

# Oracle® Fusion Cloud EPM

## Administering Access Control



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Oracle Fusion Cloud EPM Administering Access Control,

E96250-67

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# Overview of Access Control

The Oracle Fusion Cloud Enterprise Performance Management and Oracle Enterprise Data Management Cloud environments are secured with multiple layers of protection. Access is restricted to authorized users using role-based access (predefined roles). Predefined role assignments are managed using the [Oracle Cloud Console](#). For example, to permit user John Doe to view reports belonging to a Planning test environment, he should be assigned to the Viewer role of the environment. For more information, see *Understanding Predefined Roles* in *Getting Started Guide for Administrators*.

To enable more granular control over the use of Cloud EPM business processes or Oracle Enterprise Data Management Cloud, users can further be assigned application-specific roles through Access Control. For example, a user or group can be assigned to the Approval Administrator role in a Planning application, enabling them to perform approval-related activities.

It's important to note that assigning roles at the application-level will only enhance the user's access rights. These application-specific roles cannot revoke or restrict the privileges granted by predefined roles.

Access Control enables you to complete these activities in an environment:

- **Manage Groups.** See [Managing Groups](#)
- **Manage Users.** See [Assigning a User to Many Groups](#)
- **Manage Application Roles.** See [Managing Role Assignments at the Application Level](#)
- **Role Assignment Report.** See:
  - [Generating a Role Assignment Report for a User or Group](#)
  - [Viewing the Role Assignment Report for the Environment](#)
- **User Login Report.** See [Viewing the User Login Report](#)
- **User Group Report.** See [Viewing the User Group Report](#)

**Access Control** for Account Reconciliation provides specific features. For more details, refer to the following topics in *Administering Account Reconciliation*:

- Using Teams
- Managing Users
- Power User Security in Account Reconciliation

## Tutorial Link

Follow this tutorial [Setting Up Security in Cloud EPM Business Processes](#) to learn about the layers of security in Cloud EPM business processes and how to manage security using Access Control and access permissions.

## Opening Access Control

To open Access Control:

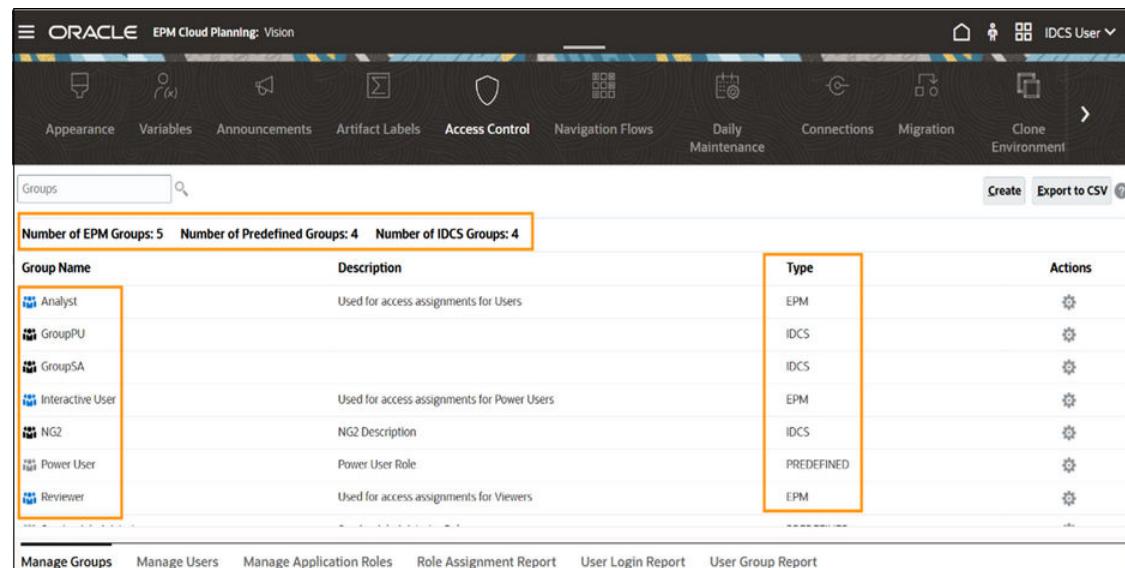
1. Access the environment as a Service Administrator or a user with Access Control - Manage application role.
2. Complete a step:
  - Click  (Navigator), and then **Access Control**.
  - Click **Tools** and then **Access Control**.
  - **Narrative Reporting only:** Click **Access Control**.

## Managing Groups

Oracle Fusion Cloud Enterprise Performance Management recognizes three types of groups:

- **PREDEFINED:** These groups are automatically created for each predefined role. All users are assigned to a PREDEFINED group based on their predefined role (for example, Power User).
- **EPM:** These are the groups that you create in the Access Control. They cannot be created in the Identity Console. They also do not show up in Identity Console.
- **IDCS:** These are the groups that you create in Oracle Identity Cloud. They may be synchronized with an identity provider (for example, Okta or Azure AD). They show up in Access Control, but you cannot create them through Access Control.

In **Manage Groups** tab, groups are categorized by type and image to differentiate easily. To search for a specific group, see [Using Search](#) for instructions.



Group Name	Description	Type	Actions
Analyst	Used for access assignments for Users	EPM	
GroupPU		IDCS	
GroupSA		IDCS	
Interactive User	Used for access assignments for Power Users	EPM	
NG2	NG2 Description	IDCS	
Power User	Power User Role	PREDEFINED	
Reviewer	Used for access assignments for Viewers	EPM	

### PREDEFINED Groups

To enable you to view user assignments, Access Control lists the users in predefined roles as PREDEFINED groups.

Key Considerations:

- PREDEFINED groups can be assigned as members of EPM groups.
- PREDEFINED groups are not editable.

To view a PREDEFINED group, select **View** under Actions against that group. You can see a list all the Cloud EPM users assigned to the group.

For more information on predefined roles, see Understanding Predefined Roles in *the Getting Started Guide for Administrators*

## EPM Groups

You can use the following options on the **Manage Groups** screen to create and manage EPM groups.

- **Create** button - Creates a new EPM group. See [Creating EPM Groups](#)
- **Export to CSV** button - Exports the EPM groups to a CSV file. See [Exporting Cloud EPM Groups to a CSV File](#)
- **Edit**  (Action) - Edits the EPM Group in the selected row of the group listing. See [Editing EPM Groups](#)
- **Delete**  (Action) - Deletes the EPM Group in the selected row of the group listing. See [Deleting EPM Groups](#)

Key Considerations:

- EPM groups can be assigned as members to larger EPM groups.
- You cannot use Access Control to import group information from a file to create groups. You may use Migration or the createGroups EPM Automate command to import groups.

## IDCS Groups

You can use IDCS groups to assign predefined roles to multiple Cloud EPM users. See [Using IDCS Groups to Assign Predefined Roles to Users](#) in *Getting Started with Oracle Enterprise Performance Management Cloud for Administrators*

Key Considerations:

- IDCS groups are not editable.  
To view an IDCS group, select **View** under Actions against that group. You can see a list of all the Cloud EPM users assigned to the group.
- IDCS groups can be assigned to application roles and EPM groups.

### Caution

If an IDCS group shares its name with an EPM or a PREDEFINED group, or if the name exceeds 256 characters, it will not show up in Access Control. It is crucial to understand that users in such IDCS groups won't be able to log in.

## Troubleshooting

See [Resolving User, Role, and Group Management Issues](#) in the *Operations Guide*.

# Creating EPM Groups

Service Administrators or users with Access Control - Manage application role can create EPM groups. Oracle Fusion Cloud Enterprise Performance Management users and other groups

can be members of a group. You cannot create an IDCS or PREDEFINED group using this option.

 **Note**

You may also use Migration or the createGroups EPM Automate command to import group information from a file to create groups.

To create groups:

1. Open **Access Control**. See [Opening Access Control](#).
2. In **Manage Groups**, click **Create**.
3. In **Create Group**, complete these steps:
  - a. In **Name**, enter a unique group name (maximum 256 characters). Group names are not case-sensitive.  
Cloud EPM does not allow you to create groups with names identical to an IDCS or a PREDEFINED group.
  - b. **Optional:** Enter a group description.
4. **Optional:** Add groups to create a nested group.
  - a. In **Available Groups**, search for groups. See [Using Search](#) for instructions on using the Search feature.  
Groups of all types that match the search criterion are listed. By default, this list is sorted by **Group Name** values.
  - b. From **Available Groups**, select the member groups for the new group.
  - c. Click **Move**.The selected groups are listed under **Assigned Groups**. To remove assigned groups, from **Assigned Groups**, select the group to remove, and then click **Remove**.
5. **Optional:** Add Cloud EPM users as members of the group.  
Only users who are assigned to a predefined role can be added as group members.
  - a. Click **Users**.
  - b. In **Available Users**, search for users. See [Using Search](#) for instructions.  
Users that match the search criterion are listed. By default, this list is sorted by **User Login** values.
  - c. From **Available Users**, select the users to add to the group.
  - d. Click **Move**.
6. Click **Save**.
7. Click **OK**.

## Editing EPM Groups

Service Administrators or users with Access Control - Manage application role can edit EPM group properties, including group name. The application roles assigned to the group and other

security assignments are not affected if you rename a group. You cannot edit an IDCS or PREDEFINED group using this option.

To edit groups:

1. Open **Access Control**. See [Opening Access Control](#).
2. **Optional:** In **Manage Groups**, locate the group to edit. See [Using Search](#) for instructions on using the Search feature.

Groups of all types that match the search criterion are listed. By default, this list is sorted by **Group Name** values.

 **Note**

Group names may contain up to 256 characters. The visible characters, for example, in the **Available Groups** column, may get truncated based on your screen resolution.

