

Oracle® Banking Platform Collections

User Provisioning Guide

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Preface

This document covers the detailed configuration of OIM that is required to integrate with Collections.

Also, it covers functional flow and detail configuration required for user provisioning in Collections on default OIM installation. OIM Reconciliation and Schedule jobs are not in scope.

This preface contains the following topics:

- [Audience](#)
- [Documentation Accessibility](#)
- [Organization of the Guide](#)
- [Related Documents](#)
- [Conventions](#)

Audience

This document is intended for the following:

- IT Deployment Team
- Consulting Staff
- Administrators

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Organization of the Guide

This document contains:

Chapter 1, "Introduction"

This chapter presents an overview of user provisioning.

Chapter 2, "Configuration"

This chapter provides information on configuring OIM for OBP Collections.

Chapter 3, "User Fields and Constraints"

This chapter provides information on the user provisioning fields and related constraints.

Chapter 4, "Functional Flow"

This chapter provides information on user provisioning activities.

Chapter 5, "Verification"

This chapter provides information on verification of OIM configuration performed.

Related Documents

For more information, see the following documentation:

- For information on the configuration that should be performed on day zero, see the Oracle Banking Platform Collections Day Zero Setup Guide

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.
<i>italic</i>	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.

Introduction

In Oracle Banking Platform (OBP), users are maintained in a centralized repository called Oracle Internet Directory (OID), which is used for authentication and authorization purpose.

OBP Collections module has its own authentication and authorization process. Users configured in the OBP require access to some of the services of Collections. To access those services, user must be present in the Collections database. Hence, the user provisioned in OBP is required to be provisioned in Collections module as soon as it is created in OBP. A typical Collections request flow from online OBP user is authenticated and authorized by the OBP framework and is forwarded to the Collections module. Collections uses the user detail to create context to fetch underline service to serve the request.

Oracle Identity Manager (OIM) is used to provision users in Collections when they are created in OBP.



Configuration

This chapter details the configuration required for Oracle Identity Manager (OIM).

2.1 Prerequisites

Following is the list of prerequisites for configuring OIM:

1. You must install the following software:
 - Weblogic Server 10.3.6
 - SOA Suite 11.1.1.7
 - IAM Suite 11gR2 PS2 (11.1.2.2.0)
 - RCU 11.1.2.2.0
2. You must have administrative access to the following:
 - OIM Design Console
 - Oracle Identity System Administration <http://<Host>:<Port>/sysadmin/>
 - Oracle Identity Self Service <http://<Host>:<Port>/identity/>
 - Oracle Directory Services Manager (ODSM). For more information, see [Chapter 5.1, "Verification of OIM Configuration"](#).
3. URL of OID to which OIM is synchronized is known. Also, must have administrative access to ODSM to connect OID.
4. Values of following fields are known:

Table 2–1 OBP Collection Connection Parameters

Field Name	Value	Description
webserviceUrl	<a href="http://<Host>:<Port>/com.ofss.fc.webservice/services/collection/ORMBUserProvisioningApplicationService">http://<Host>:<Port>/com.ofss.fc.webservice/services/collection/ORMBUserProvisioningApplicationService Where Host & Port: IP and Port of HOST Server where OBP Collections is deployed.	Host server webservice URL pointing to Collections (ORMB) User Provisioning service
sessionUserId	OBP Administrative user having access to Collections services. Also, same User must be present in Collections (ORMB) database as Administrative User.	
bankCode		Bank Code
transactionBranch		Transaction Branch

Table 2–1 (Cont.) OBP Collection Connection Parameters

Field Name	Value	Description
channel		Channel
marketEntity		Market Entity
businessUnit		Business Unit
isSecurityEnabled	true/false	This flag is used to enable security through OWSM policies. Provide value based on environment configuration.
securityParamLookup		Lookup containing client security policy properties in the form of key and value. Provide values as per client policy configured.
securityPolicy		Client security policy name as per service policy configured.

