Oracle® Agile Product Lifecycle Management for Process

Security Configuration Guide

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Oracle Agile Product Lifecycle Management for Process Security Configuration Guide, Release 6.2.4.x

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Preface

The *Oracle Agile Product Lifecycle Management for Process Security Configuration Guide* contains guidelines for managing security configurations in Oracle Agile Product Lifecycle Management (PLM) for Process.

This preface contains these topics:

Audience

This guide is intended for end users who are responsible for creating and managing information in Oracle Agile Product Lifecycle Management for Process. Information about administering the system resides in the *Oracle Agile Product Lifecycle Management for Process Administrator User Guide*.

Variability of Installations

Descriptions and illustrations of the Oracle Agile PLM for Process user interface included in this manual may not match your installation. The user interface of Oracle Agile PLM for Process applications and the features included can vary greatly depending on such variables as:

- Which applications your organization has purchased and installed
- Configuration settings that may turn features off or on
- Customization specific to your organization
- Security settings as they apply to the system and your user account

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Related Documents

For more information, see the following documents in the Oracle Agile Product Lifecycle Management for Process documentation set:

- *Oracle Agile Product Lifecycle Management for Process Administrator User Guide*
- *Oracle Agile Product Lifecycle Management for Process User Group Management User Guide*
- *Oracle Agile Product Lifecycle Management for Process Workflow Administration User Guide*
- *Oracle Agile Product Lifecycle Management for Process Configuration Guide*
- *Oracle Agile Product Lifecycle Management for Process Install/Upgrade Guide*
- Oracle Agile Product Lifecycle Management for Process Release Notes. Up-to-date Release Notes and other documentation are posted on Oracle Technology Network (OTN) at this location:

  http://www.oracle.com/technology/documentation/agile-085940.html

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

Security Overview

This chapter gives an overview of Oracle Agile Product Lifecycle Management (PLM) for Process and explains the general principles of application security:

Product Overview

The Oracle Agile PLM for Process solution is a fully integrated and comprehensive suite of software and services for collaborative product lifecycle management.

Customers are able to increase revenues, bring their products to market faster and lower risk by managing their new product introduction processes with flexible, collaborative tools. They can lower costs by managing their sourcing relationships and raw materials as well as optimizing their formulas. Using these tools that are designed for the process industry, customers are able to improve labelling accuracy and avoid costly recalls.

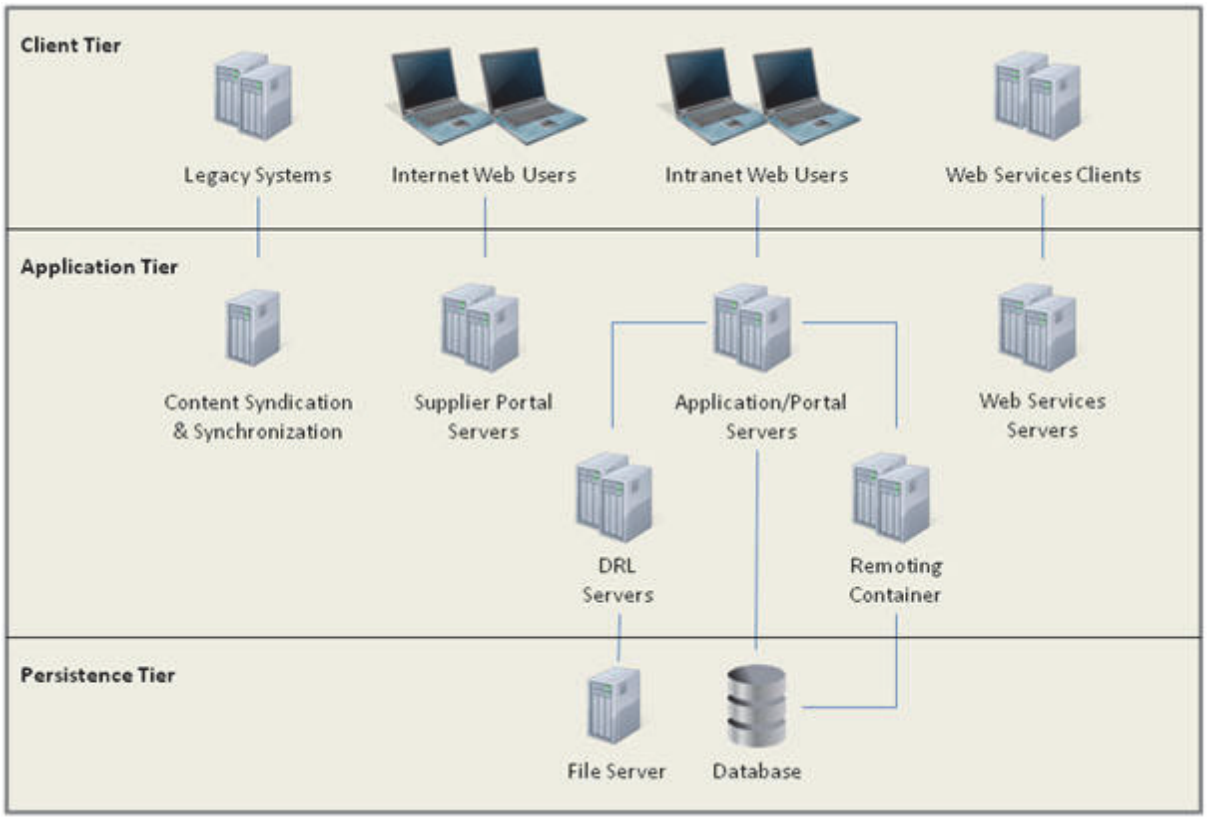
Security Overview

Agile PLM for Process offers several layers of security, as defined below:

- **Object Level Security (OLS)**—Users have access to securable objects within business objects.
- **GSM Business Unit Security**—Users can only access specifications and data about specifications if they are members of one of the business units that the specification is associated to.
- **SCRM Business Unit Security**—Users are assigned an SCRM business unit, which determines visibility and access to companies and facilities. All search screens in Agile PLM for Process that include SCRM companies and facilities respect this visibility.

Product Architecture

Figure 1–1 Product Architecture



Supported Software

For supported versions of the following software, see the *Oracle Agile PLM for Process Install/Upgrade Guide*.

Client Tier:

- Internet Explorer*
- Google Chrome
- Mozilla Firefox
- Microsoft Edge

*Note: Please refer to 'Software Requirements' in *Agile Product Lifecycle Management for Process Install/Upgrade Guide* for more details.

Application Tier:

- Microsoft Windows
- Microsoft IIS
- Microsoft .NET Framework

Persistence Tier:

- Microsoft SQL Server
- Oracle Database Server

General Security Principles

The following principles are fundamental to using any application securely:

Keep Software Up To Date

One of the principles of good security practice is to keep all software versions and patches up-to-date. Throughout this document, we assume Oracle Agile PLM for Process is version 6.2 or later.

Restrict Network Access to Critical Services

Keep both the application servers and the database behind a firewall. In addition, place a firewall between the middle-tier and the database. The firewalls provide assurance that access to these systems is restricted to a known network route, which can be monitored and restricted, if necessary. As an alternative, a firewall router substitutes for multiple, independent firewalls.

If firewalls cannot be used, be certain to configure the TNS Listener Valid Node Checking feature which restricts access based upon IP address. Restricting database access by IP address often causes client/server programs to fail for DHCP clients. To resolve this, consider using a static IP address, a software/hardware VPN or Windows Terminal Services or its equivalent.

Follow the Principle of Least Privilege

The principle of least privilege states that users should be given the least amount of privilege to perform their jobs. Over ambitious granting of responsibilities, roles, and grants especially early on in an organization's life cycle when people are few and work needs to be done quickly, often leaves a system wide-open for abuse. User privileges should be reviewed periodically to determine relevance to current job responsibilities.

