

Oracle Projects Suite- Security Options

(A security journey from Forms to HTML)

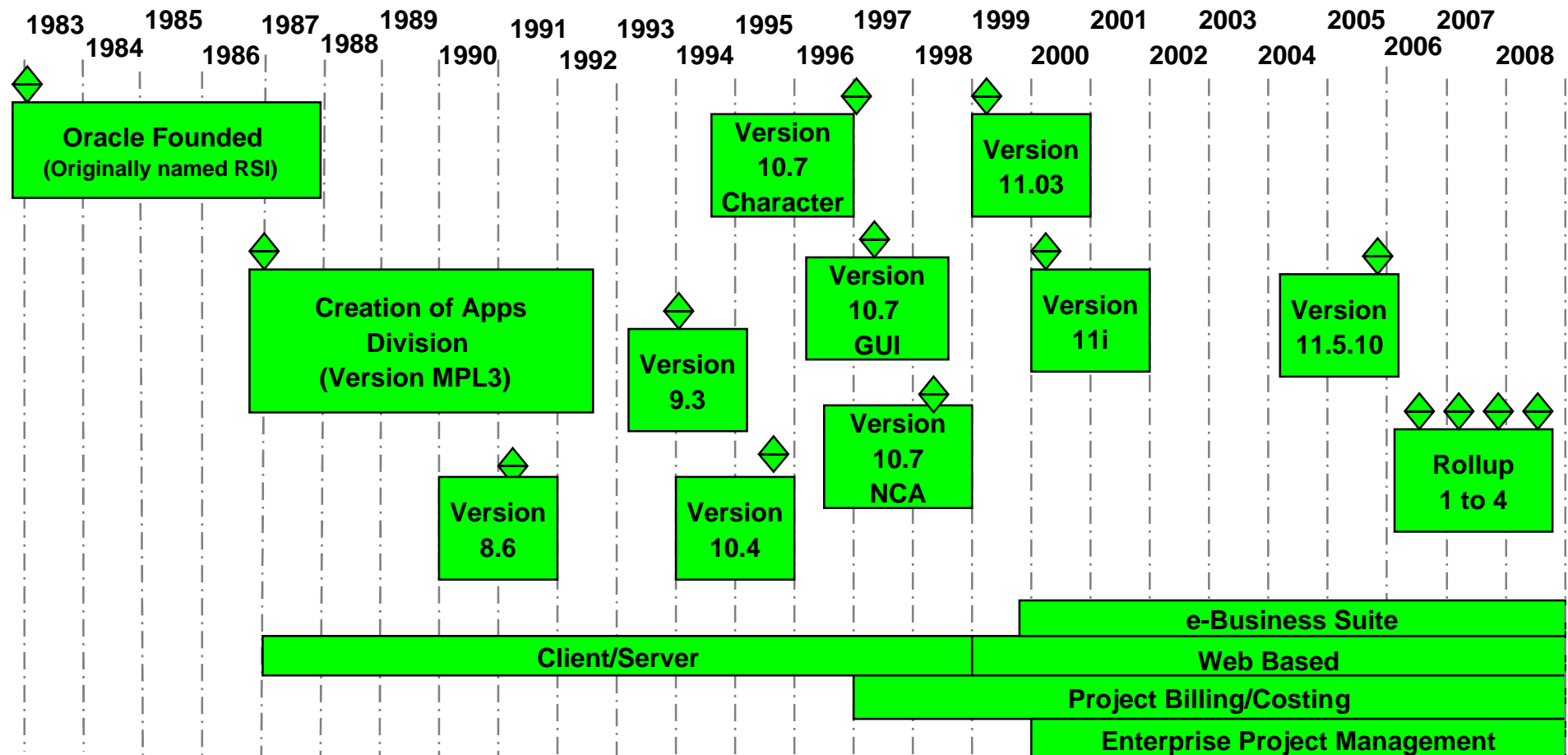
Timothy Cronin
Cronin Business Solutions

Agenda

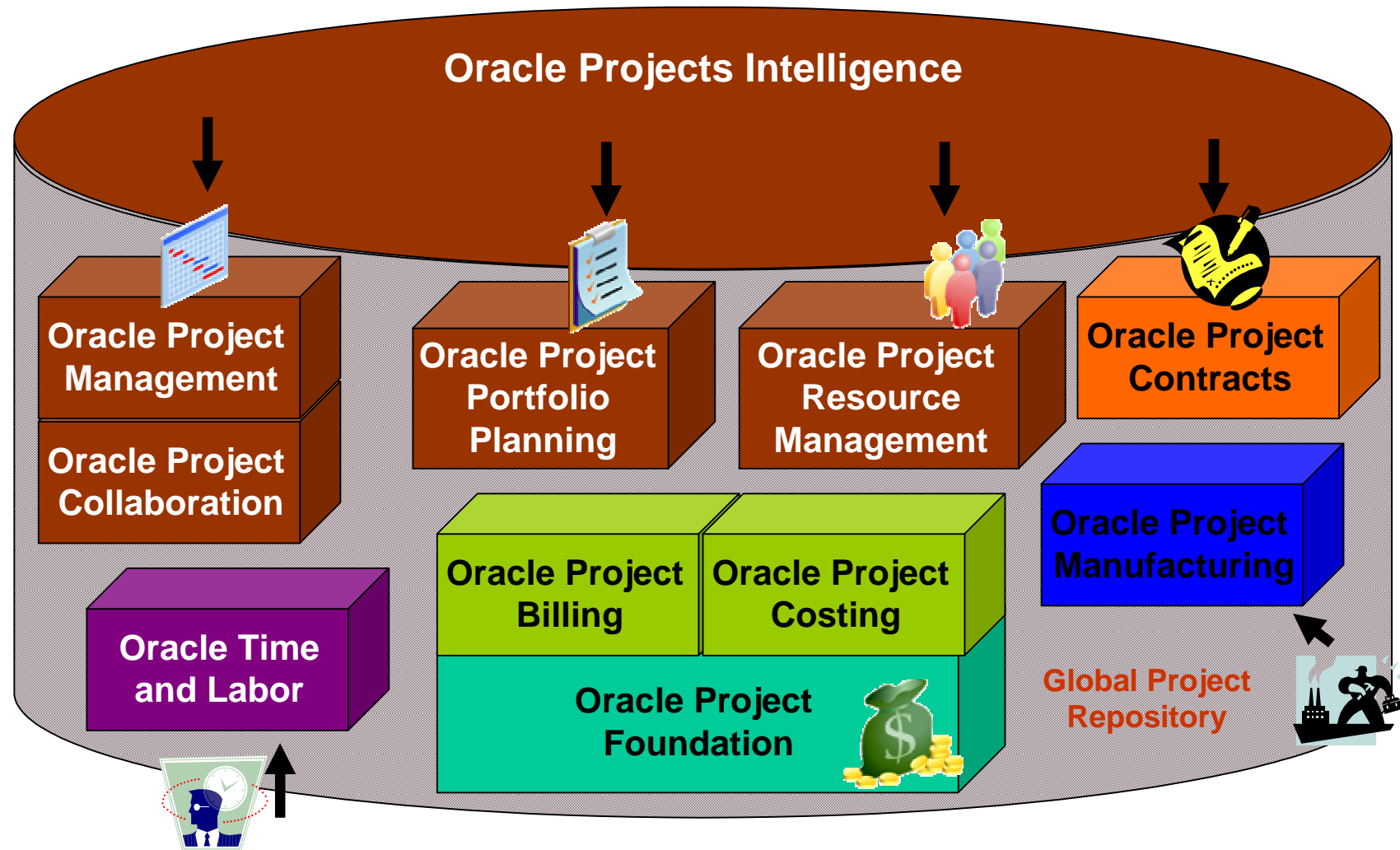
- Introduction to the Oracle Projects Suite
- Forms versus HTML
- Function and Menu Security
- Responsibilities
- PA Profile Options
- Project Access Control
- Organizational Security
- Role Based Security
- Security Extension
- Personalizations
- Configuration Considerations

