

# How is IDCS Group security is managed in EPM Cloud?

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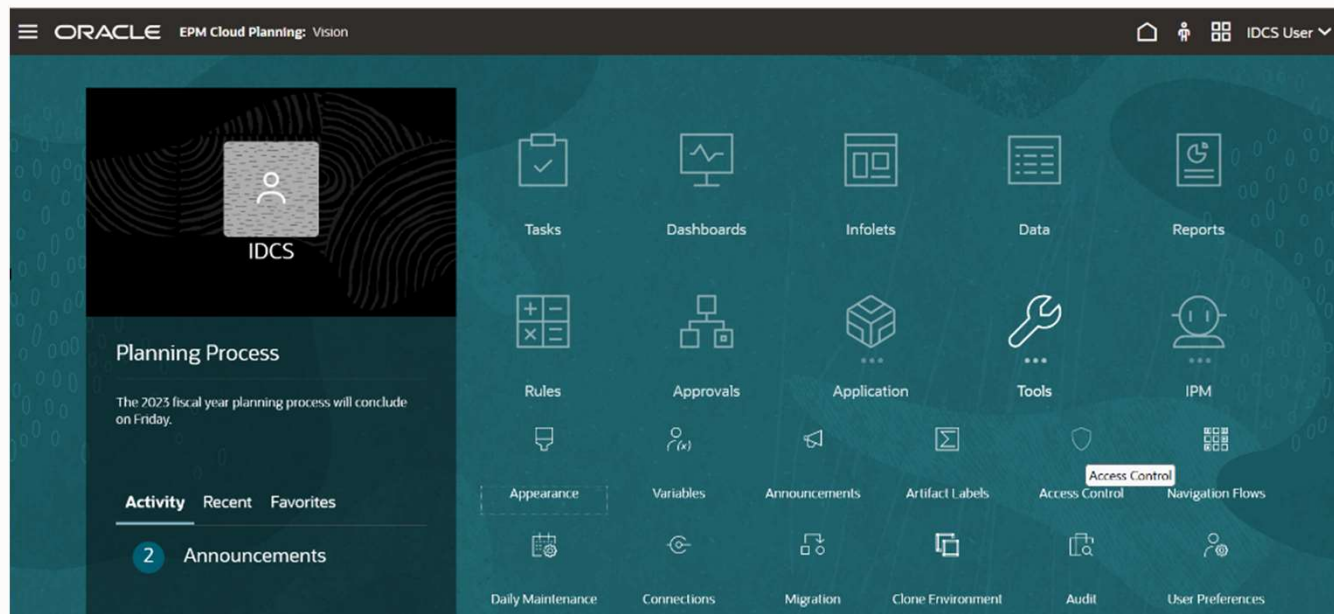
# Why manage security through IDCS Group?

- Customers can maintain all users and groups centrally in the Identity Management system of choice and control their EPM access through these central groups by assigning IDCS Group to
  - Pre-Defined Role
  - Application Role
  - EPM Group
  - ACL

# How IDCS Group security is managed in EPM Cloud?

- This article describes:
  - How IDCS Groups are available in EPM UI
  - How to assign IDCS Group to EPM Group
  - How to assign application roles to an IDCS Group
  - How to view Role Assignment Report for an IDCS Group
  - How to view Role Assignment report for a User who is a member of IDCS Group
  - How to assign ACL to an IDCS Group

# How are IDCS Groups are available in EPM UI



- Login to EPM Cloud as Service Administrator,
- Select “Tools”.
- Select “Access Control”.

