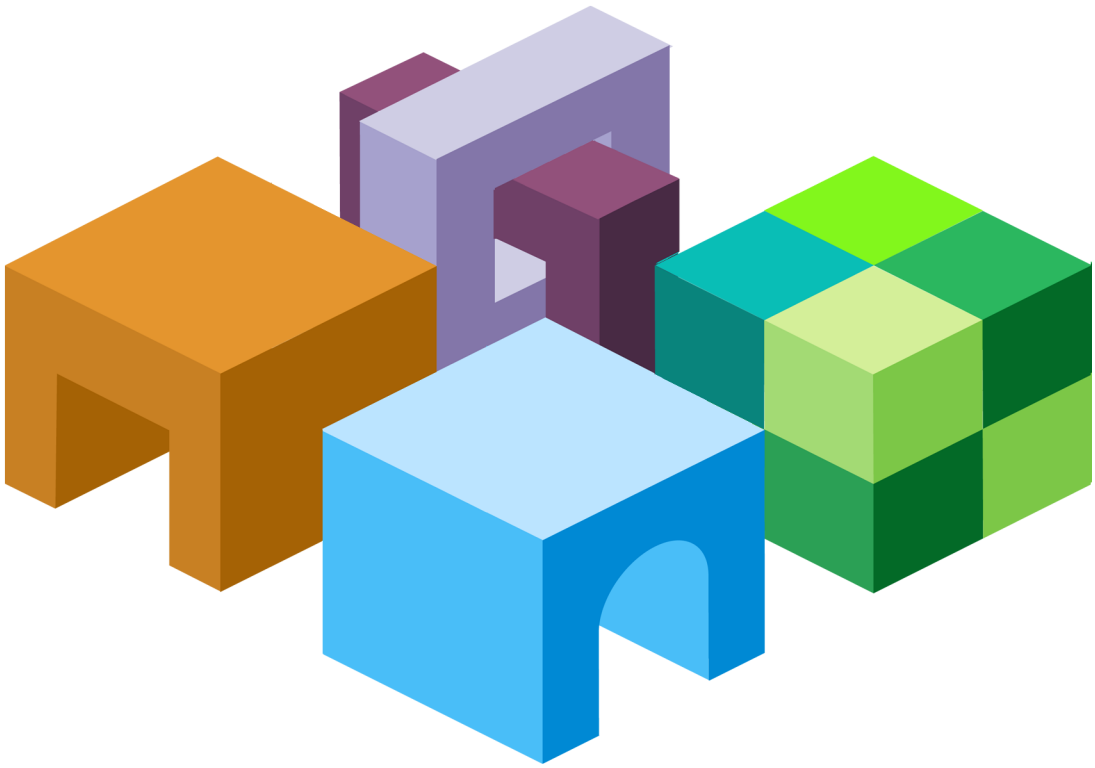

ORACLE® HYPERION ENTERPRISE PERFORMANCE MANAGEMENT SYSTEM

RELEASE 11.1.1.X

PROVISIONING ORACLE ESSBASE AND ORACLE HYPERION PLANNING, FUSION EDITION

ORACLE
ENTERPRISE PERFORMANCE MANAGEMENT SYSTEM

EPM System Provisioning Oracle Essbase and Oracle Hyperion Planning, Fusion Edition, 11.1.1.x

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1 Overview

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About This Document

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Overview

This white paper provides a roadmap for creating Oracle Hyperion Enterprise Performance Management System resources and granting access to them by assigning security roles to users and groups. It presents information on creating and provisioning EPM System artifacts in a newly deployed EPM System environment.

Audience

This document is targeted at implementation specialists who need to establish the security environment for EPM System products by provisioning users and groups with EPM System roles.

Assumptions

- The user who performs the provisioning steps is familiar with EPM System applications and their artifacts.
- All EPM System components are in the state they have been after being configured and deployed. No provisioning-related activities have taken place.
- This document will be used with other resources, especially the Online Help, to complete the provisioning tasks contained in this document.

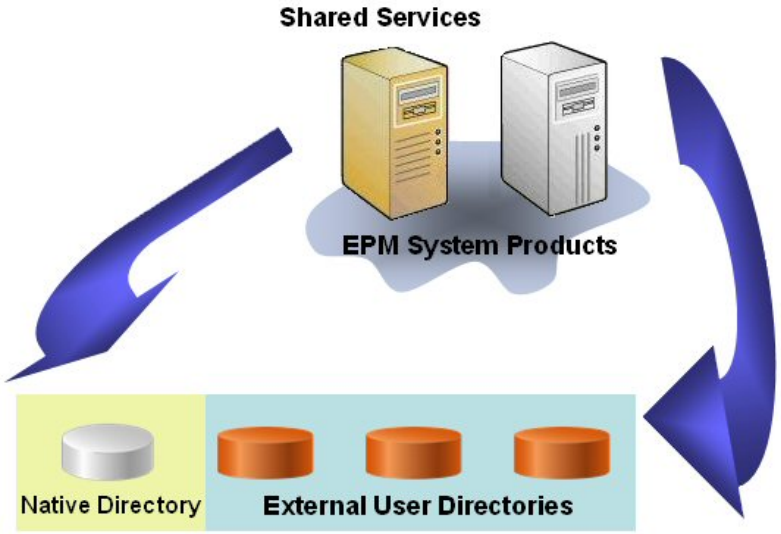
Provisioning Overview

EPM System application security determines user access to products using the concept of roles, permissions that determine user access to product functions. Some EPM System products enforce object-level ACLs to further refine user access to their artifacts.

Each EPM System product provides several default roles tailored to various business needs. Predefined roles from each EPM System application registered with Oracle's Hyperion® Shared Services are available from Oracle's Hyperion® Shared Services Console. These roles are used for provisioning. You may also create additional roles that aggregate the default roles to suit specific requirements. The process of granting EPM System roles to users and groups is called *provisioning*.

Native Directory and configured user directories are sources for user and group information for the provisioning (authorization) process. You can browse and provision users and groups from all configured user directories from Shared Services Console. You can also use application-specific aggregated roles created in Native Directory in the provisioning process.

This illustration depicts an overview of the authorization process:



1. After a user is authenticated, the EPM System product queries user directories to determine the user's groups.
2. The EPM System product uses group and user information to retrieve the user's provisioning data from Shared Services. The product uses this data to determine which resources a user can access.

   Product-specific provisioning tasks, such as setting product-specific access control, are completed from each product. This data is combined with provisioning data to determine the security.

Role-based provisioning of EPM System products uses these concepts.

Roles

A role is a construct (similar to an access control list) that defines the access permissions granted to users and groups to perform functions on EPM System resources. It is a combination of resource or resource types (what users can access; for example, a report) and actions that users can perform on the resource (for example, view and edit).

Access to EPM System application resources is restricted; users can access them only after a role that provides access is assigned to the user or to the group to which the user belongs. Access restrictions based on roles enable administrators to control and manage application access.

Global Roles

Global roles, Shared Services roles that span multiple products, enable users to perform certain tasks within the Shared Services Console. See Appendix A, "Shared Services Roles" for a complete list of Shared Services global roles.

Predefined Roles

Predefined roles are built-in roles in EPM System products. You cannot delete these roles from the product. Predefined roles are registered with Shared Services during the application registration process.

Aggregated Roles

Aggregated roles, also known as custom roles, aggregate multiple product roles within an EPM System product. An aggregated role comprises multiple roles, including other aggregated roles. For example, a Shared Services Administrator or Provisioning Manager can create a role for Oracle Hyperion Planning, Fusion Edition that combines the Planner and View User roles into an aggregated role. Aggregating roles can simplify the administration of products that include several granular roles. Global Shared Services roles can be included in aggregated roles. You cannot create an aggregated role that spans products.

User Directories and the Provisioning Process

EPM System products are supported on a large number of user and identity management systems, which are collectively referred to as user directories. These include Lightweight Directory Access Protocol (LDAP) enabled user directories such as Sun Java System Directory Server (formerly SunONE Directory Server) and Microsoft Active Directory, SAP Provider, and custom-built user directories that support LDAP version 3. User directories containing EPM System product user information must be configured on Shared Services to support the authorization processes, which is referred to as provisioning.

Generally, EPM System products use Native Directory and external user directories in the provisioning process. See *Oracle Hyperion Enterprise Performance Management System Installation Start Here* for a complete list of supported user directories.

Users and groups from all configured user directories are visible from Shared Services Console. Users and groups can be provisioned with EPM System roles. Because of the administrative overhead involved, Oracle does not recommend the provisioning of individual users.

