type account (consumer) territory.	HouseholdToSalesOrderHe
Quotes and Orders	ZCASALESORDE	Access the sales order for table ZCA_SALES_ORDER_HEADERS where they are	Quote and Order	Quotes and Orders of Related Opportunity Household of Type Account	OpptySalesOrder	Predefined rule for quotes and orders of related opportunity household of type account	HouseholdToSalesOrderHe

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Access Extension Rule Name	Predefined Access Extension Rule Number	Predefined Access Extension Rule Description	Relationship Name
		member or in management chain of associated opportunity account team, account territory team or upward territory hierarchy		(Consumer) Territory Hierarchy		(consumer) territory hierarchy.	
NA	NA	NA	Quote and Order	Quotes and Orders of Related Household of Type Account (Consumer) Team	AccountSalesOrd	Predefined rule for quotes and orders of related household of type account (consumer) team.	HouseholdToSalesOrderHe
NA	NA	NA	Quote and Order	Quotes and Orders of Related Household of Type Account (Consumer) Team Hierarchy	AccountSalesOrd	Predefined rule for quotes and orders of related household of type account (consumer) team hierarchy.	HouseholdToSalesOrderHe
NA	NA	NA	Quote and Order	Quotes and Orders of Related Household of Type Account (Consumer) Territory	AccountSalesOrd	Predefined rule for quotes and orders of related household of type account (consumer) territory.	HouseholdToSalesOrderHe
NA	NA	NA	Quote and Order	Quotes and Orders of Related Household of Type Account (Consumer) Territory Hierarchy	AccountSalesOrd	Predefined rule for quotes and orders of related household of type account (consumer) territory hierarchy.	HouseholdToSalesOrderHe

Resource Object Mapping

For each of the data security policies available for the Resource object, this topic shows the access group rules that provide equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Trading Community Party	HZPARTIESHZ22	Access the trading community resource for table HZ_PARTIES for all trading community resources.	Resource	All Resources	ResourceUserPR1	All resources	ALLRESOURCES
Trading Community Party	NA	NA	Resource	All External Resources	ResourceUserPR2	All external resources	ALLEXTERNALRESOURCES
Trading Community Resource Profile	JTFRSRESOURCE	Access the trading community resource for table JTF_RS_RESOURCE_PROFILES for their resource record	Resource	Self Resource	ResourceUserPR3	My resource	MYRESOURCE
Trading Community Resource Profile	JTFRSRESOURCE	Access the trading community resource skill for table JTF_RS_RESOURCE_PROFILES for the resource skills of persons who they manage	Resource	Resource Hierarchy	ResourceUserPR4	My resource hierarchy	RESOURCEHIERARCHY

Sales Resource Quota Object Mapping

For each of the data security policies available for the Sales Resource Quota object, this topic shows the access group rules that provide equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
MOT_QM_RESOURCE_QUOTAS	MOTQMRESOUR	Access the sales resource quota for table MOT_QM_RESOURCE_QUOTAS where they are the owner of a parent territory in the territory hierarchy where the quota is assigned	Sales Resource Quota	Resource Quota Territory Owner Hierarchy	ResourceQuotaP	Predefined rule for resource quota territory owner hierarchy	RESOURCEQUOTAOWNER
MOT_QM_RESOURCE_QUOTAS	MOTQMRESOUR	Access the sales resource quota for table MOT_QM_RESOURCE_QUOTAS where they are the owner of the root territory, if the resource quota is for the root territory	Sales Resource Quota	Resource Quota Root Territory Owner	ResourceQuotaP	Predefined rule for resource quota root territory owner	RESOURCEQUOTAROOTO
MOT_QM_RESOURCE_QUOTAS	MOTQMRESOUR	Access the sales resource quota for table MOT_QM_RESOURCE_QUOTAS where they are an administrator of the territory to which the quota is assigned	Sales Resource Quota	Resource Quota Territory Administrator	ResourceQuotaP	Predefined rule for resource quota territory administrator	RESOURCEQUOTAADMIN
MOT_QM_RESOURCE_QUOTAS	MOTQMRESOUR	Access the sales resource quota for table MOT_QM_RESOURCE_QUOTAS where they are an administrator of a parent territory in the territory hierarchy where the quota is assigned	Sales Resource Quota	Resource Quota Territory Administrator Hierarchy	ResourceQuotaP	Predefined rule for resource quota territory administrator hierarchy	RESOURCEQUOTAADMINH

