## Contents

### Documentation Accessibility

### Documentation Feedback

## 1 Overview of Access Control

- About this Guide 1-1
- Opening Access Control 1-2
- Managing Groups 1-2
  - Creating Groups 1-2
  - Modifying Groups 1-3
  - Deleting Groups 1-4
- Assigning a User to Many Groups 1-5

## 2 Managing Role Assignments at the Application Level

- Planning and Consolidation Application Roles 2-2
- Oracle Enterprise Data Management Cloud Application Roles 2-3
- Assigning Roles to a Group or a User 2-4
- Removing Application-Level Roles Assigned to a Group or a User 2-5

## 3 Generating Reports

- Generating a Role Assignment Report for a User or Group 3-1
- Generating the Role Assignment Report For Your Environment 3-2
- Viewing the User Login Report 3-3
- Viewing the User Group Report 3-4
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Overview of Access Control

Access to service components are controlled by the predefined roles in the identity domain to which users are assigned. Service Administrators can assign users to application-specific roles of planning, consolidation, and data management applications to enable them to complete additional tasks in an environment. For example, Service Administrators can assign a user to the Approval Administrator role of a planning or consolidation application to enable the user to perform approvals-related activities.

Additionally, Service Administrators can, from Access Control, create groups comprising identity domain users or other groups. Assigning roles to such groups enables Service Administrators to grant roles to many users at once, thereby reducing administrative overheads.

Assigning roles at the application-level can only enhance the access rights of users; none of the privileges granted by a predefined role can be curtailed by roles assigned at the application-level.

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

- Managing Groups
- Assigning Roles to a Group or a User
- Generating a Role Assignment Report for a User or Group
- Generating the Role Assignment Report For Your Environment
- Viewing the User Login Report

About this Guide

Access Control applies to these Oracle Enterprise Performance Management Cloud services:

- Planning
- Planning Modules
- Financial Consolidation and Close
- Tax Reporting
- Profitability and Cost Management
- Account Reconciliation
- Oracle Enterprise Data Management Cloud
- Narrative Reporting
- Oracle Strategic Workforce Planning Cloud
- Oracle Sales Planning Cloud
Opening Access Control

You can assign application-specific roles to groups and users from Access Control, which is available in the Tools card on the Home Page.

To open Access Control:

1. Access the service as a Service Administrator.
2. Complete a step:
   • Click (Navigator), and then Access Control.
   • Click Tools and then Access Control.
   • Oracle Enterprise Data Management Cloud and Narrative Reporting only: Click Access Control.

Managing Groups

The service uses an internal repository to support role assignments at the application-level and to store information on the groups that you use during the role assignment process.

Service users and other groups can be members of groups maintained using Access Control. Users can be granted application roles by assigning a role to the group.

To enable you to view user assignments, Access Control lists the predefined roles as groups. You cannot modify or assign roles to them from Access Control. Additionally, service users, who are assigned to predefined roles, are listed in Access Control so that they can be added as group members. See Understanding Pre-defined Roles in Getting Started with Oracle Enterprise Performance Management Cloud for Administrators.

• Creating Groups
• Modifying Groups
• Deleting Groups

Note:

You can no longer use Access Control to import group information from a file to create groups. Similarly you cannot export group information using Access Control. You may use Migration or EPM Automate commands to export and import groups.

Creating Groups

Service users and other groups can be members of a group.

Only Service Administrators can create and manage 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.
   b. Optional: Enter a group description.
4. Optional: Add groups to create a nested group.
   a. In Available Groups, enter a search string and then click (Search) to locate the groups that you can add as group members. Use * (asterisk) as the wildcard to retrieve all available groups.
      Groups that match the search criterion are listed under Available Groups.
   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 service 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, enter a search string and then click (Search) to locate the users (login names) that you can add as group members. Use * (asterisk) as the wildcard to retrieve all available users.
   c. From Available Users, select the users to add to the group.
   d. Click Move.
6. Click Save.
7. Click OK.

