



PeopleTools v8.5x PeopleSoft Security

Agenda

➤ Introductions

➤ Course Overview

➤ Course Lessons

- Day 1: Security Overview and Online Profiles
- Day 2: PeopleTools and Query Security
- Day 3: Definition Security, LDAP, and Troubleshooting

➤ Additional Q&A

- Throughout sessions, and at the end of each day

Introductions

Course Instructor – Douglas Pace



- 17 Years in Technology
 - Senior Developer
 - Development Manager
 - Usability Testing
 - User Interface Design

- 13 PeopleSoft Implementations
 - Conversion Lead
 - Technical Lead (Upgrades and Implementations)
 - Senior Developer

- Developer of Pace-Trace
 - Tracing Utility for PeopleSoft

About this Course

- **Overview of PeopleSoft Security**
- **A “hands-on” course, with activities accompanying each area**
- **Interactive and Dynamically paced**

Security Overview

➤ Controls:

- Online Security (access to pages)
 - Including programmatic online access (fields hidden, etc)
- Process (Batch) Security
 - What processes can be run
 - How users interact with Process Scheduler
- PeopleTools
 - Access to each tool
 - Access to types of objects
 - Migration, code control
- Query
 - Using PS Query at all
 - Types of operations allowed

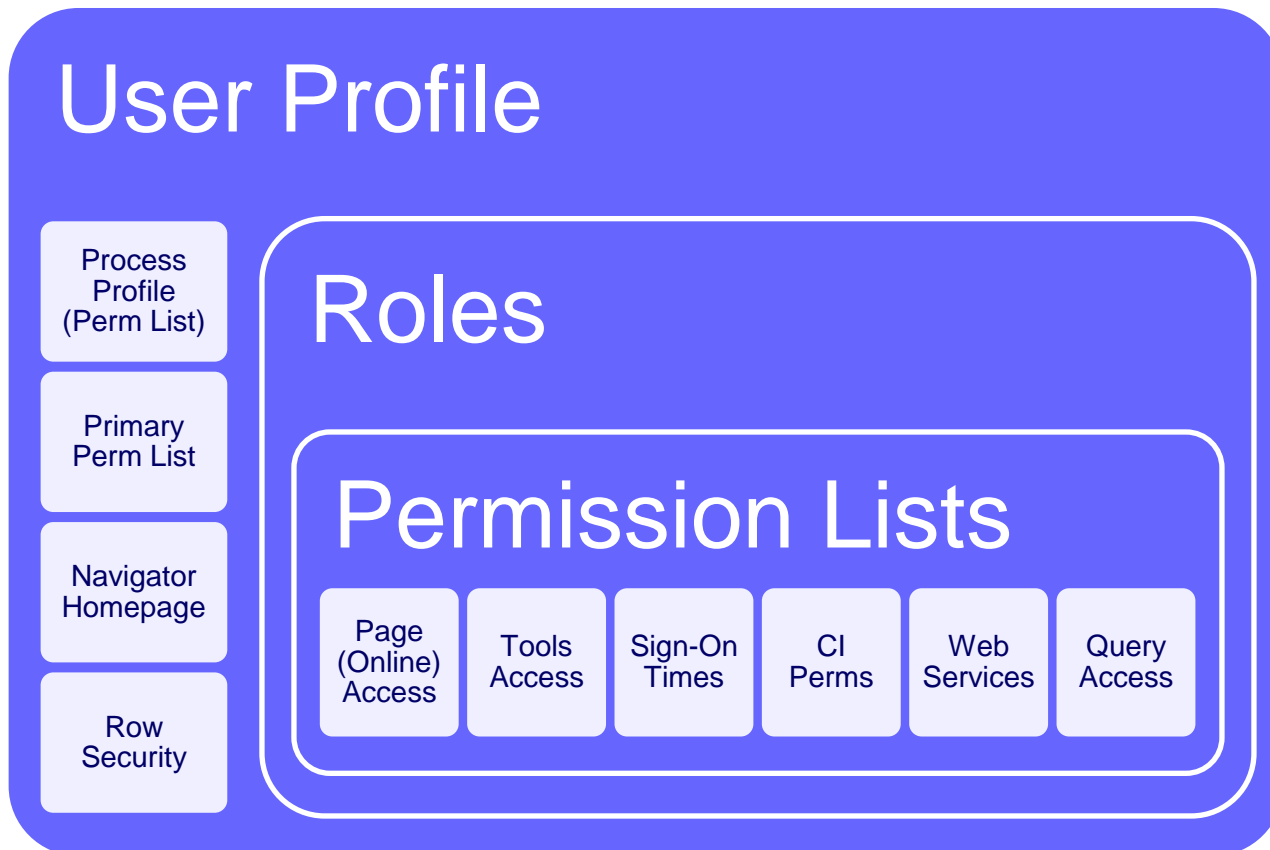
➤ Integrating with Security

- LDAP
- Synchronizing across PS environments

Security Visualized

➤ Users > Roles > Permission Lists

➤ Special Permission Lists: User > Permission List



UserID, AccessID, SymbolicID, ConnectID, oh my!

➤ These IDS are intermediaries between PeopleSoft Security and Database Security*

- UserID: Each user has their own ID which has specified online authority
- Access ID: Behind the scenes, how PeopleSoft is actually accessing the database
 - DB user with full access (and ownership) of PeopleSoft data
 - Users never access the database using this ID
- SymbolicID: Intermediary to Access ID
 - For additional security, users do not even see the name of the Access ID
 - This ID is associated to a User Profile
 - PSACCESSPRFL: SYMBOLICID -> ACCESSID (encrypted)
- Connect ID: Two-Tier Mechanism