3. Click  (Action) in the row of the group you want to edit, and then select **Edit**.
4. **Optional:** Edit group name. Changes to the group name does not impact the security assignments made using the group. You cannot rename the group with name identical to a listed IDCS or PREDEFINED group.
5. Edit group assignment:
  - a. **Optional:** Add nested groups:
    - In **Available Groups**, search for groups. See [Using Search](#) for instructions on using the Search feature.Groups of all types that match the search criterion are listed. By default, this list is sorted by **Group Name** values.
    - From **Available Groups**, select groups and click **Move**.Selected groups are listed in the **Assigned Groups** list.
  - b. **Optional:** Remove nested groups:
    - From **Assigned Groups**, select the group to remove.
    - Click **Remove**
6. Edit user assignment:
  - a. Click **Users**.
  - b. **Optional:** Add users to group:
    - In **Available Users**, search for users that you can assign as group members. See [Using Search](#) for instructions on using the Search feature.Users that match the search criterion are listed. By default, this list is sorted by **User Login** values.
    - From **Available Users**, select users and click **Move**.Selected users are listed in the **Assigned Users** list.
  - c. **Optional:** Remove users from the group:
    - From **Assigned Users**, select the users to remove.
    - Click **Remove**.

7. Click **Save**.
8. Click **OK**.

## Deleting EPM Groups

Service Administrators or users with Access Control - Manage application role can delete EPM groups. Deleting an EPM group does not delete group members. You cannot delete an IAM or PREDEFINED group using this option.

To delete a group:

1. Open **Access Control**. See [Opening Access Control](#).
2. **Optional:** In **Manage Groups**, search for the group to delete. See [Using Search](#) for instructions on using the Search feature.  
Groups that match the search criterion are listed. By default, this list is sorted by **Group Name** values.
3. Click  (Action) in the row of the EPM group you want to delete, and then select **Delete**.
4. Click **Yes** to confirm the delete operation.
5. Click **OK**.

## Exporting Cloud EPM Groups to a CSV File

Service Administrators or users with Access Control - Manage application role can export EPM group name and descriptions to `Groups.csv` file using **Export to CSV**. PREDEFINED or IDCS groups cannot be exported using this option.

**Export to CSV** is disabled if no EPM groups exists. There should be at least one EPM group in Access Control to use this option.

1. Open **Access Control**. See [Opening Access Control](#).  
The **Manage Groups** tab lists all available groups.
2. Click **Export to CSV** to export all EPM groups.
3. Follow on-screen instructions to open or save `Groups.csv` file.

## Importing Group Assignments of Users from a File

Service Administrators or users with Access Control - Manage application role can import EPM group assignments of users from a Comma Separated Value (CSV) file to create new assignments in an existing Access Control group. Oracle Fusion Cloud Enterprise Performance Management enforces application-level and artifact-level security assignments based on the new group assignments.

### Note

All User Logins identified in the import file must exist in the identity domain; all group name included in the file must exist in Access Control. You cannot create a group using this import process.

You can only create new group assignments; you cannot remove users' current group assignments.

The import CSV file format can be as shown in the following example:

```
User Login,First Name,Last Name,Email,Direct,Group  
jdoe,John,Doe,jdoe@example.com,Yes,AllRole
```

This format is identical to the CSV version of the User Group report. If you use this format, the import process ignores all columns other than User Login and Group. An easy way to create an import file is to export the current User Group Report and then modify it as needed. See [Viewing the User Group Report](#).

To import group assignments of users:

1. Open **Access Control**. See [Opening Access Control](#).
2. Click **User Group Report**.
3. Click **Import from CSV**.
4. Using **Browse** in **Import User Group Assignment CSV**, select the import file.
5. Click **Import**.
6. Click **Yes**.

On completing the import process, a confirmation dialog box, which identifies the total number of processed assignments and status, is displayed.

## Assigning a User to Many Groups

Oracle Fusion Cloud Enterprise Performance Management users can be members of many groups maintained using Access Control. Service Administrators or users with Access Control - Manage application role can assign a user to many groups.

### Note

At any given time, a user can be a member of maximum 1,000 groups either directly or indirectly.

1. Open **Access Control**. See [Opening Access Control](#).
2. Click **Manage Users**.
3. Search for the user who is to be assigned to groups. See [Using Search](#) for instructions on using the Search feature.  
Users that match the search criterion are listed. By default, this list is sorted by **User Login** values.
4. Click  (Action) in the row of the user listing, and then select **Edit**.  
The **Edit User** screen, which lists detailed user information, including current group membership (in **Assigned Groups**), is displayed. On this screen, you can modify group assignments only.
5. Find groups to assign to the user. See [Using Search](#) for instructions on using the Search feature.  
EPM Groups that match the search criterion are listed. By default, this list is sorted by **Group Name** values.
6. Complete an action:

- To assign additional groups to the user, from **Available Groups**, select one or more groups and click  (Move) to move the selected groups to **Assigned Groups**. Alternatively, click  (Move All) to move all the groups in **Available Groups** to **Assigned Groups**.
- To remove groups assigned to the user, from **Assigned Groups**, select one or more groups and click  (Remove) to move the selected groups to **Available Groups**. Alternatively, click  (Remove All) to move all the groups in **Assigned Groups** to **Available Groups**.

7. Click **Save**.
8. Click **OK**.

## Using Search

The intelligent search for user and group artifacts works in an identical manner across Access Control.

You use a string from one of the user attributes (user name, first name, last name or email ID) or the group name or role name to find specific users, groups or roles. For example, using the string *st* to search for groups displays all groups names that contain the string *st*, for example, TestGroup, Strategic\_Planner, AnalystsGroup, and so on. Similarly, using the string *jd* to search for users lists users whose user name, first name, last name or email address contain the string *jd*.

The search option does not support wildcards (\*).

### Note

Some Access Control screens, for example, **Assign Application Roles**, **Role Assignment Report**, and **User Group Report**, offer you a search choice. Make an appropriate selection before starting a search.

#### To search for users:

1. Access a screen, for example, **Manage Users**, where the user search feature is available.
2. In the search field, enter a partial string from a user attribute (user name, first name, last name or email ID).
3. Click  (Search).  
The search results display all available properties for the users who match the search criterion. By default, this list is sorted by **User Login** values.

#### To search for groups:

- Access a screen, for example, **Manage Groups**, where the group search feature is available.
- In the search field, enter a partial string from a group name.
- Click  (Search).  
The search results display the name and description of groups that match the search criterion. By default, this list is sorted by **Group Name** values.

**Create Group**

\* Name: Example

Description:

Groups **Users**

Available Users  

First Name	Last Name	Email	User Login
John	Doe	john.doe@example.com	jdoe
Jane	Doe	jane.doe@example.com	jadoe31
Jane	Doe	jane.x.doe@example.com	jadoe41

Assigned Users

First Name	Last Name	Email	User Login
No records were found.			

 **Save**  **Close**

**To search for users based on their roles in the Role Assignment Report:**

- Access the **Role Assignment Report** tab.
- Select **Users** or **Roles** from the search drop down list.
- In the search field, enter a search string.
- Click  (Search).

The search results display all available information for the users assigned to the roles that match the search criterion. By default, this list is sorted by **User Login** values.

# Managing Role Assignments at the Application Level

Access Control applies to the following Oracle Fusion Cloud Enterprise Performance Management business processes:

- Account Reconciliation
- Enterprise Profitability and Cost Management
- Financial Consolidation and Close
- FreeForm
- Narrative Reporting
- Oracle Enterprise Data Management Cloud
- Planning
- Profitability and Cost Management
- Tax Reporting

## Application Role Assignment Overview

Access Control enables you to extend the capabilities of Oracle Fusion Cloud Enterprise Performance Management user's access beyond its predefined role by assigning them roles at application level. These roles are called Application Roles. Service Administrators or user with Access Control - Manage application role can grant application-specific roles and data grants to users and to groups created and managed in Access Control.

For example, by default, only Service Administrators and Power Users can access Data Integration. To enable users with the User or Viewer predefined roles to participate in the integration process, Service Administrators can assign Data Integration - Create application roles to them.

### Note

Application roles can only enhance the access rights of users; none of the privileges granted by a predefined role can be curtailed. To learn more about predefined roles, see *Understanding Predefined Roles* in the *Getting Started Guide for Administrators*.

For more information on available Cloud EPM application roles and their predefined role mapping, see:

- [Account Reconciliation](#)
- [Enterprise Profitability and Cost Management](#)
- [Financial Consolidation and Close](#)
- [FreeForm](#)

- [Narrative Reporting](#)
- [Oracle Enterprise Data Management](#)
- [Planning](#)
- [Profitability and Cost Management](#)
- [Tax Reporting](#)

**ⓘ Note**

If you are migrating applications from an on-premises environment to Cloud EPM, see Role Mapping for Migrating to Cloud EPM in *Administering Migration*.

### Best Practice to Assign Application Roles

The recommended best practice is to assign the lowest level role that fits additional privileges where necessary. Here are some examples of situations where you may want to grant application roles to someone that would not have those privileges from their predefined role.

- Add the **Preparer** application role to a Viewer that needs to prepare reconciliations
- Have a reports designer who only works on designing reports and not the rest of application functionality. You can give them the Viewer role and then assign the application role of **Manage Reports**
- Allow a Power User to be able to manage alert types so you can assign the application role of **Manage Alert Types**

**ⓘ Note**

Granting privileges are additive only. This means that you can add to the privileges that a user's predefined role has, but cannot remove privileges that are automatically given to that predefined role.

## Account Reconciliation

The following table lists and describes Account Reconciliation application roles and maps them with predefined roles.

**ⓘ Note**

All predefined roles have the ability to drill through to Data Exchange detail data based on their access to the data in Account Reconciliation.