External User Directories

EPM System products require a user directory account for each user who accesses the products. These users may be assigned to groups to facilitate provisioning. Information about the user and the user's groups is used to provide role-based access to EPM System products and data.

See *Oracle Hyperion Enterprise Performance Management System Security Administration Guide* for detailed information on configuring external user directories.

Native Directory

By default, Oracle installs and configures OpenLDAP as the Native Directory to support EPM System products. You may configure Oracle Internet Directory as the Native Directory. Native Directory is used in two ways:

- As the central storage for all Oracle provisioning information, it stores the relationships among users, groups, and EPM System application roles
- To maintain and manage the default Shared Services user accounts required by Oracle products

Native Directory is accessed and managed using Shared Services Console. Refer to *Oracle Hyperion Enterprise Performance Management System Security Administration Guide* for Native Directory administrative procedures.

Shared Services and the Provisioning Process

Shared Services Console is the central interface that supports all provisioning activities. To facilitate the provisioning process, users and groups from all configured user directories and product roles from registered EPM System servers and applications are made visible from the Shared Services Console. Shared Services Console also provides menu options to open the application interfaces that can be used to define access control on application artifacts.

In EPM System deployments, users generally access Shared Services Console from Oracle Enterprise Performance Management Workspace, Fusion Edition. Shared Services Console can also accessed by connecting to the Shared Services URL.

Accessing Shared Services from EPM Workspace

During the provisioning process, you can access Shared Services Console using a menu option in EPM Workspace.

The process of accessing Shared Services Console from EPM Workspace uses the single sign-on capabilities of EPM System to bypass the Shared Services login screen. The Shared Services roles

assigned to the current EPM Workspace user determine the resources available to the user in Shared Services Console.

➤ To access Shared Services Console from EPM Workspace:

1 From EPM Workspace, select **Navigate**.

2 Select **Administer**, and then **Shared Services Console**.

Accessing Shared Services Console from a Browser

Make sure that pop-up blockers are turned off.

➤ To launch Shared Services Console:

1 Using a browser, access the following URL:

`http://server_name:port_number/interop`

In the URL, *server_name* indicates the name of the computer where the application server that hosts Shared Services is running, and *port_number* indicates the server port that Shared Services is using; for example, `http://myserver:28080/interop`.

Note:

Ensure that you use `https` as the protocol, instead of `http`, and the secure port number, if you are accessing EPM System products in secure environments. For example, use a URL such as: `https://myserver:28082/interop`.

2 On the Logon screen, enter your user name and password.

3 Click **Log On**.

Searching for Users, Groups, Roles, and Delegated Lists

Shared Services Console enables searching for users and groups from configured user directories and for application roles registered with Native Directory.

When searching for users, the search parameters that you can specify depend on the type of user directory you select. For example, in Native Directory, you can search for all users, active users, or inactive users.

Search boxes displayed on the Browse tab reflect the search context based on the selection in the View pane.

➤ To search for users, groups, roles, or delegated lists:

1 In the View pane, expand **User Directories**.

2 From the user directory that you want to search, select one of the following:

- Users
- Groups

- **Roles**
- **Delegated List**

Note:

Roles and Delegated List options are available only in Native Directory searches.

Available search fields appear in the Browse tab.

3 **To search for users:**

a. In **User Property**, select a user property that you want to search.

The user properties that you can select depend on the type of user directory you selected. For example, if you selected an LDAP-based user directory, you can search user name, first name, last name, description, and e-mail address. In Native Directory, you can search for all users, active users, or inactive users, an option that is not available while searching for users in other user directories.

Searchable user properties:

- **LDAP-based user directories**: User name, first name, last name, description, and e-mail address
- **NTLM**: User name, first name, and last name
- **SAP and Database providers**: User name

b. **Optional**: In **User Filter**, specify a filter for identifying specific users. Use an asterisk (*) as the wildcard in pattern searches.

c. **Optional**: In **In Group**, specify the groups (in Group1;Group2 format) where the search is to be performed. Use an asterisk (*) as the wildcard in pattern searches. To search multiple groups, use a semicolon to separate group names.

d. **Native Directory only:** From **View**, select a search context **All**, **Active**, or **InActive**.

e. Click **Search**.

4 **To search for groups:**

a. In **Group Property**, select a property that you want to search. If this property is unspecified in the user directory, the search does not retrieve any records.

Note:

Shared Services considers Oracle, SQL Server, and SAP roles equivalent to groups in user directories. For example, an Oracle or SQL Server database role is treated similarly to a user directory group. Oracle roles can contain other roles, creating a hierarchy of roles. Shared Services does not display the relationships between database roles in the search results but honors them during provisioning. SQL Server roles cannot be nested. Shared Services does not display groups if you select a DB2 database provider because DB2 does not support roles.

b. In **Group Filter**, type a search filter. Use an asterisk (*) as the wildcard in pattern searches.

c. Click **Search.**

5 **To search for roles:**

Role search is supported only for Native Directory.

a. In **Role Property**, select the property that you want to search. If this property is unspecified in Native Directory, the search does not retrieve any records.

b. In **Role Filter**, enter a search filter. Use an asterisk (*) as the wildcard in pattern searches.

6 **Click Search.**

7 **To search for delegated lists:**

a. In **List Name**, type a search string. Use an asterisk (*) as the wildcard in pattern searches.

b. Click **Search.**

Before Starting the Provisioning Process

Before starting the provisioning process, ensure that the following activities are complete.

- Plan how to provision EPM System products.
  - Understand the available roles.
  - Understand available artifact-level access permissions. Most EPM System products enforce artifact-level access rights to restrict access to product artifacts. For example, Account dimension is a Planning, artifact for which access rights can be set.
  - Configure the external user directories that contain accounts for EPM System users and groups. See the *Oracle Hyperion Enterprise Performance Management System Security Administration Guide*.
  - Identify the users and groups to provision. These users and groups can belong to Native Directory or to an external user directory.
- Determine the provisioning mode: centralized (default) or delegated administration mode. The scope of the roles assigned to delegated administrators are limited to the delegated lists assigned to them. For example, if user *Admin1* is assigned the Essbase Provisioning Manager role for *DelegatedList1*, *Admin1* can provision only the users from *DelegatedList1*. See *Oracle Hyperion Enterprise Performance Management System Security Administration Guide* for information on delegated administration mode.

2 Provisioning Essbase

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Essbase Security Model

Oracle Essbase enforces two levels of roles: Essbase Server roles and Essbase application roles. These roles are granted and maintained through Shared Services Console.

In addition to roles, Essbase enforces access control (for example, read and write) on artifacts such as dimension members, filters, and calculation scripts. Filters are also security constructs that limit access.

Provisioning information on Essbase application roles is stored in the Shared Services repository. Access control information on Essbase artifacts is stored in `essbase.sec`, the Essbase security file, which is stored on the same server as Essbase.

Prerequisites

- "Shared Services" on page 13
- "Essbase Server" on page 14
- "Administration Services" on page 14

Shared Services

- Shared Services is running.
- **Optional:** The external user directories that store user and group information for Essbase are configured in Shared Services. See "Configuring User Directories" in the *Oracle Hyperion Enterprise Performance Management System Security Administration Guide*.

Essbase Server

- Essbase is deployed in Shared Services mode (this is the default deployment option). See the *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide*.

  If Essbase is not deployed in Shared Services mode, see *Oracle Essbase Administration Services Online Help* for instructions on how to convert a stand-alone Essbase server to Shared Services mode.

- Essbase Server is running. See the *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide*.

Administration Services

- Administration Services is running. See the *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide*.

  The *admin* user of Administration Services is automatically externalized to Shared Services if Essbase is deployed in Shared Services mode using the Oracle's Hyperion Enterprise Performance Management System Configurator.

  If you convert a stand-alone Essbase instance to Shared Services mode, you must externalize the *admin* user from Administration Services. See *Administration Services Online Help* for instructions.

Accessing EPM System Products

- "Administration Services" on page 14
- "Accessing Shared Services from Administration Services Console" on page 15

Administration Services

➤ To access Administration Services Console:

1 **Perform an action:**

- **From Windows:** Select **Start**, then **All Programs**, then **Oracle EPM System**, then **Essbase**, then **Administration Services**, and then **Start Administration Services Console**.
- **Using a Web Browser:**

  Note:

  Additional configuration steps must be completed to access the Administration Services Console using a Web browser. See the *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide* for assistance.

a. Using a browser, access the following URL:

   `http://server_name:port_number/easconsole/console.html`

   In the URL, *server_name* indicates the name of the computer where the Administration Services Console is installed, and *port_number* indicates the port that Administration Services is using; for example, `http://myserver:10080/easconsole/console.html`.