5. Check following artifacts are available as part of Collections release bundle:
 - com.ofss.fc.extxface.wsdl.client.jar
 - com.ofss.fc.extxface.oim.jar
 - collections_oim_export.xml

2.2 Create OBP Collections System User

The following configuration is to create Collections System User for OIM. System User is required to authenticate OIM Collections user provisioning request at OBP server.

Note: It is assumed OBP default User and Role (Application Role Enterprise Role) configuration is already seeded in OID.

1. Create user with User Id **OIMOBPCOLL** using ODSM. Provide necessary User attributes.
2. Assign enterprise Role **Administrators** to User.
3. Create same user in Collections using Collections native admin UI. Assign **CLNHOSTUSER** Group to User, to provide minimum access of Collections native admin screen. For more information, see [Section 5.3, "Create Users in Collections."](#)

2.3 OIM Configuration

This section provides information on OIM Configuration.

2.3.1 Configure Collections Jar files

Below is sample configuration for OIM JavaTask and ThirdParty jar. Copy below listed Collections jars for user provisioning to the specified location.

Table 2–2 Collection Jar files

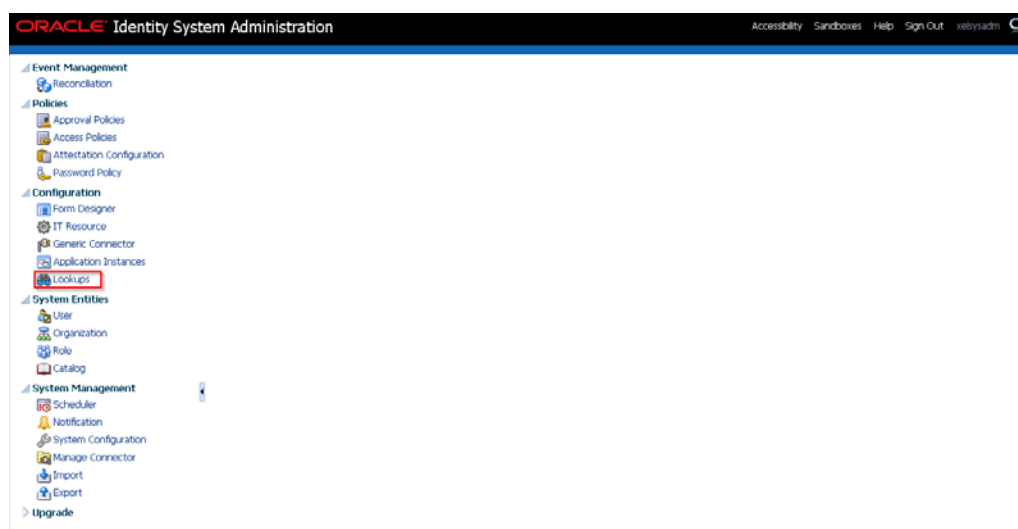
Artifact	Location	Description
com.ofss.fc.extxface.wsdclient.jar	<IDM_HOME>/server/apps/oim.ear/APP-INF/lib <IDM_HOME>/server/ThirdParty	Web service client to invoke Collections service to provision User. It should be treated as ThirdParty OIM jar . To ensure Collections java files exists, explode jar and check if package structure com\ofss\fc\extxface\app\collection\service\userprovisioning is present.
com.ofss.fc.extxface.oim.jar	<IDM_HOME>/server/JavaTasks	This jar file contains java class to create, update and delete User. It should be treated as OIM JavaTask jar . To ensure Collections java files exists, explode jar and check if package structure com\ofss\fc\extxface\oim\collection is present.

2.3.2 Configure Collections User Groups

As part of day zero configurations, administrators must add all Collections User Group to lookup definition LOOKUP.ORMB.USER.GROUPS in OIM, except Collections default User Group.

To know more about day zero configuration, see Oracle Banking Platform Collections Day Zero Setup Guide.

1. Log in to Oracle Identity System Administration. In the left pane, under Configuration, click **Lookups**.

Figure 2–1 Search and Select - Lookup Type

The **Search and Select: Lookup Type** window is displayed.

Figure 2–2 Search and Select - Lookup Type

Search and Select: Lookup Type

Search

Match All Any

Meaning

Code

Description

Search Reset

Meaning Code Description

No data to display.