**Table 2-1 Account Reconciliation Application Roles**

Application Role	Description	Included in this Predefined Role
Access Control - Manage	Performs all activities using Access Control including managing groups, assigning application roles to groups or users, and generating and viewing available reports.	Service Administrator

**Table 2-1 (Cont.) Account Reconciliation Application Roles**

Application Role	Description	Included in this Predefined Role
Access Control - View	Using Access Control, generates and views user security-related reports such as the Role Assignment Report, the User Login Report, Group Assignment Report, and the User Group Report. Users with this role cannot assign application roles, manage groups, or modify settings in Access Control.	Service Administrator
Alert Types - Manage	Manages alert types to define a procedure to follow when a certain issue arises.	Service Administrator
Announcements - Manage	Manages announcements that are displayed to users on the Welcome Panel. These may indicate upcoming events, such as system maintenance or the running of jobs.	Service Administrator
Audit - View	Provides access to all audit details. However, this application role does not enable the launch of Reconciliation Actions dialog for Reconciliations is out of their security scope.	Service Administrator
Currencies - Manage	Configures Currencies, Rate Types, and Currency Buckets. Users with this role can control which currency codes are active in the system.	Service Administrator
Dashboards - Manage	Constructs and manages custom dashboards. Users with this role can: <ul style="list-style-type: none"> <li>Configure Compliance</li> <li>Add, Edit, Duplicate and Delete</li> <li>Import and Export</li> </ul>	Service Administrator
Data Integration - Administrator	Performs all functional activities in Data Integration. Users with this role can create, perform, and run: <ul style="list-style-type: none"> <li>Integrations between source and target systems</li> <li>Pipeline activities</li> <li>Extraction and transformation of data and metadata from on-premises sources using the EPM Integration Agent</li> </ul>	Service Administrator
Data Integration - Create	Uses Data Integration to create mappings to integrate data between source and target systems. This role can define data rules with various run time options.	Service Administrator
Data Integration - Run	Users with this role use Data Integration to run an integration between the source and target.  If this is the only role assigned to the user, and if they are not a Power User or Service Administrator, they can also view the integration details, but are not able to make any changes.	Service Administrator
Data Loads - Manage	Defines data load definitions in order to load data using Data Integration and save those same data load parameters.  Views the latest status of data loads and monitor the processing of user change requests.	Service Administrator
Jobs - View	Views Account Reconciliation jobs and jobs status.  <ul style="list-style-type: none"> <li>Power User</li> <li>Service Administrator</li> </ul>	• Power User • Service Administrator
Match Types - Manage	Can manage match types, adjustment attributes, support attributes, journal columns, and group attributes.	Service Administrator
Match Types - View	Can view the details of match types, adjustment attributes, support attributes, and journal columns.	Service Administrator

**Table 2-1 (Cont.) Account Reconciliation Application Roles**

Application Role	Description	Included in this Predefined Role
Migrations - Administer	Can export and import snapshots and artifacts from the application, create applications by migrating snapshots, and delete the applications that were created. Users with this role can also clone the environment. However, to clone users and roles, the target user must have both the Identity Domain Administrator and Service Administrator role. Additionally, users with this role can view and adjust the daily maintenance start time and time zone.	Service Administrator
Organizations - Manage	Assigns a hierarchical organizational unit structure to profiles and reconciliations.	Service Administrator
Periods - Manage	Manages the period properties. They can also set the status of the periods, load data and do other operations on the existing periods.	Service Administrator
Periods - View	Users with this role can view (read access only) the number of periods associated with the reconciliations, and also load data against the period.	<ul style="list-style-type: none"> <li>Power User</li> <li>Service Administrator</li> <li>Power User</li> <li>Service Administrator</li> <li>User</li> <li>Power User</li> <li>Service Administrator</li> </ul>
Profiles - View	Users with this role can access profiles for which they have been assigned workflows, aligning with Reconciliations they can view.	<ul style="list-style-type: none"> <li>Power User</li> <li>Service Administrator</li> <li>User</li> <li>Power User</li> <li>Service Administrator</li> </ul>
Profiles and Reconciliations - Manage	Manages profiles, reconciliations, and attributes. You can set the security scope for this role in the <b>Power User Security</b> screen.	
Public Filters and Views - Manage	Filters control the records that you see in list views and reports. You can apply filters against profiles, reconciliations, or reconciliation transaction attributes, including system attributes, balances, and balance details. Users with this role can create complex filters and logics to determine the order in which filters are applied.	Service Administrator
Reconciliation - Commentator	View the reconciliations and add comments to the reconciliation or to transactions of the reconciliation.	<ul style="list-style-type: none"> <li>Power User</li> <li>Service Administrator</li> <li>User</li> <li>Power User</li> <li>Service Administrator</li> <li>User</li> <li>Power User</li> <li>Service Administrator</li> </ul>
Reconciliation - Preparer	Users with this role prepare Reconciliations, assign panels, import pre-mapped data, and add attachments to submit, claim and release reconciliations.	<ul style="list-style-type: none"> <li>Power User</li> <li>Service Administrator</li> <li>User</li> <li>Power User</li> <li>Service Administrator</li> <li>User</li> <li>Power User</li> <li>Service Administrator</li> </ul>
Reconciliation - Reviewer	Users with this role review reconciliations, assign panels and add attachments to approve, reject, claim, and release reconciliations.	<ul style="list-style-type: none"> <li>Power User</li> <li>Service Administrator</li> <li>User</li> <li>Power User</li> <li>Service Administrator</li> <li>User</li> <li>Power User</li> <li>Service Administrator</li> </ul>
Reports - Manage	Configures the application settings to display reconciliation reports.	Service Administrator
Teams - Manage	Users with this role may add, edit or remove teams, and manage members of the teams.	<ul style="list-style-type: none"> <li>Power User</li> <li>Service Administrator</li> </ul>

**Table 2-1 (Cont.) Account Reconciliation Application Roles**

Application Role	Description	Included in this Predefined Role
Users - Manage	Users with this role can manage members of the teams.	<ul style="list-style-type: none"> <li>• Power User</li> <li>• Service Administrator</li> </ul>

## Enterprise Profitability and Cost Management

The following table lists and describes Enterprise Profitability and Cost Management application roles and maps them with predefined roles.

**Table 2-2 Enterprise Profitability and Cost Management Application Roles**

Application Role	Description	Included in this Predefined Role
Access Control - Manage	Performs all activities using Access Control including managing groups, assigning application roles to groups or users, and generating and viewing available reports.	Service Administrator
Access Control - View	Using Access Control, generates and views user security-related reports such as the Role Assignment Report, the User Login Report, Group Assignment Report, and the User Group Report. Users with this role cannot assign application roles, manage groups, or modify settings in Access Control.	Service Administrator
Ad Hoc - Create	Creates, views, modifies, and saves ad hoc grids.	Power User
Ad Hoc - Read Only User	Performs all ad hoc functions but cannot write back into ad hoc grids or load data using Data Management.	Unmapped. See footnote
Ad Hoc - User	Views and modifies ad-hoc grids and performs ad hoc operations. Ad Hoc Users cannot save ad-hoc grids.	User
Application - Mass Allocate	Runs mass allocation rules within form grids.	Service Administrator
Announcements - Manage	Manages announcements that are displayed to users on the Welcome Panel. These may indicate upcoming events, such as system maintenance or the running of jobs.	Service Administrator

**Table 2-2 (Cont.) Enterprise Profitability and Cost Management Application Roles**

Application Role	Description	Included in this Predefined Role
Approvals - Administer	<p>Resolves approval issues by manually taking ownership of the process. Comprises the Approvals Ownership Assigner, Approvals Process Designer, and Approvals Supervisor roles.</p> <p>Typically, this role is assigned to business users in charge of a region who need to control the approvals process for the region but do not require the Service Administrator role. They can perform these tasks:</p> <ul style="list-style-type: none"> <li>• Control the approvals process</li> <li>• Perform actions on Planning units to which they have write access</li> <li>• Assign owners and reviewers for the organization under their charge</li> <li>• Change the secondary dimension or update validation rules</li> </ul>	Service Administrator
Approvals - Assign Ownerships	<p>Performs the following tasks for any member of the planning unit hierarchy to which the user has write access:</p> <ul style="list-style-type: none"> <li>• Assign owners</li> <li>• Assign reviewers</li> <li>• Specify users to be notified</li> </ul>	Power User
Approvals - Design Process	<p>Includes Approvals Ownership Assigner role. Additionally, performs the following tasks for any member of the planning unit hierarchy to which they have write access:</p> <ul style="list-style-type: none"> <li>• Change secondary dimensions and members of entities to which the user has write access</li> <li>• Change the scenario and version assignment for a planning unit hierarchy</li> <li>• Edit data validation rules of data forms to which the user has access</li> </ul>	Unmapped. See footnote
Approvals - Supervise	<p>Performs the following tasks for any member of the planning unit hierarchy to which the user has write access even if the user does not own the planning unit. This user cannot change data in planning units that the user does not own.</p> <ul style="list-style-type: none"> <li>• Stop and start a planning unit</li> <li>• Take any action on a planning unit</li> </ul>	Power User
Audit - Manage	Can view and delete the audit records.	Service Administrator
Audit - View	Can view audit records.	Unmapped. See footnote
Calculation - Run	Calculates a model in the Calculation Control page.	<ul style="list-style-type: none"> <li>• Power User</li> <li>• Service</li> <li>• Administrator</li> <li>• User</li> <li>• Power User</li> <li>• Service</li> <li>• Administrator</li> <li>• User</li> </ul>
Calculation History - Delete	Deletes a selected instance of a completed calculation from the Calculation Analysis page. Deleting calculation history does not delete any data. It merely deletes the recorded instance of a calculation that was run.	

