

# **Gain Control: Leveraging the Oracle Hyperion Security Tools**

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# Agenda

- ❖ **Introductions**
- ❖ **Background on security**
- ❖ **Overview of available security-related tools**
- ❖ **Resource guides for security tools**
- ❖ **Walk through each security tool**
- ❖ **Demonstrations**
- ❖ **Questions & answers**

# Analytic Vision Introduction

- ❖ **Analytic Vision is a data warehousing, business intelligence, performance management consulting firm**
  - ❖ Data warehouse design and development
  - ❖ Oracle Business Intelligence Enterprise Edition (OBIEE)
  - ❖ OBIEE pre-built applications over Oracle EBS, PeopleSoft, and JDEdwards
  - ❖ Hyperion Essbase and related build and reporting products
  - ❖ Hyperion Planning and Financial Management (HFM)
- ❖ **Founded in 2001, currently a team of 50 consultants**
- ❖ **Headquartered in Charlotte, NC; serving Eastern United States**
- ❖ **Extensive business experience cross many verticals:**
  - ❖ Retail, Financial Services, Manufacturing, Distribution, Health Sciences, Communications, and Healthcare
- ❖ **Oracle Platinum Partner** 



## Security assignment is controlled via:

- ❖ **Shared Services**
- ❖ **Product Security**
  - ❖ **Planning**
  - ❖ **Business Rules**
  - ❖ **Essbase**
  - ❖ **Workspace (Financial Reports, Web Analysis, OBIEE, etc.)**
  - ❖ **BI Security Manager**

# Overview of Security Tools Available

- ❖ **Shared Services cssimportexport utility**
- ❖ **Planning import export utility (secfile utility)**
- ❖ **Business Rules import export utility**
- ❖ **Workspace API import utility**
- ❖ **Shared Services audit utility**
- ❖ **Shared Services audit reports**
- ❖ **Planning audit utility**
- ❖ **Shared Services/Planning security reports**
- ❖ **Lifecycle Management (LCM)**
- ❖ **Essbase Administration Console**
- ❖ **OBIEE Security Manager**

# Security Tools Information

- ❖ **EPM Security Administration Guide**
- ❖ **Import/Export Utility User's Guide\***
- ❖ **Hyperion Planning Administrator's Guide**
- ❖ **Hyperion Business Rules Administrator's Guide**
- ❖ **Essbase Database Administrator's Guide**
- ❖ **OBIEE Server Administrator Guide**
- ❖ **Workspace Developer's Guide & Oracle Help Desk**

Documents on Oracle Technology Network website:

<http://www.oracle.com/technology/documentation/epm.html>

\**Hyperion\_Home/common/utilities/CSSImportExportUtility/CSS ImportExport/ImportExport/doc* folder of Shared Services Server once utility is installed

# Shared Services CSSImportExport Utility



- ❖ **Need to install on the Shared Services server**
- ❖ **Sample files and guide available in CSSImportExportUtility folder**
- ❖ **Modify two files (Properties File & Load File)**
- ❖ **Allows XML or CSV formats for Load File**
- ❖ **Can be run from client machine**
- ❖ **Recommend always doing export of all security prior to doing an import**
- ❖ **Use for initial security load or migration**
- ❖ **Use for security on training/testing applications**
- ❖ **Use to satisfy audit requirements**

# Planning Import Export Utility



- ❖ One file to modify and file name must be `secfile.txt`
- ❖ `Secfile.txt` must be placed in the bin directory of the Planning server
- ❖ Syntax varies from System 9 and Fusion 11 product releases
- ❖ File can be tab, comma, pipe, space, colon, or semi-colon delimited (comma is the default)
- ❖ `CLEARALL` is an optional setting and must be in upper case
- ❖ Recommend always doing export of all security prior to doing an import
- ❖ Does not support exporting Task Lists for Administrators
- ❖ Use for initial security load or migration
- ❖ Use for security on training/testing applications
- ❖ Use to satisfy audit requirements

# Business Rules Import Export Utility



- ❖ **Not used to import first-time security load**
- ❖ **Used to move rules, etc. between environments**
- ❖ **Can be used to export projects (groupings of rules)**
- ❖ **Only in an XML format**
- ❖ **Will not import object if it already exists in target location**

# Workspace API Import Utility



- ❖ **Uses the Workspace API**
- ❖ **Java**
- ❖ **ModifyACLRecursively.java file uploads only one user at a time**
- ❖ **AddACL.java code has been written, but not part of release**
- ❖ **Obtain AddACL.java code through Oracle Help Desk**
- ❖ **Create custom code using API**

# Shared Services Audit Utility



- ❖ **Purge logs periodically**
- ❖ **Performance impact**
- ❖ **Results of this utility seen in Shared Services Audit Reports**
- ❖ **Does not cover “product” security changes (dimension members, data entry forms, task lists, etc.)**

# Shared Services Audit Reports



- ❖ **Provisioning Report**
  - ❖ Show effective or assigned role
  - ❖ Shows where access was inherited (example: group name if applicable)
- ❖ **Audit Reports**
  - ❖ Security
  - ❖ Artifact
  - ❖ Config
- ❖ **Auditing must be turned on to use Audit Reports**
- ❖ **Can export all reports to a .csv file**
- ❖ **Application settings / reports in a different location**

# Planning Audit Utility

- ❖ Purge table periodically
- ❖ Performance impact
- ❖ Results put in HSP\_AUDIT\_RECORDS table
- ❖ No pre-built reports for utility
- ❖ Use relational DB report writer tool for reporting needs
- ❖ Turn on/off by application
- ❖ Tool does not track *how* data form design has changed

# Shared Services / Planning Security Reports



- ❖ **Report location varies by software version**
  - ❖ **Older versions in Planning**
  - ❖ **Newer versions in Shared Services**
- ❖ **Reflects user/group access assigned within Planning application**
- ❖ **Assigned and effective access**
- ❖ **Inherited access source**
- ❖ **Save as a .pdf file**

# OBIEE Security and EPM Integration



- ❖ **OBIEE Security is managed through:**
  - ❖ **BI Server Security Manager accessed through the BI Administration Tool**
  - ❖ **BI Presentation Administration accessed through Presentation Services**
  - ❖ **Catalog Manager**
- ❖ **OBIEE can be integrated into EPM Workspace**
  - ❖ **Integration creates links within Workspace to access or administer OBIEE products**
  - ❖ **OBIEE objects can be imported into Workspace Repository**

# Provisioning OBIEE Presentation Services Users in Shared Services

- ❖ **After OBIEE is integrated into EPM workspace, provisioning can be managed through Shared Services under the following conditions**
  - ❖ **Administrators create groups in Presentation Services and assign the groups access to Presentation Services objects**
  - ❖ **Shared Services Administrators create the same group in Shared Services and assign users to the group**
  - ❖ **The users added to the group in Shared Services will have the access permissions granted to the group in Presentation Services**

# BI Publisher and Shared Services Provisioning



- ❖ **BI Publisher is registered with Shared Services in order to perform Shared Services Provisioning**
- ❖ **BI Publisher is integrated with EPM Workspace and the BI Publisher product, application, project, and roles are seeded in Shared Services similar to other EPM applications**
  - ✧ **Roles available:**
    - **Provisioning Manager**
    - **Administrator**
    - **Developer**
    - **Scheduler**
    - **Analyzer**
    - **Template Designer**



## Demonstration



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