Introduction to the Oracle Projects suite

History of Oracle Applications

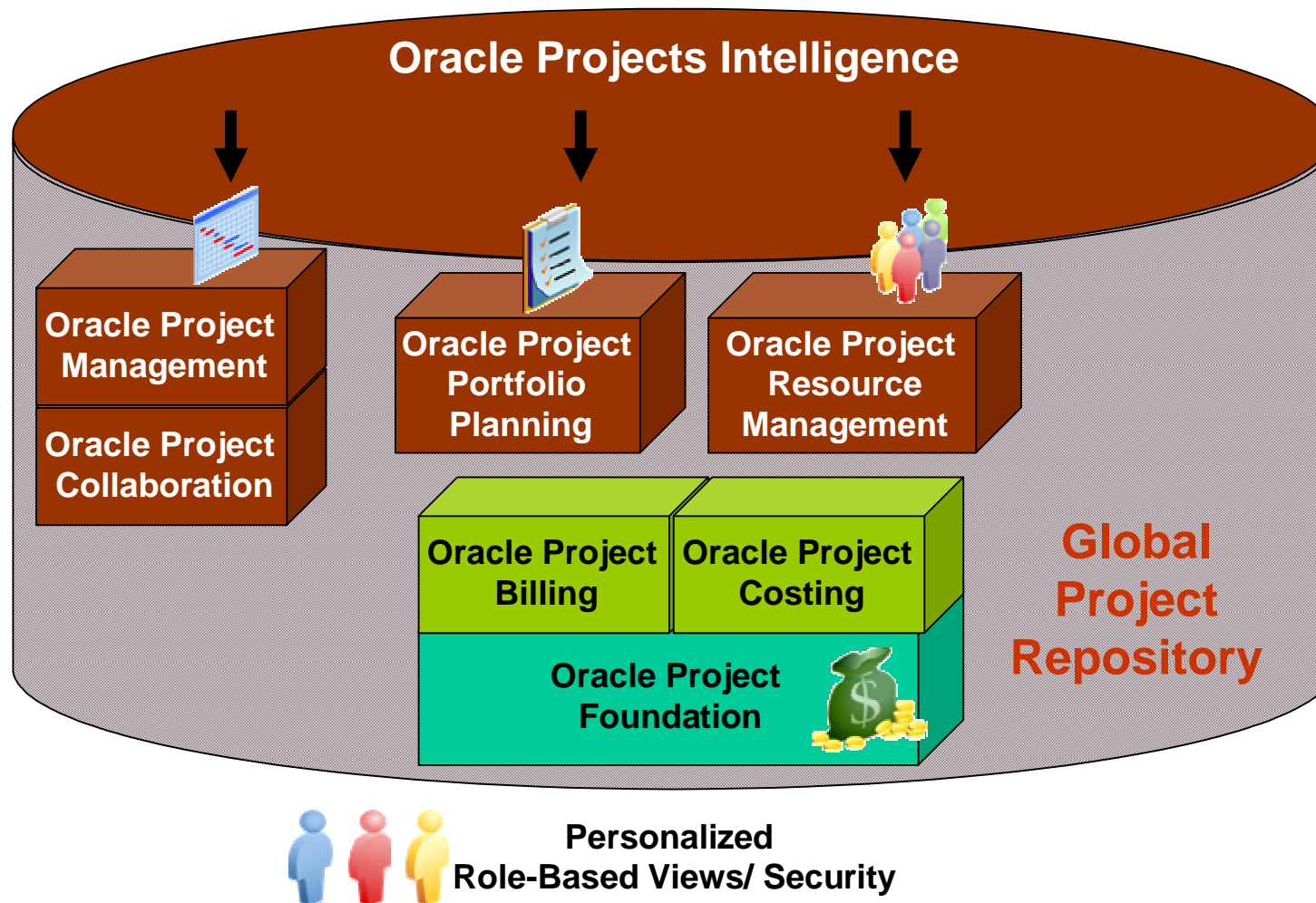


The Projects Suite...

