

Oracle Projects Suite- Security Options (A security journey from Forms to HTML)

Timothy Cronin
Cronin Business Solutions

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About the Author

Timothy Cronin has over 15 years of experience with the Oracle Projects suite and is the president of Cronin Business Solutions. Cronin Business Solutions focuses exclusively on the implementation of the Oracle Projects suite. Our expertise ranges from standard Oracle Project Costing and Billing to advanced features offered by Oracle Project Management, Resource Management, Collaboration, Intelligence and Portfolio Planning.

Paper/Session Overview

This presentation will discuss standard security options in the Oracle Projects Suite. The following topics will be covered: Responsibilities, Enterprise Level Security, Organizational Based Security, Role Based Security. Key discussion areas will include the differences between standard security and HTML based features.

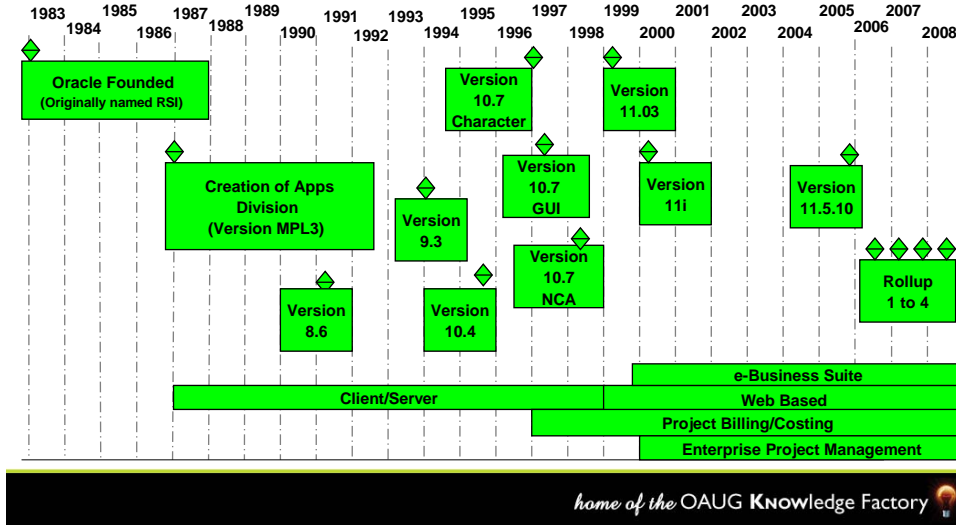
Session Objectives

- Provide an overview of standard security features in the Oracle Projects Suite.
- Review role based security.
- Review organization based security.
- Review configuration steps and methods related to Oracle Projects.

Introduction to the Oracle Projects Suite

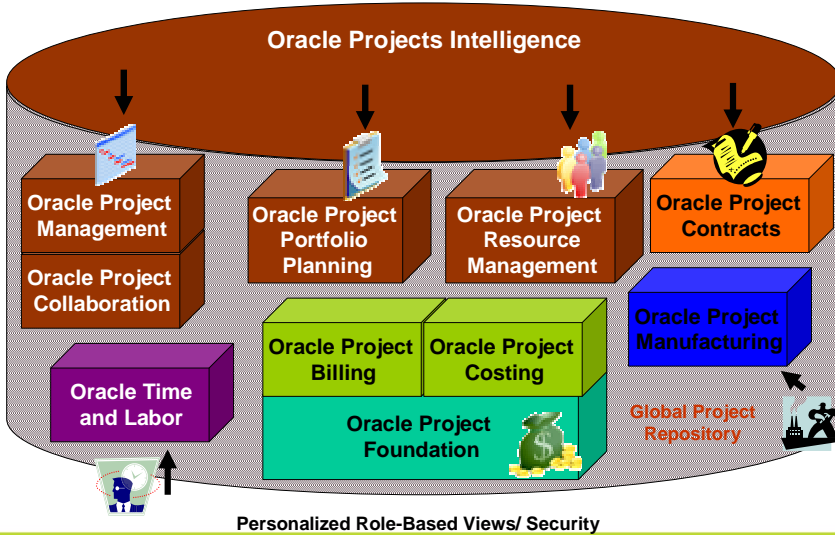
The Oracle Projects suite has expanded rapidly over the past decade. The following slides depict the evolution of the suite.