Monitor System Activity

System security stands on three legs: good security protocols, proper system configuration, and system monitoring. Auditing and reviewing audit records address this third requirement. Each component within a system has some degree of monitoring capability. Follow audit advice in this document and regularly monitor audit records.

Keep Up To Date on Latest Security Information

Oracle continually improves its software and documentation. Check this note yearly for revisions.

2

Secure Installation and Configuration

This chapter outlines the planning process for a secure installation, describes several recommended deployment topologies for the systems, and includes the following topics:

Understanding Your Environment

To better understand your security needs, ask yourself the following questions:

- Which resources am I protecting?

  Many resources in the production environment can be protected, including information in the database, file servers and the availability, performance, and integrity of the Web site. Consider the resources you want to protect when deciding the level of security you must provide.

- From whom am I protecting the resources?

  Resources belonging to PLM for Process should be protected from everyone on the Internet. Do you have suppliers that will be accessing the Supplier Portal? What level of access do you want to give to employees? What resources should they be able to access? Should the system administrators be able to access all data? You might consider giving access to highly confidential data or strategic resources to only a few well-trusted system administrators. Perhaps it would be best to allow no system administrators access to the data or resources.

- What will happen if the protections on strategic resources fail?

  In some cases, a fault in your security scheme is easily detected and considered nothing more than an inconvenience. In other cases, a fault might cause great damage to companies or individual clients that use the Web site. Understanding the security ramifications of each resource will help you protect it properly.

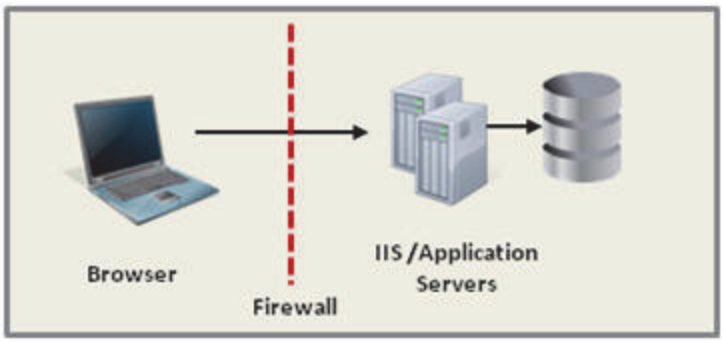
Recommended Deployment Topologies

This section describes recommended architecture for deploying Oracle Agile PLM for Process.

Core Applications

All applications, with the exception of the Supplier Portal, are deployed on a company's intranet. We recommend that the application server and database are deployed behind a firewall, to prevent direct access, as shown in Figure 2–1.

Figure 2–1 Single Firewall

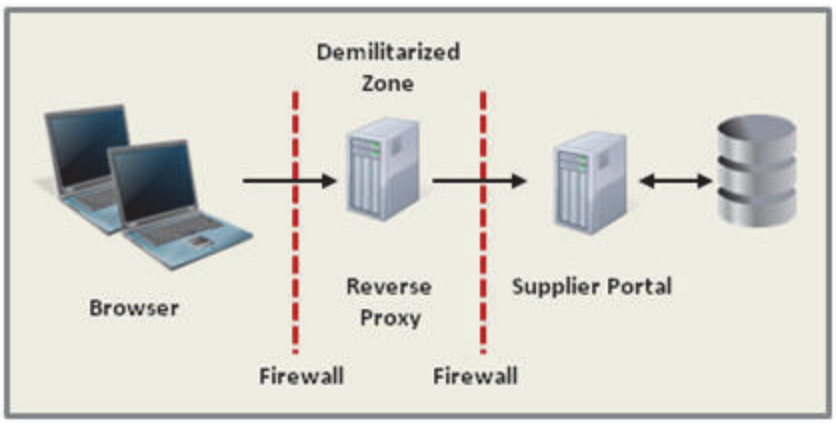


Supplier Portal

The Supplier Portal application should be accessible to the Internet. There are two recommendations for this deployment.

First is the well-known and generally accepted Internet-Firewall-DMZ-Firewall-Intranet architecture shown in Figure 2–2.

Figure 2–2 Traditional DMZ View



Note: The term demilitarized zone (DMZ) refers to a server that is isolated by firewalls from both the Internet and the intranet, thus forming a buffer between the two.

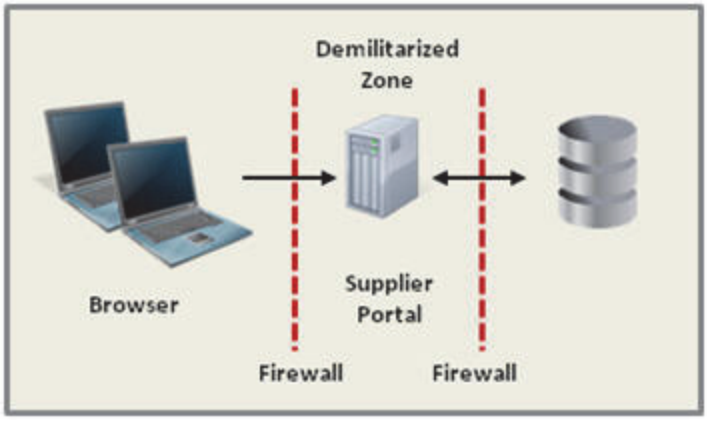
Firewalls separating DMZ zones provide two essential functions:

- Blocking any traffic types that are known to be illegal.

- Providing intrusion containment, should successful intrusions take over processes or processors.

The second option is deploying the Supplier Portal server in the DMZ and opening up the DB ports and file sharing ports if PLM4P.XDocuments.Path is set to a shared folder, so the Supplier Portal can access it directly. This is shown in Figure 2–3.

Figure 2–3 Deploying Supplier Portal in DMZ



When setting up Supplier Portal, ports 80/443 (http/https), 139/445 (file sharing) and 1433/1521 (database) need to be configured in the firewall so that the internal applications can access these ports.

Installing Microsoft Windows Server with IIS

This section describes how to install and configure Microsoft Windows 2008, 2012, and 2016 Server with IIS securely.

For an installation of Oracle Agile PLM for Process on Microsoft Windows 2008 Server, 2012 Server, or 2016 Server, modify the default configuration following the appropriate guideline found here: NSA Security Guides, with the following differences:

1. To properly run a PLM for Process application, the only application role required is IIS. Install the following Microsoft Windows Server OS supported by the certified software

   IIS 10 on Microsoft Windows 2016 Server

   IIS 8.5 on Microsoft Windows 2012 Server R2

   IIS 8.0 on Microsoft Windows 2012 Server

   IIS 7.5 on Microsoft Windows 2008 Server R2 SP1 (64-bit)

   IIS 7.0 on Microsoft Windows 2008 Server SP2 (64-bit)

2. When configuring Application Pools for PLM for Process, avoid using Local System for the production environment. Local System prevents the use of Integrated SSPI when connecting to the database. Instead, a clear text username and password must be used in the environmentvariables.config configuration file. If Local System is not used, then Integrated SSPI can be used and the password is not exposed in the configuration file. Refer to the *Agile Product Lifecycle Management for Process Install/Upgrade Guide* for guidance.

   Example of Oracle DB configuration:

   ```
   PLM4P.DB.Type=orcl
   ```

```
PLM4P.DB.URL=data source=#DATA_SOURCE;user id=#DB_USER_ID;password=#DB_PASSWORD
```

Example of SQL DB configuration:

```
PLM4P.DB.Type=msft
PLM4P.DB.URL=server=localhost;uid=user;pwd=pass;database=database
```

Installing Microsoft SQL Server Database 2008/2012/2014/2016

This section describes how to install and configure SQL Server 2008, 2012, 2014, and 2016 securely.