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
MOT_QM_RESOURCE_QUOTAS	MOTQMRESOUR	Access the sales resource quota for table MOT_QM_RESOURCE_QUOTAS where they are the administrator of the root territory, if the resource quota is for the root territory	Sales Resource Quota	Resource Quota Root Territory Administrator	ResourceQuotaP	Predefined rule for resource quota root territory administrator	RESOURCEQUOTAROOTAD
MOT_QM_RESOURCE_QUOTAS	MOTQMRESOUR	Access the sales resource quota for table MOT_QM_RESOURCE_QUOTAS where they are assigned the quota	Sales Resource Quota	Resource Quota Territory Member	ResourceQuotaP	Predefined rule for resource quota territory member	RESOURCEQUOTAMEMBER
MOT_QM_RESOURCE_QUOTAS	MOTQMRESOUR	Access the sales resource quota for table MOT_QM_RESOURCE_QUOTAS where they are the owner of the territory to which the quota is assigned	Sales Resource Quota	Resource Quota Territory Owner	ResourceQuotaP	Predefined rule for resource quota territory owner	RESOURCEQUOTAOWNER
MOT_QM_RESOURCE_QUOTAS	MOTQMRESOUR	Access the sales resource quota for table MOT_QM_RESOURCE_QUOTAS for all sales resource quota objects in the enterprise	Sales Resource Quota	All Resource Quotas	ResourceQuotaP	Predefined rule for all resource quotas	GLOBAL_RESOURCEQUOTA
MOT_QM_QUOTA_PLANS_B	MOTQMQUOTAP	Access the sales quota plan for table MOT_QM_QUOTA_PLANS_B for all sales quota plans	Sales Quota Plan	All Quota Plans	QuotaPlanPR1	Predefined rule for access to all quota plans	GLOBAL_QUOTAPLAN

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
MOT_QM_QUOTA_PLANS_B	MOTQMQUOTAP	Access the sales quota plan for table MOT_QM_QUOTA_PLANS_B for all sales quota plans that are active	Sales Quota Plan	All Active Quota Plans	QuotaPlanPR2	Predefined rule for access to active quota plans	ACTIVEQUOTAPLANS
MOT_QM_QUOTA_PLANS_B	MOTQMQUOTAP	Access the sales quota plan for table MOT_QM_QUOTA_PLANS_B for all sales quota plans that are new, pending activation, or active	Sales Quota Plan	All Not Completed Quota Plans	QuotaPlanPR3	Predefined rule for access to quota plans that are not in completed status	NONCOMPLETEDQUOTAP

Sales Territory Object Mapping

For each of the data security policies available for the Sales Territory object, this topic shows the access group rules that provide equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
NA	NA	NA	Sales Territory	All Territories	TerritoryPRO	Access all territories	GLOBAL_TERRITORY
Sales Territory	MOTTERRITORIES	Access the sales territory for table MOT_TERRITORIES where they are an administrator of the territory	Sales Territory	Active Territory Administrator	TerritoryPR1	Territories where the access group member is administrator of the active territory	TERRITORYACTIVEADMIN
Sales Territory	MOTTERRITORIES	Access the sales territory for table MOT_TERRITORIES where they are an administrator of the territory	Sales Territory	Draft Territory Administrator	TerritoryPR2	Territories where the access group member is administrator of the draft territory	TERRITORYDRAFTADMIN