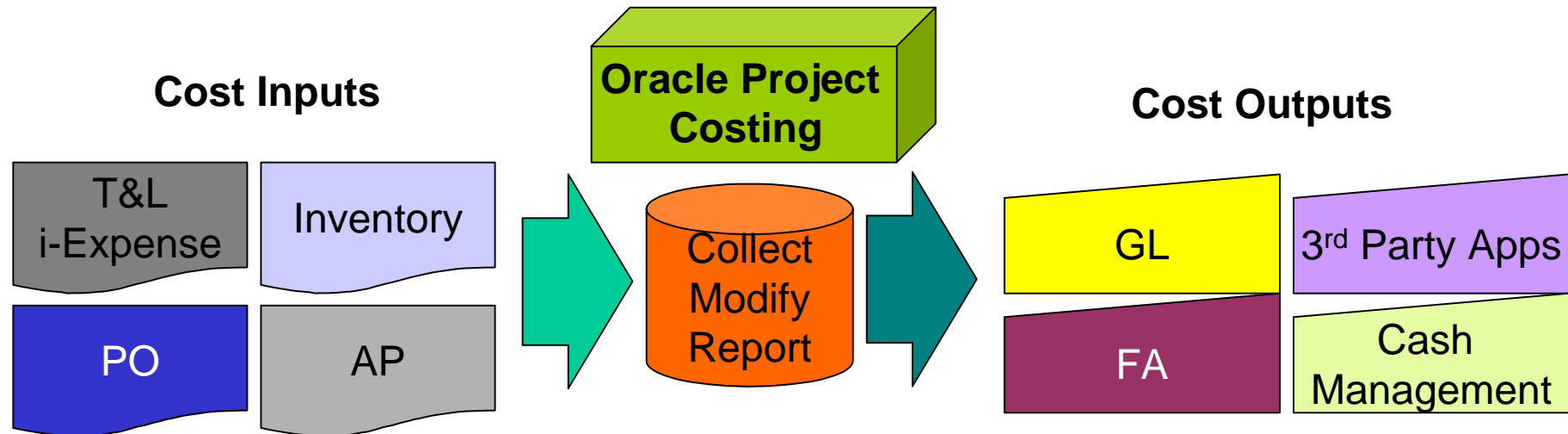


Personalized Role-Based Views/ Security

Oracle Enterprise Project Management...

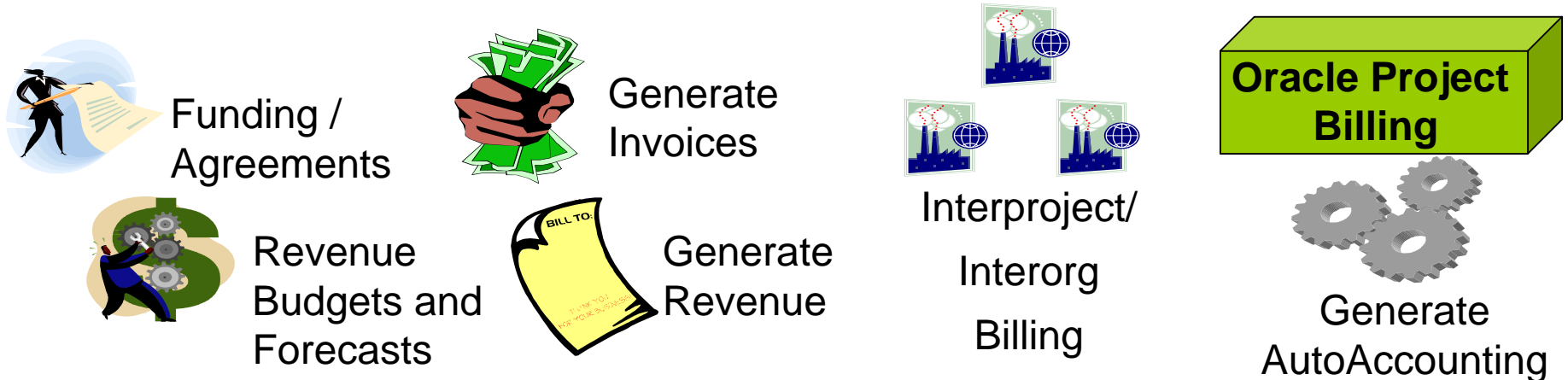


Oracle Project Costing...



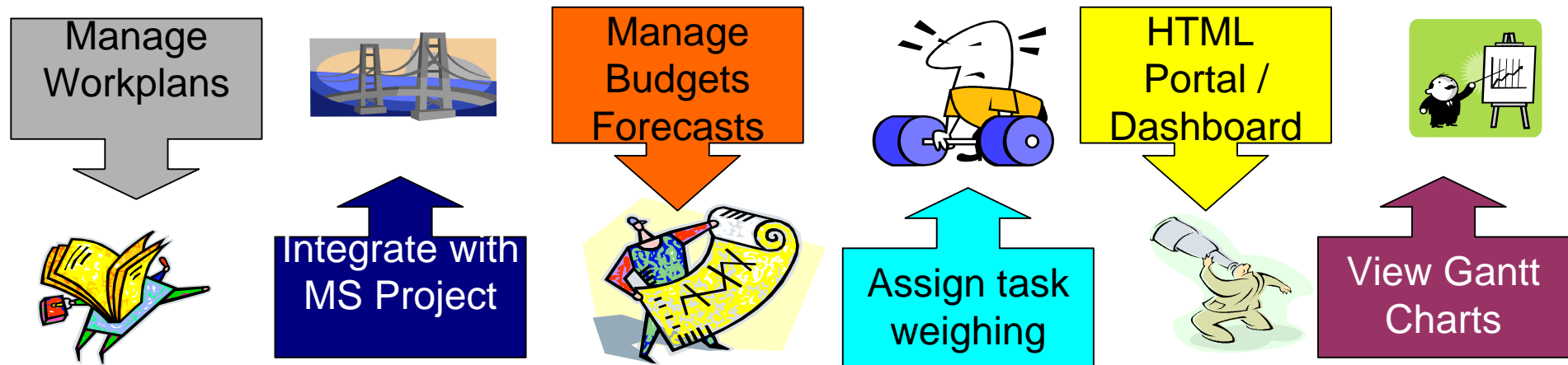
- Create Projects from templates
- Integrate with multiple sources
- Manage cost via a WBS
- Track cost against budget
- Burden/Allocate/Transfer Cost
- View Commitments
- Drill Down features
- Capitalize Assets
- Generate Accounting

Oracle Project Billing...