History of Oracle Applications



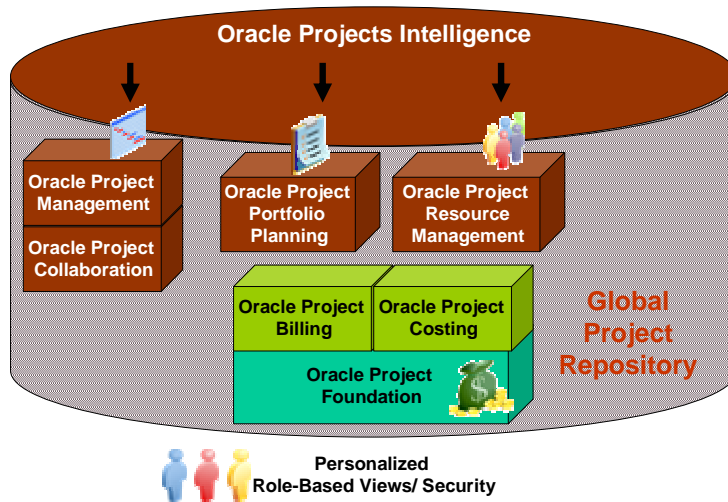
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The Projects Suite...



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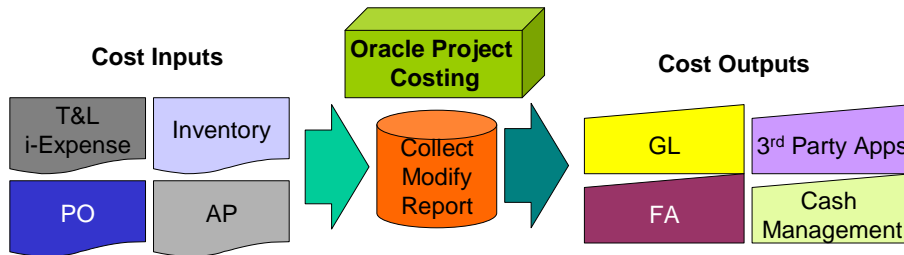
Oracle Enterprise Project Management...



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Module Overview

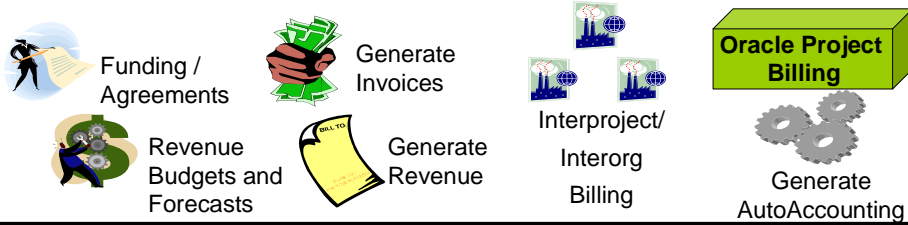
Oracle Project Costing...



- 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

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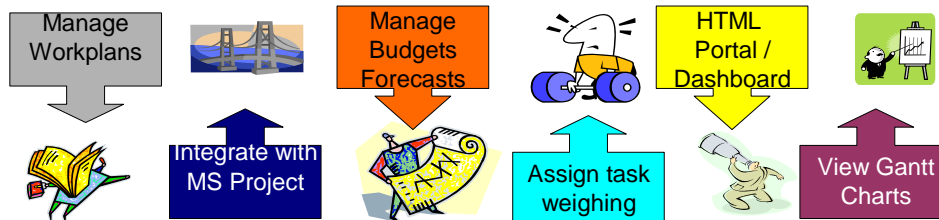
Oracle Project Billing...