For an installation of Oracle Agile PLM for Process on SQL Server 2008, 2012, 2014, or 2016 follow the appropriate guideline and modify the configuration with the following notes:

- Security Considerations for SQL Server 2008
- SQL Server 2012 Security Best Practices
- Security Considerations for a SQL Server 2014
- Security Considerations for a SQL Server 2016
- Choosing an Authentication Mode

By default, the application is configured to use Integrated SSPI. For this, only Windows Authentication is needed. However, you can choose to use SQL Server Authentication, as well. This method is less secure as it requires a username and password stored in clear text in the environmentvariables.config configuration file. SQL Server Authentication should not be used for production environments.

Installing Oracle Database 11g or 12c

For an installation of Oracle Agile PLM for Process on Oracle Database Server 11g, follow the Oracle Database Security Guide (11g Release 2) and make the necessary configuration changes.

For an installation of Oracle Agile PLM for Process on Oracle Database Server 12c, follow the Oracle Database Security Guide (12c Release 1) and make the necessary configuration changes.

Installing Oracle Agile PLM for Process

The solution only has one package. Please refer to *Agile Product Lifecycle Management for Process Install Upgrade Guide* for the deployment.

Post-Installation Configuration

- The URLs for the application are set in the environmentvariables.config configuration file. By default, the URLs are set to HTTPS for a more secured connection. It is highly recommended that all environments where the client browser is on a different server than the application server use HTTPS to ensure that data travelling over the network is secure. If a customer decides not to use SSL, these URLs can be changed to HTTP.
- Export Encryption Key

  The Data Admin application allows you to export an encrypted file of administrative data changes for import into a target environment. For increased security, this encryption key can be modified by an administrative user.

By default, the encryption keys are stored as key-value pairs in a database table called ConfigurationDictionary. To change these keys, you must update the values for the following two keys in the table:

DataExchange.Encryption.KeyPassphrase

DataExchange.Encryption.IVPassphrase

The encryption keys must be identical on both the export and import application environments. Depending on your security requirements, you may need to modify this table to store the keys, for example, in a restricted-access file. The storage and retrieval mechanism for the encryption keys can be modified by creating a custom class and modifying the application configuration.

- The Install/Upgrade Guide provides information for installing the application in a secure environment using Integrated SSPI as the DB connection method. For non-production and environments that do not contain sensitive or confidential information, you can choose to configure the following:

  Remoting Container Service Run as Local System

  Application Pools: Run as Local System

  Connect string to use username and password

  ```
  PLM4P.DB.URL=server=localhost;uid=user;pwd=pass;database=database
  ```

- For additional security, you may wish to lock down the application directory. To do this, follow these steps to secure your %PRODIKA_HOME%:

  Using Windows Explorer

  1. Right-click %PRODIKA_HOME%>Sharing and Security>Security Tab>Advanced.
  2. Uncheck "Allow inheritable permissions from the parent...".
  3. Choose Copy on the security pop-up.
  4. Remove all groups other than Administrators.
  5. Add the user that the application pool and remotecontainerservice service runs as.
  6. Give this user the following permissions to %PRODIKA_HOME%:
     a. Read & Execute
     b. List Folder Contents
     c. Read
  7. Also give this user the following permissions to %PRODIKA_HOME\XDocuments and %PRODIKA_HOME%\Logs:
     a. Read & Execute
     b. List Folder Contents
     c. Read
     d. Write
  8. Give this user the following permissions to the system temp directory:

     You can find the path information located in your Windows environment variables under System variables. Typically, this is %WINDIR%\temp.

     a. Read & Execute
     b. List Folder Contents

c. Read

d. Write

9. Add the account chosen as the anonymous access user for the website.

Typically, this is IUSR_<machinename> and can be found in IIS > <website> > properties > Directory Security > Authentication and access control > Edit.

10. Give that user “Read” permissions to the %PRODIKA_HOME% directory.

3

Security Features

This chapter outlines specific security mechanisms offered by Oracle Agile PLM for Process and includes the following topics:

Security Model

Application security arises from the need to protect company assets from unauthorized users.

The critical security features that provide protection are:

- Authentication—ensuring that only authorized individuals get access to the system and data.
- Authorization—access control to system privileges and data. This builds on authentication to ensure that individuals only get appropriate access.
- Audit—allows administrators to detect attempted breaches of the authentication mechanism and attempted or successful breaches of access control.

Configuring and Using Authentication

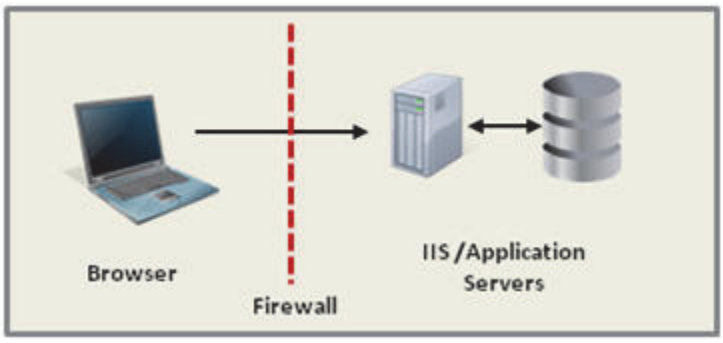
Oracle Agile PLM for Process can be configured to accommodate two kinds of authentication models. Each model has its benefit and is explained in the following sections:

- Basic Authentication
- Single Sign On Authentication

Basic Authentication

Using Oracle Agile PLM for Process's internal authentication capabilities, Basic Authentication is the simplest form of authentication provided. It is achieved by using the User ID and a secure salted password derivation function using PBKDF2 with the SHA256 algorithm as HMAC. The User ID, salt, hash algorithm with process iterations, and password are all stored in the Users table of the PLM4P database.

Figure 3–1 Basic Authentication



If SSL is not used, the password is transmitted in clear text, so it is very important to use SSL in a production environment.

The application uses Basic Authentication by default.

Passwords

Password Policy

The password policy for Basic Authentication can be configured to meet the specific needs of each customer. In particular, you can configure these attributes:

- Password Expiration

  Purpose: Specifies the number of days a password is valid until it needs to be changed.

  Configuration File: EnvironmentSetting.config

  Element:

  ```
  <config key="PasswordExpiration" value="{days}" />
  ```

  {days}: Days until expiration, -1 means never expire

  Default: -1

- Password Length

  Purpose: Specifies the min and max length for the password

  Configuration File: CustomerSettings.config

  Element:

  ```
  <EnvironmentManager.configChildKey="key">
      <config.key="MinPasswordSize" value="{minlength}"/>
      <config.key="MaxPasswordSize" value="{maxlength}"/>
  </EnvironmentManager>
  ```

  {minlength}: Minimum length of password, Default:8

  {maxlength}: Maximum length of password, Default:15

- Required Characters

  Purpose: Specifies what characters are required

  Configuration File: ValidationSettings.xml

  Element:

  ```
  <rule type="userPassword">
  ```

```
    <condition event="save" minRequirement="{amounttomeet}:">
        <if type="ReflectiveRegExValidator" expression="[a-z]+"
        property="Text"/>
        <if type="ReflectiveRegExValidator" expression="[A-Z]+"
        property="Text"/>
        <if type="ReflectiveRegExValidator" expression="[0-9]+"
        property="Text"/>
        <if type="ReflectiveRegExValidator" expression="[~!@#$%^&*()_
        ;:<>?=\[\]\+\-]+" property="Text"/>
    </condition>
</rule>
```

{amounttomeet}: Number of conditions that need to be met. For example, if it is set to 3, at least 3 of the regular expressions in the list have to be met.

Default: 3

Additional regular expression can be added.

Based on the specifications, the default password policy is as follows:

At least 8 characters and include 3 of the following: Upper Case (A-Z), Lower Case (a-z), Numbers (0-9) and/or Special Characters (~!@#$%^&*() -+[];:<>?). Password is set to never expire.