**Table 2-2 (Cont.) Enterprise Profitability and Cost Management Application Roles**

Application Role	Description	Included in this Predefined Role
Calculation History - View	Views completed calculations from the Calculation Analysis page.	<ul style="list-style-type: none"> <li>• Power User</li> <li>• Service Administrator</li> <li>• User</li> </ul>
Dashboards - Manage	Constructs and manages planning and operational dashboards. Users with this role can: <ul style="list-style-type: none"> <li>• Add, edit, duplicate and delete dashboards based on permissions set on them</li> <li>• Import and export dashboards</li> </ul>	Service Administrator
Data Integration - Administrator	Performs all functional activities in Data Integration. Service Administrator Users with this role can create, perform, and run: <ul style="list-style-type: none"> <li>• Integrations between source and target systems</li> <li>• Pipeline activities</li> <li>• Extraction and transformation of data and metadata from on-premises sources using the EPM Integration Agent</li> </ul>	Service Administrator
Data Integration - Create	Uses Data Integration to create mappings to integrate data between source and target systems. Users can define data rules with various run time options.	Power User
Data Integration - Drill Through	Drills through to the source system of the data.	<ul style="list-style-type: none"> <li>• Power User</li> <li>• User</li> </ul>
Data Integration - Run	Users with this role use Data Integration to run an integration between the source and target.  If this is the only role assigned to the user, and if they are not a Power User or Service Administrator, they can also view the integration details, but are not able to make any changes.	Power User
Documents - Manage	Constructs and manages documents. Users with this role can: <ul style="list-style-type: none"> <li>• Add, edit, duplicate and delete documents based on the permissions set on them</li> <li>• Import and export documents</li> </ul>	Service Administrator
IPM - Manage	Manages and configures Intelligent Performance Management (IPM) jobs including Insights, Auto Predict, and Advanced Prediction. Users with this role: <ul style="list-style-type: none"> <li>• Can view, edit, and manage only the jobs they have created</li> <li>• Cannot view or manage jobs created by other users</li> </ul>	Service Administrator
Jobs - Manage	Can view and delete job status records for any user.	Service Administrator
Jobs - View	Can view job status records for all users in the environment, but can only delete their own job status records.	Unmapped. See footnote
Model - Create	Creates a new model in the Modeling page.	<ul style="list-style-type: none"> <li>• Power User</li> <li>• Service Administrator</li> </ul>
Model - Delete	Deletes a model in the Modeling page. Deleting a model will also delete all of the rules in the model.	Service Administrator

**Table 2-2 (Cont.) Enterprise Profitability and Cost Management Application Roles**

Application Role	Description	Included in this Predefined Role
Model - View	Views models and their associated rules in the Designer page.	<ul style="list-style-type: none"> <li>• Power User</li> <li>• Service Administrator</li> <li>• User</li> <li>• Viewer</li> </ul>
Model Validation - Run	Validates models in the Model Validation page.	<ul style="list-style-type: none"> <li>• Power User</li> <li>• Service Administrator</li> <li>• User</li> </ul>
POV - Create	Creates a new point of view in the Calculation Control page.	<ul style="list-style-type: none"> <li>• Power User</li> <li>• Service Administrator</li> </ul>
POV - Delete	Deletes a point of view in the Calculation Control page. Deleting a point of view will also delete the associated data, as well as the calculation history page for that point of view. It also removes the point of view from the Calculation Control page.	Service Administrator
POV Data - Clear	Clears data from a point of view in the Calculation Control page without removing the point of view.	<ul style="list-style-type: none"> <li>• Power User</li> <li>• Service Administrator</li> </ul>
POV Data - Copy	Copies data from one point of view to another in the Calculation Control page.	<ul style="list-style-type: none"> <li>• Power User</li> <li>• Service Administrator</li> </ul>
POV Status - Edit	Changes the status of a point of view from the <b>Edit Point of View</b> dialog box in the Calculation Control page. The available statuses for a point of view are Draft, Published, and Archived.	Service Administrator
Profit Curve - Create	Creates profit curves on the <b>Profit Curves</b> tab in the Intelligence cluster.	<ul style="list-style-type: none"> <li>• Power User</li> <li>• Service Administrator</li> </ul>
Profit Curve - Edit	Edits profit curves on the <b>Profit Curves</b> tab in the Intelligence cluster.	<ul style="list-style-type: none"> <li>• Power User</li> <li>• Service Administrator</li> </ul>
Profit Curve - Run	Runs profit curves on the <b>Profit Curves</b> tab in the Intelligence cluster.	<ul style="list-style-type: none"> <li>• Power User</li> <li>• Service Administrator</li> <li>• User</li> <li>• Viewer</li> </ul>
Reports - Manage	Constructs and manages reporting artifacts (reports, snapshots, books and bursting definitions). Users with this role can:	Service Administrator
	<ul style="list-style-type: none"> <li>• Add, edit, duplicate and delete reporting artifacts based on permissions set</li> <li>• Import and export reporting artifacts</li> </ul>	
Rule - Create / Edit	Creates or edits an Allocation Rule, Custom Calculation Rule, or Rule Set in the Designer page.	<ul style="list-style-type: none"> <li>• Power User</li> <li>• Service Administrator</li> <li>• User</li> </ul>

**Table 2-2 (Cont.) Enterprise Profitability and Cost Management Application Roles**

Application Role	Description	Included in this Predefined Role
Rule - Delete	Deletes an Allocation Rule, Custom Calculation Rule, or Rule Set in the Designer page.	<ul style="list-style-type: none"> <li>• Power User</li> <li>• Service Administrator</li> <li>• User</li> </ul>
Rule Balancing - Run	Views the Rule Balancing report to see the impact of each rule.	<ul style="list-style-type: none"> <li>• Power User</li> <li>• Service Administrator</li> <li>• User</li> </ul>
Rules - Mass Edit	Accesses the <b>Mass Edit</b> tab in the Designer page to make edits to multiple rules at once.	<ul style="list-style-type: none"> <li>• Power User</li> <li>• Service Administrator</li> <li>• User</li> </ul>
Trace Allocation - Run	Traces allocation amounts on the <b>Trace Allocations</b> tab of the Intelligence cluster.	<ul style="list-style-type: none"> <li>• Power User</li> <li>• Service Administrator</li> <li>• User</li> <li>• Viewer</li> </ul>
Footnote: This role is not mapped to any predefined role and requires assignment to users or groups to activate it		

## Financial Consolidation and Close

The following table lists and describes Financial Consolidation and Close roles for the following applications and maps them with predefined roles:

**Table 2-3 Financial Consolidation and Close Application Roles**

Application Role	Description	Included in this Predefined Role
Access Control - Manage	Manages groups, assigns application roles to a group or a user, and generates reports on user security.	Service Administrator
Access Control - View	Views reports on user security such as Role Assignment Report, User Login Report, and User Group Report, but cannot assign application roles, manage groups, or perform any other update operation in Access Control.	Service Administrator
Ad Hoc - Create	Creates, views, modifies, and saves ad hoc grids.	Power User
Ad Hoc - Read Only User	Performs all ad hoc functions, but cannot write back into ad hoc grids or load data using Data Management.	Unmapped. See footnote
Ad Hoc - User	Views and modifies ad-hoc grids and performs ad hoc operations. Ad Hoc Users cannot save ad-hoc grids.	User
Announcements - Manage	Constructs and manages announcements. Users with this role can add, edit, duplicate and delete announcements.	Service Administrator
Application - Mass Allocate	Runs mass allocation rules within form grids.	Service Administrator

**Table 2-3 (Cont.) Financial Consolidation and Close Application Roles**

Application Role	Description	Included in this Predefine Role
Application - Mass Allocate	Runs mass allocation rules within form grids.	Service Administrator
Approvals - Administer	Resolves approval issues by manually taking ownership of the process. Comprises the Approvals Ownership Assigner, Approvals Process Designer, and Approvals Supervisor roles.	Service Administrator
	Typically, this role is assigned to business users in charge of a region who need to control the approvals process for the region but do not require the Service Administrator role. They can perform these tasks:	
	<ul style="list-style-type: none"> <li>• Control the approvals process</li> <li>• Perform actions on Planning units to which they have write access</li> <li>• Assign owners and reviewers for the organization under their charge</li> <li>• Change the secondary dimension or update validation rules</li> </ul>	
Approvals - Assign Ownerships	Performs the following tasks for any member of the planning unit hierarchy to which the user has write access:	Power User
	<ul style="list-style-type: none"> <li>• Assign owners</li> <li>• Assign reviewers</li> <li>• Specify users to be notified</li> </ul>	
Approvals - Design Process	Includes Approvals Ownership Assigner role. Additionally, performs the following tasks for any member of the planning unit hierarchy to which they have write access:	Unmapped. See footnote
	<ul style="list-style-type: none"> <li>• Change secondary dimensions and members of entities to which the user has write access</li> <li>• Change the scenario and version assignment for a planning unit hierarchy</li> <li>• Edit data validation rules of data forms to which the user has access</li> </ul>	
Approvals - Supervise	Performs the following tasks for any member of the planning unit hierarchy to which the user has write access even if the user does not own the planning unit. This user cannot change data in planning units that the user does not own.	Power User
	<ul style="list-style-type: none"> <li>• Stop and start a planning unit</li> <li>• Take any action on a planning unit</li> </ul>	
Audit - Manage	Can view and delete the audit records.	Service Administrator
Audit - View	Can view audit records.	Unmapped. See footnote
Consolidation Journals - Approve	Approve a consolidation journal that has been submitted for approval or reject a submitted journal.	Unmapped. See footnote
Consolidation Journals - Auto-Post after Approval	Allows a consolidation journal to be automatically posted after the approver has approved it. The user who approved the journal will also be the posting user.	Unmapped. See footnote

**Table 2-3 (Cont.) Financial Consolidation and Close Application Roles**

Application Role	Description	Included in this Predefine Role
Consolidation Journals - Create	Create, modify, and delete consolidation journals and consolidation journal templates.	Unmapped. See footnote
Consolidation Journals - Manage Periods	Open time periods for consolidation journals or close journal time periods. If there are Approved journals or unposted Auto-reversal journals in the period, you cannot close it. If you select to close a period that contains Working or Submitted journals, a warning message is displayed that non-posted journals were found for the period, but you can close it.	Unmapped. See footnote
Consolidation Journals - Post	Post a consolidation journal that has been completed or submitted and approved. You must first open the time period for each scenario to which consolidation journals are to be posted.	Unmapped. See footnote
Consolidation Journals - Submit	Submit a consolidation journal for approval or reject a consolidation journal with Completed status.	Unmapped. See footnote
Consolidation Journals - Un-Post	Unpost a consolidation journal. You must have Write access to the members in the journal.	Unmapped. See footnote
Dashboards - Manage	Constructs and manages all dashboards, including operational dashboards. Users with this role can: <ul style="list-style-type: none"> <li>Add, edit, duplicate and delete dashboards</li> <li>Import and export dashboards</li> </ul>	<ul style="list-style-type: none"> <li>Service Administrator</li> <li>Power User</li> </ul>
Data Integration - Administrator	Performs all functional activities in Data Integration. Service Administrator Users with this role can create, perform, and run: <ul style="list-style-type: none"> <li>Integrations between source and target systems</li> <li>Pipeline activities</li> <li>Extraction and transformation of data and metadata from on-premises sources using the EPM Integration Agent</li> </ul>	
Data Integration - Create	Uses Data Integration to create mappings to integrate data between source and target systems. Users can define data rules with various run time options.	Power User
Data Integration - Drill Through	Drills through to the source system of the data.	<ul style="list-style-type: none"> <li>Power User</li> <li>User</li> </ul>
Data Integration - Run	Users with this role use Data Integration to run an integration between the source and target.  If this is the only role assigned to the user, and if they are not a Power User or Service Administrator, they can also view the integration details, but are not able to make any changes.	Power User
Documents - Manage	Constructs and manages documents. Users with this role can: <ul style="list-style-type: none"> <li>Add, edit, duplicate and delete documents based on the permissions set on them</li> <li>Import and export documents</li> </ul>	Service Administrator