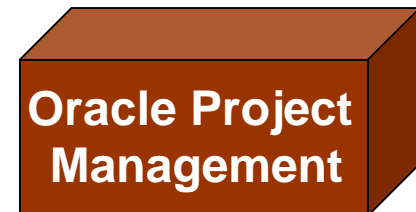


- Track agreements / Fund Projects
- Manage Revenue Budgets
- Generate Invoices
- Generate Revenue
- Supports the following billing/revenue methods:
 - T&M
 - % Spent
 - % Complete
 - Events
 - Custom methods

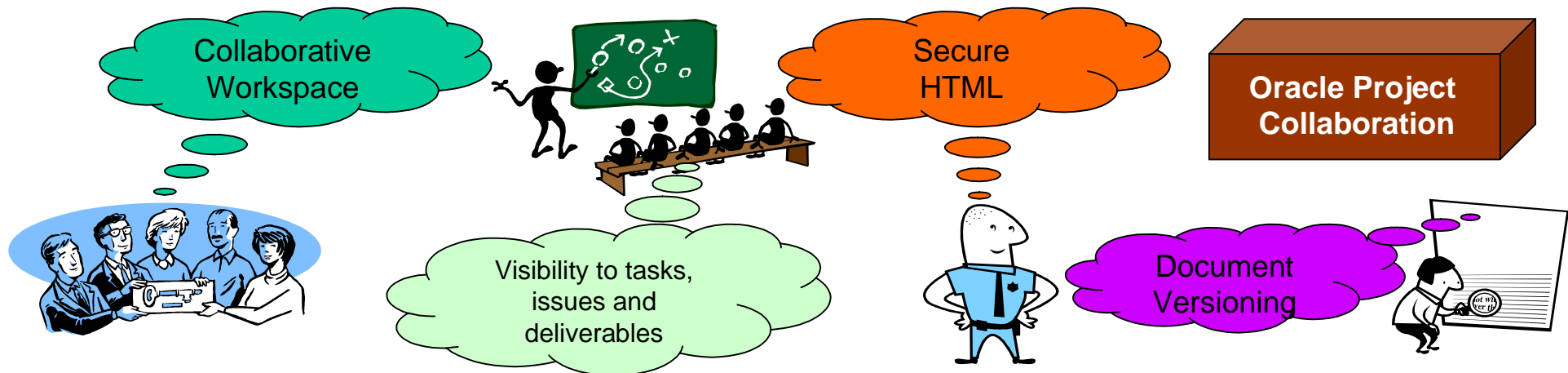
Oracle Project Management...



- Create, manage and version workplans
- Track progress against plan
- Integrate with MS Project
- Create budgets / forecasts to completion
- Provide real time project overview via HTML
- Manage issues at a project or task level
- View Gantt charts
- Create work plan dependencies
- Manage change orders

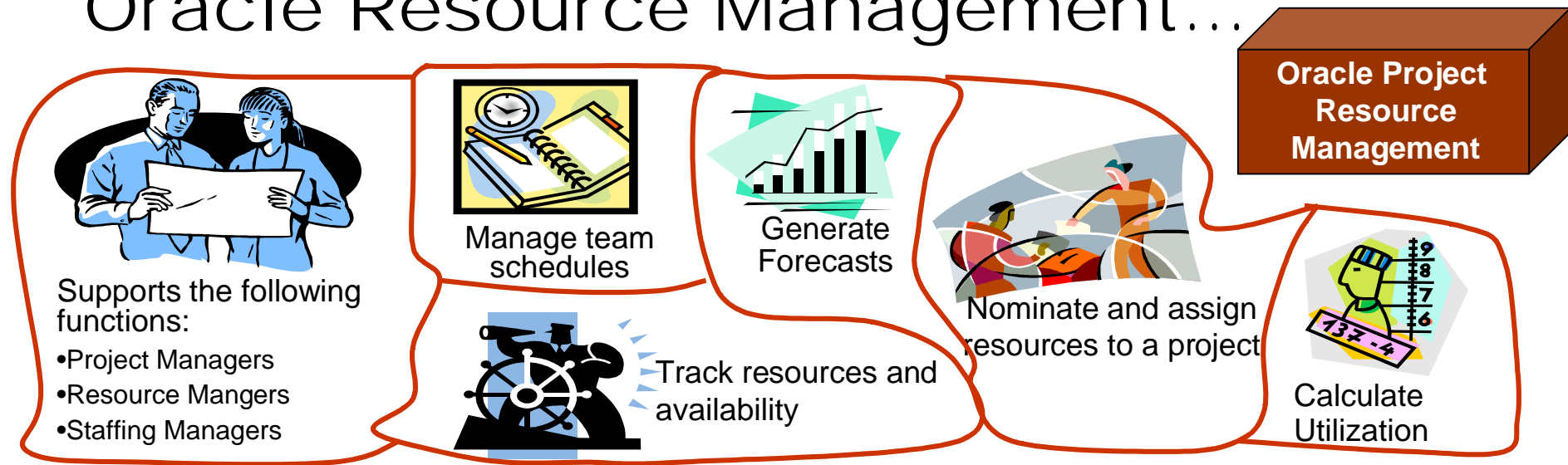


Oracle Project Collaboration...



- Provides a secure collaborative workspace
- Visibility to assigned tasks, issues and deliverables
- Single document repository with versioning capabilities
- Related to Oracle Project Management

Oracle Resource Management...



- Used by all members of your project based organization
- Calculate organization / resource utilization
- Managing team schedules
- Track resources and availability
- Nominate / Assign resources to a project
- Search for open requirements
- Generate financial forecasts

Oracle Project Intelligence...