Passphrase Policy

A passphrase is provided to support the eSignature feature. Refer to the *Oracle Agile Product Lifecycle Management for Process Administrator User Guide* for more information on this feature. The policy for this passphrase is configurable in the same way as the user password, same files just different elements. The default settings are also the same.

Passwords for Default Accounts

After installation there is a default user account and password available in the certified database to allow administration access to the applications. The user account information is as follows:

Username: prodikaadmin

Password: agile

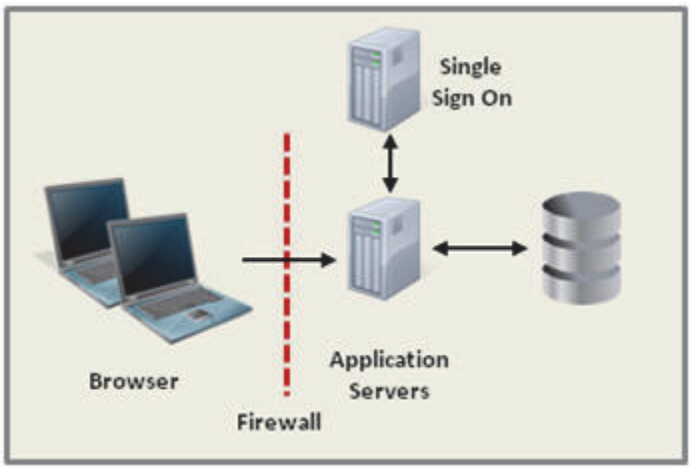
To help better secure the application, the user is required to change this password during the first login.

Single Sign On Authentication

Single Sign On (SSO) authentication allows companies to take advantage of their existing assets. Companies will be able to take advantage of the feature that their specific SSO solution offers, such as strong password enforcement.

Specific SSO implementations are not certified. However, if the requirements outlined in this document are respected, it should work.

Figure 3–2 Single Sign On Authentication



When a user accesses PLM for Process, the request should be directed to your SSO server and authentication will be performed there. The User ID or External ID should be passed back in the response using HTTP Header Rewrite. The request should then be forwarded to the application server.

With either the User ID or External ID in the request, the application server is able to authenticate the user.

It is important to secure the communication channel between the application server and the SSO server. Secure this channel with SSL.

Using the External ID to authenticate the user is more secure than using the User ID because the External ID is not publicly exposed. To configure the system to authenticate with the SSO, you must configure the SingleSignOn element in the EnvironmentSettings.config file.

```
<SingleSignOn
    xmlMergeKey='SingleSignOn'
    paramName='externalid'
    columnName='username'
    enabled='true'
/>
```

Key Name	Excepted Value	Description
paramName	Name of header key	The header key set by the SSO solution once it authenticates the user in the incoming request.
columnName	Name of the column in the user table	The name of the column in the Users table that contains the value to be compared to the value of the header key in the request.
enabled	true/false	Indicates if SSO is enabled.

The internal authentication mechanism must be set to use Raw Authentication in order for SSO to work properly. To enable this, you must modify the envvar element in the EnvironmentSettings.conf file as follows:

```
<envvar name="AuthenticationStrategies">
    <envvar name="AuthenticationStrategy"
        id="Prodika"
        useRawAuthentication="true"
        configAttributeOverrideModifier="IsLocked"/>
</envvar>
```

Configuring and Using Access Control

Oracle Agile PLM for Process implements various authorization models which work together to provide secure and flexible access control. The following table is an overview of these security features:

General	
User Accounts	User accounts are managed in the User Group Management application. Refer to the *Oracle Agile Product Lifecycle Management for Process User Group Management User Guide* for more information.
Role Based Features	Many features across the product suite are enabled by the user's association to a Role. Users are associated to Roles through the use of User Groups in the User Group Management application. A complete list of Roles and their function can be found in Appendix A of the *Oracle Agile Product Lifecycle Management for Process User Group Management User Guide*.
Site Access	Users are granted access to specific applications within the application site through the Site Access Section in the User Group Management application. Refer to the *Oracle Agile Product Lifecycle Management for Process User Group Management User Guide* for more information.
Segment Security	Segment acts as security restricting visibility to objects based on user association. Segment is found in all applications (GSM, SCRM, NPD, LIO, Component Catalog, eQ, DRL, PQM, NSM), is configurable on/off, and serves as WFA resolution criteria. Refer to the *Agile Product Lifecycle Management for Process Configuration Guide* for more information.
GSM	
Business Unit Security	Read access to specifications within GSM can be controlled through BU Security. This allows users in a given Business Unit access to only specifications in the same Business Units. Note that this is different from Business Level Visibility. To enable this feature, set the Common.GSMBusinessUnitSecurity.Enabled configuration in the FeatureConfig section of the CustomerSettings.config file to true.
Workflow Security	Read, edit, and workflow permission to GSM Specifications can be controlled for each workflow step by using the Workflow Administration (WFA) component.

Section Level Editing	Custom validation rules can be created to control edit access of GSM sections. For example, a rule can be written to turn off editing of specific sections based on UGM user group and specification category, regardless of workflow status. When a section is read-only, all editing methods are hidden such as, Add New buttons and Edit icons. For more information, see the *Agile Product Lifecycle Management for Process Extensibility Overview Guide*.
Object Level Security	Object Level Security permits or restricts read access to certain securable objects within a business object (specification, company, facility, sourcing approval, or questionnaire). OLS does not determine access to the business object, but once the user does have access, OLS determines what securable objects within the business object the user has access to. These securable objects include: Extended attributes Custom sections Sourcing approvals Supporting documents Supplier Document Management (SDM) documents
Private Smart Issue Requests	By default, all users with the [SMART_ISSUE_READER] role are able to read the smart issue request. If a request is marked as Private, only the users added to the Owner and Readers fields will be allowed to view the request.
Veto Plugin Handler	Custom security rules can be evaluated when determining GSM specification read permissions, and PQM item read/write permissions. The Specification Veto Plugin is an extension point available to all GSM specifications that allows a custom class to be accessed when the user opens a specification. The custom class evaluates the current specification and returns a true or false value giving read access to the specification or not. Similarly, PQM has two extension points, one for Read permission and one for Write permissions, that can be used to further define those permissions.
Formula Classifications	Formula Classifications can be used to restrict access to % breakdowns on Ingredient specifications.
eSignature	Providing a signature for a Signature Document and advancing a specification in a workflow can be configured to require the user to enter a passphrase.

Printing	For all specifications printed, the following table shows how the items are secured. If you do not have access to them, they are not printed: **Secured Object** — **Security Respected** Attachments — OLS Custom Sections — OLS Sourcing Approvals — OLS and SCRM BU Security % Breakdowns — Formulation Classification All related specifications — WFA, Segment, BU Security Additionally, customers can create fine grained control over what can be printed using extensions available in the Printing models. Refer to the *Agile Product Lifecycle Management for Process Print Extensibility Guide* for more information.
SCRM	
SCRM Business Unit Security	Access to Company and Facility data can be controlled by using SCRM Business Unit security. Refer to the *Oracle Agile Product Lifecycle Management for Process Supply Chain Relationship Management User Guide* for more information. To enable this feature, set the SCRMBusinessUnitSecurity.Enabled configuration in the FeatureConfig section of the CustomerSettings.config file to true.
NPD	
Private Projects	All projects are available to all NPD users by default. When the Private flag is checked on the project, only authorized team members will have access to the project. Refer to the *Oracle Agile Product Lifecycle Management for Process New Product Development User Guide* for more information.
Object Level Security	Object Level Security permits or restricts read access to certain securable objects within a business object. OLS does not determine access to the business object, but once the user does have access, OLS determines what securable objects within the business object the user has access to. These securable objects include: NPD metrics Extended attributes Custom sections Supporting documents
Supplier Portal	
Contact Profiles	Supplier access to the Supplier Portal is managed using the Supply Chain Relationship Management application. Refer to the *Oracle Agile Product Lifecycle Management for Process Supply Chain Relationship Management User Guide* for more information.