   Note:

   Ensure that you use `https` as the protocol (not `http`) and the secure port number, if you are accessing Administration Services Console in secure environments. For example, use a URL such as: `https://myserver:10082/easconsole/console.html`.

b. Select a locale; for example, `UNITED STATES`.

c. Click **Launch**.

2 **On the Logon screen, enter your user name and password.**

3 **Click OK.**

Accessing Shared Services from Administration Services Console

During the provisioning process, you can access Shared Services Console from the Administration Services Console (see below) or using Shared Services URL. See "Accessing Shared Services Console from a Browser" on page 9.

The process of accessing Shared Services from Administration Services Console uses the single sign-on capabilities of EPM System to bypass the Shared Services login screen. The Shared Services roles assigned to the current Administration Services user determine the resources available to the user in Shared Services Console.

➤ To access the Shared Services Console from Administration Services:

1 **In Enterprise View, expand Essbase Servers.**

2 **Expand the node representing your Essbase Server.**

3 **Right-click Security and select Manage users and groups.**

Shared Services Console opens.

Provisioning Process

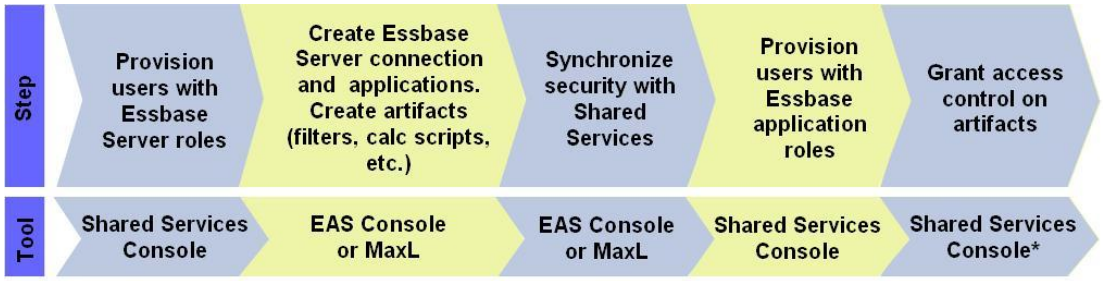
Provisioning users and groups to work with Essbase applications involves the following steps:

- "Provisioning Users and Groups with Essbase Server Roles" on page 16
- "Creating Essbase Server Connection" on page 17

- "Synchronize Essbase Security with Shared Services Security" on page 18
- "Creating Essbase Applications and Artifacts" on page 19
  - "Creating Security Filters" on page 20
  - "Creating Calculation Scripts" on page 21
- "Provisioning Users with Essbase Application Roles" on page 21
- "Defining Access Controls" on page 22

Provisioning Process Overview

The steps involved in provisioning Essbase are depicted in the following illustration.



* Accesses Essbase Application

Provisioning Users and Groups with Essbase Server Roles

All Shared Services users can log in to Administration Services Console. The activities that users can perform in Administration Services Console, and by extension on the Essbase server, are defined by the Essbase Server role assignments.

For example, the Create/Delete Application role allows users to create or delete Essbase applications from Administration Services Console. See Table 1 for information on Essbase server roles and the embedded access permissions.

If Essbase is deployed in Shared Services mode, Shared Services *admin* user account is used initially to administer Essbase Server and applications. Other users who are provisioned with Essbase Server and application roles can work with Essbase applications only after Essbase security is synchronized with Shared Services security. See "Synchronize Essbase Security with Shared Services Security" on page 18.

➤ To provision users with Essbase server roles:

1. Log in to Shared Services Console as *admin*. See "Accessing Shared Services Console from a Browser" on page 9.
2. From a configured user directory, find the user or group to provision. See "Searching for Users, Groups, Roles, and Delegated Lists" on page 9.
3. Provision the user or group with an Essbase Server role. See Table 1 for information on Essbase server roles and the embedded access permissions.

a. Right-click the user or group and select **Provision**.

   The Provisioning tab is displayed.

b. **Optional:** Select a view.

   Roles can be displayed in a hierarchy (tree) or a list. You must drill down the hierarchy to display available roles. The list view lists available roles but does not show their hierarchy.

c. Expand the node that represents the Essbase Server; for example, `Essbase:myServer:1`.

d. Select one or more Essbase Server roles (see Table 1), and click **Add**.

   The selected roles are displayed in Selected Roles.

Table 1 Essbase Server Roles

Role	Description
Administrator	Full access to administer the server, applications, and databases. **Note:** The Provisioning Manager role is automatically assigned when you migrate Essbase Administrators; however, when you create an Essbase Administrator in Shared Services Console, you must manually assign the Provisioning Manager role.
Create/Delete Application*	Creates and deletes applications and databases within applications. Includes Application Manager and Database Manager permissions for the applications and databases created by this user.
Provisioning Manager	Assigns Essbase application to users and groups.
Server Access	Accesses any application or database that has a minimum access permission other than the default, which is *None*. **Note:** When assigning security at the Essbase application level, you must assign the user the Server Access role for the Essbase Server that contains the application (unless the user has another Essbase Server level role, for example, Create/Delete Application).

*The *Create Essbase Application* Shared Services role is not required to create Essbase applications.

e. Click **Save**.

   A dialog box, indicating that the provisioning process is successful, opens.

f. Click **OK**.

Creating Essbase Server Connection

Before you can perform any task from Administration Services Console, you must connect to an Essbase Server installation. Initially, `admin` is the only user who can create a server connection.

After `admin` creates an Essbase Server connection from the Administration Services Console, the Enterprise View displays a node that represents the Essbase Server connection. Nodes, such as Applications and Security, appear within the node that represents the Essbase Server connection.

By default, seven Essbase sample applications—ASOsamp, Demo, DMDemo, Sampeast, Sample, Sample_U, and Samppart—are registered with Shared Services. These applications are listed under the Application node.

Sample Essbase applications are owned by `admin`. They can be used to practice Essbase application provisioning. Essbase Server Administrators can manage sample applications from the Administration Services Console.

➤ To create an Essbase Server connection:

1. **Log in to Administration Services Console as `admin`.**
2. **Right-click Essbase Servers and select Add Essbase Server.**
3. **Enter required information. Click Help for assistance.**

Synchronize Essbase Security with Shared Services Security

Essbase Server maintains its own security file containing data about users who are provisioned to perform operations on the Essbase Server. Because this information is not automatically updated, you must synchronize Essbase security every time an Essbase Server user's provisioning data is changed from Shared Services.

If Essbase is deployed in Shared Services mode, Shared Services *admin* user account is the only account that can initially synchronize security. Other users who are provisioned with Essbase Server and application roles are recognized by Essbase only after the *admin* refreshes security after completing the provisioning process. For example, newly provisioned users are not recognized by the Essbase Server until synchronization is performed. Similarly, changes to provisioning assignments are recognized by the Essbase Server only after security is synchronized.

Note:

Only `admin` can synchronize security for the first time. Subsequently, users who are provisioned with Essbase Server Administrator role also can synchronize Essbase security with Shared Services security

Note:

Instead of performing the following procedure, you can execute the MaxL command `alter system resync sss` to synchronize Essbase security with Shared Services security. For information on running this MaxL command, see *Oracle Essbase Technical Reference*.

➤ To synchronize Essbase security with Shared Services security:

1. **Log in to Administration Services Console as `admin`.**
2. **In Enterprise View, expand Essbase Severs.**
3. **Expand the node representing your Essbase Server.**

4 Right-click **Security** and select **Refresh security from Shared Services**.

Note:

Users with Create/Delete Application or Server Access Essbase Server role can refresh their own security only.

5 Select **All Users** in the Refresh Security from Shared Services dialog box. Click **Help** for assistance.

6 Click **OK**.

7 Click **Yes** to close the message window.

8 Click **OK** in the confirmation window.

9 Verify that provisioned users are available in Essbase Server.

a. Expand the node that represents your Essbase Server.

b. Expand **Security**.

c. Perform an action:

- To list provisioned users, right-click **Users** and select **Display users table**.
- To list provisioned groups, right-click **Groups** and select **Display groups table**.