Operation and
Financial Project
Metrics



Real time
On-line reporting



Prepackaged
Reports

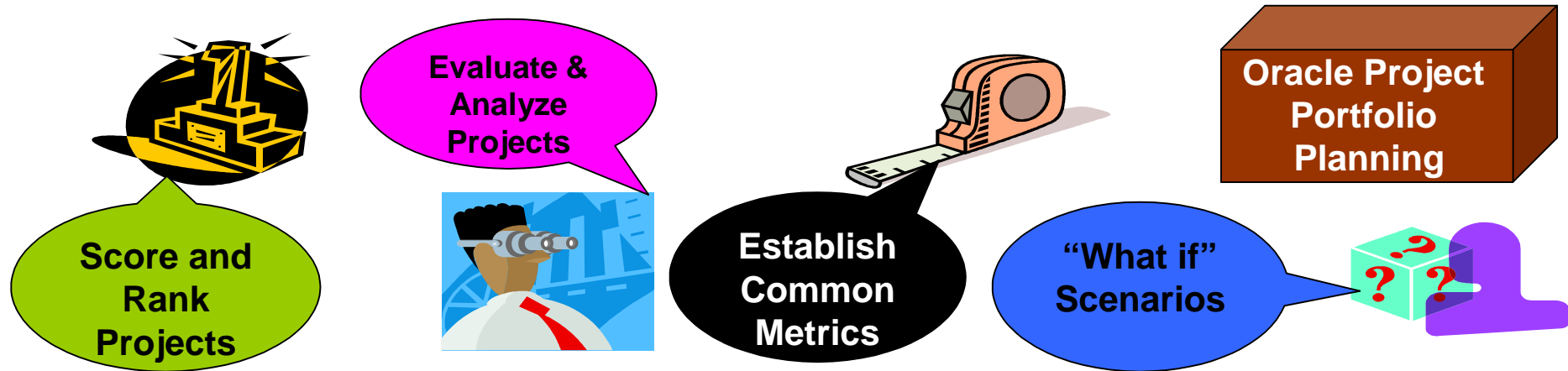


Dashboard
And KPI
tools

- Provides Project based operational and financial metrics, reporting and analytics
- Provides role based security
- Drill down to transactions
- Dashborad and KPI's
- Manage by exception



Oracle Project Portfolio Planning...



- Release Date: **May 2005**
- Evaluate, analyze, prioritize potential projects
- Establish common metrics for potential projects
 - NPV, ROI, strategic or financial fit
- Score and rank projects
- Create and compare “What if” scenarios

HTML versus Forms

HTML vs. Forms...

- Oracle is migrating away from Forms towards HTML
- Oracle Projects suite is on the leading edge
- The bulk of the Oracle Projects suite is now in HTML
 - In many cases, a function can be performed in both Forms and HTML
- Security features are sometimes related to either HTML or Forms

HTML vs. Forms...

- Project creation is HTML and Forms:

Source Template **GSD POC (T200001)**

- * Project Number
- * Project Name
- * Project Description
- * Customer Name
- POC Master Project
- * Product Line
- * Revenue Type
- * Classification
- * Customer Group
- * Country
- * State

Field Name	Value	Required
Project Number		<input checked="" type="checkbox"/>
Project Name		<input checked="" type="checkbox"/>
Project Description		<input checked="" type="checkbox"/>
Customer Name		<input checked="" type="checkbox"/>
POC Master Project		<input type="checkbox"/>
Product Line		<input checked="" type="checkbox"/>
Revenue Type		<input checked="" type="checkbox"/>

OK Cancel

Functions and Menus

Function and Menu Security

Function Security

- Function security controls user access to Oracle Projects functions
- Functions are assigned to Menus
 - Thus providing access to specific functionality in PA

Menu Security

- Build from either other menus or functions
- Grant access to specific PA functionality
- Menus are assigned to either Responsibilities or Roles

Function and Menu Security

- Functions control access to most features within PA
- Examples include:
 - Ability to see a button
 - Ability to baseline a workplan
 - Ability to view cost rates
 - Ability to update progress
 - Etc...

Menu

Menu: **PA_PRM_PROJ_SU** View Tree...

User Menu Name: **Project Super User Responsibility Main Menu**

Menu Type: **Standard**

Description: **Project Super User Responsibility Main Menu**

Seq	Prompt	Submenu	Function	Description	Grant
1			Projects: Assignment: R	PA_PRM_REMOVE_CONFLICTS	<input checked="" type="checkbox"/>
2			Projects: Project Progre		<input checked="" type="checkbox"/>
3			Projects : Project Progn		<input checked="" type="checkbox"/>
4			Projects: Page Layout: '		<input checked="" type="checkbox"/>
5			Projects: Page Layout: l		<input checked="" type="checkbox"/>
6	Unlock Structure		Unlock Structure	Unlock Structure	<input checked="" type="checkbox"/>
7			Projects: Report Types: Report Types Setup		<input checked="" type="checkbox"/>
8			Projects: Options: Repo		<input checked="" type="checkbox"/>
9			Projects: Project Sets: L	Projects: Project Sets: Update All	<input checked="" type="checkbox"/>
10			PA: Workplan: Change	PA: Workplan: Change Current P	<input checked="" type="checkbox"/>

Functions

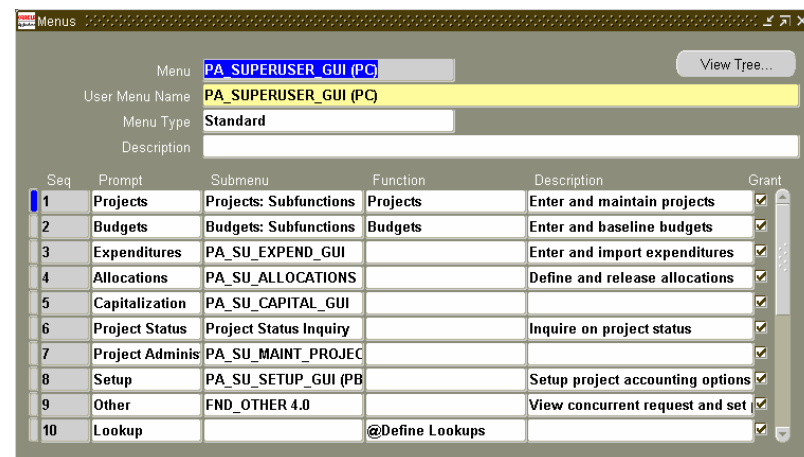
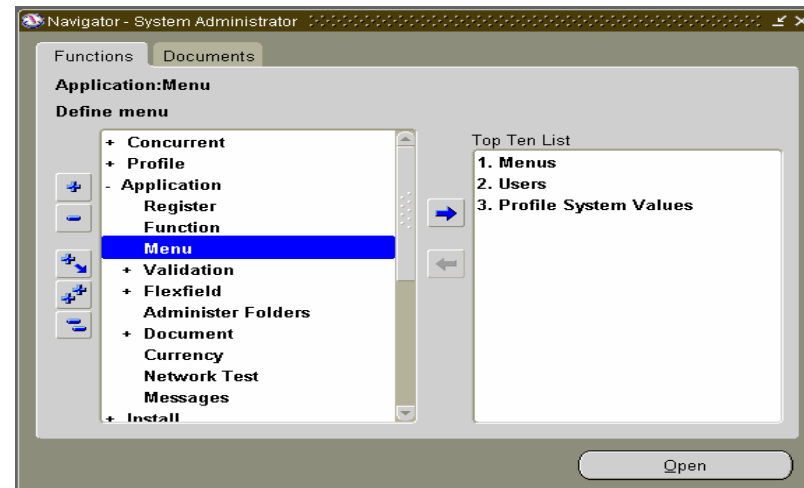
Find: **Projects: Project**