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

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Oracle Project Management...

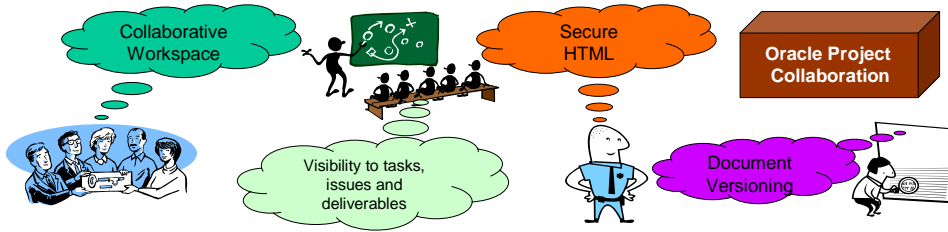


- Create, manage and version workplans
- Track progress against plan
- Integrate with MS Project
- Create budgets / forecasts to completion
- Provide real time project overview via HTML
- Manage issues at a project or task level
- View Gantt charts
- Create work plan dependencies
- Manage change orders

Oracle Project Management

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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

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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

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Oracle Project Intelligence...



Operation and
Financial Project
Metrics



Real time
On-line reporting

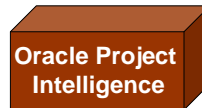


Prepackaged
Reports



Dashboard
And KPI
tools

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



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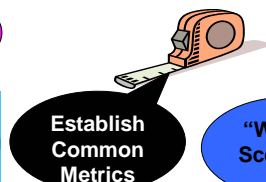
Oracle Project Portfolio Planning...



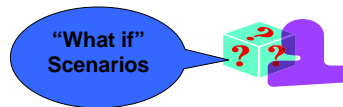
Score and
Rank
Projects



Evaluate &
Analyze
Projects



Establish
Common
Metrics



"What if"
Scenarios



- 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

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Forms versus HTML

The Oracle Projects suite is currently leveraging two end user technologies: Professional Forms and HTML. Oracle Corporation is currently in the process of migrating the majority of its applications from Professional Forms to HTML. The Oracle Projects suite is an early adopter of HTML functionality. With the introduction of Family Pack's J, K, L and M, significant portions of PA functionality are now in HTML.



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:

The screenshot displays two parts of the Oracle Project creation interface. On the left is a tree view showing the project structure with fields like Project Number, Project Name, Project Description, Customer Name, POC Master Project, Product Line, Revenue Type, Classification, Customer Group, Country, and State. On the right is a table listing the fields to be populated:

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"/>

Buttons for 'OK' and 'Cancel' are visible at the bottom of the table.

Function and Menu Security

Functions are the basic building blocks of security in the Oracle Projects suite.

Function and Menu Security

Function Security

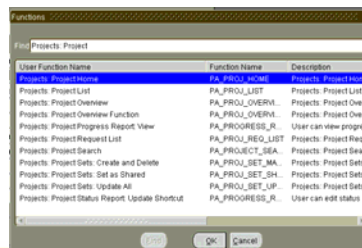
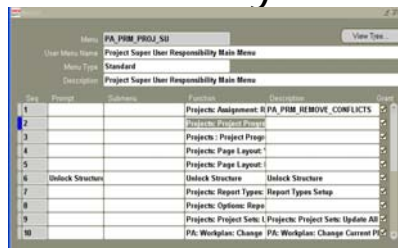
- Function security controls user access to Oracle Projects functions
- Functions are assigned to Menus
 - Thus providing access to specific functionality in PA

Menu Security

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

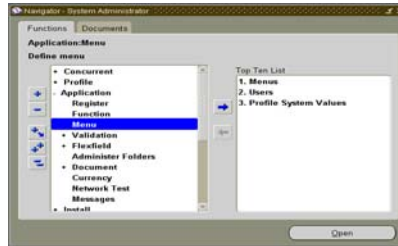
Function and Menu Security

- 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...