Modifying Groups

Service Administrators can modify group properties, including group name. The application roles assigned to the group and other security assignments are not affected if you rename a group.

To modify groups:

1. Open Access Control. See Opening Access Control.
2. Optional: In Manage Groups, enter a search string and then click to locate the group to modify.

![Note:]

Group names may contain up to 71 characters. However, only the first 34 characters appear in the list displayed in the Available Groups column.

3. Click (Action) in the row of the group you want to modify, and then select Edit.

4. Optional: Modify group name. Changes to the group name does not impact the security assignments made using the group.

5. Modify group assignment:
   a. Optional: Add nested groups:
      • In Available Groups, enter a search string and then click (Search) to locate the groups that you want to add as group members. Use * (asterisk) as the wildcard to retrieve all available groups.
      • 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. Modify user assignment:
   a. Click Users.
   b. Optional: Add users to group:
      • In Available Users, enter a search string and then click (Search) to locate the users that you can assign as group members. Use * (asterisk) as the wildcard to retrieve all available users.
      • 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 Groups

Deleting a group does not delete group members.

To delete a group:
1. Open Access Control. See Opening Access Control.

2. **Optional:** In Manage Groups, enter a search string and then click (Search) to locate the group to delete.

3. Click (Action) in the row of the group you want to delete, and then select Delete.

4. Click Yes to confirm the delete operation.

5. Click OK.

### Assigning a User to Many Groups

Oracle Enterprise Performance Management Cloud users can be members of many groups maintained using Access Control.

To assign a user to many groups:

1. Open Access Control. See Opening Access Control.

2. Open Manage Users.

   A list of all users of the current environment is displayed.

3. Search for the user who is to be assigned to groups:

   a. In the search field, enter the login name, first name, last name, or email ID of the user. Use * (asterisk) as the wildcard to for pattern searches.

   b. Click (Search).

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.

   a. In the search field next to Available Groups, enter a search string. Use * (asterisk) as the wildcard to for pattern searches.

   b. Click (Search).

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.
Managing Role Assignments at the Application Level

Overview

Note:

Role assignment at the application level is supported for planning, consolidation and close, tax reporting, and Oracle Enterprise Data Management Cloud applications. Planning, consolidation, and Oracle Enterprise Data Management Cloud applications use granular application-specific roles to enhance the access granted through predefined roles while Profitability and Cost Management assigns user and group level data grants to secure access to application data.

While the overall access rights are controlled by the predefined Oracle Enterprise Performance Management Cloud roles, Service Administrators can grant application-specific roles and data grants to users and to groups created and managed in Access Control. For example, a User, by default, does not have the right to design the approvals process, which is granted only to Power Users and Service Administrators. From Access Control, Service Administrators can assign the Approvals Administrator role to enable the user to perform approvals-related activities.

Role assignments at the application level can only enhance the access rights of users; none of the privileges granted by a predefined role can be curtailed by assigning role at the application-level.

You manage the role assignment process using Access Control. You can perform these tasks:

- Create groups and add service users or other groups as members.
- Add or delete group members
- Assign planning and consolidation application roles to groups or to users
- View a list of users who are members of a group

Service Users

You create and manage service users in the identity domain associated with the environment to which the application belongs. Only the users who are assigned to predefined roles can be assigned application-level roles to enhance the access they have to perform tasks within applications.
Planning and Consolidation Application Roles

The following roles apply to planning, consolidation, and tax reporting applications only. See *Administering Oracle Profitability and Cost Management Cloud* for information on assigning data grants from the Profitability and Cost Management application.

By default, only Service Administrators and Power Users can access Data Management to work on the data integration process. To enable users with the User or Viewer identity domain role to participate in the integration process, Service Administrators should assign Data Management roles (Create Integration, Run Integration, and Drill Through) to them.