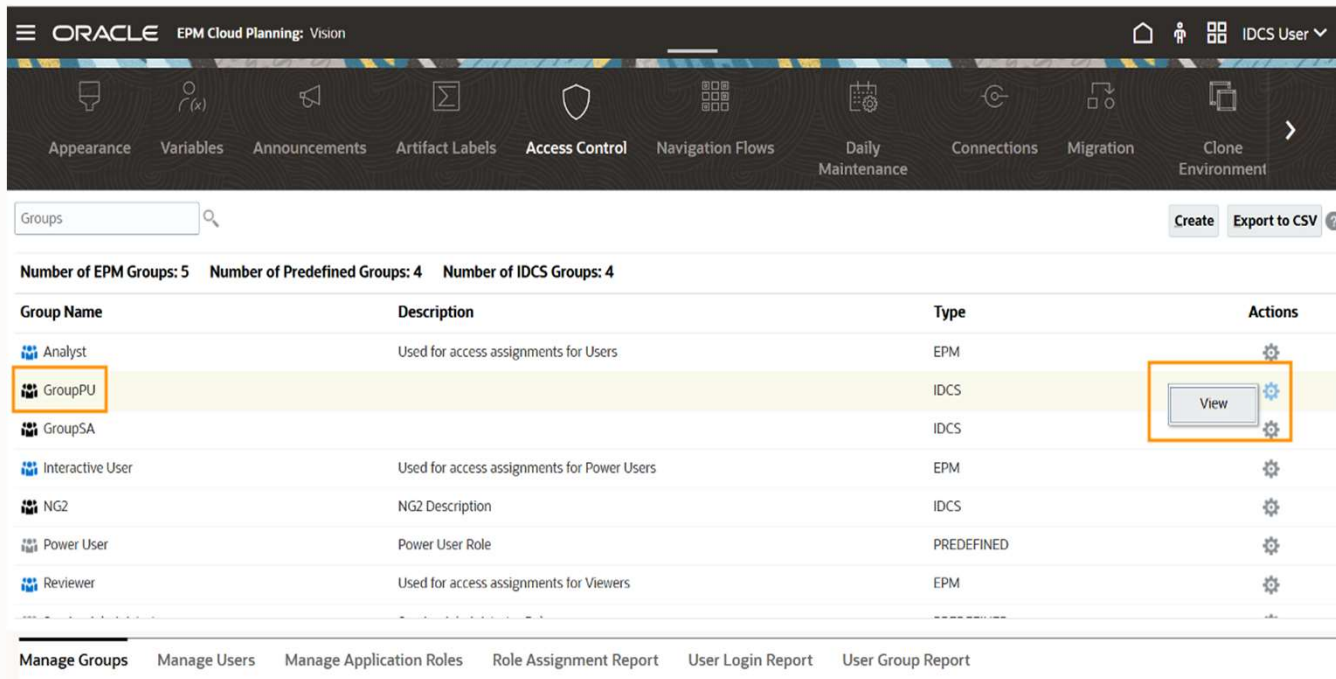


# How are IDCS Groups are available in EPM UI? (Contd..)

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

- Manage Groups tab lists
  - IDCS Group
  - Predefined Group
  - EPM Group (a.k.a Native Group)
- Groups are categorized with “Type” and “Image” to differentiate easily.

# How are IDCS Groups are available in EPM UI? (Contd..)



The screenshot shows the Oracle EPM Cloud Planning: Vision interface. The top navigation bar includes the Oracle logo, the text 'EPM Cloud Planning: Vision', and a user profile dropdown for 'IDCS User'. Below this is a secondary navigation bar with icons and labels for various functions: Appearance, Variables, Announcements, Artifact Labels, Access Control, Navigation Flows, Daily Maintenance, Connections, Migration, and Clone Environment. The main content area is titled 'Groups' and includes a search bar, 'Create', and 'Export to CSV' buttons. A summary row indicates: 'Number of EPM Groups: 5', 'Number of Predefined Groups: 4', and 'Number of IDCS Groups: 4'. Below this is a table with columns: Group Name, Description, Type, and Actions. The table lists several groups, with 'GroupPU' highlighted. The 'View' button in the Actions column for 'GroupPU' is also highlighted.