**Table 2-3 (Cont.) Financial Consolidation and Close Application Roles**

Application Role	Description	Included in this Predefine Role
IPM - Manage	Manages and configures Intelligent Performance Management (IPM) jobs including Insights, Auto Predict, and Advanced Prediction. Users with this role: <ul style="list-style-type: none"> <li>Can view, edit, and manage only the jobs they have created</li> <li>Cannot view or manage jobs created by other users</li> </ul>	Service Administrator
Jobs - Manage	Can view and delete job status records for any user.	Service Administrator
Jobs - View	Can view job status records for all users in the environment, but can only delete their own job status records.	Unmapped. See footnote
Reports - Manage	Constructs and manages reporting artifacts (reports, snapshots, books and bursting definitions). Users with this role can: <ul style="list-style-type: none"> <li>Add, edit, duplicate and delete reporting artifacts based on permissions set</li> <li>Import and export reporting artifacts</li> </ul>	Service Administrator
Task List - Manage Access	Assigns tasks to other users.	Power User
Task Manager - Approver	Eligible to be an approver on tasks from Task Manager	<ul style="list-style-type: none"> <li>Power User</li> <li>Service Administrator</li> <li>User</li> </ul>
Task Manager - Artifacts - Manage	Manages all Task Manager artifacts such as alerts, currencies, and organization	Service Administrator
Task Manager - Assignee	Eligible to be an assignee on tasks from Task Manager	<ul style="list-style-type: none"> <li>Power User</li> <li>Service Administrator</li> <li>User</li> </ul>
Task Manager - Audit - View	Views the audit history information	Service Administrator
Task Manager - Custom Reports - Manage	Designs custom reports	Service Administrator
Task Manager - Operational Dashboards - Manage	Configures operational dashboard	Service Administrator
Task Manager - Public Filters and Views - Manage	Publishes filters and views to make them accessible to all	<ul style="list-style-type: none"> <li>Power User</li> <li>Service Administrator</li> </ul>
Task Manager - System Services and Settings - Manage	Defines the system services and system settings for an application	Service Administrator
Task Manager - Tasks - Manage	Designs and manages the tasks, templates, and schedules	<ul style="list-style-type: none"> <li>Power User</li> <li>Service Administrator</li> </ul>

**Table 2-3 (Cont.) Financial Consolidation and Close Application Roles**

Application Role	Description	Included in this Predefine Role
Task Manager - Users and Teams - Manage	Manages Users and Teams	<ul style="list-style-type: none"> <li>• Power User</li> <li>• Service Administrator</li> </ul>

Footnote: This role is not mapped to any predefined role and requires assignment to users or groups to activate it

## FreeForm

The following table lists and describes FreeForm application roles and maps them with predefined roles.

### Note

Roles within the application that lack mapping to predefined roles require individual assignments to users or groups. Without such assignments, users are unable to engage in activities related to their application roles. For instance, the *Ad Hoc - Read Only User* role, which is not associated with any predefined role in the subsequent table, needs to be explicitly granted to a user to activate its features. This functionality is not automatically included in any predefined role.

**Table 2-4 FreeForm Application Roles**

Application Role	Description	Included in this Predefined Role
Access Control - Manage	Manages groups, assign application roles to a group or a user, and generates reports on user security.	Service Administrator
Access Control - View	Views reports on user security such as Role Assignment Report, User Login Report, and User Group Report, but cannot assign application roles, manage groups, or perform any other update operation in Access Control.	Service Administrator
Ad Hoc - Create	Creates, views, modifies, and saves ad hoc grids.	Power User
Ad Hoc - Read Only User	Performs all ad hoc functions, but cannot write back into ad hoc grids or load data using Data Management.	Unmapped. See footnote
Ad Hoc - User	Views and modifies ad-hoc grids and performs ad hoc operations. Ad Hoc Users cannot save ad-hoc grids.	User
Announcements - Manage	Constructs and manages announcements. Users with this role can add, edit, duplicate and delete announcements.	Service Administrator
Application - Mass Allocate	Runs mass allocation rules within form grids.	Service Administrator
Audit - Manage	Can view and delete the audit records.	Service Administrator
Audit - View	Can view audit records.	Unmapped. See footnote

**Table 2-4 (Cont.) FreeForm Application Roles**

Application Role	Description	Included in this Predefined Role
Data Integration - Administrator	<p>Performs all functional activities in Data Integration. Service Administrator</p> <p>Users with this role can create, perform, and run:</p> <ul style="list-style-type: none"> <li>• Integrations between source and target systems</li> <li>• Pipeline activities</li> <li>• Extraction and transformation of data and metadata from on-premises sources using the EPM Integration Agent</li> </ul>	
Data Integration - Create	<p>Uses Data Integration to create mappings to integrate data between source and target systems.</p> <p>Users can define data rules with various run time options.</p>	Power User
Data Integration - Drill Through	<p>Drills through to the source system of the data.</p>	<ul style="list-style-type: none"> <li>• Power User</li> <li>• User</li> </ul>
Data Integration - Run	<p>Users with this role use Data Integration to run an integration between the source and target.</p> <p>If this is the only role assigned to the user, and if they are not a Power User or Service Administrator, they can also view the integration details, but are not able to make any changes.</p>	Power User
Dashboards - Manage	<p>Constructs and manages planning and operational dashboards. Users with this role can:</p> <ul style="list-style-type: none"> <li>• Add, edit, duplicate and delete dashboards based on permissions set on them</li> <li>• Import and export dashboards</li> </ul>	Service Administrator
Documents - Manage	<p>Constructs and manages documents. Users with this role can:</p> <ul style="list-style-type: none"> <li>• Add, edit, duplicate and delete documents based on the permissions set on them</li> <li>• Import and export documents</li> </ul>	Service Administrator
IPM - Manage	<p>Manages and configures Intelligent Performance Management (IPM) jobs including Insights, Auto Predict, and Advanced Prediction. Users with this role:</p> <ul style="list-style-type: none"> <li>• Can view, edit, and manage only the jobs they have created</li> <li>• Cannot view or manage jobs created by other users</li> </ul>	Service Administrator
Jobs - Manage	<p>Can view and delete job status records for any user.</p>	Service Administrator
Jobs - View	<p>Can view job status records for all users in the environment, but can only delete their own job status records.</p>	Unmapped. See footnote
Reports - Manage	<p>Constructs and manages reporting artifacts (reports, snapshots, books and bursting definitions). Users with this role can:</p> <ul style="list-style-type: none"> <li>• Add, edit, duplicate and delete reporting artifacts based on permissions set</li> <li>• Import and export reporting artifacts</li> </ul>	Service Administrator
Task List - Manage Access	<p>Assigns tasks to other users.</p>	Power User

**Table 2-4 (Cont.) FreeForm Application Roles**

Application Role	Description	Included in this Predefined Role
Footnote: This role is not mapped to any predefined role and requires assignment to users or groups to activate it		

## Narrative Reporting

The following table lists and describes Narrative Reporting application roles, and maps them with predefined roles.

**Table 2-5 Narrative Reporting Application Roles**

Application Role	Description	Included in this Predefined Role
Access Control - Manage	Manages groups, assign application roles to a group or a user, and generates reports on user security.	Service Administrator
Access Control - View	Views reports on user security such as Role Assignment Report, User Login Report, and User Group Report, but cannot assign application roles, manage groups, or perform any other update operation in Access Control.	Service Administrator
Library - Administer	Creates folders, including root-level folders.	<ul style="list-style-type: none"> <li>• Library Administrator</li> <li>• Power User</li> <li>• Service Administrator</li> </ul>
Report - Administer	Creates report packages, reports, books and bursting definitions.	<ul style="list-style-type: none"> <li>• Power User</li> <li>• Report Administrator</li> <li>• Service Administrator</li> </ul>

## Oracle Enterprise Data Management

The following table lists and describes Oracle Enterprise Data Management application roles, and maps them with predefined roles.

**Table 2-6 Oracle Enterprise Data Management Application Roles**

Application Role	Description	Included in this Predefined Role
Access Control - Manage	Manages groups, assign application roles to a group or a user, and generates reports on user security.	Service Administrator
Access Control - View	Views reports on user security such as Role Assignment Report, User Login Report, and User Group Report, but cannot assign application roles, manage groups, or perform any other update operation in Access Control.	Service Administrator

**Table 2-6 (Cont.) Oracle Enterprise Data Management Application Roles**

Application Role	Description	Included in this Predefined Role
Application - Create	Registers applications in Oracle Enterprise Data Management. The user who registers an application is assigned Application Owner permission. This user also is assigned as the view owner of the default application view.	Service Administrator
Audit	Views audit related information such as transaction history and requests for changes to data in Oracle Enterprise Data Management.	Service Administrator
Migrations - Administer	Can export and import snapshots and artifacts from the application, create applications by migrating snapshots, and delete the applications that were created. Users with this role can also clone the environment. However, to clone users and roles, the target user must have both the Identity Domain Administrator and Service Administrator role. Additionally, users with this role can view and adjust the daily maintenance start time and time zone.	Service Administrator
Views - Create	Users with this role can creates Views to work with metadata. They are the default Owners so they have the ability to grant other users permission to the Views as well. They retain the privilege to edit or delete the View.	Service Administrator

## Planning

The following table lists and describes Planning application roles and maps them with predefined roles. Planning application types includes Custom, FreeForm, Planning Modules, Predictive Cash Forecasting, Strategic Workforce Planning, and Sales Planning.