Function and Menu Security

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



Seq	Prompt	Submenu	Function	Description
1	Projects	Project: Subfunctions	Projects	Enter and maintain projects
2	Budgets	Budget: Subfunctions	Budgets	Enter and baseline budgets
3	Expenses	PA_SIS_EXPEND_GIB		Enter and import expenditures
4	Allocations	PA_SIS_ALLOCATIONS		Define and release allocations
5	Capitalization	PA_SIS_CAPITAL_GIB		
6	Project Status	Project Status Inquiry		Inquire on project status
7	Project Admin	PA_SIS_MAINT_PROJECT		
8	Setup	PA_SIS_SETUP_GIB (PC)		Setup project accounting options
9	Other	END_OTHER.LB		View concurrent request and set
10	Lookup	@Define Lookups		

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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

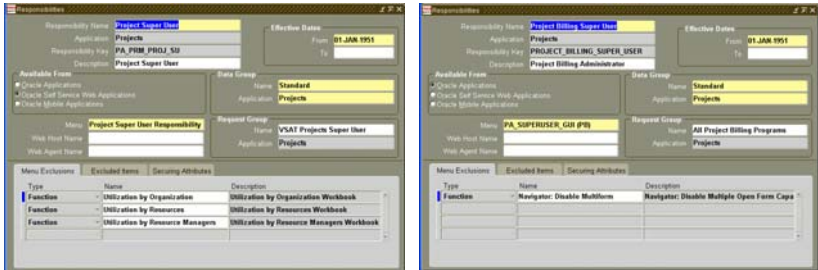
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Responsibilities

All Oracle applications utilize the concept of responsibilities. The Oracle Projects suite is no different...

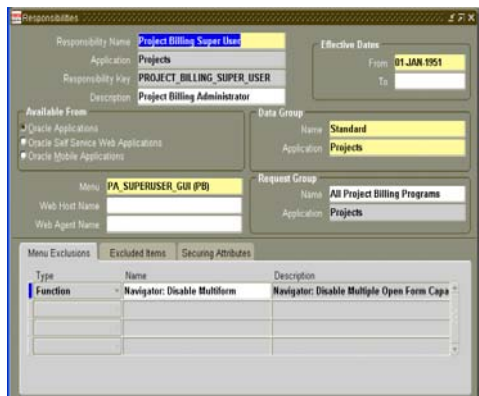
Responsibility Based Security...

- 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



Responsibility Based Security...

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



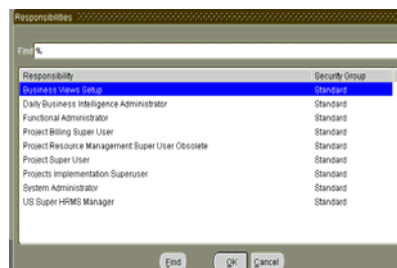
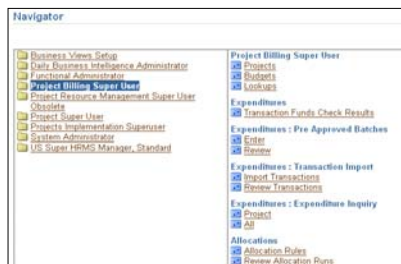
Responsibility Based Security...

- 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)

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Responsibility Based Security...

- HTML versus Forms responsibilities...



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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

There are three primary PA related profile options that control broad access to project and resource visibility.