User Function Name	Function Name	Description
Projects: Project Home	PA_PROJ_HOME	Projects: Project Home
Projects: Project List	PA_PROJ_LIST	Projects: Project List
Projects: Project Overview	PA_PROJ_OVERVI...	Projects: Project Overv
Projects: Project Overview Function	PA_PROJ_OVERVI...	Projects: Project Overv
Projects: Project Progress Report: View	PA_PROGRESS_R...	User can view progres
Projects: Project Request List	PA_PROJ_REQ_LIST	Projects: Project Requ
Projects: Project Search	PA_PROJECT_SEA...	Projects: Project Search
Projects: Project Sets: Create and Delete	PA_PROJ_SET_MA...	Projects: Project Sets:
Projects: Project Sets: Set as Shared	PA_PROJ_SET_SH...	Projects: Project Sets:
Projects: Project Sets: Update All	PA_PROJ_SET_UP...	Projects: Project Sets:
Projects: Project Status Report: Update Shortcut	PA_PROGRESS_R...	User can edit status re

Find OK Cancel

Function and Menu Security

- Menus are defined using the System Administrator responsibility
- They are build from both:
 - Submenus
 - Functions



Function and Menu Security

- **Steps to create a function loaded menu**
 1. Navigate to System Administrator- Menu
 2. Either create a new menu or query an existing menu
 3. Add/Remove Functions as necessary

Responsibility Based Security

Responsibility Based Security...

- A user's logon determines which functions the user can perform
- Each responsibility limits user access to the operating unit with which it is associated

Responsibilities

Responsibility Name: **Project Super User**
 Application: **Projects**
 Responsibility Key: **PA_PRM_PROJ_SU**
 Description: **Project Super User**

Effective Dates: From **01-JAN-1951** To

Available From:
☐ Oracle Applications
☒ Oracle Self Service Web Applications
☐ Oracle Mobile Applications

Data Group:
 Name: **Standard**
 Application: **Projects**

Menu: **Project Super User Responsibility**

Web Host Name:
 Web Agent Name:

Request Group:
 Name: **VSAT Projects Super User**
 Application: **Projects**

Menu Exclusions: Excluded Items | Securing Attributes

Type	Name	Description
Function	Utilization by Organization	Utilization by Organization Workbook
Function	Utilization by Resources	Utilization by Resources Workbook
Function	Utilization by Resource Managers	Utilization by Resource Managers Workbook

Responsibilities

Responsibility Name: **Project Billing Super User**
 Application: **Projects**
 Responsibility Key: **PROJECT_BILLING_SUPER_USER**
 Description: **Project Billing Administrator**

Effective Dates: From **01-JAN-1951** To

Available From:
☐ Oracle Applications
☒ Oracle Self Service Web Applications
☐ Oracle Mobile Applications

Data Group:
 Name: **Standard**
 Application: **Projects**

Menu: **PA_SUPERUSER_GUI (PB)**

Web Host Name:
 Web Agent Name:

Request Group:
 Name: **All Project Billing Programs**
 Application: **Projects**

Menu Exclusions: Excluded Items | Securing Attributes

Type	Name	Description
Function	Navigator: Disable Multiform	Navigator: Disable Multiple Open Form Capa

Responsibility Based Security...

- Responsibilities contain the following attributes:
 - Menu
 - Request Group
 - Function and Menu Exclusions

The screenshot shows the 'Responsibilities' configuration window in Oracle Applications. The 'Project Billing Super User' responsibility is configured with the following attributes:

- Responsibility Name:** Project Billing Super User
- Application:** Projects
- Responsibility Key:** PROJECT_BILLING_SUPER_USER
- Description:** Project Billing Administrator
- Effective Dates:** From 01-JAN-1951
- Available From:**
 - ☒ Oracle Applications
 - ☐ Oracle Self Service Web Applications
 - ☐ Oracle Mobile Applications
- Menu:** PA_SUPERUSER_GUI (PB)
- Web Host Name:**
- Web Agent Name:**
- Data Group:**
 - Name:** Standard
 - Application:** Projects
- Request Group:**
 - Name:** All Project Billing Programs
 - Application:** Projects
- Menu Exclusions:**

Type	Name	Description
Function	Navigator: Disable Multiform	Navigator: Disable Multiple Open Form Capa

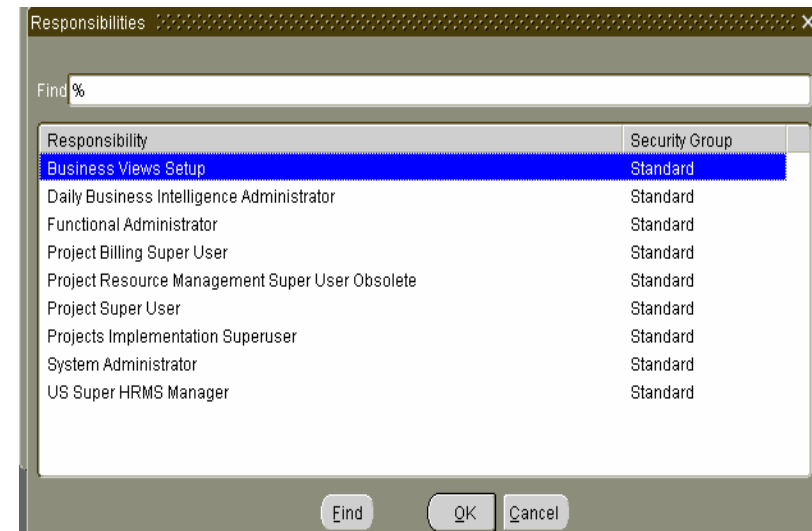


Responsibility Based Security...

- The Oracle Projects Suite contains the following predefined responsibilities:
 - **HTML Based**
 - Project Super User
 - Project Manager
 - Project Administrator
 - Resource Manager
 - Staffing Manager
 - Operations Manager
 - Team Member
 - **Forms Based**
 - Project Costing Super User
 - Project Billing Super User
 - Projects Implementation Super User
 - Project Manager (Non-HTML)

Responsibility Based Security...

- HTML versus Forms responsibilities...