Publishing Specifications to Supplier Portal	For a specification to be visible in the Supplier Portal, both the specification and the relevant sourcing approval must be in a workflow step on which the system action is set to "Publish to Supplier." Refer to the *Oracle Agile Product Lifecycle Management for Process Supplier Portal User Guide* for more information.
eQuestionnaire	
Questionnaire Security	There are two modes for eQuestionnaire security: Enabled—In this mode, the primary owner and those users defined in the Additional Administrators field have read and write access to this questionnaire. All other users are unable to access the questionnaire. Disabled—In this mode, all users with access to the eQuestionnaire application have read and write access to all questionnaires. To enable this feature, set the EQ.QuestionnaireSecurity.Enabled configuration in the FeatureConfig.config file to true.
UGM	
Import/Export	Customers maintain a staging environment where they add, update, and test administration data changes prior to deploying in a production environment. When ready to deploy to production, the data is exported into a file from the staging environment and then imported into production. Data that is confidential in nature will be exported to an encrypted file. The out-of-the-box functionality allows the user to create a token on the target environment and used to create the export file. This file will now only be able to be imported in the target environment.
PQM	
Workflow Security	Read, edit, and workflow permission to PQM Issues, Actions, and Audits, can be controlled for each workflow step by using the Workflow Administration (WFA) component.
Custom Read/Write permission	Custom security rules can be evaluated when determining PQM item read/write permissions. The HasPQMReadPermissionPlugin and HasPQMWritePermissionPlugin are extension points available to all PQM items that allows a custom class to be accessed when the user opens a PQM item. The custom class evaluates the current item and returns a true or false value giving read access to it or not.

Default Access

General

User Accounts	The following users with roles are available by default. **ProdikaAdmin** [ACCESS_LEVEL_EDITOR],[ADD_CUSTOM_SECTION],[ADD_EXT_ATT],[ARCHIVED_SCRM_VIEWER],[AVAILABLE_UOM_ADMIN],[CACHE_ADMIN],[CACHE_SERVER_VIEWER],[CAN_RERESOLVE_WORKFLOWS],[CAN_RERESOLVE_WORKFLOWS_SCRM],[CHANGE_OWNER],[COMPANY_CREATOR],[COMPLIANCE_REVIEWER],[COMPONENT_CATALOG_ID_ADMN],[COMPONENT_CATALOG_CREATOR],[COMPONENT_CATALOG_READER],[CONFIG_ROLLUP_VIEWER],[CONTACT_CREATOR],[CONTACT_EDITOR],[CONTACT_READER],[CREATE_FROM_TEMPLATE_1004],[CREATE_FROM_TEMPLATE_1005],[CREATE_FROM_TEMPLATE_1006],[CREATE_FROM_TEMPLATE_1009],[CREATE_FROM_TEMPLATE_1010],[CREATE_FROM_TEMPLATE_2076],[CREATE_FROM_TEMPLATE_2121],[CREATE_FROM_TEMPLATE_2147],[CREATE_FROM_TEMPLATE_2280],[CREATE_FROM_TEMPLATE_2283],[CREATE_FROM_TEMPLATE_5001],[CREATE_FROM_TEMPLATE_5002],[CREATE_FROM_TEMPLATE_5012],[CREATE_FROM_TEMPLATE_5019],[CREATE_FROM_TEMPLATE_5750],[CREATE_FROM_TEMPLATE_5816],[CREATE_FROM_TEMPLATE_6500],[CREATE_FROM_TEMPLATE_6501],[CSS_ADMIN],[DATA_ADMIN],[DRL_CREATOR],[DRL_EDITOR],[DRL_VIEWER],[EA_SECTION_CREATOR],[EQ_ACCESS_LEVEL_EDITOR],[EQ_TEMPLATE_CREATOR],[EXTERNALLY_MANAGED_CROSS_REF_ADMIN],[FACILITY_CREATOR],[FRM_ FLEXSYNC],[FRM_OPTIMIZATION],[FRM_REFRESH_HIERARCHY],[GSM_PRINT_ADMIN],[HIDDEN_SA_VIEWER],[HIDDEN_SPEC_VIEWER],[LABEL_CLAIMS_CREATOR],[LIO_COMPOSITION],[LIO_CREATOR],[LIO_READER],[LIO_SORTORDER],[LIO_STATEMENT_EDITOR],[LOCAL_USER],[NON_SPEC_SAC_CREATOR],[NPD_ADMIN],[NPD_FINANCIAL],[NPD_GLOBAL_DATA_MANAGER],[NPD_GLOBAL_FINANCIAL],[NPD_IDEA_DELETER],[NPD_ISP_CREATOR],[NPD_PACKAGE_COPY_ADMIN],[NPD_PROJECT_DELETER],[NPD_SA],[NPD_SA_READER],[NUTRIENT_ANALYSIS_CREATOR],[NUTRIENT_ANALYSIS_READER],[NUTRIENT_COMPARER],[NUTRIENT_COMPOSITE_CREATOR],[NUTRIENT_COMPOSITE_READER],[PQS_ADMIN],[PQS_FINAL_SCORER_ROLE],[PQS_GUEST],[PQS_REPORTER],[PQS_SAMPLE_CREATOR],[PQS_SCORECARD_CREATOR],[PQS_SESSION_CREATOR],[PRINT_DEBUG],[READY_REPORT_ADMIN], [READY_REPORT_SUPER_ADMIN],[REGULATORY_FILING_CREATOR],[REMOVE_CUSTOM_SECTION],[REMOVE_EXT_ATT],[SAC_CREATOR],[SCREEN_CREATOR],[SCRM_ADMIN],[SCRM_COMPANY_EDITOR],[SCRM_COMPANY_READER],[SCRM_COPIER],[SCRM_FACILITY_EDITOR],[SCRM_FACILITY_READER],[SCRM_FACILITY_RELOCATOR],[SCRM_LOGIN],[SCRM_PRINCIPAL_EDITOR],[SCRM_SEARCH],[SMART_ISSUE_CREATOR],[SMART_ISSUE_EDITOR],[SMART_ISSUE_READER],[SPEC_ADMIN],[SPEC_COPIER],[SPEC_CREATOR],[SPEC_CREATOR_1004],[SPEC_CREATOR_1005],[SPEC_CREATOR_1006],[SPEC_CREATOR_1009],[SPEC_CREATOR_1010],[SPEC_CREATOR_2076],[SPEC_CREATOR_2121],[SPEC_CREATOR_2147],[SPEC_CREATOR_2280],[SPEC_CREATOR_2283],[SPEC_CREATOR_5750],[SPEC_CREATOR_6500],[SPEC_CREATOR_6501],[SPEC_GRADUATOR],[SPEC_ISSUER],[SPEC_PRINT_CONTROLLER],