 - Used in Two-Tier mode for client-based apps (App Designer, Data Mover)
 - Specified in Configuration Manager (default: people)
 - Very limited DB account, just used to determine Access ID for user and re-login
 - Create a connect ID by running the Connect.SQL and Grant.SQL scripts.

User Profiles

- One for each user
- Where special permission list associations are made (see next)
- Workflow tab: Used for supervisor association

The screenshot shows the Oracle User Profile configuration page for user 'jtheis'. The page is divided into several tabs: Roles, Workflow, Audit, Links, and User ID Queries. The 'User ID Queries' tab is currently selected. The page displays the following information and controls:

- User ID:** jtheis
- Description:** Jeff Theis
- Account Locked Out?
- Logon Information**
- Symbolic ID:** sa1 (dropdown menu)
- Password:** [Redacted]
- Password Expired?
- Confirm Password:** [Redacted]
- User ID Alias:** [Empty text field]
- [Edit Email Addresses](#)
- General Attributes**
- Language Code:** English (dropdown menu)
- Enable Expert Entry
- Currency Code:** US Dollar (dropdown menu)
- Default Mobile Page:** [Empty text field]
- Permission Lists**
- Navigator:** ALLPAGES (dropdown menu) [Explain](#)
- Homepage:** ALLPAGES (dropdown menu) [Explain](#)
- Process Profile:** ALLPAGES (dropdown menu) [Explain](#)
- Primary:** ALLPAGES (dropdown menu) [Explain](#)
- Row Security:** ALLPAGES (dropdown menu) [Explain](#)
- Buttons:** Save, Return to Search, Previous in List, Next in List, Add, Update/Display

User Profile Permission Lists

➤ Defined at the User Profile level

- Is associated directly with a User, not their Role

➤ Navigator Homepage

- Provides a business process flow on login page

➤ Process Profile

- Used for batch process security: authorizes users to view output, update run locations, and restart processes
- Required for running any batch process

➤ Primary

- Users inherit Sign-in Timeouts, mass change definitions, definition security and additional (configurable by application) settings from here.
- HR Global Security