Lookup Values

Meaning Code Enabled Sequence Description

No data to display.

OK Cancel

2. Click **Create Lookup Type** icon on the toolbar. The **Create Lookup Type** dialog box is displayed.

Figure 2–3 Create Lookup Type - Clicking icon

Search and Select: Lookup Type

Search

Match All Any

Meaning

Code

Description

Meaning	Code	Description
No data to display.		

Lookup Values

Meaning	Code	Enabled	Sequence	Description
No data to display.				

Figure 2–4 Create Lookup Type - Dialog box

Create Lookup Type

* Meaning Description

* Code

Lookup Codes

View

* Meaning	* Code	Enabled	Sequence	Description
Click Create to add a lookup code.				




- Specify the following values:
 - Meaning:** LOOKUP.ORMB.USER.GROUPS
 - Code:** LOOKUP.ORMB.USER.GROUPS
 - Description:** Collections User Groups

Figure 2–5 Enter Lookup Values

Create Lookup Type

* Meaning: LOOKUP_ORMB.USER.GROUPS Description: Collections User Groups
 * Code: LOOKUP_ORMB.USER.GROUPS

Lookup Codes

View ▾    Detach

* Meaning	* Code	Enabled	Sequence	Description
Click Create to add a lookup code.				

Save Cancel




4. In the Lookup Codes section, click the **Create Lookup Code** icon. A row is added to the Lookup Codes section in which you can specify valid Collections ORMB User Group in **Meaning** and **Code**.
 - **Meaning:** C1_BSERVICES (This is a sample value, add values provided).
 - **Code:** C1_BSERVICES (This is a sample value, add values provided).
 - **Enabled:** Select the check box if you want to enable the lookup code.
 - **Sequence:** Number to specify a sequence for the lookup code. A lower number indicates higher priority. For example, 1 indicates highest priority.

Figure 2–6 Edit Lookup Type

Edit Lookup Type

* Meaning: LOOKUP_ORMB.USER.GROUPS Description: Collections User Groups
 Code: LOOKUP_ORMB.USER.GROUPS

Lookup Codes

View ▾    Detach

* Meaning	* Code	Enabled	Sequence	Description
C1_BSERVICES	C1_BSERVICES	<input checked="" type="checkbox"/>	1	

Save Cancel

5. Similarly, repeat steps (step 4) to create as many lookup codes you want. To remove a lookup code, you can select the row for the code, and click the Remove Lookup Code icon.

Note: Code should be valid Collections User Group, else it would be treated as invalid while provisioning. Meaning value will be shown to User on Create User form.

- Click **Save**. The lookup type is created.

Figure 2–7 Lookup Type Creation

Search and Select: Lookup Type

Search

Match All Any

Meaning

Code

Description

Search Reset

Meaning	Code	Description
Audit.UserProfile.CustomP	Audit.UserProfile.Cus	
Catalog Risk Level	Lookup.Catalog.Risk.	
Global.Lookup.Language	Global.Lookup.Langua	
Global.Lookup.Region	Global.Lookup.Region	
LOOKUP.ORMB.USER.GRC	LOOKUP.ORMB.USER	Collections User Groups
Lookup.ACT_PROCESS_TR	Lookup.ACT_PROCES	
Lookup.Adapter Factory.A	Lookup.Adapter Fact	

LOOKUP.ORMB.USER.GROUPS: Lookup Values

Meaning	Code	Enabled	Sequence	Description
C1_BSERVICES	C1_BSERVICES	<input checked="" type="checkbox"/>		

OK Cancel

Note:

- Lookup definition LOOKUP.ORMB.USER.GROUPS values can be imported or exported using OIM Deployment Manager, useful when migrating from one environment to other.
- Restart of OIM server is required after updating the lookup definition.