**Table 2-7 Planning Application Roles**

Application Role	Description	Included in this Predefined Role
Access Control - Manage	Manages groups, assign application roles to a group or a user, and generates reports on user security.	Service Administrator
Access Control - View	Views reports on user security such as Role Assignment Report, User Login Report, and User Group Report, but cannot assign application roles, manage groups, or perform any other update operation in Access Control.	Service Administrator
Ad Hoc - Create	Creates, views, modifies, and saves ad hoc grids.	Power User
Ad Hoc - Read Only User	Performs all ad hoc functions, but cannot write back into ad hoc grids or load data using Data Management.	Unmapped. See footnote
Ad Hoc - User	Views and modifies ad-hoc grids and performs ad hoc operations. Ad Hoc Users cannot save ad-hoc grids.	User

**Table 2-7 (Cont.) Planning Application Roles**

Application Role	Description	Included in this Predefined Role
Announcements - Manage	Constructs and manages announcements. Users with this role can add, edit, duplicate and delete announcements.	Service Administrator
Application - Mass Allocate	Runs mass allocation rules within form grids.	Service Administrator
Approvals - Administer	<p>Resolves approval issues by manually taking ownership of the process. Comprises the Approvals Ownership Assigner, Approvals Process Designer, and Approvals Supervisor roles.</p> <p>Typically, this role is assigned to business users in charge of a region who need to control the approvals process for the region but do not require the Service Administrator role. They can perform these tasks:</p> <ul style="list-style-type: none"> <li>• Control the approvals process</li> <li>• Perform actions on Planning units to which they have write access</li> <li>• Assign owners and reviewers for the organization under their charge</li> <li>• Change the secondary dimension or update validation rules</li> </ul>	Service Administrator
Approvals - Assign Ownerships	<p>Performs the following tasks for any member of the planning unit hierarchy to which the user has write access:</p> <ul style="list-style-type: none"> <li>• Assign owners</li> <li>• Assign reviewers</li> <li>• Specify users to be notified</li> </ul>	Power User
Approvals - Design Process	<p>Includes Approvals Ownership Assigner role. Additionally, performs the following tasks for any member of the planning unit hierarchy to which they have write access:</p> <ul style="list-style-type: none"> <li>• Change secondary dimensions and members of entities to which the user has write access</li> <li>• Change the scenario and version assignment for a planning unit hierarchy</li> <li>• Edit data validation rules of data forms to which the user has access</li> </ul>	Unmapped. See footnote
Approvals - Supervise	<p>Performs the following tasks for any member of the planning unit hierarchy to which the user has write access even if the user does not own the planning unit. This user cannot change data in planning units that the user does not own.</p> <ul style="list-style-type: none"> <li>• Stop and start a planning unit</li> <li>• Take any action on a planning unit</li> </ul>	Power User
Audit - Manage	Can view and delete the audit records.	Service Administrator
Audit - View	Can view audit records.	Unmapped. See footnote
Dashboards - Manage	<p>Constructs and manages planning and operational dashboards. Users with this role can:</p> <ul style="list-style-type: none"> <li>• Add, edit, duplicate and delete dashboards based on permissions set on them</li> <li>• Import and export dashboards</li> </ul>	Service Administrator

**Table 2-7 (Cont.) Planning Application Roles**

Application Role	Description	Included in this Predefined Role
Data Integration - Administrator	<p>Performs all functional activities in Data Integration. Service Administrator</p> <p>Users with this role can create, perform, and run:</p> <ul style="list-style-type: none"> <li>• Integrations between source and target systems</li> <li>• Pipeline activities</li> <li>• Extraction and transformation of data and metadata from on-premises sources using the EPM Integration Agent</li> </ul>	
Data Integration - Create	<p>Uses Data Integration to create mappings to integrate data between source and target systems.</p> <p>Users can define data rules with various run time options.</p>	Power User
Data Integration - Drill Through	<p>Drills through to the source system of the data.</p>	<ul style="list-style-type: none"> <li>• Power User</li> <li>• User</li> </ul>
Data Integration - Run	<p>Uses Data Integration to run an integration between the source and target systems.</p> <p>If this is the only role assigned to the user, and if they are not a Power User or Service Administrator, they can also view the integration details, but are not able to make any changes.</p>	Power User
Documents - Manage	<p>Constructs and manages documents. Users with this role can:</p> <ul style="list-style-type: none"> <li>• Add, edit, duplicate and delete documents based on the permissions set on them</li> <li>• Import and export documents</li> </ul>	Service Administrator
IPM - Manage	<p>Manages and configures Intelligent Performance Management (IPM) jobs including Insights, Auto Predict, and Advanced Prediction. Users with this role:</p> <ul style="list-style-type: none"> <li>• Can view, edit, and manage only the jobs they have created</li> <li>• Cannot view or manage jobs created by other users</li> </ul>	Service Administrator
Jobs - Manage	Can view and delete job status records for any user.	Service Administrator
Jobs - View	<p>Can view job status records for all users in the environment, but can only delete their own job status records.</p>	Unmapped. See footnote
Reports - Manage	<p>Constructs and manages reporting artifacts (reports, snapshots, books and bursting definitions). Users with this role can:</p>	Service Administrator
	<ul style="list-style-type: none"> <li>• Add, edit, duplicate and delete reporting artifacts based on permissions set</li> <li>• Import and export reporting artifacts</li> </ul>	
Task List - Manage Access	Assigns tasks to other users.	Power User
Task Manager - Approver	Eligible to be an approver on tasks from Task Manager	<ul style="list-style-type: none"> <li>• Service Administrator</li> <li>• Power User</li> <li>• User</li> </ul>
Task Manager - Artifacts - Manage	Manages all Task Manager artifacts such as alerts, currencies, and organization	Service Administrator

**Table 2-7 (Cont.) Planning Application Roles**

Application Role	Description	Included in this Predefined Role
Task Manager - Assignee	Eligible to be an assignee on tasks from Task Manager	<ul style="list-style-type: none"> <li>• Power User</li> <li>• Service Administrator</li> <li>• User</li> </ul>
Task Manager - Audit - View	Views the audit history information	Service Administrator
Task Manager - Custom Reports - Manage	Designs custom reports	Service Administrator
Task Manager - Operational Dashboards - Manage	Configures operational dashboards	Service Administrator
Task Manager - Public Filters and Views - Manage	Publishes filters and views to make them accessible to all	<ul style="list-style-type: none"> <li>• Power User</li> <li>• Service Administrator</li> </ul>
Task Manager - System Services and Settings - Manage	Defines the system services and system settings for an application	Service Administrator
Task Manager - Tasks - Manage	Designs and manages the tasks, templates, and schedules	<ul style="list-style-type: none"> <li>• Power User</li> <li>• Service Administrator</li> </ul>
Task Manager - Users and Teams - Manage	Manages Users and Teams	<ul style="list-style-type: none"> <li>• Power User</li> <li>• Service Administrator</li> </ul>
Footnote: This role is not mapped to any predefined role and requires assignment to users or groups to activate it		

## Profitability and Cost Management

The following table lists and describes Profitability and Cost Management application roles, and maps them with predefined roles.

**Table 2-8 Profitability and Cost Management Application Roles**

Application Role	Description	Included in this Predefined Role
Access Control - Manage	Manages groups, assign application roles to a group or a user, and generates reports on user security.	Service Administrator
Access Control - View	Views reports on user security such as Role Assignment Report, User Login Report, and User Group Report, but cannot assign application roles, manage groups, or perform any other update operation in Access Control.	Service Administrator

**Table 2-8 (Cont.) Profitability and Cost Management Application Roles**

Application Role	Description	Included in this Predefined Role
Data Integration - Administrator	Performs all functional activities in Data Integration. Service Administrator Users with this role can create, perform, and run: <ul style="list-style-type: none"><li>• Integrations between source and target systems</li><li>• Pipeline activities</li><li>• Extraction and transformation of data and metadata from on-premises sources using the EPM Integration Agent</li></ul>	
Migrations - Administer	Can export and import snapshots and artifacts from the application, create applications by migrating snapshots, and delete the applications that were created. Users with this role can also clone the environment. However, to clone users and roles, the target user must have both the Identity Domain Administrator and Service Administrator role. Additionally, users with this role can view and adjust the daily maintenance start time and time zone.	Service Administrator

## Tax Reporting

The following table lists and describes Tax Reporting application roles and maps them with predefined roles.

### Note

Roles within the application that lack mapping to predefined roles require individual assignments to users or groups. Without such assignments, users are unable to engage in activities related to their application roles. For instance, the *Ad Hoc - Read Only User* role, which is not associated with any predefined role in the subsequent table, needs to be explicitly granted to a user to activate its features. This functionality is not automatically included in any predefined role.

**Table 2-9 Tax Reporting Application Roles**

Application Role	Description	Included in this Predefined Role
Access Control - Manage	Performs all activities using Access Control including managing groups, assigning application roles to groups or users, and generating and viewing available reports.	Service Administrator
Access Control - View	Using Access Control, views user security reports such as Role Assignment Report, User Login Report, and User Group Report. However, they cannot assign application roles, manage groups, or perform any other update operation in Access Control.	Service Administrator
Ad Hoc - Create	Creates, views, modifies, and saves ad hoc grids.	Power User