**Approvals Administrator**

Resolves approval issues by manually taking ownership of the process. Comprises the Approvals Ownership Assigner, Approvals Process Designer, and Approvals Supervisor roles.

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 Planning Administrator role. They can perform these tasks:

- Control the approvals process
- Perform actions on Planning units to which they have write access
- Assign owners and reviewers for the organization under their charge
- Change the secondary dimension or update validation rules

**Approvals Ownership Assigner**

Performs all tasks that users with the Planner role can complete. Additionally, performs the following tasks for any member of the planning unit hierarchy to which the user has write access:

- Assign owners
- Assign reviewers
- Specify users to be notified

**Approvals Process Designer**

Performs all tasks that users with the Planner and Approvals Ownership Assigner role can complete. Additionally, performs the following tasks for any member of the planning unit hierarchy to which they have write access:

- Change secondary dimensions and members of entities to which the user has write access
- Change the scenario and version assignment for a planning unit hierarchy
- Edit data validation rules of data forms to which the user has access
Approvals Supervisor

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.

- Stop and start a planning unit
- Take any action on a planning unit

Ad Hoc Grid Creator

Creates, views, modifies, and saves ad hoc grids.

Ad Hoc User

Views and modifies ad-hoc grids and performs ad hoc operations. Ad Hoc Users cannot save ad-hoc grids.

Ad Hoc Read Only User

Performs all ad hoc functions, but cannot write back into ad hoc grids or load data using Data Management.

Mass Allocation

Runs mass allocation rules within form grids.

Task List Access Manager

Assigns tasks to other users.

Create Integration

Uses Data Management to create mappings to integrate data between source and target systems. Users can define data rules with various run time options.

Run Integration

From Data Management, executes data rules with runtime parameters and views execution logs.

Drill Through

Drills through to the source system of the data.

Oracle Enterprise Data Management Cloud Application Roles

These roles apply to Oracle Enterprise Data Management Cloud applications only.

Application Creator

 Registers applications in Oracle Enterprise Data Management Cloud. 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.
Auditor
Views audit related information such as transaction history and requests for changes to data in Oracle Enterprise Data Management Cloud.

View Creator
Creates views in an Oracle Enterprise Data Management Cloud application. The user who creates a view is assigned View Owner permission to the view.

Assigning Roles to a Group or a User
During this process, Service Administrators assign application-level roles to groups and users who are assigned a predefined role.

**Note:**
You cannot assign application roles to your own user account.

To enable you to view role assignments, Access Control lists the predefined Oracle Enterprise Performance Management Cloud roles as groups. You cannot assign application-level roles to them from Access Control.

To assign application-level roles to a group or a user:

1. Open **Access Control**. See **Opening Access Control**.
2. Click **Assign Application Roles**.
3. Find a user or group. Use * (asterisk) as the wildcard to retrieve all available groups or users.
   - In **Search**, enter a search string and then click (Search) to locate a user.
   - From the drop down list, select **Groups**, then in **Search**, enter a search string, and then click (Search) to locate a group.
4. Click (Actions) of the user or group, and then select **Assign Roles**.
5. From **Available Roles**, select the roles that you want to assign to the user or group and then click **Move**.
   See these sections for descriptions of the roles that can be assigned to users and groups.
   - **Planning and Consolidation Application Roles**
   - **Oracle Enterprise Data Management Cloud Application Roles**
   Selected roles are listed under **Assigned Roles**. To remove assigned roles, from **Assigned Roles**, select the role to remove, and then click **Remove**.
6. Click **OK**.
7. Click **OK**.
Removing Application-Level Roles Assigned to a Group or a User

This process removes all the application roles that are assigned to the group or to the user. Removal of application-level role assignment does not affect the predefined roles of the user.