2.3.3 Collection Sandbox

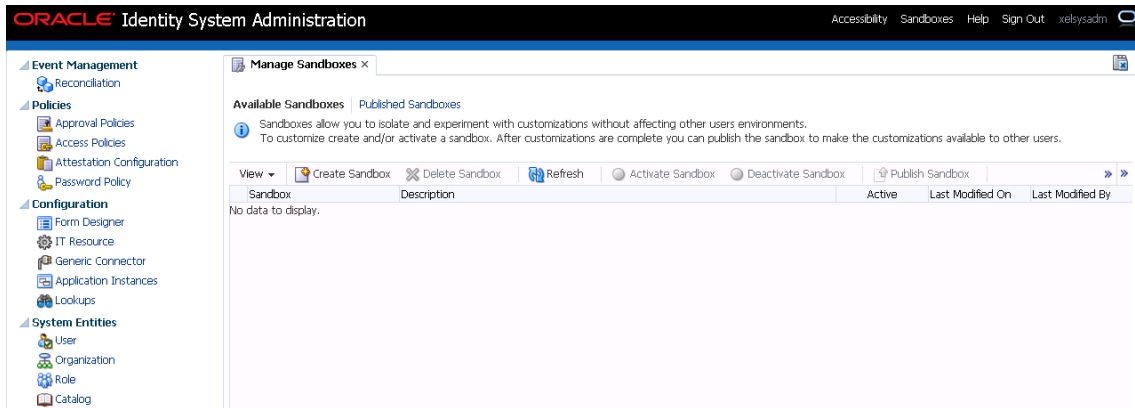
Following is configuration to create, activate, deactivate, and publish sandbox.

- Click **Sandboxes. Manage Sandboxes** page is displayed.

Figure 2–8 Oracle Identity System Administration - Sandbox tab



Figure 2–9 Manage Sandbox



2.3.3.1 Create Sandbox

To create a Sandbox, perform the following steps:

1. Click **Create Sandbox**. **Create Sandbox** page is displayed.

Figure 2–10 Create Sandbox

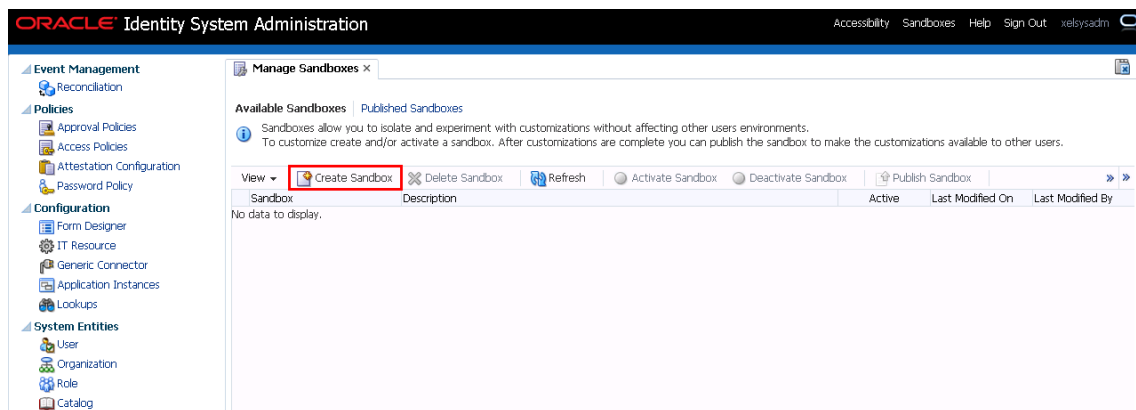


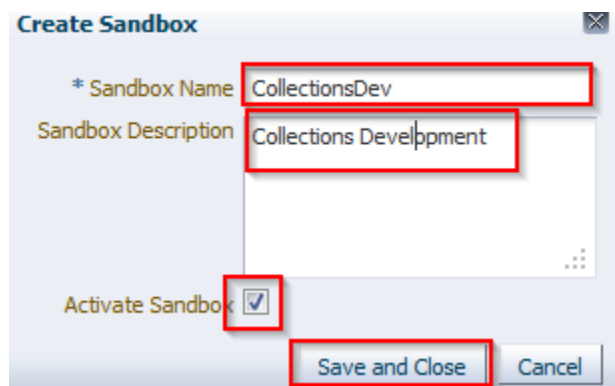
Figure 2–11 Create Sandbox Dialog Box

- Specify the following values:

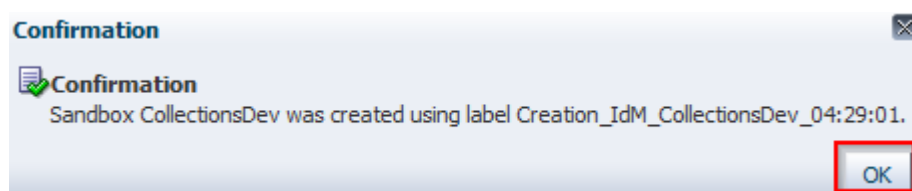
Table 2–3 Create Sandbox Parameters

Sandbox Fields	Values
Sandbox Name	CollectionsDev
Sandbox Description	Collections Development
Activate Sandbox	Check check box

- Click **Save and Close**.

Figure 2–12 Create Sandbox Parameters

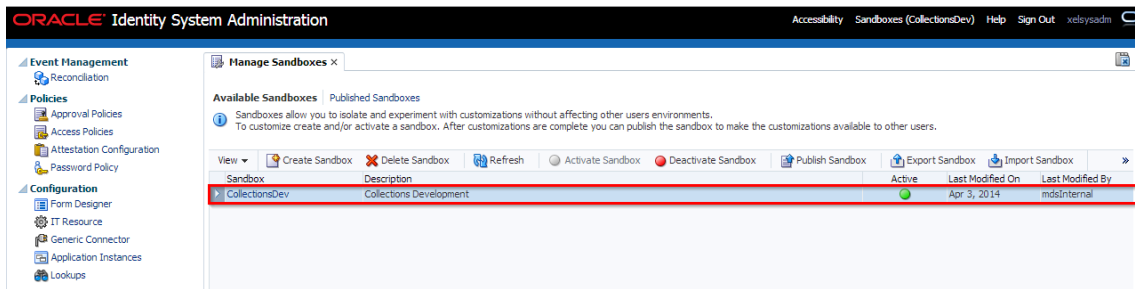
- Click **OK**. The **Confirmation** dialog box appears.

Figure 2–13 Sandbox Creation Confirmation

CollectionsDev sandbox is created and it is activated

Note: After you activate the sandbox, any changes to metadata objects are stored in the sandbox only. There can be only one active sandbox at a time. The information about the active sandbox is stored in the session. Therefore, a sandbox must be activated to continue with customization after every login to Oracle Identity Manager.

Figure 2–14 Available Sandbox

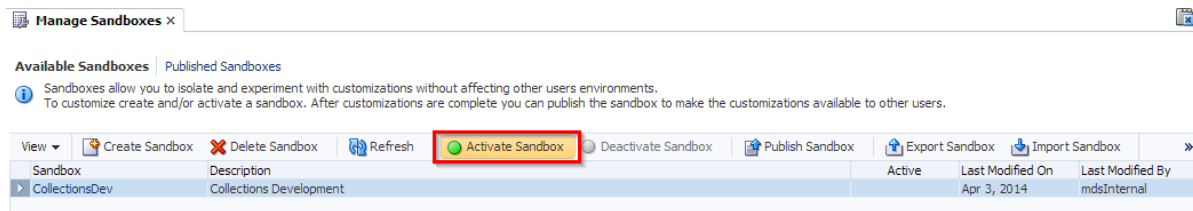


2.3.3.2 Activate Sandbox

To activate a Sandbox, perform the following steps:

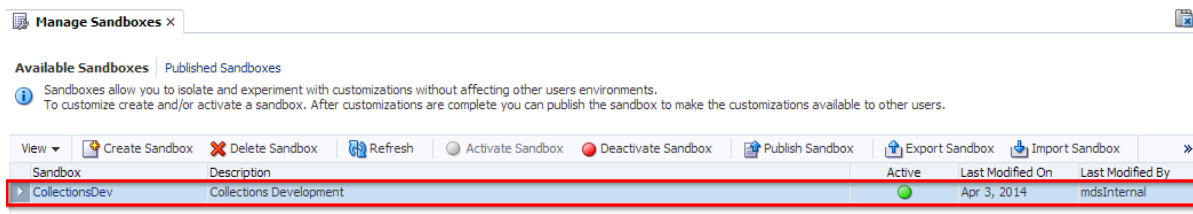
1. Select **CollectionsDev** sandbox and then click **Activate Sandbox** to activate sandbox.