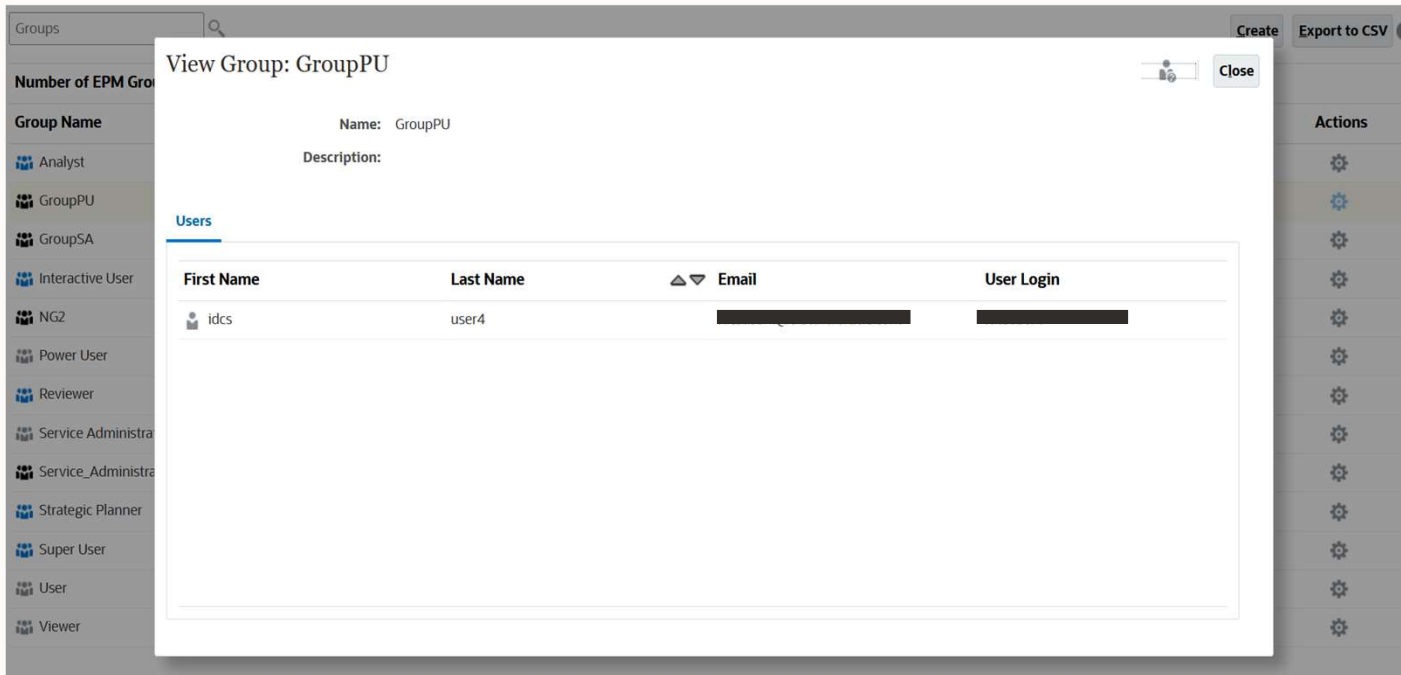
| Group Name       | Description                                 | Type       | Actions           |
|------------------|---------------------------------------------|------------|-------------------|
| Analyst          | Used for access assignments for Users       | EPM        | [Settings]        |
| GroupPU          |                                             | IDCS       | [View] [Settings] |
| GroupSA          |                                             | IDCS       | [Settings]        |
| Interactive User | Used for access assignments for Power Users | EPM        | [Settings]        |
| NG2              | NG2 Description                             | IDCS       | [Settings]        |
| Power User       | Power User Role                             | PREDEFINED | [Settings]        |
| Reviewer         | Used for access assignments for Viewers     | EPM        | [Settings]        |

Manage Groups   Manage Users   Manage Application Roles   Role Assignment Report   User Login Report   User Group Report

- IDCS groups are provided only with “View” option.



# How are IDCS Groups are available in EPM UI? (Contd..)



The screenshot shows the 'View Group: GroupPU' dialog box in the EPM UI. The dialog box has a 'Name' field set to 'GroupPU' and a 'Description' field. Below these fields, there is a tab labeled 'Users'. The 'Users' tab displays a table with the following columns: 'First Name', 'Last Name', 'Email', and 'User Login'. The table contains one row of data:

| First Name | Last Name | Email      | User Login |
|------------|-----------|------------|------------|
| idcs       | user4     | [REDACTED] | [REDACTED] |

The background of the EPM UI shows a list of groups on the left and an 'Actions' column on the right.

- On Viewing IDCS Group,
  - It will list all the Users assigned to it.

# How to assign IDCS Group to EPM Group?

The screenshot shows the 'Edit Group: Analyst' window. On the left, a sidebar lists various groups, with 'GroupPU' highlighted. The main window has a 'Name' field set to 'Analyst' and a 'Description' field set to 'Used for access assignments for Users'. Below these fields, there are tabs for 'Groups' and 'Users'. The 'Groups' tab is active, showing a search bar and a table of available groups. The 'Assigned Groups' section on the right is empty, with the message 'No records were found.'.

| Group Name            | Description               | Type       |
|-----------------------|---------------------------|------------|
| GroupPU               |                           | IDCS       |
| GroupSA               |                           | IDCS       |
| Interactive User      | Used for access assign... | EPM        |
| NG2                   | NG2 Description           | IDCS       |
| Power User            | Power User Role           | PREDEFINED |
| Reviewer              | Used for access assign... | EPM        |
| Service Administrator | Service Administrator ... | PREDEFINED |

- IDCS groups can be assigned as member of EPM groups similar to other groups.

# How to assign application roles to an IDCS Group?

The screenshot shows the Oracle EPM Cloud Planning: Vision interface. The top navigation bar includes tabs for Appearance, Variables, Announcements, Artifact Labels, Access Control, Navigation Flows, Daily Maintenance, Connections, Migration, and Clone Environment. The 'Access Control' tab is active. Below the navigation bar, there is a search bar with a dropdown menu showing 'Groups' and 'Users'. The 'Groups' option is selected and highlighted with a red box. To the right of the dropdown is a search icon. Below the search bar is a table with columns: First Name, Last Name, Email, User Login, and Actions. The table lists several users, including User1, Robin, Stacey, Holly, Kulwaran, Kelly, Andrew, and Ron. The 'Kulwaran' row is highlighted. At the bottom of the interface, there are several tabs: Manage Groups, Manage Users, Manage Application Roles (which is the active tab), Role Assignment Report, User Login Report, and User Group Report.