Creating Essbase Applications and Artifacts

Each Essbase server can support multiple applications, each with its own databases. Essbase Server users must be provisioned separately to each application and its database artifacts. See the *Oracle Essbase Administration Services Online Help* or *Oracle Essbase Technical Reference* for detailed information on creating applications and databases.

You must create filters and calculation scripts in the Essbase application database before artifact access controls can be imposed. Essbase uses filters to accommodate the security needs of specific parts of a database and to control security access to data values or cells by restricting access to database cells. Essbase Server stores filters in `essbase.sec`, the security file.

Calculation scripts are commands that define how a database is consolidated or aggregated. calculation scripts may also contain commands that specify allocation and other calculation rules separate from the consolidation process.

You can use the Administration Services Console or MaxL to create filters and calculation scripts. For information on creating and managing filters and calculation scripts, see the *Oracle Essbase Administration Services Online Help* or the *Oracle Essbase Technical Reference*.

➤ To create Essbase applications and artifacts:

1 Log in to Administration Services Console as `admin`.

Note:

Users provisioned with Essbase Server Administrator or Create/Delete Application role also can create Essbase applications. These users do not require a Shared Services role (for example,

Essbase Application Creator) to be able to create Essbase applications from Administration Services Console.

2 **Create an Essbase application.**

Note:

EPM System automatically assigns Provisioning Manager and Application Manager roles to the user who creates the Essbase application.

a. Under **Essbase Servers**, right-click **Applications**.

b. Select **Create application**, and then either **Using aggregate storage** or **Using block storage**.

c. Enter required information. Click **Help** for assistance.

3 **Add a database for the application.**

a. Right-click the application and then select **Create database**.

b. Enter the required information. Click **Help** for assistance.

4 **Add dimensions and members to the outline.**

a. Expand the node representing the application database.

b. Right-click **Outline**, and then select **Edit**.

The Outline Editor opens.

c. On the Outline tab, right-click **Outline** and select **Add child**.

d. Enter member name. Click **Help** for assistance.

e. Click **Verify** to validate the outline.

f. Click **Save**.

Creating Security Filters

Security filters control access to data values or cells in the Essbase database. Filters are the most granular form of Essbase security access. While creating a filter, you designate a number of restrictions on a database cell. Filter information is stored in the Essbase security file (`essbase.sec`) on the Essbase server.

Filters can be assigned to Essbase users and groups.

➤ To create a filter:

1 **Log in to Administration Services Console as `admin`, or as a user provisioned with the Essbase Administrator role. See** **"Administration Services" on page 14**.

2 **Under Essbase Servers, expand Applications.**

3 **Expand the node representing the Essbase application for which you want to define security filters.**

4 **Right-click the database for which you want to define security filters, select Create, and then Filters.**

The Filter Editor window opens.

5 Create the filter. Click **Help** to display *Administration Services Online Help*.

Creating Calculation Scripts

Calculation scripts specify how databases are calculated. They override the calculations defined by the database outline. You construct calculation scripts using the Calculation Script Editor.

Calculation scripts can be assigned to Essbase users and groups.

➤ To create a calculation script:

1 Log in to Administration Services Console as *admin* or as a user provisioned with Essbase Administrator role.

2 Under **Essbase Servers**, expand **Applications**.

3 Expand the node representing the Essbase application for which you want to define calculation scripts.

4 Select the database for which you want to define calculation scripts.

5 Select **File**, then **Editors**, and then **Calculation Script Editor**.

The Calculation Script Editor opens.

6 Create calculation script. Click **Help** for assistance.

Provisioning Users with Essbase Application Roles

Each Essbase server can have multiple Essbase applications, each with its own databases. Essbase server users must be provisioned separately to each application and its databases.

➤ To provision users with Essbase application roles:

1 Log in to Shared Services Console as Shared Services Administrator. See "Accessing EPM System Products" on page 14.

Note:

Users provisioned with Provisioning Manager role from an Essbase application can provision other users with roles from the application.

2 Find a user or group to provision.

See "Searching for Users, Groups, Roles, and Delegated Lists" on page 9.

3 Right-click the user or group, and select **Provision**.

4 **Optional:** Select a view.

Roles can be displayed in a hierarchy (tree) or a list. Drill down the hierarchy to display available roles. The list view lists available roles but does not show their hierarchy.

5 Expand the node that represents your Essbase Server; for example, `Essbase:myServer:1`.

6 Under the Essbase Server node, expand the node representing the Essbase application that you created in the preceding section.

7 **Select one or more Essbase application roles, and click Add. See Table 2 for a description of Essbase application roles and their embedded permissions.**

The selected roles are displayed in Selected Roles.

Table 2 Essbase Application Roles

Role	Description
Application Manager	Creates, deletes, and modifies databases and application settings within the assigned application. Includes Database Manager permissions for databases within the application. **Note:** The Provisioning Manager role is automatically assigned to you when you migrate Essbase Application Managers; however, when you create an Essbase Application Manager in Shared Services Console, you must manually assign to yourself the Provisioning Manager role.
Database Manager	Manages the databases, database artifacts, locks, and sessions within the assigned application.
Start/Stop Application	Starts and stops applications or databases.
Calc	Calculates, updates, and reads data values based on assigned scope, using any assigned calculations and filter.
Write	Updates and reads data values based on assigned scope, using any assigned filter.
Filter	Accesses specific data and metadata according to filter restrictions.
Read	Reads data values.

8 **Click Save.**

A status screen, indicating that the provisioning process is successful, opens.

9 **Click OK.**

10 **Optional: Repeat step 2–step 8 to provision other users with roles from this Essbase application.**

11 **Optional: Repeat step 6–step 9 to provision the selected user with roles from other Essbase applications belonging to this Essbase Server.**

12 **Synchronize Essbase server security with Shared Services. See "Synchronize Essbase Security with Shared Services Security" on page 18.**

Defining Access Controls

Essbase application roles grant wide-ranging access to the artifacts stored in the application's database. You can set limits to artifact access by defining access controls. Essbase artifacts include filters and calculation scripts.

Caution!

Ensure that Essbase Server security information is synchronized with Shared Services. See "Synchronize Essbase Security with Shared Services Security" on page 18.

➤ To grant access to Essbase artifacts:

1. Log in to Shared Services Console as Shared Services Administrator. See "Accessing EPM System Products" on page 14.
2. In the View Pane, expand **Application Groups**, and then expand the Essbase server node; for example, `Essbase:myServer:1`. Essbase Server names identify the machine that hosts the Essbase Server.
3. Right-click the Essbase application for which artifact access permissions are to be set, and then select **Assign Access Control**.

   The Application tab opens. By default, this tab lists all the users who have been provisioned with roles belonging to this Essbase application. You can list all users and groups, or only available groups.
4. Select the users and groups for which artifact access controls are to be set, and move them to the selected list.
5. Click **Next**.
6. Select the users who should receive access to artifacts.
7. From **Filter**, select the database security filter to which the users should be granted access.
8. From **Calc**, select the calculation script that the selected users can access.
9. Select the check mark next to **Calc**.
10. Repeat step 7–step 9 to assign access to more filters and calculation scripts.
11. Click **Save**.

3 Provisioning Planning

In This Chapter

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Planning Security Model

Planning enforces two types of roles: Planning global roles and Planning application roles. Planning global roles (Dimension Editor and Planning Application Creator) are used to provision users who create Planning applications using Oracle Hyperion EPM Architect, Fusion Edition. These are granted through the Shared Services Console. Planning application roles are also granted using Shared Services Console.

Planning artifacts such as Web forms and dimensions/members are maintained and defined from a Planning user interface. Security on these artifacts is defined from within the Planning application. Planning artifacts are stored in the Planning relational repository.

Planning Application Types

There are two types of Planning applications: Classic and Performance Management Architect.

Classic Planning applications are stand-alone applications that do not share dimensions and members with other Planning applications. Classic Planning applications are created using the Classic Application Wizard.

Planning applications created using Performance Management Architect are referred to as EPMA Planning applications throughout this document. EPMA Planning applications can share dimensions and members with each other.

Prerequisites

- "Shared Services" on page 26
- "Essbase Server" on page 26
- "Administration Services (Optional)" on page 26

- "EPM Workspace" on page 26
- "Performance Management Architect (Optional)" on page 27
- "Relational Database" on page 27

Shared Services

- Shared Services is running.
- **Optional:** External user directories that store user and group information for Planning are configured in Shared Services. See "Configuring User Directories" in the *Oracle Hyperion Enterprise Performance Management System Security Administration Guide*.