To remove the application-level roles of a group or a user:

1. Open Access Control. See Opening Access Control.
2. Click Assign Application Roles.
3. Find a user or a group. Use * (asterisk) as the wildcard to list all available groups or users.
   - In Search, enter a search string and then click (Search) to locate a user.
   - From the drop down list, select Groups, then in Search, enter a search string and then click (Search) to locate a group.
4. Click (Actions) of the user or group, and then select Unassign Roles.
5. Click Yes.
6. Click OK.
Generating Reports

You use these reports to analyze and manage role assignments:

• Generating a Role Assignment Report for a User or Group
• Generating the Role Assignment Report For Your Environment
• Viewing the User Login Report
• Viewing the User Group Report

Report generation time indicated on reports reflects the time based on browser time zone (local system clock).

About the CSV Version of the Report

You can export a report to create a 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 a users are assigned are not listed if the groups are not assigned to any role.

Generating a Role Assignment Report for a User or Group

Service Administrators use the Role Assignment Report to review assigned predefined roles and application roles of users. Groups to which a user belong are not listed if the groups are not used to assign application roles to the user. This report enables you to track user access for compliance reporting.

To generate a Role Assignment Report for a user or a group:

1. Open Access Control. See Opening Access Control.
2. Click Assign Application Roles.
3. Find a user or a group for which you want to create the report. Use * (asterisk) as the wildcard to retrieve all available groups or users.
   • In Search, enter a search string and then click (Search) to locate a user.
   • From the drop down list, select Groups, then in Search, enter a search string, and then click (Search) to locate a group.
4. Click Action (Action) of the user or group for which you want to generate the report, and then select Role Assignment Report.
5. Optional: Click Export to CSV to export the report into a Comma Separated Value (CSV) file.

6. Click Close to close the report.

Generating the Role Assignment Report For Your Environment

Service Administrators use the Role Assignment Report to review the access, assigned through predefined roles and application-level roles, of all users. The report lists the predefined roles (for example, Service-name Power User) and application roles (for example, Mass Allocation, which is a Planning application role) assigned to the user.

Inherited roles, as well as information on inheritance, are displayed in one row for each user. For example, assume that user John Doe is assigned the Service-name User predefined role and that User is a member of the example group to which the Approvals Administrator Planning application role is assigned. In this scenario, the Role Assignment Report displays the following as a part of the role assignment information for John Doe:

Approvals Administrator (example->Service-name User).

The Role Assignment Report also identifies the number of users who are authorized to access the environment based on their predefined roles. It does not list the application roles that are subsumed into predefined roles or the component roles of application roles assigned to the user. If you need a report showing such details, you may generate the classic version of the report using the provisionReport EPM Automate command. See Working with EPM Automate for Oracle Enterprise Performance Management Cloud for detailed information.

You can export the Role Assignment Report as a Comma Separated Value (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.
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**: Click **Export to CSV** to export the report into a CSV file.

### Viewing the User Login Report

The User Login Report contains information on the users who signed into the environment over a specified period of time. It shows the IP address of the computer from which the user logged in and the date and time at which the user accessed the environment.

The service provides you a default User Login Report that lists all users who signed in over the last day. Service Administrators can regenerate this report for a custom date range or for the last 30 days, last 90 days, and last 120 days.

**Note:**

The service 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 service 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. Skip this step if you are generating the report for all users.
   a. In the search box, type a search criterion. Use * (asterisk) as the wild card character in search strings.
   b. Click **(Search)**.

5. **Optional:** Click **Export to CSV** to export the report into a Comma Separated Value (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 groups in Access Control.

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

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<table>
<thead>
<tr>
<th><strong>Note:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>This report is not applicable to Account Reconciliation and Narrative Reporting.</td>
</tr>
</tbody>
</table>

To regenerate the User Group Report:

1. Open **Access Control**. See **Opening Access Control**.
2. Click **User Group Report**.
3. **Optional:** Click **Export to CSV** to export the report into a Comma Separated Value (CSV) file.
4. Click **Cancel** to close the report.