**Table 2-9 (Cont.) Tax Reporting Application Roles**

Application Role	Description	Included in this Predefined Role
Ad Hoc - Read Only User	Performs all ad hoc functions, but cannot write back into ad hoc grids or load data using Data Management.	Unmapped. See footnote
Ad Hoc - User	Views and modifies ad-hoc grids and performs ad hoc operations. Ad Hoc Users cannot save ad-hoc grids.	User
Announcements - Manage	Manages announcements that are displayed to users on the Welcome Panel. These may indicate upcoming events, such as system maintenance or the running of jobs.	Power User
Application - Mass Allocate	Runs mass allocation rules within form grids.	Service Administrator
Approvals - Administer	<p>Resolves approval issues by manually taking ownership of the process. Comprises the Approvals Ownership Assigner, Approvals Process Designer, and Approvals Supervisor roles.</p> <p>Typically, this role is assigned to business users in charge of a region who need to control the approvals process for the region but do not require the Service Administrator role. They can perform these tasks:</p> <ul style="list-style-type: none"> <li>• Control the approvals process</li> <li>• Perform actions on Planning units to which they have write access</li> <li>• Assign owners and reviewers for the organization under their charge</li> <li>• Change the secondary dimension or update validation rules</li> </ul>	Service Administrator
Approvals - Assign Ownerships	<p>Performs the following tasks for any member of the planning unit hierarchy to which the user has write access:</p> <ul style="list-style-type: none"> <li>• Assign owners</li> <li>• Assign reviewers</li> <li>• Specify users to be notified</li> </ul>	Power User
Approvals - Design Process	<p>Includes Approvals Ownership Assigner role. Additionally, performs the following tasks for any member of the planning unit hierarchy to which they have write access:</p> <ul style="list-style-type: none"> <li>• Change secondary dimensions and members of entities to which the user has write access</li> <li>• Change the scenario and version assignment for a planning unit hierarchy</li> <li>• Edit data validation rules of data forms to which the user has access</li> </ul>	Unmapped. See footnote
Approvals - Supervise	<p>Performs the following tasks for any member of the planning unit hierarchy to which the user has write access even if the user does not own the planning unit. This user cannot change data in planning units that the user does not own.</p> <ul style="list-style-type: none"> <li>• Stop and start a planning unit</li> <li>• Take any action on a planning unit</li> </ul>	Power User
Audit - Manage	Can view and delete the audit records.	Service Administrator

**Table 2-9 (Cont.) Tax Reporting Application Roles**

Application Role	Description	Included in this Predefined Role
Audit - View	Can view audit records.	Unmapped. See footnote
Dashboards - Manage	Constructs and manages custom dashboards. Users with this role can: <ul style="list-style-type: none"> <li>Configure Compliance</li> <li>Add, Edit, Duplicate and Delete</li> <li>Import and Export</li> </ul>	Service Administrator
Data Integration - Administrator	Performs all functional activities in Data Integration. Service Administrator Users with this role can create, perform, and run: <ul style="list-style-type: none"> <li>Integrations between source and target systems</li> <li>Pipeline activities</li> <li>Extraction and transformation of data and metadata from on-premises sources using the EPM Integration Agent</li> </ul>	Service Administrator
Data Integration - Create	Uses Data Integration to create mappings to integrate data between source and target systems. Users can define data rules with various run time options.	Power User
Data Integration - Drill Through	Drills through to the source system of the data.	<ul style="list-style-type: none"> <li>Power User</li> <li>User</li> </ul>
Data Integration - Run	Users with this role use Data Integration to run an integration between the source and target. If this is the only role assigned to the user, and if they are not a Power User or Service Administrator, they can also view the integration details, but are not able to make any changes.	Power User
Documents - Manage	Constructs and manages documents. Users with this role can: <ul style="list-style-type: none"> <li>Add, edit, duplicate and delete documents based on the permissions set on the documents</li> <li>Import and export documents</li> </ul>	Service Administrator
IPM - Manage	Manages and configures Intelligent Performance Management (IPM) jobs including Insights, Auto Predict, and Advanced Prediction. Users with this role: <ul style="list-style-type: none"> <li>Can view, edit, and manage only the jobs they have created</li> <li>Cannot view or manage jobs created by other users</li> </ul>	Service Administrator
Jobs - Manage	Can view and delete job status records for any user.	Service Administrator
Jobs - View	Can view job status records for all users in the environment, but can only delete their own job status records.	Unmapped. See footnote
Reports - Manage	Constructs and manages reporting artifacts (reports, snapshots, books and bursting definitions). Users with this role can: <ul style="list-style-type: none"> <li>Add, edit, duplicate and delete reporting artifacts based on permissions set</li> <li>Import and export reporting artifacts</li> </ul>	Service Administrator

**Table 2-9 (Cont.) Tax Reporting Application Roles**

Application Role	Description	Included in this Predefined Role
Task List - Manage Access	Assigns tasks to other users.	Power User
Task Manager - Approver	Eligible to be an approver on tasks from Task Manager	<ul style="list-style-type: none"> <li>Power User</li> <li>Service</li> <li>Administrator</li> <li>User</li> </ul>
Task Manager - Artifacts - Manage	Manages all Task Manager artifacts such as alerts, currencies, and organization	Service Administrator
Task Manager - Assignee	Eligible to be an assignee on tasks from Task Manager	<ul style="list-style-type: none"> <li>Power User</li> <li>Service</li> <li>Administrator</li> <li>User</li> </ul>
Task Manager - Audit - View	Views the audit history information	Service Administrator
Task Manager - Custom Reports - Manage	Designs the custom reports	Service Administrator
Task Manager - Operational Dashboards - Manage	Configures the dashboard	Service Administrator
Task Manager - Public Filters and Views - Manage	Publishes filters and views to make them accessible to all	<ul style="list-style-type: none"> <li>Power User</li> <li>Service</li> <li>Administrator</li> </ul>
Task Manager - System Services and Settings - Manage	Defines the system services and system settings for an application	Service Administrator
Task Manager - Tasks - Manage	Designs and manages the tasks, templates, and schedules	<ul style="list-style-type: none"> <li>Power User</li> <li>Service</li> <li>Administrator</li> </ul>
Task Manager - Manage Users and Teams		<ul style="list-style-type: none"> <li>Power User</li> <li>Service</li> <li>Administrator</li> </ul>
Users and Teams - Manage		

Footnote: This role is not mapped to any predefined role and requires assignment to users or groups to activate it

## Assigning Application Roles to a Group or a User

During this process, Service Administrators or users with Access Control - Manage application role can assign or unassign application roles to EPM and IDCS groups and users who have a predefined role. They can also assign application roles to themselves.

For information on groups and assigned users to groups, see [Managing Groups](#).

To assign or unassign application roles to a group or a user:

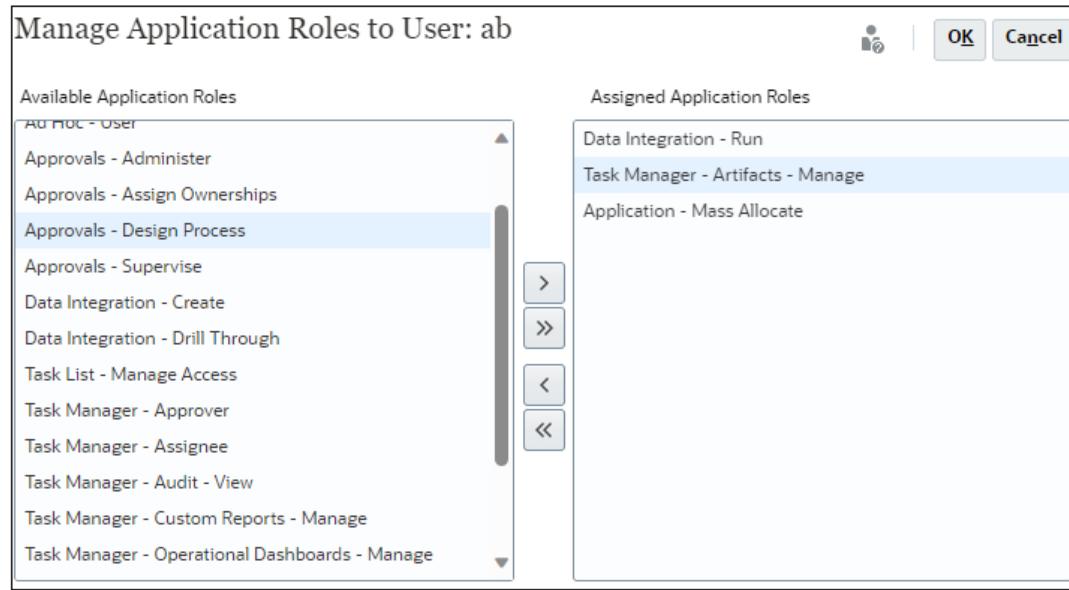
1. Open **Access Control**. See [Opening Access Control](#).
2. Click **Manage Application Roles** tab.

3. Find a user or group. From the drop-down list select **Users** or **Groups**. See [Using Search](#) for instructions on using the Search feature.

Users or groups (EPM or IDCS) that match the search criterion are listed. By default, the list is sorted by **User Login** values, and then by **Group Name** values (for group searches).

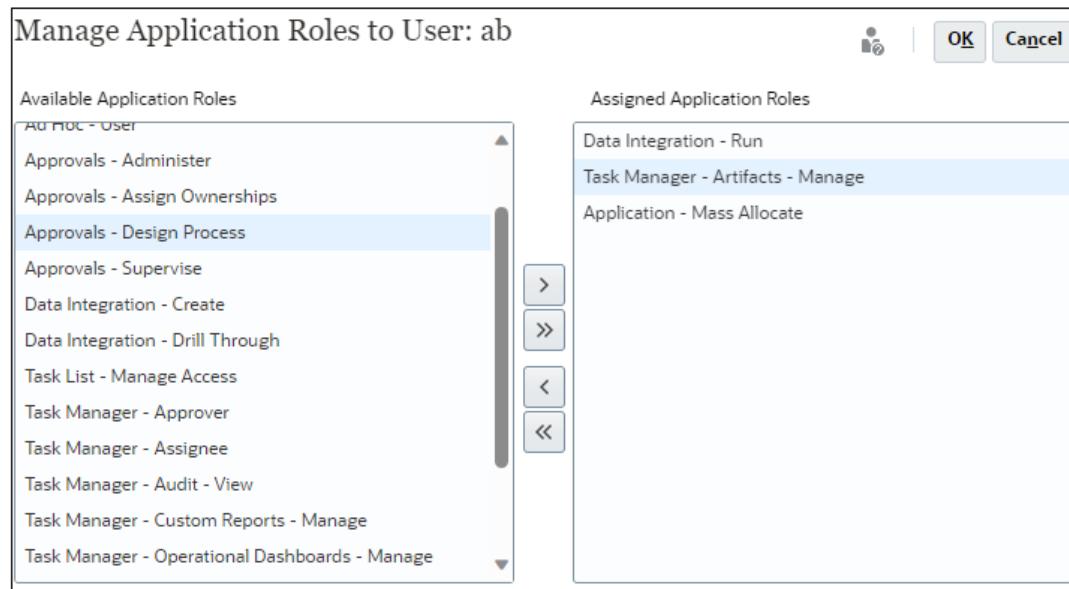
4. Click  (**Actions**) of the user or group, and then select **Manage Roles**.