| First Name | Last Name | Email | User Login     | Actions |
|------------|-----------|-------|----------------|---------|
| User1      |           |       | 001@oracle.com |         |
| Robin      |           |       | 0068964        |         |
| Stacey     |           |       | 0068982        |         |
| Holly      |           |       | 0117896        |         |
| Kulwaran   |           |       | 0176261        |         |
| Kelly      |           |       | 0177589        |         |
| Andrew     |           |       | 0224181        |         |
| Ron        |           |       | 0748600        |         |

- Click on “Manage Application Roles” tab.
- Click on dropdown and select “Groups”.
- Click “Search” icon.

# How to assign application roles to an IDCS Group? (Contd..)

ORACLE EPM Cloud Planning: Vision

Appearance Variables Announcements Artifact Labels Access Control Navigation Flows Daily Maintenance Connections Migration Clone Environment

Groups Search

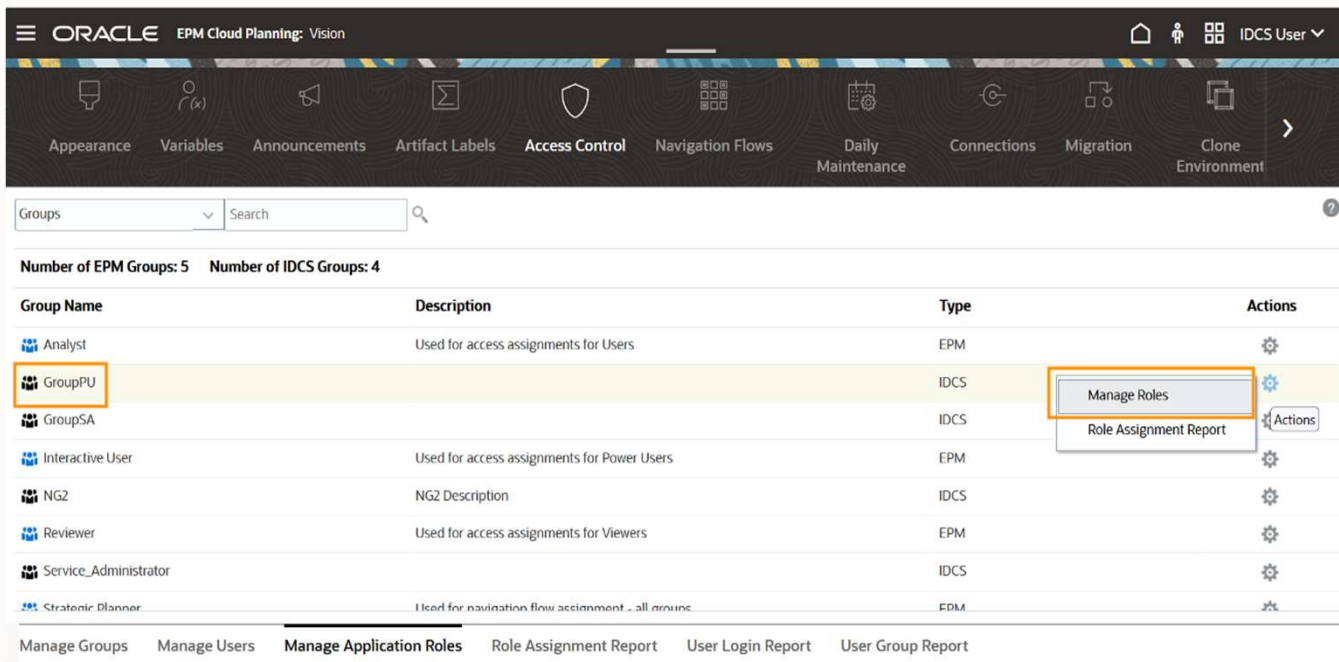
Number of EPM Groups: 5 Number of IDCS Groups: 4

| Group Name            | Description                                      | Type | Actions |
|-----------------------|--------------------------------------------------|------|---------|
| Analyst               | Used for access assignments for Users            | EPM  | ⚙️      |
| GroupPU               |                                                  | IDCS | ⚙️      |
| GroupSA               |                                                  | IDCS | ⚙️      |
| Interactive User      | Used for access assignments for Power Users      | EPM  | ⚙️      |
| NG2                   | NG2 Description                                  | IDCS | ⚙️      |
| Reviewer              | Used for access assignments for Viewers          | EPM  | ⚙️      |
| Service_Administrator |                                                  | IDCS | ⚙️      |
| Strategic Planner     | Used for navigation flow assignment - all groups | EPM  | ⚙️      |

Manage Groups Manage Users Manage Application Roles Role Assignment Report User Login Report User Group Report

- On selecting Groups in Manage Application Roles tab
  - It will list both EPM and IDCS groups.