Essbase Server

- Essbase is deployed in Shared Services mode (this is the default). See the *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide*.

  If Essbase is not deployed in Shared Services mode, see *Administration Services Online Help* for instructions to convert a stand-alone Essbase Server to Shared Services mode.
- Essbase Server is running.

  See the *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide*.

Administration Services (Optional)

Administration Services, the administration console for Essbase, is required only if you want to verify the creation of Planning applications, databases, and members in Essbase.

- Administration Services is running.

  See the *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide*.

EPM Workspace

Classic and EPMA Planning applications are created and accessed through EPM Workspace.

- EPM Workspace Agent Services is running.
- EPM Workspace is running.

  See the *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide*.

Performance Management Architect (Optional)

Performance Management Architect is required to create EPMA Planning applications that can share dimensions across applications. Performance Management Architect components such as Application Library and Dimension Library are accessed through EPM Workspace.

- Performance Management Architect Process Manager is running. When you start Performance Management Architect Process Manager, .NET JNI Bridge, Engine Manager, Event Manager, and Job Manager are automatically started.
- Performance Management Architect web application is running.

  See *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide*.

Relational Database

A relational database account with sufficient privileges must be available to store Planning application data.

See the *Oracle Hyperion Enterprise Performance Management System Installation Start Here* for a list of supported database platforms and required privileges.

Accessing EPM System Products

You will need to access EPM System Products such as Shared Services and EPM Workspace during the provisioning process.

Shared Services

During the provisioning process, you can access Shared Services Console using a menu option in EPM Workspace (preferred) or by accessing the Shared Services URL from a browser.

The process of accessing Shared Services Console from EPM Workspace uses the single sign-on capabilities of EPM System to bypass the Shared Services login screen. The Shared Services roles assigned to the current EPM Workspace user determines the resources available to the user in Shared Services Console.

- "Accessing Shared Services from EPM Workspace" on page 8
- "Accessing Shared Services Console from a Browser" on page 9

EPM Workspace

EPM Workspace is a portal from which you can access EPM System Products such as Planning and Performance Management Architect. A logon screen is displayed when you access the EPM Workspace using a URL.

➤ To access Shared Services Console from a URL:

1 **Using a browser, access the following URL:**

`http://server_name:port_number/interop`

In the URL, *server_name* indicates the name of the computer where the application server that hosts Shared Services is running, and *port_number* indicates the server port that Shared Services is using; for example, `http://myserver:28080/interop`.

Note:

Ensure that you use `https` as the protocol (not `http`) and the secure port number, if you are accessing EPM System products in secure environments. For example, use a URL such as: `https://myserver:28082/interop`.

2 **On the Logon screen, enter a user name and password.**

3 Click **Log On**.

Planning Provisioning Process

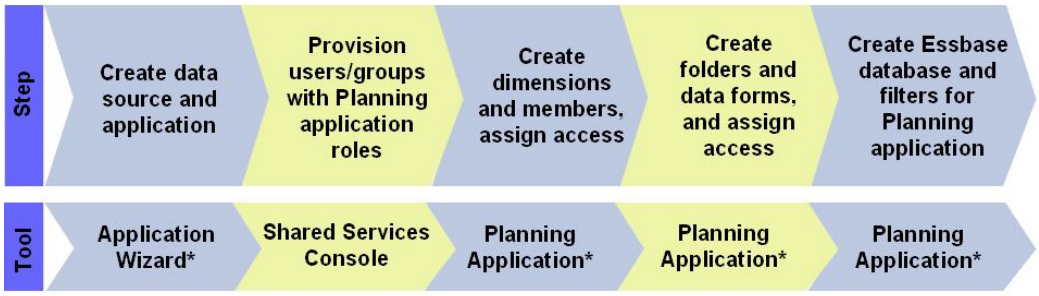
Provisioning users and groups to work with Planning applications is a multi-step process.

Process Overview

- "Classic Planning" on page 28
- "EPMA Planning" on page 28

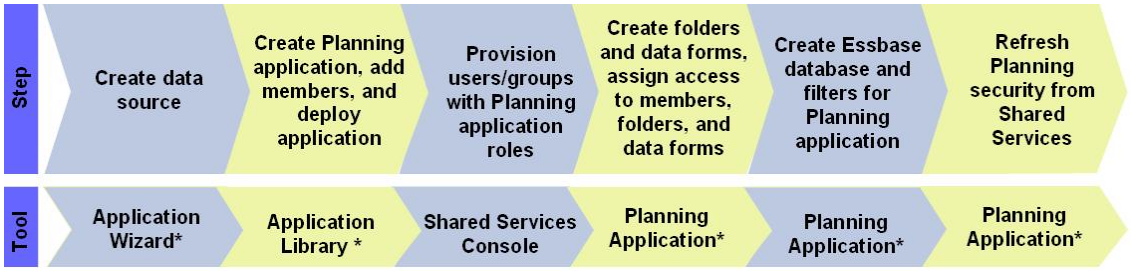
Classic Planning

The steps involved in provisioning Classic Planning applications are depicted in the following illustration.



EPMA Planning

The steps involved in provisioning EPMA Planning applications are depicted in the following illustration.



* Accessed through EPM Workspace

Creating Planning Data Source

Each Planning application requires a unique data source, which comprises connection information for a Planning application database and an Essbase Server. Because a Planning application database can store information from only one Planning application, each data source requires a unique database. Many data sources can use an Essbase Server.

Note:

The data sources you create using this process can be used for classic and EPMA Planning applications.

➤ To create a data source:

1. From EPM Workspace, select **Navigate**, then **Administer**, then **Classic Application Administration**, and then **Planning Administration**.
2. Select **Manage Data Source**.
3. Select **Create Data Source**.
4. In **Data Source Name**, enter a name.
5. From **Select Database Platform**, select the database type for the Planning application database.
6. Enter connection information for Application Database and Essbase Server settings. Ensure that you enter information for an Essbase Server administrator (or Shared Services Administrator) in Essbase Server settings.

   Click Help for assistance.
7. Click **Validate** to validate the Application Database Connection and the Essbase Server Connection.
8. Select **Finish** to create the data source.

Creating Classic Planning Applications with Dimensions and Members

A Planning installation can support multiple Planning applications. The application that you create is automatically registered with Shared Services.

Creating a classic Planning application with dimensions and members involves the following:

- "Creating Classic Planning Application" on page 30
- "Accessing Planning Applications" on page 31
- "Creating Dimensions and Members: Classic Planning Applications" on page 31

Creating Classic Planning Application

➤ To create an application:

1 From EPM Workspace, select **Navigate**, then **Administer**, then **Classic Application Administration**, and then **Planning Administration**.

2 Select **Create Application**

3 In **Data Source**, select the data source to use for the application.

4 In **Application**, enter an application name (maximum eight characters). Application names should not contain special characters (for example, a space or an asterisk).

5 In **Shared Services Project**, select an application group to which the Planning application should be added.

You can create a custom application group in Shared Services if needed. See "Creating Application Groups" in the *Oracle Hyperion Enterprise Performance Management System Security Administration Guide*.

6 In **Instance**, select a Planning instance to support this application. The default instance is created when you deploy Planning using the EPM System Configurator.

To add a Planning instance to create a Planning cluster, use the Oracle's Hyperion Enterprise Performance Management System Configurator. See the *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide*.

7 **Optional:** Select **Sample Application** to use sample Planning application settings.

If you choose this option, you cannot select information on Calendar, Currencies, and Plan Types tabs.

8 **Optional:** Enter or select information on the **Calendar**, **Currencies**, and **Plan Types** tabs. Click **Next** after entering information on a tab. Click **Help** for detailed information.

9 On the **Finish** tab, review the information that you selected. Click **Finish** to create the Classic Planning application.

Note:

The Planning application that you created is listed in the Essbase Server node of Administration Services. It is also listed in Shared Services Console under the node representing the application group that you selected in step 5.

Accessing Planning Applications

➤ To open your Planning application:

1 From EPM Workspace, select **Navigate**, then **Applications**, and then **Planning**.

2 Select the Planning application that you created. If you do not see the planning application, select **Navigate**, then **Applications**, and then **Refresh** to refresh the application list.

The Planning application opens.

Creating Dimensions and Members: Classic Planning Applications

When you create a Planning application, default dimensions are populated in the application database. At this stage, you can:

- Add custom dimensions to the application
- Add members to dimensions

➤ To add dimensions and dimension members:

1 Open the Planning application. See "Accessing Planning Applications" on page 31.

2 Select **Administration**, and then **Dimensions**.

3 **Optional**: Add a custom dimension.

a. From **Dimensions**, select **Add Dimension**.