5. To assign an application role to the user or group, select from the list of **Available Application Roles**, and then click right- arrow button.



To learn which application roles apply to each business process, see [Managing Role Assignments at the Application Level](#).

6. If you want to unassign an application role, select from the list of **Assigned Application Roles**, and then click left-arrow key.



7. Click **OK** to complete application role assignment for the user or group.
8. Click **OK** again to return to **Manage Application Roles** tab.

# Generating Reports

Service Administrators or users with Access Control - Manage application role can generate these reports to analyze and manage role assignments:

- [Generating a Role Assignment Report for a User or Group](#)
- [Viewing the Role Assignment Report for the Environment](#)
- [Viewing the User Login Report](#)
- [Viewing the User Group Report](#)

 **Note**

These Access Control reports display only active users. Any users who are inactive or have been removed from IAM do not appear in the reports.

## Report Time Zone

The report generation time shown in the reports reflects the local time zone of the user's browser (based on the system clock).

## About the CSV Version of the Report

You can export a report to create a Comma Separated Value (CSV) version of the report. In addition to a count of the number of users assigned to predefined roles, the CSV version of the report lists the following:

- Predefined roles to which each user is assigned. Each predefined role assigned to a user appears in a separate row. Application roles subsumed into predefined roles are not listed.
- Application roles to which a user is assigned either directly or through group. Each application role assigned to a user appears in a separate row.
- Groups to which the users are assigned are not listed if the groups are not assigned to any role.
- Only the information from the current view of the report is exported to CSV. For example, if you filter the report to view the role assignments of a specific user, the exported CSV file contains only the assignments of that user.

## Troubleshooting

See Troubleshooting Reports Issues in the *Operations Guide*.

## Generating a Role Assignment Report for a User or Group

The Role Assignment Report enables you to track user access for compliance reporting.

This report shows all active users that have been assigned a predefined role. Users that are deactivated are not reflected in this report. IDCS or EPM groups to which a user belong are not listed if the groups are not used to assign application roles to the user. Service Administrators

or users with Access Control - Manage application role can access the Role Assignment Report to review assigned predefined roles and application roles of a user or group. To generate a Role Assignment Report for a user or a group:

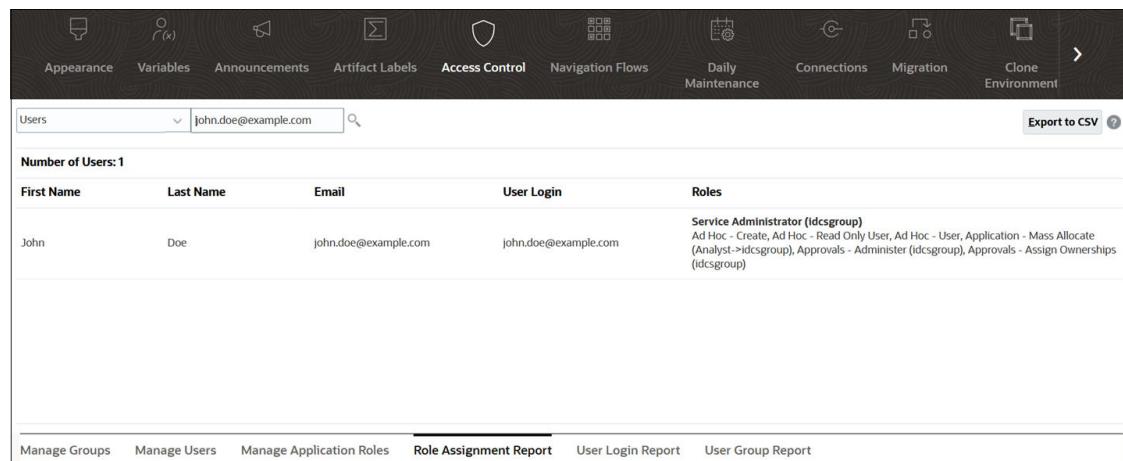
1. Open **Access Control**. See [Opening Access Control](#).
2. Click **Manage Application Roles** tab.
3. Find a user or group. From the drop down list select **Users** or **Groups**. See [Using Search](#) for instructions on using the Search feature.  
Users or groups that match the search criterion are listed. By default, the report is sorted by **User Login** values, and then by **Group Names** (for group searches).
4. Click  of the user or group, and then select **Role Assignment Report**.
5. **Optional:** Click **Export to CSV** to export the report into a CSV file.

## Viewing the Role Assignment Report for the Environment

Service Administrators or users with Access Control - Manage application role use the Role Assignment Report to review the access, assigned through predefined roles (in bold) and application-level roles, of all users. This report shows all active users that have been assigned a predefined role. Users that are deactivated are not reflected in this report.

Inherited roles, as well as information on inheritance, are displayed in one row for each user.

If a predefined role or an application role is assigned to an IDCS group, the report will show that predefined role assigned indirectly to the user through IDCS group. For example, assume that user John Doe is assigned as member of idcsgroup and this group is assigned to Service Administrator predefined role. In this scenario, the Role Assignment Report displays the following as a part of the role assignment information for John Doe:



First Name	Last Name	Email	User Login	Roles
John	Doe	john.doe@example.com	john.doe@example.com	Service Administrator (idcsgroup) Ad Hoc - Create, Ad Hoc - Read Only User, Ad Hoc - User, Application - Mass Allocate (Analyst->idcsgroup), Approvals - Administer (idcsgroup), Approvals - Assign Ownerships (idcsgroup)

You can export the Role Assignment Report as a CSV file, which can then be opened using a program such as Microsoft Excel or saved to your computer. The Role Assignment Report in CSV format uses one row for each role assignment.

User Login	First Name	Last Name	Email	Role	Granted through Group
john.doe@example.com	John	Doe	john.doe@example.com	Service Administrator	idcsgroup
john.doe@example.com	John	Doe	john.doe@example.com	Ad Hoc - Create	
john.doe@example.com	John	Doe	john.doe@example.com	Ad Hoc - Read Only User	
john.doe@example.com	John	Doe	john.doe@example.com	Ad Hoc - User	
john.doe@example.com	John	Doe	john.doe@example.com	Application - Mass Allocate	Analyst->idcsgroup
john.doe@example.com	John	Doe	john.doe@example.com	Approvals - Administer	idcsgroup
john.doe@example.com	John	Doe	john.doe@example.com	Approvals - Assign Ownerships	idcsgroup

To open the Role Assignment Report:

1. Open **Access Control**. See [Opening Access Control](#).
2. Click **Role Assignment Report**.

The Role Assignment Report is displayed.

3. **Optional:** Filter the report to display the following:
  - Role assignments of a specific user. Select **Users** from the drop down list and then enter a partial search string. See [Using Search](#) for instructions on using the Search feature.
  - Users assigned to a specific role. Select **Roles** from the drop down list and then enter a partial role name. See [Using Search](#) for instructions on using the Search feature.

 **Note**

Users may be assigned to many roles. In such cases, the report lists all the roles of the user even if you filter it for a specific role.

The Role Assignment report is displayed. By default, the report is sorted by **User Login** values and then by application roles under **Roles** (for searches by roles). The predefined roles are displayed in bold font, while the application roles are in non-bold font.

4. **Optional:** Click **Export to CSV** to export the report into a CSV file. Note that only the information from the currently displayed report is exported to CSV.

## Viewing the User Login Report

The User Login Report, by default, contains information on the users who signed into the environment over the last 24 hours. It lists the IP address of the computer from which the user logged in and the date and time (UTC) at which the user accessed the environment.

Service Administrators or users with Access Control - Manage application role can regenerate this report for a custom date range or for the last 30 days, last 90 days, and last 120 days. They can also filter the report to view only the information of specific users by using a partial string of the users' first name, last name or userid as the search string.

 **Note**

Oracle Fusion Cloud Enterprise Performance Management maintains user login audit history for the last 120 days only.

To regenerate the User Login Report:

1. Open **Access Control**. See [Opening Access Control](#).

2. Click **User Login Report**.

A report that lists all users who signed into the environment over the last day is displayed.

3. Select a period—Last 1 Day, Last 30 Days, Last 90 Days, or Last 120 Days—for which you want to generate the report. To specify a custom date range, select **Date Range** and then select a start date and end date.

4. **Optional:** Select the users to include in the report. See [Using Search](#) for instructions on using the Search feature.

The User Login report is displayed. By default, the report is sorted by **Access Date and Time** values.

5. **Optional:** Click **Export to CSV** to export the displayed report as a CSV file.

6. Click **Cancel** to close the report.

## Viewing the User Group Report

The User Group Report lists the direct or indirect membership of users assigned to EPM groups in . Service Administrators or users with Access Control - Manage application role can generate this report.

Users are deemed to be direct members of a group if they are assigned to the group; they are considered indirect members if they are assigned to a group which is a child of another group. For each user assigned to a group, the report lists information such as the login ID, first and last name, email ID, and a list of comma separated groups to which the user is directly or indirectly assigned. The direct groups are displayed in bold font, while the indirect groups are in non-bold font.

The CSV version of the report indicates whether the user is directly or indirectly assigned to a group by using Yes or No.

 **Note**

This report is not applicable to Account Reconciliation and Narrative Reporting.

To generate the User Group report:

1. Open **Access Control**. See [Opening Access Control](#).

2. Click **User Group Report**.

3. **Optional:** Filter the report. From the drop down list select **Users or Groups**. See [Using Search](#) for instructions on using the Search feature.

The User Groups report is displayed. By default, the report is sorted by **User Login** values.

4. Click **Cancel** to close the report.

5. **Optional:** Click **Export to CSV** to export EPM group name and descriptions to Groups.csv file.

PREDEFINED or IAM groups cannot be exported using this option. **Export to CSV** is disabled if no EPM group exists. There should be at least one EPM group in Access Control to use this option.

6. **Optional:** Click **Import from CSV** to import group assignments of EPM Users from a CSV file into Access Control.

For information on CSV file format and other details, see [Importing Group Assignments of Users from a File](#).