# How to assign application roles to an IDCS Group? (Contd..)



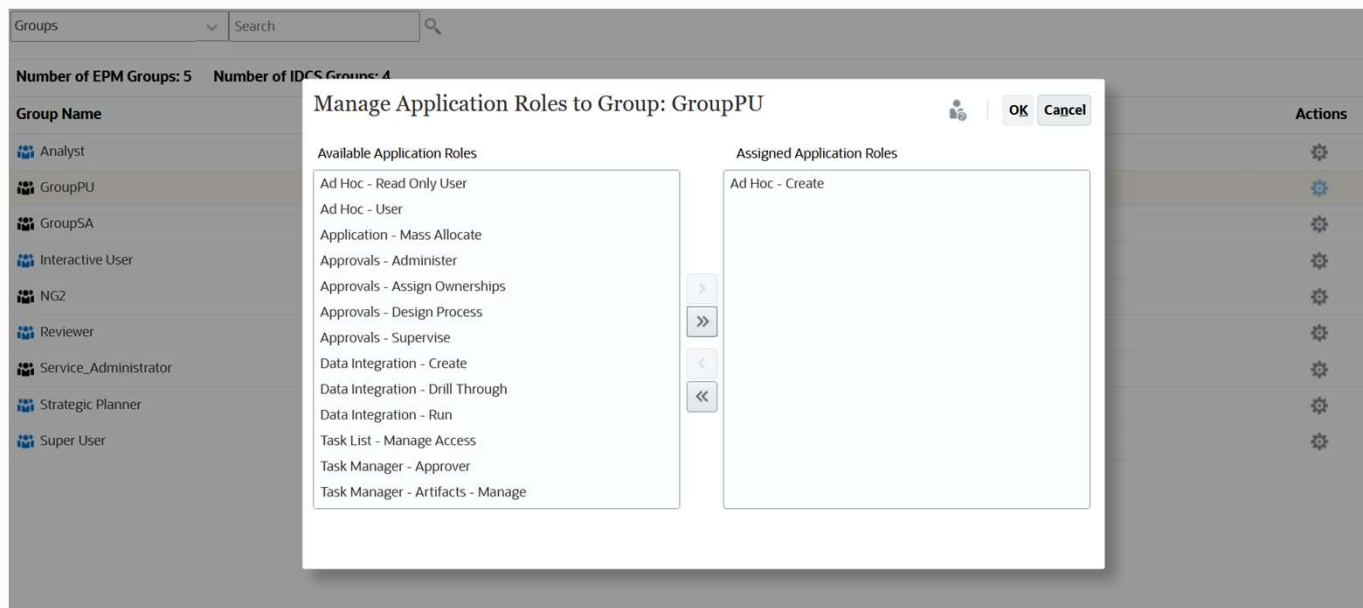
The screenshot displays the Oracle EPM Cloud Planning: Vision interface. The top navigation bar includes the Oracle logo and the text "EPM Cloud Planning: Vision". Below the navigation bar, there is a search bar labeled "Groups" and a search icon. The main content area shows a table of groups with columns: Group Name, Description, Type, and Actions. The table lists several groups, including Analyst, GroupPU, GroupSA, Interactive User, NG2, Reviewer, Service\_Administrator, and Strategic Planner. The "GroupPU" row is highlighted in yellow. The "Actions" column for "GroupPU" shows a gear icon, and a dropdown menu is open, displaying "Manage Roles" and "Role Assignment Report". The bottom navigation bar includes links for Manage Groups, Manage Users, Manage Application Roles, Role Assignment Report, User Login Report, and User Group Report.

| Group Name            | Description                                      | Type | Actions                                      |
|-----------------------|--------------------------------------------------|------|----------------------------------------------|
| Analyst               | Used for access assignments for Users            | EPM  | ⚙️                                           |
| GroupPU               |                                                  | IDCS | ⚙️<br>Manage Roles<br>Role Assignment Report |
| GroupSA               |                                                  | IDCS | ⚙️                                           |
| Interactive User      | Used for access assignments for Power Users      | EPM  | ⚙️                                           |
| NG2                   | NG2 Description                                  | IDCS | ⚙️                                           |
| Reviewer              | Used for access assignments for Viewers          | EPM  | ⚙️                                           |
| Service_Administrator |                                                  | IDCS | ⚙️                                           |
| Strategic Planner     | Used for navigation flow assignment - all groups | EDM  | ⚙️                                           |

- Select IDCS Group.
- Click on “Actions”.
- Select “Manage Roles”.