The Add Dimension window opens.

b. Enter a dimension name and other required values. Click **Help** for information.

Note:

You must select the Apply Security check box if you plan to define security access for the custom dimension.

c. Click **Save**.

Custom dimensions that you create in Planning are not automatically written to the Essbase database. See "Working with Essbase Database" on page 44 for instructions.

4 Add dimension members.

All dimensions other than Currency, Period, and Year are secure dimensions. You can enforce security only on members (children) of secure dimensions.

a. In Dimensions list, select the dimension for which you want to define members.

b. Click **Add Child**.

The Add Member window opens.

c. Enter a member name and other required values. Click **Help** for information.

d. Click **Save**.

e. Repeat this step to create additional members (children and siblings).

5 **Update the Essbase database with custom dimensions and members data. See "Working with Essbase Database" on page 44 for instructions.**

Creating and Deploying EPMA Planning Applications

Note:

If you are using classic Planning, skip this section.

EPMA Planning applications are created from the Application Library.

Each EPMA Planning application requires a unique data source. A data source comprises connection information for a Planning application database and an Essbase Server. Because a Planning application database can store information from only one Planning application, each data source requires a unique database. Many data sources can point to an Essbase Server. See "Creating Planning Data Source" on page 29.

Note:

EPMA Planning application creation process allows you to create a data source before deploying your application. However, Oracle recommends that you create the data source as the first step in creating the application.

The applications that you deploy become a part of the Application Library. Planning applications are listed also in Shared Services Console and Administration Services Console.

➤ To create an application:

1 **Access EPM Workspace. See "EPM Workspace" on page 27.**

2 **Select Navigate, then Administer, and then Application Library.**

The Application Library, which is empty at this stage, opens.

3 **Select File, then New, and then Application.**

4 **In Name, enter an application name (maximum eight characters). Application names should not contain special characters (for example, a space or an asterisk).**

5 **In Type, select** `Planning`.

Additional fields are displayed on the screen.

Note:

You can create an empty application, into which you can drag dimensions from the Dimension Library. To create an empty application, select the Create Blank Application check box and click the Finish button.

6 **Optional:** Enter or select information in the **Plan Type** area.

a. To use multiple currencies, select **Use Multiple Currencies**.

b. To create an Oracle Hyperion Workforce Planning, Fusion Edition data cube in Essbase, select **Workforce**.

c. To create an Oracle Hyperion Capital Asset Planning, Fusion Edition data cube in Essbase, select **Capital Asset**.

7 In **Calendar** area, perform these actions:

a. Select **Create New Local Period Dimension** and enter a period name.

b. Select **Create New Local Year Dimension** and enter information in:

- **Year Name**
- **Fiscal Start Year**
- **Total Years**

8 Click **Next**.

The Dimension Selection (Application Settings) window opens.

9 Choose the dimensions for the application. You must create the required default dimensions—Entity, Version, Scenario, Account, Year, Period, and Alias—and custom dimensions, if needed, as local dimensions. The required dimensions are in bold type.

a. Click in the **Dimension** column, and select **Create New Dimension**.

The Add New Dimension window opens.

b. Enter a dimension name.

c. Click **OK**.

10 Click **Next** to seed the dimensions that you created.

Properties of the application are displayed.

Security access for custom dimensions can be defined only after you apply security to the dimension and its members.

To apply security to custom dimensions:

a. In the Application Settings tab, expand the node representing your application.

b. Select the custom dimension for which the apply security property is to be defined.

c. Select **Apply Security**.

11 Click **Validate** to validate the application. Correct any reported errors. You can find detailed validation information in the Library Job Console. To open the Library Job Console, select **Navigate**, then **Administer**, and then **Library Job Console**.

12 Click **Finish**.

The Dimension Library opens. From the Dimension Library, you can add members for your application dimensions. At this stage, an icon for the application is displayed in the Application Library.

13 Create dimension members. Dimension members are the highest level at which access control can be defined. To create dimension members:

Note:

Application dimensions can be protected by defining the users and groups that can access them. Access control can be defined for members of secure dimensions (default dimensions other than Currency, Period, and Year) from the Dimension Library.

a. Right-click the application dimension for which you want to define a member.

b. Select **Create Member**, and then **As Child**.

Note:

If you selected an existing dimension member, you can create a member as the child or sibling of the current member.

c. In the New Member dialog box, enter a name for the member.

d. Click **OK**.

14 **Optional:** Specify plan type performance settings. To specify plan type performance settings:

a. Right-click the application.

b. Select **Performance Settings**.

The Plan Type Performance Settings window opens.

c. Select a plan type (for example, Plan1, Plan2, or Plan3).

Plan dimensions and their settings are displayed.

d. To change the performance setting for a dimension, double-click in the **Density** column.

e. Select a setting (**Dense** or **Sparse**).

15 Deploy the application:

a. In Application Library, right-click your Planning application.

b. Select **Deploy**, and then **Application**.

Performance Management Architect validates the application. If no errors are found, the Deploy window opens.

c. Enter or select the required information. Click **Help** for assistance.

Note:

From the Deploy window, you should select the data source for the application. See "Creating Planning Data Source" on page 29 for instructions to create data sources using classic Planning. You can also create data source by clicking the Create Datasource button next to the Data Source drop-down list.

d. Click **Deploy**.

The deployment process takes some time to finish. Performance Management Architect displays a deployment job ID that can be used to track deployment progress and any reported errors.

Provisioning Users to Planning Application

Each Planning instance (deployment) can support multiple Planning applications. You must provision Planning users separately to each application.

Shared Services Administrators and Planning Provisioning Managers can provision Planning application users using Shared Services Console.

➤ To provision users to Planning applications:

1 **Access Shared Services Console as `admin` or as a user provisioned with the Provisioning Manager role of the Planning application that you want to provision. See:**

- "Accessing Shared Services from EPM Workspace" on page 8.
- "Accessing Shared Services Console from a Browser" on page 9.

2 **Provision users to Planning application:**

a. Find a user or group to provision.

See "Searching for Users, Groups, Roles, and Delegated Lists" on page 9.

b. Right-click the user or group, and select **Provision**.

The Provisioning tab is displayed.

c. **Optional:** Select a view.

Roles can be displayed in a hierarchy (tree) or a list. You must drill down the hierarchy to display available roles. The list view lists available roles but does not show their hierarchy.

d. In **Available Roles**, expand the application group (for example, Planning) that contains your Planning application.

e. Expand the node that represents your application.

f. Select one or more roles, and click **Add**.

The selected roles are displayed in Selected Roles list. See Table 3.

Table 3 Planning Application Roles

Role*	Description
Power Roles	
Administrator	Performs all application tasks except those reserved for the Application Owner and Mass Allocate roles. Creates and manages applications, manages access permissions, initiates the budget process, designates the e-mail server for notifications. Can use the Copy Data function.
Provisioning Manager	Provisions users to the Planning application.

Role*	Description
Mass Allocation	Accesses the Mass Allocate feature to spread data multidimensionally down a hierarchy, even to cells not visible in the data form and to which the user does not have access. Any user type can be assigned this role, but it should be assigned sparingly.
Analytic Services Write Access	For planners and interactive users: Grants users access to Planning data in Essbase equivalent to their Planning access permissions. Enables users having write access, to change Planning data directly in Essbase using another product such as Oracle Hyperion Financial Reporting, Fusion Edition or a third-party tool.
Planner Roles	
Planner	Enters and submits plans for approval and runs business rules and adapter processes. Uses reports that others have created, views and uses task lists, enables e-mail notification for themselves, and creates data using Oracle Hyperion Smart View for Office, Fusion Edition.
Interactive Roles	
Interactive User	Creates and maintains data forms, Smart View worksheets, business rules, task lists, Financial Reporting reports, and adapter processes. Manages the budget process. Can create Smart Slices in Smart View, use the Clear Cell Details function, and perform all Planner tasks. Interactive users are typically department heads and business unit managers.
View Roles	
View User	Views and analyzes data through Planning data forms and any data access tools for which they are licensed (for example, Oracle Hyperion Financial Reporting, Fusion Edition, Oracle's Hyperion® Web Analysis, and Smart View). Typical View users are executives who want to see business plans during and at the end of the budget process.