Figure 2–15 Activate Sandbox



Sandbox is active now; it will be highlighted with green dot.

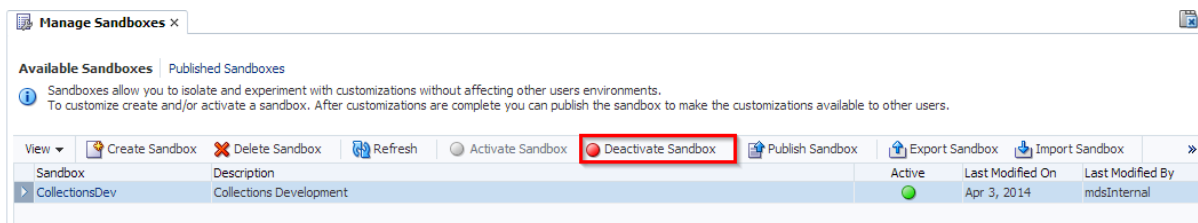
Figure 2–16 Activate Sandbox: Active



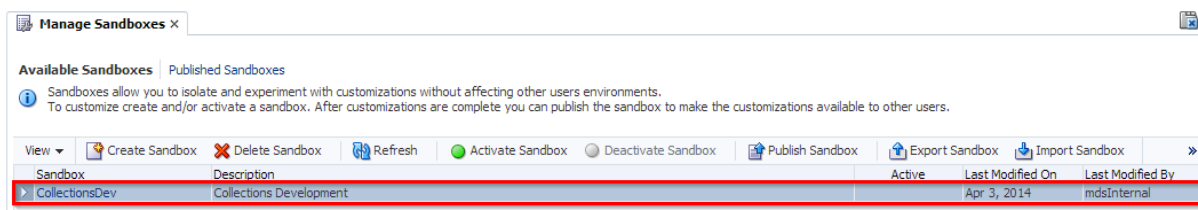
2.3.3.3 Deactivate Sandbox

To deactivate a Sandbox, perform the following steps:

1. Select **CollectionsDev** sandbox and then click **Deactivate Sandbox** to deactivate sandbox.

Figure 2–17 Deactivate Sandbox

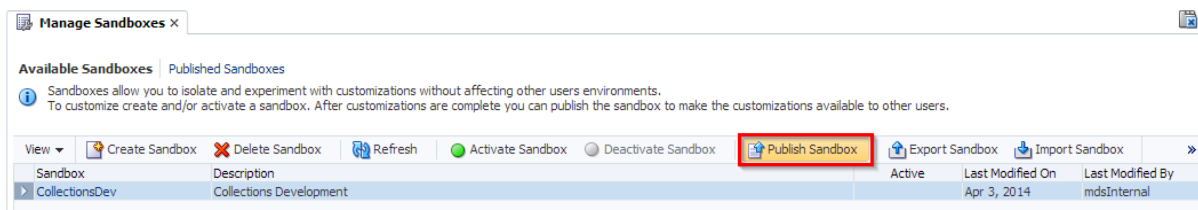
Sandbox is deactivated now.