# How to assign application roles to an IDCS Group? (Contd..)



- Select and Move Application Roles to assign.
- Click OK.

# How to view the Role Assignment report for an IDCS Group?

The screenshot shows the Oracle EPM Cloud Planning: Vision interface. The top navigation bar includes icons for Appearance, Variables, Announcements, Artifact Labels, Access Control, Navigation Flows, Daily Maintenance, Connections, Migration, and Clone Environment. The 'Groups' page is displayed, showing a table of EPM and IDCS groups. The 'GroupPU' row is selected, and the 'Role Assignment Report' option is highlighted in the 'Actions' column.

| Group Name            | Description                                      | Type | Actions                                |
|-----------------------|--------------------------------------------------|------|----------------------------------------|
| Analyst               | Used for access assignments for Users            | EPM  |                                        |
| GroupPU               |                                                  | IDCS | Manage Roles<br>Role Assignment Report |
| GroupSA               |                                                  | IDCS |                                        |
| Interactive User      | Used for access assignments for Power Users      | EPM  |                                        |
| NG2                   | NG2 Description                                  | IDCS |                                        |
| Reviewer              | Used for access assignments for Viewers          | EPM  |                                        |
| Service_Administrator |                                                  | IDCS |                                        |
| Strategic Planner     | Used for navigation flow assignment - all groups | EPM  |                                        |

At the bottom, there are tabs for Manage Groups, Manage Users, Manage Application Roles, Role Assignment Report, User Login Report, and User Group Report.

- Select IDCS Group.
- Click on “Actions”.
- Select “Role Assignment Report”.



# How to view the Role Assignment report for an IDCS Group? (Contd..)

Role Assignment Report

| Group   | Roles                                                                       |
|---------|-----------------------------------------------------------------------------|
| GroupPU | <b>Power User</b><br>Ad Hoc - Create, Application - Mass Allocate (Analyst) |

- IDCS group's role assignment shown appropriately with,
  - Pre-Defined Roles (in **Bold** letters)
  - Application Roles

# How to view the Role Assignment report for a User who is a member of IDCS Group?

The screenshot shows the Oracle EPM Cloud Planning: Vision interface. The top navigation bar includes the Oracle logo and the text "EPM Cloud Planning: Vision". The main navigation bar contains various icons and labels: Appearance, Variables, Announcements, Artifact Labels, Access Control, Navigation Flows, Daily Maintenance, Connections, Migration, and Clone Environment. The "Access Control" tab is selected. Below the navigation bar, there is a search bar with the text "Users" and a dropdown menu showing "idcsuser4". To the right of the search bar is an "Export to CSV" button. Below the search bar, the text "Number of Users: 1" is displayed. A table with the following columns: First Name, Last Name, Email, User Login, and Roles. The table contains one row with the following data: First Name: idcs, Last Name: user4, Email: [REDACTED], User Login: idcsuser4, Roles: Power User (GroupPU), Ad Hoc - Create (GroupPU), Application - Mass Allocate (Analyst->GroupPU), Data Integration - Create. At the bottom of the interface, there is a navigation bar with the following tabs: Manage Groups, Manage Users, Manage Application Roles, Role Assignment Report (selected), User Login Report, and User Group Report.