	[SPEC_TARGET_REVISIONER],[SUBSTITUTE_MATERIAL_DEFINER],[SUCCESSION_REQUEST_EDITOR],[SUCCESSION_REQUEST_READER],[SUPER_DATA_ADMIN],[SUPPLIER_PORTAL_ADMIN],[TEMPLATE_CREATOR],[TEMPLATE_OVERRIDE],[TESTING_PROTOCOL_ADMIN],[THUMBNAIL_EDITOR],[TSA_ADMIN],[UGM_GLOBAL_ADMIN],[UGM_GROUP_ADMIN],[UGM_GROUP_APPROVER],[UGM_USER_ADMIN],[UGM_USER_APPROVER], [WFA_ADMIN],[WFA_GLOBAL_ADMIN],[WFA_USER]
	System—used for system services like DRL and Remotingcontainer. [CACHE_ADMIN],[CAN_RERESOLVE_WORKFLOWS],[COMPANY_CREATOR],[COMPLIANCE_REVIEWER],[COMPONENT_CATALOG_CREATOR],[COMPONENT_CATALOG_READER],[CSS_ADMIN],[DATA_ADMIN],[DRL_CREATOR],[DRL_VIEWER],[FACILITY_CREATOR],[GSM_PRINT_ADMIN],[LOCAL_USER],[NON_SPEC_SAC_CREATOR],[NPD_ADMIN],[NPD_FINANCIAL],[NPD_GLOBAL_DATA_MANAGER],[NPD_GLOBAL_FINANCIAL],[NPD_ISP_CREATOR],[NPD_PACKAGE_COPY_ADMIN],[NPD_PROJECT_DELETER],[NPD_SA],[NPD_SA_READER],[NUTRIENT_ANALYSIS_CREATOR],[NUTRIENT_COMPARER],[NUTRIENT_COMPOSITE_CREATOR],[PQS_ADMIN],[PQS_GUEST],[PQS_REPORTER],[PRINT_DEBUG],[REGULATOR_FILING_CREATOR],[SAC_CREATOR],[SCREEN_CREATOR],[SCRM_COMPANY_EDITOR],[SCRM_COMPANY_READER],[SCRM_FACILITY_EDITOR],[SCRM_FACILITY_READER],[SCRM_LOGIN],[SCRM_SEARCH],[SPEC_ADMIN],[SPEC_CREATOR],[SPEC_CREATOR_1004],[SPEC_CREATOR_1005],[SPEC_CREATOR_1006],[SPEC_CREATOR_1009],[SPEC_CREATOR_1010],[SPEC_CREATOR_2076],[SPEC_CREATOR_2121],[SPEC_CREATOR_2147],[SPEC_CREATOR_2280],[SPEC_CREATOR_5750],[SPEC_CREATOR_6500],[SPEC_CREATOR_6501],[SPEC_PRINT_CONTROLLER],[SUCCESSION_REQUEST_EDITOR],[SUCCESSION_REQUEST_READER],[SUPER_DATA_ADMIN],[TESTING_PROTOCOL_ADMIN],[TSA_ADMIN],[UGM_GLOBAL_ADMIN],[UGM_GROUP_ADMIN],[UGM_USER_ADMIN],[WFA_ADMIN],[WFA_GLOBAL_ADMIN],[WFA_USER] **ProdikaUserGroupAdmins** [datareader], [datawriter]
Role Based Features	Many features across the product suite are enabled by the user's association to a Role. Users are associated to Roles through the use of User Groups in the User Group Management application. A complete list of Roles and their function can be found in Appendix A of the *Oracle Agile Product Lifecycle Management for Process User Group Management User Guide*.
Site Access	Users are granted access to specific applications within the application suite through the Site Access Section in the User Group Management application. Refer to the *Oracle Agile Product Lifecycle Management for Process User Group Management User Guide* for more information.

Object Level Security

Object Level Security permits or restricts read access to certain securable objects within a business object (specification, company, facility, sourcing approval, questionnaire, innovation/sales pipeline, strategic brief, activity, or project). OLS does not determine access to the business object, but once the user does have access, OLS then determines what securable objects within the business object the user has access to. These securable objects include:

- Extended attributes
- Custom sections
- Sourcing approvals
- Supporting documents
- Supplier Document Management (SDM) documents
- NPD metrics

Each of these securable objects will have one associated security classification. You select a security classification when defining an extended attribute or custom section in the ADMN (Manage Core Data) application. For GSM supporting documents, you assign a security classification using the attachments Summary Information page. For SCRM SDM documents, assign security classifications using the Supplier Document Management page. Sourcing approvals have only one security classification, called Sourcing Approval, so no choice is required.

Object level security can be configured on or off per customer implementation. When configured off, these objects are unsecured and are accessible by all users who can access the specification or questionnaire.

Simple Security

Once the security classifications have been defined for the extended attributes or custom sections, you then define a privilege in user groups within UGM for each security classification. This security classification is referred to as Access Classification in the privilege list. These two terms can be used interchangeably. This privilege determines whether or not users within this group have access to these specific security classifications. If a privilege is not defined, then by default the users will not have access.

Contextual Security

Extended attributes, custom sections, and supporting documents support an additional security mode called “contextual security.” This mode allows you to configure access based on context, i.e. the specification or questionnaire where the extended attribute, custom section, or supporting document exists. This means that a given extended attribute, custom section, or supporting document can be visible in one specification but not visible in another. An example of this would be if you wanted a group of users to access financial data for all specifications except for those that are considered highly restricted. You might have a smaller group of users who can view this information on these highly restricted specifications.

Access Level

To set contextual security, an attribute of the specification or questionnaire called access level is used. Contextual security uses the access level to help determine if the user has access to the data based on the specific security classification. Access level is hierarchical, meaning that there is a ranking or level associated to each one. If users have access to a certain level for a security classification, they will also have access to all the levels below it. The access level is a combination of a description, such as “Highly Restricted,” and a ranking, such as “500.” When

the access level is blank, objects are unsecured and are accessible by all users who can access the specification or questionnaire.

The way contextual security is defined is similar to that for simple security. Within the access privilege section of the user group in UGM, the Read column contains the security level that the group has access to for the corresponding security classification.

The security mode, “simple” or “contextual,” is determined based on the security classification. Each security classification is defined as either non contextual (simple) or contextual. In the **Read** column of the Access Privilege list, the simple security classifications will have a drop-down list containing “Has Access” or “No Access.” The contextual security classifications will have a drop-down list containing the access levels.

User Access Privilege Resolution

The access privileges that a user inherits is a combination of access privileges from the user groups’ hierarchies that they are members of. A user can be a member of multiple groups. A group can be a child of another group. The final user access privileges resolve based on the following rules:

- The list is a superset of privileges from the groups the user belongs to plus all the parents/grandparents of those groups. The resolution process climbs the group hierarchy until either the root node is reached or it encounters a group for which the Inherit Parent Privileges box is unchecked.
- If more than one group contains the same security classification, the user inherits the least restrictive one, i.e. the highest ranked one. For example, if the financial security classification was found in two groups, one with an access level of “Highly Restricted (500)” and one with a less restrictive access level of “Restricted (400),” the user would inherit the highly restricted (500) access level. This means the user will have access to data with a security classification of “Financial” that is contained on any specification or questionnaire that the user has access to, with an access level of highly restricted (500) or below.

The fully resolved privilege list for a user can be viewed in the Access Privilege section of a user’s profile within UGM.

Segment Security

To eliminate clutter from some pages, we offer a suite level identification hierarchy called Business Segment. This security level acts much like Business Unit security however this will be a single list used across all applications [GSM, SCRM, NPD, LIO, Component Catalog, eQ, DRL, PQM, NSM].

This feature is controlled by a feature configuration added to the Common section of the base feature configuration file above GSM BU security. It is on by default:

```
<add key="Common.Segment.Enabled" value="true"
configDescription="When enabled this config displays the Segment
field throughout PLM4P. It will be a required field and used for
security when enabled. Refer to the security guide for more
information"/>

<add key="Common.SegmentSecurity.Enabled" value="true"/>
```

This field will be added to WFA as resolution criteria, NPD Template resolution and will be a new search criteria and display column option in all affected applications.

Visibility

All search views need to respect Segment security if configured on. This means users will not see items in their search results if they are not associated to one or more of the segments on the item.

Security

If a user opens an object with a segment they aren't associated to they should see the No Access Error page.

Resolution Rules

How we resolve visibility and security around segment behaves how GSM Business Unit visibility and security behave today.

Take a look at the examples below.

If you were to give a user access to Texas, the user would have access to objects tied to the segments in blue.