➤ Row Security

- Used in HR for data permission security

Permission Lists			
Navigator	<input type="text" value="ALLPAGES"/>		Explain
Homepage:	<input type="text" value="ALLPAGES"/>		Explain
Process Profile:	<input type="text" value="ALLPAGES"/>		Explain
Primary:	<input type="text" value="ALLPAGES"/>		Explain
Row Security:	<input type="text" value="ALLPAGES"/>		Explain

User Profiles: Workflow

➤ Alternate UserID

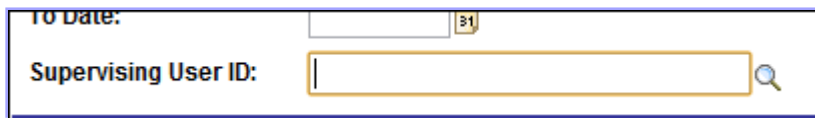
- Someone to fill in for you
- At the start/end dates, will add to their worklist instead of yours
- Note: They must still have security to work the items

➤ Re-Assign worklist entries

- Assign over items that are already in your queue

➤ Supervising User ID

- Creates relationships up and down (who manages who)
- Stored in ROLEXLATOPR



The image shows a screenshot of a web form. It contains two input fields. The first field is labeled 'TO Date:' and has a date value of '31' displayed next to it. The second field is labeled 'Supervising User ID:' and is currently empty, with a magnifying glass icon to its right, indicating a search function.

Process Profile Notes

- All about Permission List Process Details
- Will be covered in detail in Process Security discussion

The screenshot shows the 'Process' tab of a configuration page. It contains the following text:

General Pages PeopleTools Process

Permission List: ALLPAGES

Description: ALLPAGES

Process Permissions

[Process Group Permissions](#)

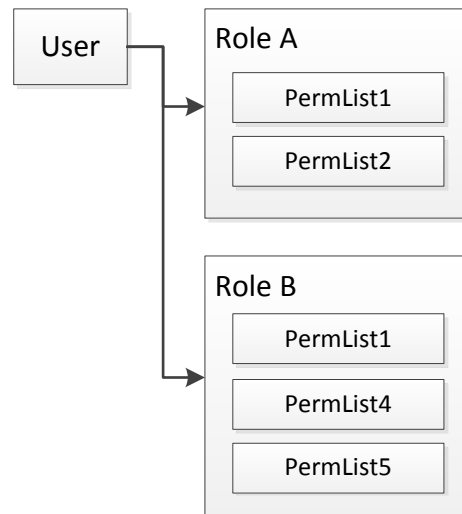
[Process Profile Permissions](#)

Annotations:

- 'Roles Grant These to you' points to the 'Process Permissions' header.
- 'Defined by Process Profile Permission List' points to the 'Process Profile Permissions' link.

Roles: Overview

- Container for Permission Lists
- Connects Users to Permission Lists



Roles: Assigning Members

- Add Permission Lists to the Role
- Review members in the Members tab



The screenshot displays the Oracle Roles configuration interface. At the top, there are several tabs: 'General', 'Permission Lists', 'Members', 'Dynamic Members', 'Workflow', 'Role Grant', and 'Links'. The 'Permission Lists' tab is currently selected. Below the tabs, the role details are shown: 'Role Name: MBC Auditor' and 'Description: Finance Auditor'. A table titled 'Permission Lists' is displayed, showing a single entry for 'MBCAUDITOR' with the description 'Finance Auditor'. The table has columns for 'Permission List', 'Description', and 'View Definition'. The 'MBCAUDITOR' entry is highlighted, and a search icon is visible next to the 'MBCAUDITOR' text. The table also includes navigation controls like 'First', '1 of 1', and 'Last'.

Permission List	Description	View Definition
MBCAUDITOR	Finance Auditor	View Definition

Dynamic Role Associations

➤ Automated association of Role > User

➤ Defined one of three ways:

- Query
- LDAP
- PeopleCode (via PeopleCode, could be a combination of all three)

➤ Dynamic does not mean immediate

- Typically a nightly batch program would regenerate the associations