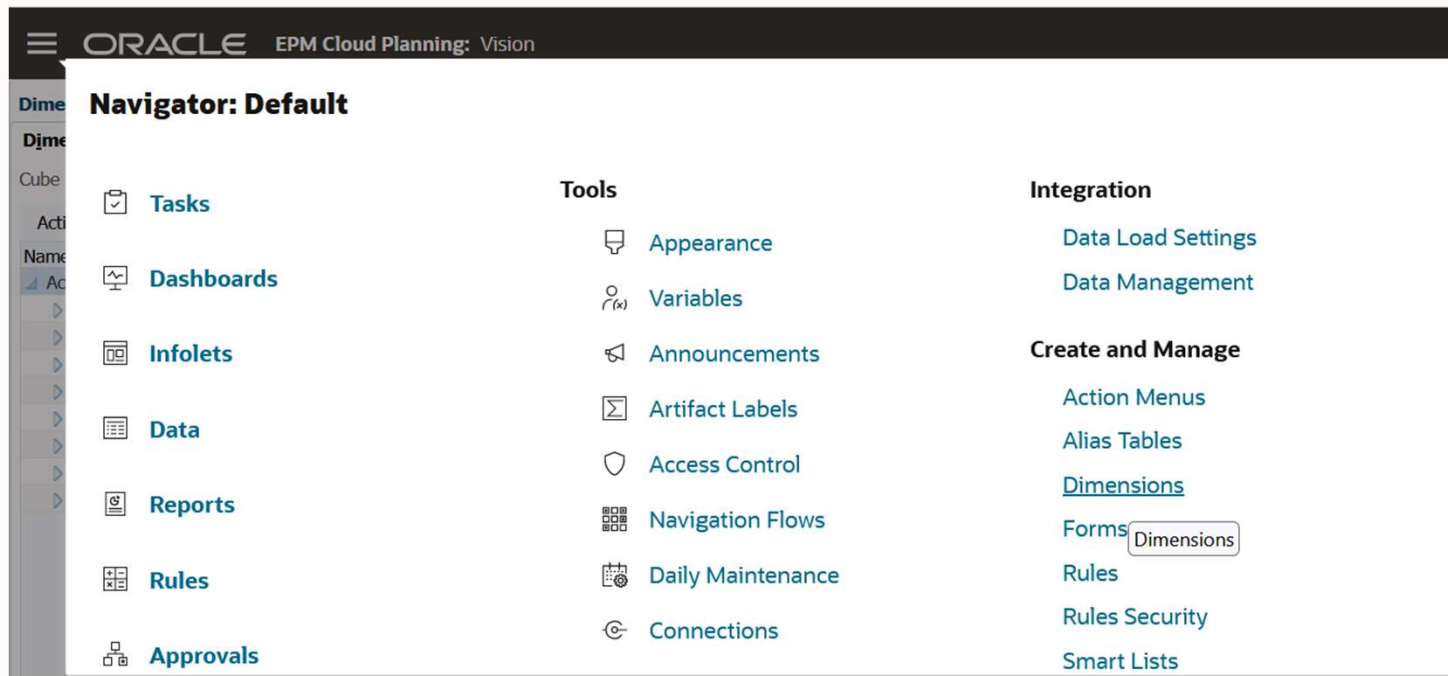
| First Name | Last Name | Email      | User Login | Roles                                                                                                                        |
|------------|-----------|------------|------------|------------------------------------------------------------------------------------------------------------------------------|
| idcs       | user4     | [REDACTED] | idcsuser4  | Power User (GroupPU)<br>Ad Hoc - Create (GroupPU), Application - Mass Allocate (Analyst->GroupPU), Data Integration - Create |

- Click on “Role Assignment Report tab”.
- User is a member of IDCS Group “GroupPU”
- “GroupPU” assigned with “Power User” Predefined role and few Application Roles.
- Users’ indirect roles via IDCS group are shown appropriately.

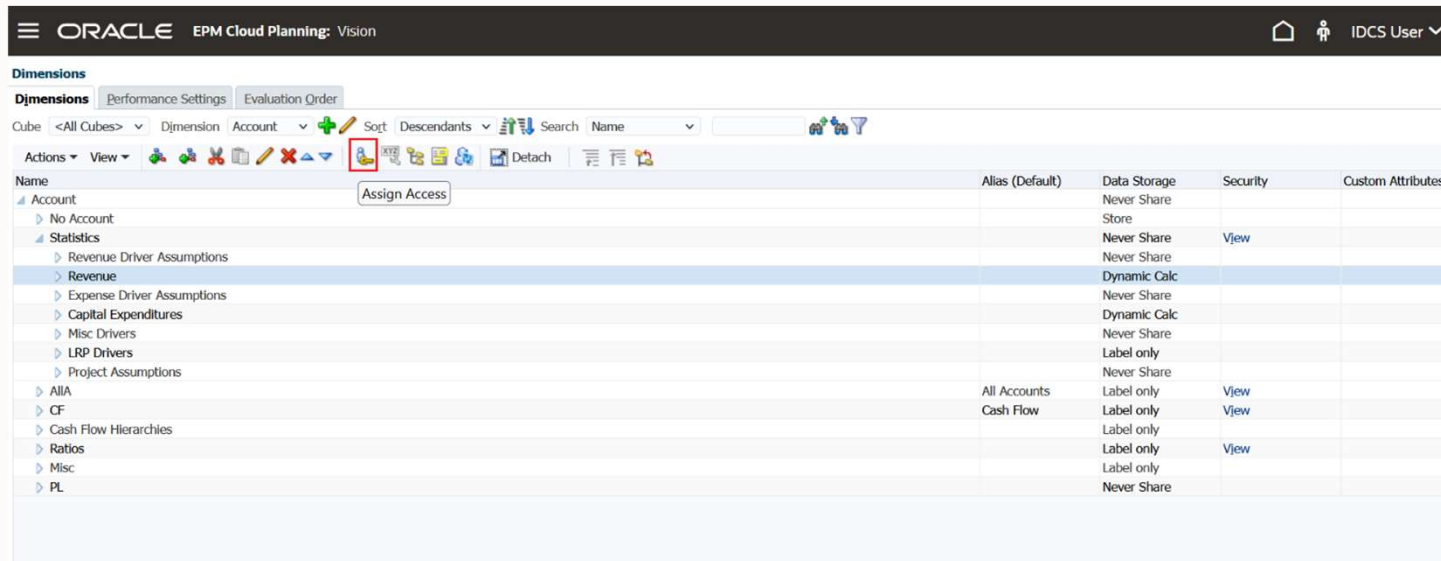


# How to assign ACL to an IDCS Group?

- Select “Navigator”.
- Click “Dimensions”.