Pet Food

- United States
  - California
  - Florida
  - Texas
    - Dallas
    - Houston
- Canada

Chocolates

If you were to give a user access to the United States, the user would have access to objects tied to the business units in blue.

Pet Food

- United States
  - California
  - Florida
  - Texas
    - Dallas
    - Houston
- Canada

Chocolates

GSM Business Unit Security

When GSM BU security is enabled, read permissions are controlled by the business unit assigned to the specification in addition to WFA permissions. What business unit(s) the user has access to is defined on the UGM user profile.

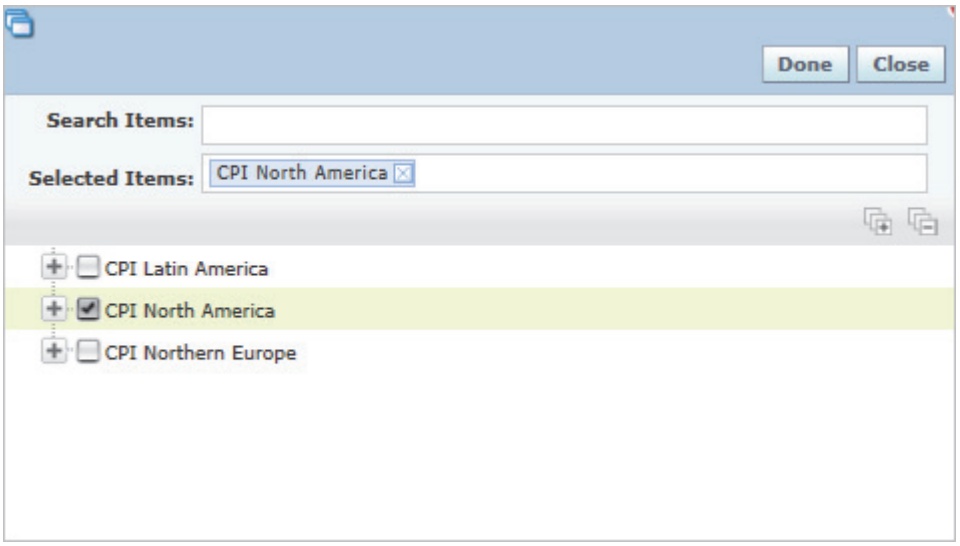
GSM BU Security also restricts access to some objects that are linked to specifications. For example, if a sourcing approval is related to a specification the user does not have BU access

to, the user will not have access to the sourcing approval. In addition, if a specification the user does not have access to is attached to an NSM object, the user will not have access to the NSM object.

If a user is associated to no business units in UGM they have access to all business units.

In addition to controlling read permissions, GSM BU Security also filters the business unit dialog box as shown in Figure 3–3 below. The user will only see business units they have access to as. This dialog box is used to select a BU for searching or assigning a BU to an entity.

Figure 3–3 BU dialog box



SCRM Business Unit Security

When SCRM BU security is enabled, read permissions and visibility of company, facility, and sourcing approval objects is controlled by the business unit attached to the company and facility. What business unit(s) the user has access to is defined on the UGM user profile.

SCRM Business Units can be associated with a status on the company or facility profile. The combination of the business unit plus status creates the permission rule. For example, company A is attached to a BU ABC and BU ABC is set to “Inactive.” Users not assigned to BU ABC can still see company A because BU ABC is inactive. This all depends on your configuration.

In addition to controlling read permissions, SCRM BU security also filters the business unit dialog box as Figure 3–3 shows above. The user will only see business units they have access to. This dialog box is used to select a BU for searching or assigning a BU to an entity.

If a user is associated to no business units in UGM, they will have access to all business units.

SCRM BU Security Example

The system is configured with the following statuses:

Status	Configuration
Null	Secured
In Review	Secured
Approved	Secured
Not Approved	Secured
Inactive	Not Secured

In this example let's assume User A has access to the CPI Vendors - North America BU and User B has access to the CPI Vendors - Latin America.

Figure 3–4 User A's UGM user profile, SCRM Business Units

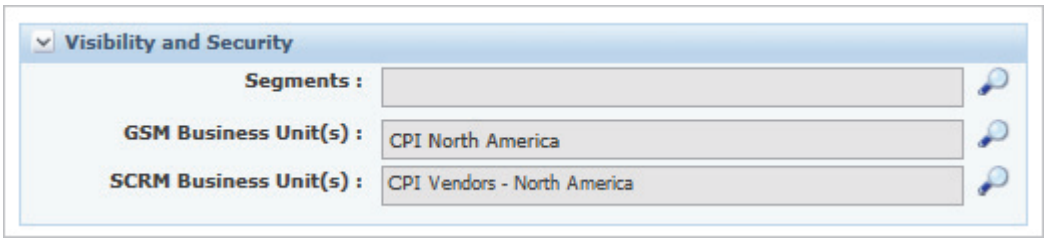


Figure 3–5 User B's UGM user profile, SCRM Business Units

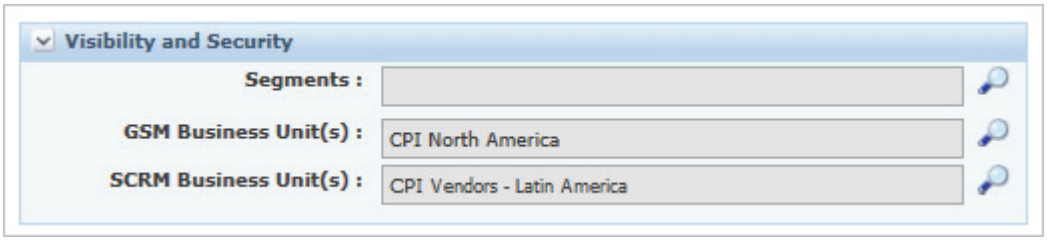
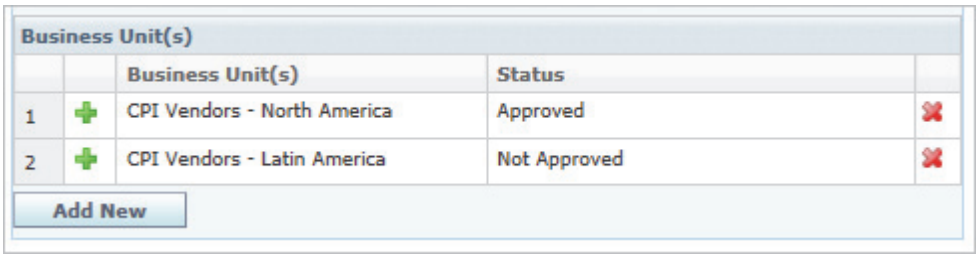


Figure 3–6 Company Profile - Business unit and status pairing



Company	Business Unit - Status Pair Defined	Users Who Have Access
A	North America - Approved Latin America - Not Approved Canada - Null	User A User B
B	North America - Approved	User A
C	Latin America - Inactive	User A User B
D	Latin America - Approved North American - Inactive	User A User B

User B will not see company B or any company, facility or sourcing approval tied to company B in EQT search results. If the user follows a URL to any object tied to company B they will be presented with a Permission Denied screen.

BU Visibility Versus BU Security

It is important to understand the difference between business unit (BU) visibility and BU security.

BU Visibility

BU visibility feature helps reduce the number of specifications presented in a search result. Think of it as helper and not security.