*Manage Models and Offline User roles are deprecated even though they are displayed as provisionable Planning application roles. The Cube Creator role is not used for provisioning Planning users; Essbase uses this role to determine who can create Smart Slice.

g. Click **Save**.

A dialog box, indicating that the provisioning process is successful, opens.

h. Click **OK**.

3 **Repeat the preceding step for each Planning application that you want to provision.**

Assigning Access for Dimension Members

Application dimensions can be protected by defining the users and groups that can access them. Access control can be defined for members of secure dimensions (default dimensions other than Currency, Period, and Year).

Only the custom dimensions that were created with the Apply Security option support the assigning of access control to members.

➤ To define access control:

1 **Access the Dimensions screen using either step a or step b:**

a. From a Planning application:

i. Access EPM Workspace. See "EPM Workspace" on page 27.

ii. Open the Planning application. See "Accessing Planning Applications" on page 31.

iii. Select **Administration**, and then **Dimensions**.

Note:

Classic Planning applications allow you to create members from this screen, but Performance Management Architect Planning applications do not. If you need to add dimensions or members to a Performance Management Architect Planning application, use the Dimension Library. You must validate and redeploy your Performance Management Architect Planning application if you change dimensions or members.

b. From Shared Services Console:

i. Access Shared Services Console as `admin` or as a user provisioned with the Provisioning Manager role of the Planning application that you want to provision. See:

- "Accessing Shared Services from EPM Workspace" on page 8.
- "Accessing Shared Services Console from a Browser" on page 9.

ii. In **View Pane**, expand **Application Groups**.

iii. Expand the application group (for example, Planning) that contains your Planning application.

iv. Right-click your application and select **Dimensions**.

v. Click **Yes** if you get a message about accessing information not under the control of this server.

2 **Select the secure dimension for which security is to be assigned.**

3 **Select Expand to display dimension members and their children.**

4 **Select a dimension member.**

5 **Select Assign Access.**

The Assign Access window opens.

6 **Select Add Access.**

Available Planning application users and groups are listed in Add Access window.

Note:

Only the users and groups provisioned to the current application are listed in the Add Access screen.

7 **Select the users or groups who should be granted access to the selected member.**

8 From **Type of Access**, select the access to grant on the member.

9 From the drop-down list, select access relationship. For example, select `Children` to assign access to the children of the selected member.

10 Select **Add**.

11 Select **Close** to return to the Assign Access window.

12 Repeat step 4—step 11 to assign access to additional members.

Working with Data Forms

Data forms are grids for entering data. You can create many data forms to meet users' needs.

Creating Data Form Folders

➤ To create data form folders:

1 Open Data Forms screen using either step a or step b:

a. From a Planning application:

i. Access EPM Workspace. See "EPM Workspace" on page 27.

ii. Open a Planning application. See "Accessing Planning Applications" on page 31.

iii. Select **Administration**, and then **Manage Data Forms**.

b. From Shared Services Console:

i. Access Shared Services Console as `admin` or as a user provisioned with the Provisioning Manager role of the Planning application that you want to provision. See:

- "Accessing Shared Services from EPM Workspace" on page 8.
- "Accessing Shared Services Console from a Browser" on page 9.

ii. In **View Pane**, expand **Application Groups**.

iii. Expand the application group (for example, Planning) that contains your Planning application.

iv. Right-click your application and select **Manage Task Forms**.

2 Click **Create** above the Data Form Folders List.

3 Enter a name for the folder.

Creating Data Forms

You can create simple or composite data forms. Composite data forms display several data forms simultaneously, including those associated with different plan types. Users can enter data and see results aggregated to an upper-level intersection, such as Total Revenue. Some tasks for creating composite data forms are the same as for regular data forms.

➤ To create data forms:

1 **Open Data Forms screen using either step a or step b:**

a. From a Planning application:

i. Access EPM Workspace. See "EPM Workspace" on page 27.

ii. Open a Planning application. See "Accessing Planning Applications" on page 31.

iii. Select **Administration**, and then **Manage Data Forms**.

b. From Shared Services Console:

i. Access Shared Services Console as `admin` or as a user provisioned with the Provisioning Manager role of the Planning application that you want to provision. See:

- "Accessing Shared Services from EPM Workspace" on page 8.
- "Accessing Shared Services Console from a Browser" on page 9.

ii. In **View Pane**, expand **Application Groups**.

iii. Expand the application group (for example, Planning) that contains your Planning application.

iv. Right-click your application and select **Manage Task Forms**.

2 **To create a data form, perform click a button above the Data Form List:**

- Click **Create** to create a simple data form.
- Click **Create Composite** to create a composite data form.

3 **Define options:**

- Data form properties
- Row and column layout
- Page and Point of View layout
- Precision; display; printing; and Oracle Hyperion Smart View for Office, Fusion Edition
- Display options
- Business rules

Click Help for detailed information.

Granting Access to Data Form Folders

Only planners, interactive users, and administrators can be granted access to folders.

➤ To grant access to data form folders:

1 **Open the Data Forms screen using step a or b:**

a. From a Planning application:

i. Access Oracle Enterprise Performance Management Workspace, Fusion Edition. See "EPM Workspace" on page 27.

ii. Open a Planning application. See "Accessing Planning Applications" on page 31.

iii. Select **Administration**, and then **Manage Data Forms**.

b. From Shared Services Console:

i. Access Shared Services Console as `admin` or as a user provisioned with the Provisioning Manager role of the Planning application that you want to provision. See:

- "Accessing Shared Services from EPM Workspace" on page 8.
- "Accessing Shared Services Console from a Browser" on page 9.

ii. In **View Pane**, expand **Application Groups**.

iii. Expand the application group (for example, Planning) that contains your Planning application.

iv. Right-click your application, and select **Manage Task Forms**.

2 **Select a folder.**

3 **Click Assign Access above the Data Forms Folders list.**

The Assign Access for *FOLDER_NAME* window opens.

4 **Select Add Access.**

5 **Select the users and groups that are to be granted access to the folder.**

Note:

Only the users and groups provisioned to the current application are listed in the Add Access screen.

6 **Select the type of access (Read or Write) to grant.**

7 **Select Add.**

8 **In the Add Access window, select Close.**

9 **In the Assign Access for *FOLDER_NAME* window, select Close.**

Granting Access to Data Forms

Planners can view or enter data only into data forms to which they have access (and can work only with members to which they have access). Administrators and interactive users have write access to all data forms for design modifications.

Only planners and interactive users can be granted access to data forms.

➤ To grant access to data forms:

1 **Open a Planning application. See "Accessing Planning Applications" on page 31.**

2 **Select Administration, and then Manage Data Forms.**

3 **Select data forms.**

4 **Click Assign Access above the Data Forms list.**

The Assign Access for *FORM_NAME* window opens.

5 Select **Add Access**.

6 Select the users and groups that are to be granted access to the folder.

Note:

Only the users and groups provisioned to the current application are listed in the Add Access screen.

7 Select the type of access (**Read** or **Write**) to grant.

8 Select **Add**.

Click Help for assistance.

9 In the Add Access window, select **Close**.

10 In the Assign Access for *FORM_NAME* window, select **Close**.

Working with Task Lists

Task lists guide users through the planning process by listing tasks, instructions, and due dates. Administrators and interactive users create and manage tasks and task lists.

Creating Task List Folders

➤ To create task list folders:

1 Open the Task List screen using step a or b:

a. From a Planning application:

i. Open a Planning application. See "Accessing Planning Applications" on page 31.

ii. Select **Administration** and then **Manage Task Lists**.

b. From Shared Services Console:

i. Access Shared Services Console as `admin` or as a user provisioned with the Provisioning Manager role of the Planning application that you want to provision. See:

- "Accessing Shared Services from EPM Workspace" on page 8.
- "Accessing Shared Services Console from a Browser" on page 9.

ii. In **View Pane**, expand **Application Groups**.

iii. Expand the application group (for example, Planning) that contains your Planning application.

iv. Right-click your application and select **Manage Task List**.

2 Click **Create** above the Task List Folders list.

3 Enter a name for the folder.

4 Click **OK**.

Creating Task Lists

Task lists help organize tasks. Administrators and interactive users create and manage tasks and task lists.

➤ To create task lists:

1 **Open Task List screen using a step:**

a. From a Planning application:

i. Open a Planning application. See "Accessing Planning Applications" on page 31.

ii. Select **Administration**, and then **Manage Task Lists**.

b. From Shared Services Console:

i. Access Shared Services Console as `admin` or as a user provisioned with the Provisioning Manager role of the Planning application that you want to provision. See:

- "Accessing Shared Services from EPM Workspace" on page 8.
- "Accessing Shared Services Console from a Browser" on page 9.

ii. In **View Pane**, expand **Application Groups**.

iii. Expand the application group (for example, Planning) that contains your Planning application.

iv. Right-click your application and select **Manage Task List**.