# How to assign ACL to an IDCS Group? (Contd..)



ORACLE EPM Cloud Planning: Vision

Dimensions Performance Settings Evaluation Order

Cube <All Cubes> Dimension Account Sort Descendants Search Name

Actions View Assign Access

| Name                       | Alias (Default) | Data Storage | Security | Custom Attributes |
|----------------------------|-----------------|--------------|----------|-------------------|
| Account                    |                 | Never Share  |          |                   |
| No Account                 |                 | Store        |          |                   |
| Statistics                 |                 | Never Share  | Vjew     |                   |
| Revenue Driver Assumptions |                 | Never Share  |          |                   |
| Revenue                    |                 | Dynamic Calc |          |                   |
| Expense Driver Assumptions |                 | Never Share  |          |                   |
| Capital Expenditures       |                 | Dynamic Calc |          |                   |
| Misc Drivers               |                 | Never Share  |          |                   |
| LRP Drivers                |                 | Label only   |          |                   |
| Project Assumptions        |                 | Never Share  |          |                   |
| All                        | All Accounts    | Label only   | Vjew     |                   |
| CF                         | Cash Flow       | Label only   | Vjew     |                   |
| Cash Flow Hierarchies      |                 | Label only   |          |                   |
| Ratios                     |                 | Label only   | Vjew     |                   |
| Misc                       |                 | Label only   |          |                   |
| PL                         |                 | Never Share  |          |                   |

- Select appropriate dimension.
- Click “Assign Access”.



# How to assign ACL to an IDCS Group? (Contd..)

- Select “Groups” tab.
- Click “Add Access”.

The screenshot displays the Oracle EPM Cloud Planning: Vision interface. A dialog box titled "Assign Access for Revenue" is open, showing the "Groups" tab. The "Groups" tab is highlighted with a red box. Below the tab, there is a table with columns "Group", "Access Rights", and "Relation". The table currently shows "No access defined." and an "Add Access" button. The background interface shows a sidebar with a tree view of dimensions and a main area with a table of data.

# How to assign ACL to an IDCS Group? (Contd..)

ORACLE EPM Cloud Planning: Vision

Dimensions

Dimensions Performance Settings Evaluation Order

Cube <All Cubes> Dimension Account Sort Descendants Search Name

Actions View

Name

Account

No Account

Statistics

Revenue Driver Assumptions

Revenue

Expense Driver Assumptions

Capital Expenditures

Misc Drivers

LRP Drivers

Project Assumptions

AIA

CF

Cash Flow Hierarchies

Ratios

Misc

PL

Rows Selected1 Columns Hidden10

Add Access for Revenue

Users Groups

Group

Analyst

GroupPU

GroupSA

Interactive User

NG2

Power User

Reviewer

Service Administrator

Service\_Administrator

Strategic Planner

Super User

User

Type of Access

☒ Read ☐ Write ☐ None Member

Help Add Close

Security Custom Attributes

View

View

View

View

Members 294

- It lists all the available groups.
- Select IDCS group.
- Click Add.

# What are not supported currently with IDCS Group in EPM

- epmautomate doesn't support
  - any CRUD operation on IDCS Group.
  - assigning/unassigning Pre-Defined role on IDCS Group.
  - assigning/unassigning Application role on IDCS Group.
  - assigning/unassigning IDCS Group to EPM Group.
  - migrating IDCS Group and its members.
- Role Assignment Report UI doesn't generate report with all IDCS Groups but can be generated for selected IDCS Group.

# What are the common behavior of IDCS Groups feature in EPM?

- IDCS Groups are created in IDCS (Identity Cloud Service) as similar to Users.
- IDCS Groups are loaded into EPM only if it is assigned to pre-defined role.
- IDCS Group name restriction is managed by IDCS.
- IDCS Groups behave the same was a native groups but they are no editable and only Viewable
- IDCS Group are ignored in EPM,
  - If an Native group exists with the name of an IDCS group.
  - If an IDCS Groups exists with the name of an Pre-Defined Group.
  - If an IDCS Groups exists with the name longer length than 256 characters.
- IDCS groups will not get imported with LCM Import Users option
- Renaming an IDCS group is functionally equivalent to deleting it and creating a new one.



# Thank You