1. When a user performs a search, GSM only presents specifications where the user and the specifications have common BUs either directly or indirectly. “Directly” represents an exact match and “Indirectly” would be a parent or child of a BU node.
2. The results returned will appear despite workflow permissions. Therefore you do not need read or write access to see a given specification in my search results.
3. However as soon as you click on the specification, then workflow permissions govern the ability to see and interact with the specification. If a user that is not assigned to the proper BU gains access to a specification, then workflow permissions govern security. Some examples of how users can gain access to specifications without the use of a search include:
    a. Automated email due to ownership, notification, signature
    b. A user provides a link to another user
    c. A user has access to Specification A which references Specification B. The user is not associated with a BU related to Specification B, i.e. Trade to Material, Formulation to Material…
4. An example follows:
    a. Assume two users are both part of R&D.
    b. We place both in a UGM group called "R&D" and assign each to their own BU; User A BU=NA, User B BU=CN.
    c. Workflows are configured to allow anyone who is a member of "R&D" to read specifications.
    d. Via a standard search, User A will only see specifications associated with BU = NA and User B will only see specifications associated with BU=CN.
    e. But User A emails User B a link to a NA specification. Because workflow permissions govern read access and User B is a member of "R&D," User B will be able to read the NA specification.

BU Security

BU security basically changes how workflow permissions works in step 3 above as well as providing the various other forms of security described in this chapter. When BU security is turned on, then workflow permissions + BU govern read or write access. Therefore however a user finds a link to the specification they must be a member of both a proper BU and UGM group to see a specification.

Configuring and Using Auditing

There are two auditing features that can be used as part of a deployment:

1. Application level login attempt auditing
2. IIS level request auditing

Application Level Login Attempt Auditing

These logs should be periodically reviewed for suspicious failed login attempts.

The PLM for Process applications automatically log login attempts to the local server's Event Viewer, which can be found under System Tools in the Computer Management console on the server where the web application is running. A successful login will create an Information level event. A failed login attempt will create a Warning level event. The event log can filter the events by right-clicking the application in the Event Viewer and selecting Properties. On the Filter tab, the event types to be logged can be adjusted.

IIS Level Request Auditing

If a secure breach has been suspected, these logs can help determine which users viewed or edited data in question.

IIS can be configured to log every web request to any of the web applications deployed. To configure this, open IIS Manager. Right-click on the appropriate web site(s) on the tree on the left and choose Properties. On the Web Site tab, make sure Enable Logging is checked. To find the log file that is being used, select the Properties button. Another window opens. At the bottom of the General tab, the log file and directory are displayed.

Securing DRL as a Web Service

This section explains how to secure DRL as a web service. Two main tasks are:

- Setting up DRL web service endpoints for Supplier Portal
- Adapting Supplier Portal to secure the connection to DRL web services

DRL services connected by Supplier Portal should be separated from the internal core application topology. You can install a new DRL instance on the same server or on a different server. The newly created DRL instance should only be accessed by Supplier Portal.

Securing DRL Web Service

Since Release 6.2, we use WebAPI technology to create the DRL web service.

WebAPI creates the REST web service. REST is an alternate to using complex mechanisms like CORBA, RPC, and SOAP to connect between client and server. REST makes communication between remote computers easy by using the simple HTTP protocol.

So unlike previous versions, you don’t need to set complex policy configuration. What you need to do is quite simple:

In EnvironmentVariables.config, modify PLM4P.DRLAttachment.URL to point to drlService application.

```
PLM4P.DRLAttachment.URL = @@VAR:PLM4P.Server1.URL@@/drlService
```

Note: In a load balancer environment, don't use the external load balancer FQDN as the DRLAttachment.URL variable. Use the internal Server URL instead.

4

Security Considerations for Developers

This chapter discusses information useful to developers extending the application or producing applications using the product as a platform and includes the following topics:

Extensibility Points

The PLM for Process suite includes numerous extensibility points—areas in the application suite used to extend functionality of the product suite. Several extensibility points can be leveraged to provide additional customized security within the application, including Section Level Editing and the Specification Veto Plugin. Other extensibility points allow for customized display of information in the application, either as user interface screen enhancements (Notification Panel, Spec Identity Plugins) or in print or report output.

Detailed documentation is available for each extensibility point, including class diagrams, configuration file examples, a working, compiled, reference implementation, and the related source code. The *Agile Product Lifecycle Management for Process Extensibility Overview Guide* provides an overview of each extensibility point, as well as the locations of the reference implementations and documentation.

Custom Classes

To implement most extensibility points, application developers will typically write custom classes using C#, place the compiled code into the *bin* directories of the relevant web applications, and add a reference to their class in specific XML configuration files.

The application framework will call these custom classes and provide to each class relevant contextual data, such as the current specification data object. These data objects, however, do not contain security-related business logic, so application developers must take care to implement various security checks as needed.

For instance, when viewing a trade specification's related material specification, you can use the "TrdMaterialSpecAssociationIdentityPlugin" extension to add information to the user interface display of the specification information, such as the material specification's ingredient

statement. If you want to ensure that only users that have read permission to that material specification can read the ingredient statement, you would have to add specific code to perform that permission check.

Utility classes are available for determining specification permissions. See the Security section of the *Extensibility Overview Guide* for more details.

Web Services

A set of over 40 PLM for Process web services provide the ability to query, retrieve, and update data. When calling web services related to specific business objects, such as specifications, the user calling the web service is evaluated for security permissions. If the user does not have permission to read a given business object, then the business object is not returned in the web service result. For example, the GetSpecSummary web service—which returns the specification's name, status, and more—will not return a specification that the calling user does not have read permission for. See the *Agile Product Lifecycle Management for Process Web Services Guide* for more details about the web services.

Printing

Printing the various system objects, such as specifications, NPD projects, etc., may be customized to meet various client needs. Clients may limit access to specific print templates (via print template Guard Conditions classes), limit visibility of specific data elements (via mapping file Guard Conditions classes), use custom data and field translations in the existing print templates, and create their own print templates. See the *Agile Product Lifecycle Management for Process Print Extensibility Guide* for more details.

Reporting

The Reporting application allows clients to organize, configure, secure, and launch custom reports. Clients can configure custom reports, specify the categorization of the reports, configure visibility rules via custom classes, and define the various report parameters to display. Reports are categorized by two grouping levels: Report Contexts and Report Groups, each of which can be secured by configuring security classes. Report parameters can use existing pop-ups found throughout the application, or use custom-defined parameters. See the *Agile Product Lifecycle Management for Process Reporting Guide* for more details (Appendix B details how to apply security to reports).

Custom Portal

Custom Portal is an extensible web portal framework for customers to build web pages that query for Agile PLM for Process objects, display the search results, and print the result details in various formats. Access to the Custom Portal pages is secured through PLM for Process administration. The search results screens, however, are custom built. They can be implemented in various ways, from web service calls, which enforce security permission checks, to completely custom SQL code, which would then require custom security checks to be written. See the *Agile Product Lifecycle Management for Process Extensibility Overview Guide* for more details.

Site Navigation

The site navigation menu allows for overriding the existing menu items and icon buttons or adding new menu items that are not part of the core product. Each menu item or icon's visibility can be restricted by modifying the configuration entries as indicated in the *Agile*

Product Lifecycle Management for Process Navigation Configuration Guide. For instance, the Edit icon on a specification can be limited to certain user groups or roles. A custom class can also be called to evaluate visibility permissions for the icon.

A

Secure Deployment Checklist

This appendix contains the Secure Deployment Checklist to help secure your database.

Secure Deployment Checklist

The following security checklist includes guidelines that help secure your database:

1. Install only what is required.
2. Lock and expire default user accounts.
3. Enable data dictionary protection.
4. Practice the principle of least privilege.
   a. Grant necessary privileges only.
   b. Revoke unnecessary privileges from the PUBLIC user group.
   c. Restrict permissions on run-time facilities.
5. Enforce access controls effectively and authenticate clients stringently.
6. Restrict network access.
   a. Use a firewall.
   b. Never poke a hole through a firewall.
   c. Monitor listener activity.
   d. Monitor who accesses your systems.
   e. Check network IP addresses.
   f. Encrypt network traffic.
   g. Harden the operating system.
7. Apply all security patches and workarounds.