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Sales Territory	MOTERRITORIES	Access the sales territory for table MOT_TERRITORIES where they are an administrator of a parent territory in the territory hierarchy	Sales Territory	Active Territory Administrator In Territory Hierarchy	TerritoryPR3	Territories where the access group member is administrator of the active parent territory in the territory hierarchy	TERRITORYACTIVEADMINISTRATOR
Sales Territory	MOTERRITORIES	Access the sales territory for table MOT_TERRITORIES where they are an administrator of a parent territory in the territory hierarchy	Sales Territory	Draft Territory Administrator In Territory Hierarchy	TerritoryPR4	Territories where the access group member is administrator of the draft parent territory in the territory hierarchy	TERRITORYDRAFTADMINISTRATOR
Sales Territory	MOTERRITORIES	Access the sales territory for table MOT_TERRITORIES where they are the territory owner	Sales Territory	Active Territory Owner	TerritoryPR5	Territories where the access group member is owner of the active territory	TERRITORYACTIVEOWNER
Sales Territory	MOTERRITORIES	Access the sales territory for table MOT_TERRITORIES where they are the territory owner	Sales Territory	Draft Territory Owner	TerritoryPR6	Territories where the access group member is owner of the draft territory	TERRITORYDRAFTOWNER
Sales Territory	MOTERRITORIES	Access the sales territory for table MOT_TERRITORIES where they are the owner of a parent territory in the territory hierarchy	Sales Territory	Active Territory Owner In Territory Hierarchy	TerritoryPR7	Territories where the access group member is owner of the active parent territory in the territory hierarchy	TERRITORYACTIVEOWNER
Sales Territory	MOTERRITORIES	Access the sales territory for table MOT_TERRITORIES where they are	Sales Territory	Draft Territory Owner In Territory Hierarchy	TerritoryPR8	Territories where the access group member is owner of the	TERRITORYDRAFTOWNER

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
		the owner of a parent territory in the territory hierarchy				draft parent territory in the territory hierarchy	
Sales Territory For additional mapping information, see the note following the table.	MOTTERRITORIES	Access the sales territory for table MOT_TERRITORIES where they are a member of the territory team	Sales Territory	Active Territory Team	TerritoryPR9	Territories where the access group member is part of the active territory team	TERRITORYACTIVETEAM
NA	NA	NA	Sales Territory	Deleted Territory Owner	TerritoryPR10	Territories where the access group member is owner of the deleted territory	TERRITORYDELETEDOWN
NA	NA	NA	Sales Territory	Deleted Territory Administrator	TerritoryPR11	Territories where the access group member is administrator of the deleted territory	TERRITORYDELETEDADM

Note: The data security policy for the Sales Territory MOTTERRITORIESMOT26 instance set provides access to territory team members of both active and draft territories. This data security policy is mapped to the Active Territory Team (TerritoryPR9) predefined rule, which provides access to team members of active territories only. Team members of draft territories aren't assigned access through a predefined rule.

Sales Territory Proposal Object Mapping

For each of the data security policies available for the Sales Territory Proposal object, this topic shows the access group rules that provide equivalent data access.

Data Security Policy Business Object	Data Security Policy Predefined Instance Set	Data Security Policy Condition Name	Access Group Object	Predefined Rule Name	Predefined Rule Number	Predefined Condition Name	Predefined Condition Code
Sales Territory Proposal	MOTTERRPROPC	Access the sales territory proposal for table MOT_TERR_PROPOSALS where they are the proposal owner	Sales Territory Proposal	Proposal Owner	TerritoryProposal	Access the sales territory proposal for table MOT_TERR_PROPOSALS where they are the proposal owner	PROPOSALOWNER
Sales Territory Proposal	MOTTERRPROPC	Access the sales territory proposal for table MOT_TERR_PROPOSALS where they are an administrator of a territory owned by the proposal owner	Sales Territory Proposal	Proposal Territory Administrator	TerritoryProposal	Access the sales territory proposal for table MOT_TERR_PROPOSALS where they are an administrator of a territory owned by the proposal owner	PROPOSALTERRITORYADM
Sales Territory Proposal	MOTTERRPROPC	Access the sales territory proposal for table MOT_TERR_PROPOSALS where they are the owner of a territory administered by the proposal owner	Sales Territory Proposal	Proposal Territory Owner	TerritoryProposal	Access the sales territory proposal for table MOT_TERR_PROPOSALS where they are the owner of a territory administered by the proposal owner	PROPOSALTERRITORYOWN
NA	NA	NA	Sales Territory Proposal	All Proposals	TerritoryProposal	Access all PROPOSALS	GLOBAL_TERRITORYPROPOSAL