Responsibility Based Security...

- Steps to create a responsibility
 1. Navigate to System Administrator – Responsibilities
 2. Enter name
 3. Assign Application
 4. Determine: Forms vs HTML
 5. Assign Menu
 6. Assign Request Group
 7. Enter any function or menu exclusions

PA Profile Options

PA Profile Options...

- The following profile options provide an additional level of security for a responsibility
- Cross Project User functionality provides access to all projects regardless of the role assigned to a user:
 - **PA: Cross Project User – Update**
 - **PA: Cross Project User – View**
 - **PA: View All Project Resources**

Profile Option Name	Site	Application	Responsibility	User
PA: Cross Project User -- Update				
PA: Cross Project User -- View	Yes			

PA Profile Options...

- Steps to define the PA Profile Options
 1. Navigate to System Admin- Profile System Values
 2. Query each of the following profiles an update as necessary
 - **PA: Cross Project User – Update**
 - **PA: Cross Project User – View**
 - **PA: View All Project Resources**

Project Access Levels

Project Access Level...

- Project Access Levels allow control of who can search and view specific projects
- There are two access levels for projects:
 - **Secured:** Users need role or organizational access to view the project
 - **Enterprise:** Project can be viewed by any user in your enterprise regardless of their role

Project Access Level...

- The project access level is assigned via HTML
- The **UPG: Update Project Access Level** concurrent process to update the access levels of several projects at once

Create Project Template
* Indicates required field

Template Information

- * Name:
- * Long Name:
- * Number:
- * Organization:
- Description:

Project Type:

Access Level: (dropdown menu shows Enterprise, Secured, Access Level)

Effective From: (dropdown menu shows Enterprise, Secured, Access Level)

Effective To:

Submit Request

Run this Request...

Name:

Parameters:

Language:

At these Times...

Run the Job:

Upon Completion...

☒ Save all Out

Layout:

Notify:

Parameters

- From Project Number:
- To Project Number:
- Project Status:
- Project Type:
- Organization:
- Access Level:



Project Access Level...

- Steps to enable Project Level Access
 1. Navigate to Project Super User
 2. Query a Project or Template
 3. Set the access level to either:
 - Enterprise
 - Secured

Organizational Based Security

Organizational Based Security...

- Access for users at an organizational level
- Users with Organizational based security **do not need** roles
- Note that this feature does **not** recognize Organizational Hierarchies, therefore each organization must be assigned to the user

The screenshot shows the 'Resource' form in Oracle. The 'Organization Authority' section is expanded, displaying a table with columns for 'Organization', 'Forecast Authority', 'Primary Contact', and 'Utili: Autl'. The 'Organization' column has a list of organizations, and the other columns have checkboxes for assigning authority. The 'Forecast' section is also visible, showing a table with columns for 'Forecast Authority', 'Primary Contact', and 'Utili: Autl'.

Organizational Based Security...

- Organization based security provides the following organizational authorities:
 - **Project Authority:** Perform Project Manager functions on all projects in the organization
 - **Resource Authority:** View and update resource information for all resources in the organization
 - **Utilization Authority:** Calculate and view utilization for all resources in the organization
 - **Forecast Authority:** Generate and view forecast information for all projects in an organization

Organizational Based Security...

- Steps to enable Organizational Based Security
 1. Navigate to Project Billing Super User – Organizational Authority
 2. Enter the name of the user that needs organizational access
 3. Enter the organizations the user should see
 4. Set the users authority for each Organization by checking the authority check boxes

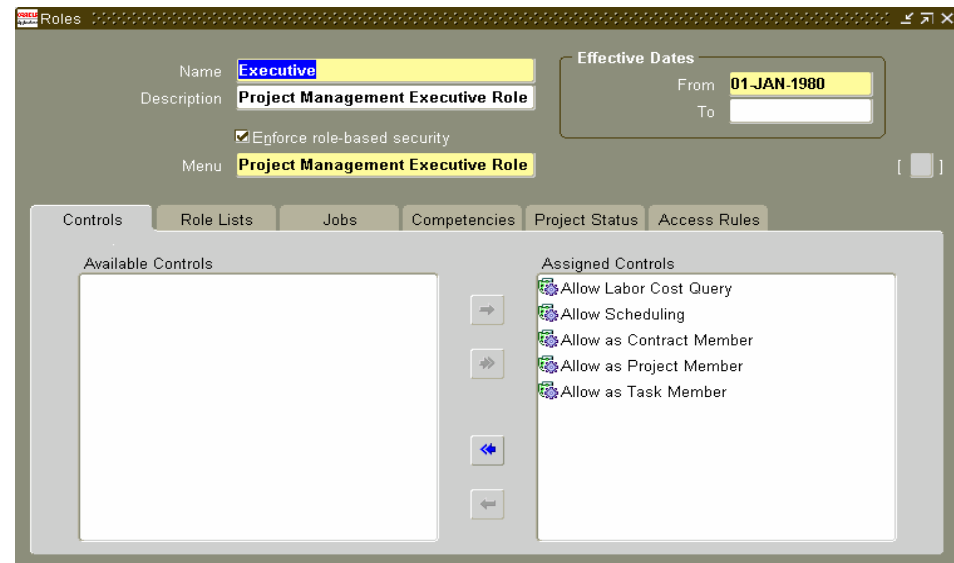
Role Based Security

Role Based Security...

- Role based security controls access based on the role the user plays on a project
- Access for a user can be different on each project
 - Project Specific
- Role based security overrides responsibility based security for individual users

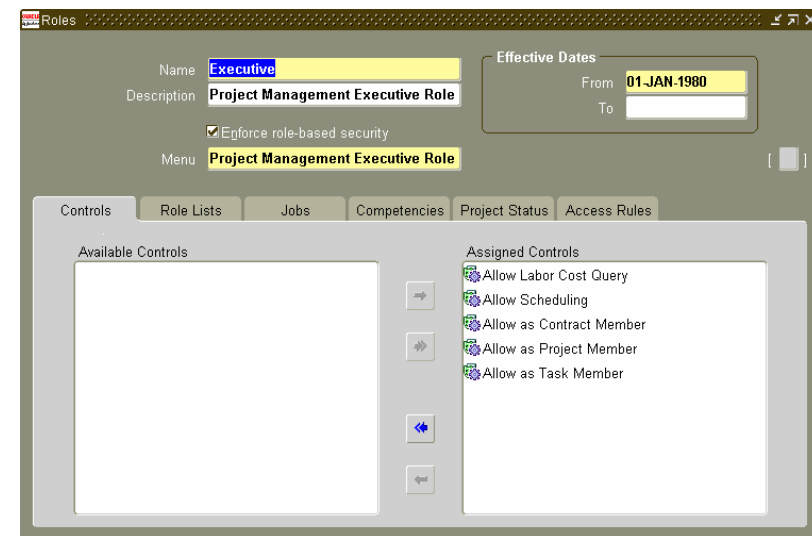
Role Based Security...

