Creating Custom Project Administrator Role to Review Project Performance and Analyze KPI Categories

Worked Example

ORACLE PPM CLOUD SERVICES SOLUTION OVERVIEW | MAY 2018

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Table of Contents

Requirements Overview

Users other than project managers want to review project performance and analyze KPI categories. These users aren't added as project team members and they don't want to view data for the specific projects that they are assigned to. They want to view data for all the projects in the application. For this, the users want to be able to access the Review Project Performance and the Analyze KPI Categories pages.

Solution Overview

Users, other than project managers who want to access the Review Project Performance and Analyze KPI Categories pages, must be granted a custom role that has the required functional and data access to enable them to do so. In order to achieve this, you must perform the following high-level steps:

1. Create a custom Project Administrator role.
2. Grant required functional security to the role.
3. Create a new data security policy.
4. Assign the custom role to the user.
5. Grant relevant business units or organizations access to the user.

Implementation Steps

The detailed steps to achieve the requirement are as follows.

Create a Custom Project Administrator Role

1. From the Navigator, click **Tools** > **Security Console**.
2. On the **Roles** page, search for the role Project Administrator.
3. In the **Search Results** section, verify that the Project Administrator role appears.
4. From the **Actions** menu, select **Copy Role**.
5. In the **Copy Options** window, select **Copy top role and inherited roles** and click **Copy Role**.
6. On the **Copy Role: Basic Information** page, enter the required values as follows.

Field	Value
Role Name	Desired role name, for example, Custom Project Administrator
Role Code	Desired role code, for example, PJF_PROJECT_ADMINISTRATOR_CUSTOM
Role Category	Projects – Job Roles
Description	Desired role description, for example, Assists the project manager with the administrative functions of a project, particularly the functions related to collecting and entering information into the project application.

7. Click **Next**.

Grant Required Functional Security to the Role

8. On the **Copy Role: Function Security Policies** page, click **Add Function Security Policy**.
9. On the **Add Function Security Policy** window, search for Manage Project Performance.
10. Select the function security policy in the **Search Results** section and click **Add Privilege to Role**.
11. Click **OK** to close the confirmation message window.
12. Repeat steps 9 through 11 to add the following privileges to the Custom Project Administrator role:
    a. Review Project Performance
    b. Review Project Performance Health
    c. Run Generate Key Performance Indicators
    d. Run Maintain Project Performance
    e. View Project Financial Performance in Project Home

13. Close the **Add Function Security Policy** window.
14. Click **Next**.

Create a New Data Security Policy

15. On the **Copy Role: Data Security Policies** page, click **Create Data Security Policy**.
16. On the **Create Data Security Policy** window, enter the required values as follows:

Field	Value
Policy Name	Grant on Business Unit
Start Date	System date
Database Resource	Search for PJF_PROJECTS_ALL_VL and select Project for Table PJF_PROJECTS_ALL_VL.
Policy Description	Access to projects in a business unit to which you have access.
Data Set	Select by instance set
Condition Name	The project access for table PJF_PROJECTS_ALL_VL for project business units on which they are authorized as defined in Manage Data Access for Users Page.
Actions	Select the following: • Edit Project Key Performance Areas And Notifications For Project • View Project Financial Performance In Project Home • View Project Key Performance Areas And Notifications For Project • Analyze Project Key Performance Area • Analyze Project Performance • Generate Project Performance Exceptions • Manage Project Key Performance Indicators Notes • Manage Project Performance • Review Project Performance

	• Review Project Performance Health • Update Project Performance

Note: To create new data security policy to restrict access based on organizations, enter:

- Policy Name as Grant on Organization
- Condition Name as The projects access for table PJF_PROJECTS_ALL_VL for the project organizations on which they are authorized as defined in Manage Data Access for Users Page.

17. Click **OK** to close the **Create Data Security Policy** window.
18. Click **Next**.
19. On the **Copy Role: Role Hierarchy** page, click **Next**.

Assign the Custom Role to the User

20. On the **Copy Role: Users** page, click **Add User**.
21. On the **Add User** window, search for the user to whom you want to grant this role.
22. Select the user in the **Search Results** section and click **Add User to Role**.
23. Click **OK** to close the confirmation message window.
24. Close the **Add User** window.
25. Click **Next**.
26. On the **Copy Role: Summary and Impact Report** page, click **Submit and Close**.
27. Note the process ID on the confirmation message window.
28. Click **OK** to close the confirmation message window.
29. Navigate to the **Administration** page.
30. Click the **Role Copy Status** tab.
31. Verify that the process ID that you noted in step 27 is in Complete status.

Grant Relevant Business Units or Organizations Access to the User

32. Navigate to the **Setup and Maintenance** work area.
33. Search for and click the setup task **Manage Data Access for Users**.
34. On the **Manage Data Access for Users** page, select **Users without Data Access**.
35. In the **Search** section, in the **User Name** field, search for the user whom you granted the custom role in step 22.
36. Click **Search**.
37. In the **Search Results** section, select the user record and click **Create**.

38. In the **Create Data Access for Users** window, enter the required values as desired to grant access to relevant business units or organizations for the user and role combination. Select security context as Business unit or Project organization classification as required.

On the Project Financial Management work area, the links for Review Project Performance and Analyze KPI Categories are now enabled for the user under the Analyze group in the Tasks panel tab. The user can click these links to navigate to the Review Project Performance and Analyze KPI Categories pages to view summarized data and project health for the projects that belong to the business units or organizations to which the user was given access through step 38.

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