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			

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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**

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Project Access Control

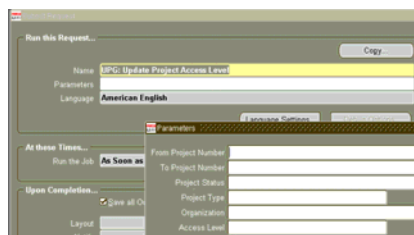
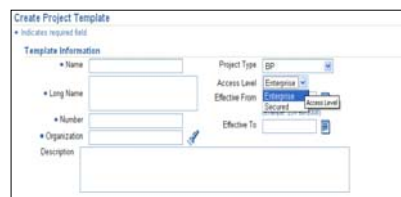
Project Access Control enables a user to define a project as “Enterprise” or Secured.

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



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

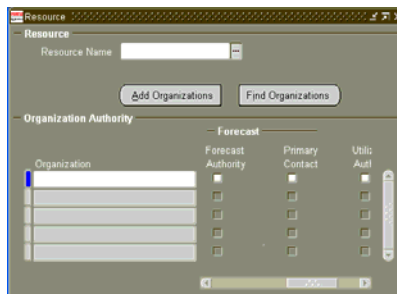
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Organizational Security

Oracle Projects also provides the ability to grant access to projects based on organizational authority.

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



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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

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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

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Role Based Security

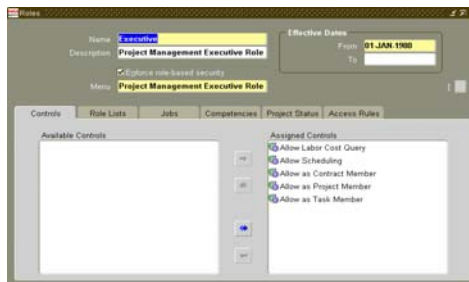
Role Based Security is one of the most robust aspects of security in the Projects Suite.

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...

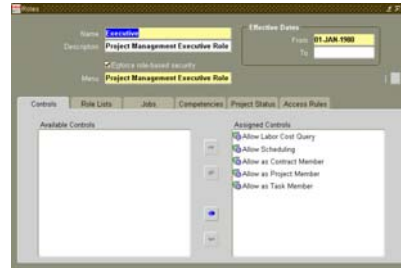
- Role Based Security assigns menus to roles
 - Menus with roles are considered secured roles
 - Unsecured roles use the Responsibility to determine project access
- Menus are build from:
 - Functions
 - Sub-menus
 - Etc...



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

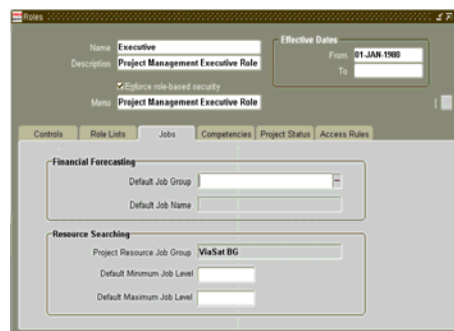


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Role Based Security...

- Other features associated with Role Based Security include:

- Role List
- Jobs
- Competencies
- Project Status
- Access Rules



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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

If the standard PA security features do not meet your needs, Oracle has provided the PA Security Extension. This extension provides the ability to extend the existing security features.

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

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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

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Personalizations

Oracle Projects also provides the ability to personalize specific forms. This feature can then be secured to a specific responsibility, site or organization.

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	User Shown	Personalizable	Personalize	Reorder	Create Item	Update Item	Delete Item	Seeded User Views	Show Complete
Page Layout: Time Entry	Yes	Yes							
Raw Test: <html><div style="color:#000000;font-size:10px;text-align:center">ViaSat	Yes	Yes							
Contingent Worker Invoice	Yes	Yes							
Page Button Bar: Timecard Activi...	Yes	Yes							

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Personalizations...

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

Personalization Properties

Clear Personalization Choose Levels Displayed

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

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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

Please take the following configuration considerations into account when designing and implementing security within the Oracle Projects suite.

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

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Cronin Business Solutions Contact Information

Where to find more information

- Timothy Cronin, President

www.CroninINC.com
tcronin@CroninINC.com
954.243.3101

- Experts in the Oracle Projects Suite



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