2 **From Task List Folders, select a folder in which to store the task list.**

3 **Click Create above Task List.**

4 **Enter a name for the task list, and click OK.**

Creating Tasks

➤ To create a task:

1 **Open the Task List screen by performing an action:**

a. From a Planning application:

i. Open a Planning application. See "Accessing Planning Applications" on page 31.

ii. Select **Administration**, and then **Manage Task Lists**.

b. From Shared Services Console:

i. Access Shared Services Console as `admin` or as a user provisioned with the Provisioning Manager role of the Planning application that you want to provision. See:

- "Accessing Shared Services from EPM Workspace" on page 8.

- "Accessing Shared Services Console from a Browser" on page 9.

ii. In **View Pane**, expand **Application Groups**.

iii. Expand the application group (for example, Planning) that contains your Planning application.

iv. Right-click your application and select **Manage Task List**.

2 From **Task List Folders**, select the folder containing the task list to which you want to add the task.

3 Select a task list.

4 Click **Edit**.

The Edit Task List window opens.

5 Click **Add Child**.

The Add Task window opens.

6 Create task by entering information. Click **Help** for assistance.

7 Click **Save**.

Granting Access to Task Lists

➤ To grant access to task lists:

1 Open the Task List screen using step a or b:

a. From a Planning application:

i. Open a Planning application. See "Accessing Planning Applications" on page 31.

ii. Select **Administration**, and then **Manage Task Lists**.

b. From Shared Services Console:

i. Access Shared Services Console as `admin` or as a user provisioned with the Provisioning Manager role of the Planning application that you want to provision. See:

- "Accessing Shared Services from EPM Workspace" on page 8.
- "Accessing Shared Services Console from a Browser" on page 9.

ii. In **View Pane**, expand **Application Groups**.

iii. Expand the application group (for example, Planning) that contains the Planning application.

iv. Right-click the application, and select **Manage Task List**.

2 Select a task list folder.

3 Select a task list.

4 Click **Assign Access**.

The Assign Access for *TASK_LIST_NAME* window opens.

5 Select **Add Access**.

6 Select the users and groups that are to be granted access to the task list.

Note:

Only the users and groups provisioned to the current application are listed in the Add Access screen.

7 Select the type of access (**Assign**, **Manage**, **Manage and Assign**, or **None**) to grant.

Click Help for Assistance.

8 Select **Add**.

9 In Add Access window, select **Close**.

10 In Assign Access for *TASK_LIST_NAME* window, select **Close**.

Working with Essbase Database

Planning applications require an Essbase database to store outlines, dimensions and their members, data forms, and filters. Because this database is not automatically created during the Planning application creation process, you must create it.

Data about custom dimensions and members and data forms are not automatically written into the Essbase database. If you create custom dimensions after creating the database, you must refresh the database to write the information into it.

➤ To work with the Essbase database:

1 Open the Planning application, if needed. See "Accessing Planning Applications" on page 31.

2 Select **Administration**, and then **Manage Database**.

3 Perform an action:

- Select **Create** to create an Oracle Essbase database for your Planning application.

  Existing dimension, dimension member, and access permission data is automatically written into the database.

  Note:

  In Oracle Essbase Administration Services, the database that you created is listed under your Planning application node within the Essbase Server node.

- To refresh an existing database with new custom dimensions and members data, select database refresh options, and then **Refresh**.

Synchronize Planning with Shared Services (Classic Planning only)

After completing the provisioning process, synchronize classic Planning application security with Shared Services security. This allows all provisioned users to access and work with the Planning application.

➤ To synchronize classic Planning application security with Shared Services security:

1. Open the Planning application, if needed. See "Accessing Planning Applications" on page 31.
2. Select **Administration**, and then **Manage Database**.
3. Under refresh Database Options, select **Security Filters**.
4. Click one of the following:
   - **Create** to create security filters and to synchronize security.
   - **Refresh** to refresh security filters and to synchronize security.

Setting Applications in Production Mode

By default, newly created Planning applications are put in maintenance mode, which allows only Planning administrators to access them.

Note:

You must be a Planning administrator to perform this task.

➤ To put Planning applications in production mode:

1. Open the Planning application, if needed. See "Accessing Planning Applications" on page 31.
2. Select **Administration**, and then **Application Settings**.
3. In Application Maintenance Mode section on the System Settings tab in **Enable Use of application for**, select `All Users`.
4. Select **Save**.

Generating Access Control Report for Planning Applications

From Shared Services Console, you can view current access permissions and print reports.

➤ To generate access control report:

1. Access Shared Services Console as `admin` or as a user provisioned with the Provisioning Manager role of the Planning application that you want to provision. See:
   - "Accessing Shared Services from EPM Workspace" on page 8.
   - "Accessing Shared Services Console from a Browser" on page 9.

2 In **View Pane**, expand **Application Groups**.

3 Expand the application group (for example, Planning) that contains your Planning application.

4 Right-click your application, and select **Access Control Report**.

5 Select the following for which the report is to be generated:

- Users or groups
- Application objects

6 Set report settings. Click **Help** for detailed information.

7 Click **Finish**.

A Shared Services Roles

All Shared Services roles are power roles. Typically, these roles are granted to power users who are involved in administering Shared Services and other EPM System products.

Table 4 Shared Services Roles

Role Name	Description
Administrator	Provides control over all products that integrate with Shared Services. It enables more control over security than any other Oracle Hyperion Enterprise Performance Management System product roles and should therefore be assigned sparingly. Administrators can perform all administrative tasks in Oracle's Hyperion® Shared Services Console and can provision themselves. This role grants broad access to all applications registered with Shared Services. The Administrator role is, by default, assigned to the *admin* Native Directory user, who is the only user available after you deploy Shared Services.
Directory Manager	Creates and manages users and groups within Native Directory. Do not assign to Directory Managers the Provisioning Manager role, because combining these roles allows Directory Managers to provision themselves. The recommended practice is to grant one user the Directory Manager role and another user the Provisioning Manager role.
LCM Administrator	Runs Lifecycle Management Utility to promote artifacts or data across product environments and operating systems. In addition to the Provisioning Manager role, the LCM Administrator role comprises Directory Manager and Project Manager roles of Shared Services.
Project Manager	Creates and manages projects within Shared Services
Create Integrations	Creates Shared Services data integrations (the process of moving data between applications) using a wizard. For Performance Management Architect, creates and executes data synchronizations.
Run Integrations	Views and runs Oracle's Hyperion® Shared Services data integrations. For Performance Management Architect, executes data synchronizations.
Dimension Editor	Creates and manages import profiles for dimension creation. Also creates and manages dimensions manually within the Performance Management Architect user interface or the Classic Application Administration option. Required to access Classic Application Administration options for Oracle Hyperion Financial Management, Fusion Edition, and Planning using Web navigation.

Role Name	Description
Application Creator ● Essbase Application Creator ● Financial Management Application Creator ● Planning Application Creator ● Profitability Application Creator	Creates and deploys Performance Management Architect applications. Users with this role can create applications but can change only the dimensions to which they have access permissions. Required, in addition to the Dimension Editor role, for Financial Management and Planning users to be able to navigate to their product's Classic Application Administration options. When a user with Application Creator role deploys an application from Performance Management Architect, that user automatically becomes the application administrator and provisioning manager for that application. The Application Creator can create all applications. The Analytic Services Application Creator can create Generic applications. The Financial Management Application Creator can create Consolidation applications and Performance Management Architect, Generic applications. To create applications, the user must also be a member of the Application Creators group specified in Financial Management Configuration Utility. The Planning Application Creator can create Planning applications and Performance Management Architect Generic applications. The Profitability Application Creator can create Oracle Hyperion Profitability and Cost Management, Fusion Edition applications and Oracle Hyperion EPM Architect, Fusion Edition generic applications.
Calculation Manager Administrator ● Financial Management Calculation Manager Administrator ● Planning Calculation Manager Administrator	Administers and manages calculation manager functions. Financial Management Calculation Manager Administrator administers calculation manager functions in Oracle Hyperion Financial Management, Fusion Edition. Planning Calculation Manager Administrator administers calculation manager functions in Oracle Hyperion Planning, Fusion Edition.

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