- Role Based Security assigns menus to roles
 - Menus with roles are considered secured roles
 - Unsecured roles use the Responsibility to determine project access
- Menus are build from:
 - Functions
 - Sub-menus
 - Etc...



Role Based Security...

- Role based security also provides Role Controls including:
 - Allow as Project Member
 - Allow as Task Member
 - Allow as Contract Member
 - Allow Scheduling
 - Allow Labor Cost Query



Role Based Security...

- Other features associated with Role Based Security include:
 - Role List
 - Jobs
 - Competencies
 - Project Status
 - Access Rules

The screenshot shows the 'Roles' configuration window in Oracle. The 'Name' field is 'Executive' and the 'Description' is 'Project Management Executive Role'. The 'Effective Dates' section shows 'From' as '01-JAN-1980' and 'To' as an empty field. The 'Enforce role-based security' checkbox is checked. The 'Menu' field is 'Project Management Executive Role'. Below these are tabs for 'Controls', 'Role Lists', 'Jobs', 'Competencies', 'Project Status', and 'Access Rules'. The 'Financial Forecasting' section has 'Default Job Group' and 'Default Job Name' fields. The 'Resource Searching' section has 'Project Resource Job Group' (set to 'ViaSat BG'), 'Default Minimum Job Level', and 'Default Maximum Job Level' fields.

Role Based Security...

- After the role has been created
- Assign a user as a key member/team member to the project
- Note that key members/team members can be established in both:
 - Forms
 - HTML

Effective ☒


Employee Name	Number	Role	From	To
Cronin, Timothy	123456	Project Manager	01-JAN-2008	

Add Team Members

* Indicates required field

* Person 

* Role 

* Start Date 
(example: 26-Feb-2008)

End Date 

☐ Scheduled Member

Role Based Security...

- Steps to enable Role Based Security
 1. Navigate to Project Billing Super User- Setup- Project Roles
 2. Create a new role
 - Create Name
 - Assign Menu for Role based security
 - Enter appropriate controls
 - Enter further information:
 - Role Lists
 - Jobs
 - Competencies
 - Project Status
 3. Assign users to the roles in either HTML or Forms

Security Extension

Security Extensions...

- The Project Security extension allows customized business rules for project and labor cost security
- Only applies to non-HTML architecture
- Examples:
 - Responsibilities can view or update only capital projects
 - Only users that belong to the project organization can access the project

Security Extensions...

- Steps to create a Security Extension
 1. Define your requirement
 2. Update the body and package respectively
 - Body: PAPSECXB.pls
 - Package: pa_security_extn
 3. Test the extension
 4. “Go Live” with the extension

Personalizations

Personalizations...

- Provide the ability to modify specific HTML features
- The forms can be personalized at the following levels:
 - Responsibility
 - Organization
 - Site

Personalizations...

- After enabling the following Personalize profile option, a HTML user will have access to the personalize features :
 - Personalize Self-Service Defn = “Yes”

Profile Option Name	Site	Application	Responsibility	User
Personalize Self-Service Defn	No			T_TCRONIN
				Yes

Personalizations...

- Determine the HTML screen that you would like to modify.
- Click on the Personalize Page Link
- Examples of modifications that are possible include:
 - Reorder a view
 - Create a button
 - Add a column
 - Etc

TIP In simple view mode, some items or regions may not be visible in the page structure and the reorder or create icon may be disabled for certain nodes. Please switch to complete view mode if you need full personalization capabilities over all items and regions.

[Expand All](#) | [Collapse All](#)

Focus Name	Shown	User Personalizable	Personalize	Reorder	Create Item	Update Item	Delete Item	Seeded User Views	Show Complete
▼ Page Layout: Time Entry	Yes								
Raw Text: <html> <P align="center">ViaSat Contingent Worker Invoice </html>	Yes								
⊕ ▼ Page Button Bar: Timecard Activiti...	Yes								

Personalizations...

- Determine if the change should be global or restricted to one of the following:
 - Responsibility
 - Organization
 - Site

Personalization Properties

Clear Personalization

	Original Definition	Site	Organization: VSAT_OPERATING_UNIT	Responsibility: VSAT Contingent Worker Electronic Invoice	Result / Source
Admin Personalization		true <input type="button" value="5"/>	Inherit <input type="button" value="5"/>	Inherit <input type="button" value="5"/>	true / Site
CSS Class		Inherit <input type="button" value="5"/>	Inherit <input type="button" value="5"/>	Inherit <input type="button" value="5"/>	
Export View Attribute		Inherit <input type="button" value="5"/>	Inherit <input type="button" value="5"/>	Inherit <input type="button" value="5"/>	
Prompt		Inherit <input type="button" value="5"/>	Inherit <input type="button" value="5"/>	Inherit <input type="button" value="5"/>	
Rendered		true <input type="button" value="5"/>	Inherit <input type="button" value="5"/>	Inherit <input type="button" value="5"/>	true / Site

Personalizations...

- Steps to enable Personalizations
 1. Set the “Personalize Self-Service Defn” profile option = “Yes”
 2. Determine where a Personalization is necessary
 3. Click the Personalize Page Link
 4. Make the appropriate Personalization
 5. Assign the personalization to any of the following:
 - Responsibility
 - Organization
 - Site
 6. Save Changes

Configuration Considerations

Configuration Considerations...

- Refer to the PAIG.pdf for the following documentation:
 - Profile Options
 - Menus and Responsibilities
 - Function Security
- When building and testing menus based on role based security, it is recommended to have access to bounce the Apache Server
 - Changes/updates will not immediately appear unless Apache is bounced

Where to find more information

- Timothy Cronin, President

www.CroninINC.com

tcronin@CroninINC.com

954.243.3101

- Experts in the Oracle Projects Suite