Figure 2–18 Post Deactivating Sandbox

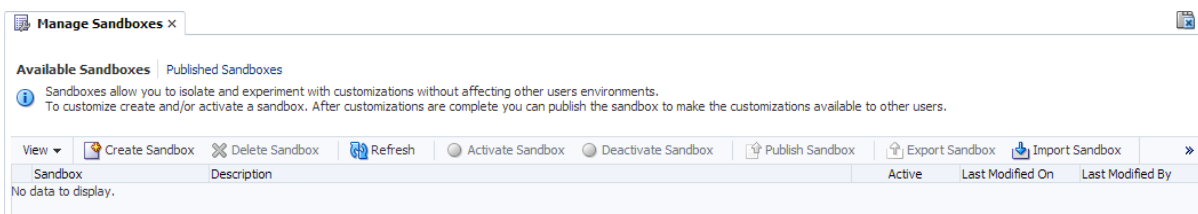
2.3.3.4 Publish Sandbox

To publish a Sandbox, perform the following steps:

1. Select **CollectionsDev** sandbox and then click **Publish Sandbox** to publish sandbox.

Figure 2–19 Publish Sandbox

Sandbox is published now; it will be removed from sandbox list. Once Sandbox is published, all changes will be visible to all the users.

Figure 2–20 Published Sandbox

2.3.4 Import Collections Configuration

Collections adapter configuration for User Provisioning must be imported. Below is the list of artifacts developed for Collections User Provisioning.

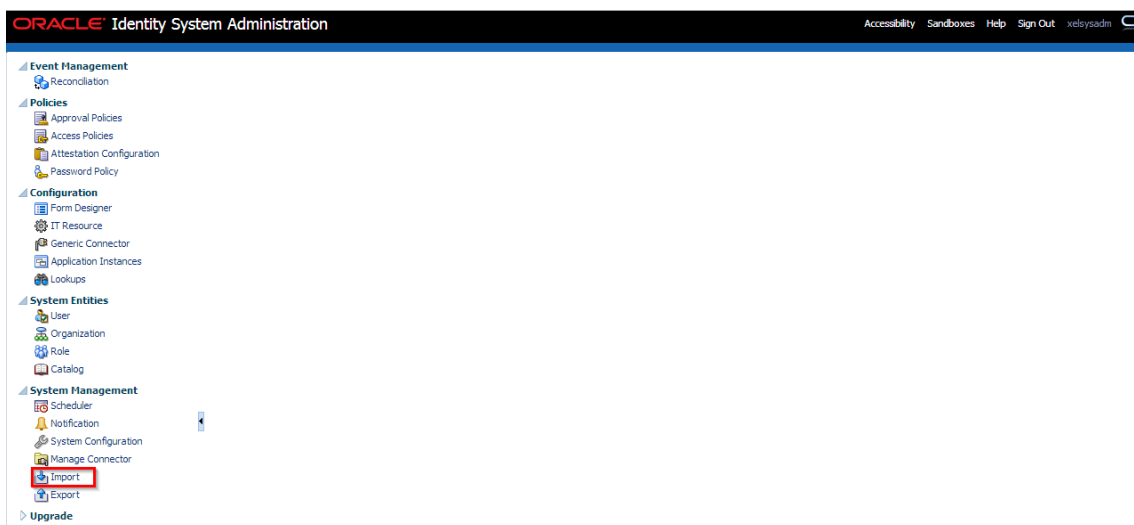
Table 2–4 Collections User Provisioning Artifacts

Artifact	Artifact Type	Description
Collections	Collections	It stores definition of connection parameters to connect OBP Collections system.
Collection Arguments	IT Resource Type	It stores parameters and its values required to make connection with OBP Collections. OIM uses this information to connect target Collections system.
Collections User Provisioning	Process Definition	This process definition contains process tasks for User provisioning Create User, Change First Name, Change Last Name, Change UserName, Change Email, Change End Date, Change Collections User Group and Delete User.
Collection User	Resource Object	This resource object is used for provisioning users in Collection. It contains Collections system details required for provisioning.
ORMB Create User	Task Adapter	This adapter is responsible to create user in Collections.
ORMB Update User	Task Adapter	This adapter is responsible to update user in Collections.
ORMB Delete User	Task Adapter	This adapter is responsible to delete user in Collections.
UD_COLL_USR	Process Form	This is Collections process form associated with Collections User Provisioning process. It holds relevant information about Collections User resource object.
CollectionsUserDetails	Pre-populate Adapter	The Adapter is used to pre-populate user details in the Collections resource form.

OBP Collections configuration can be imported in OIM by using deployment manager.

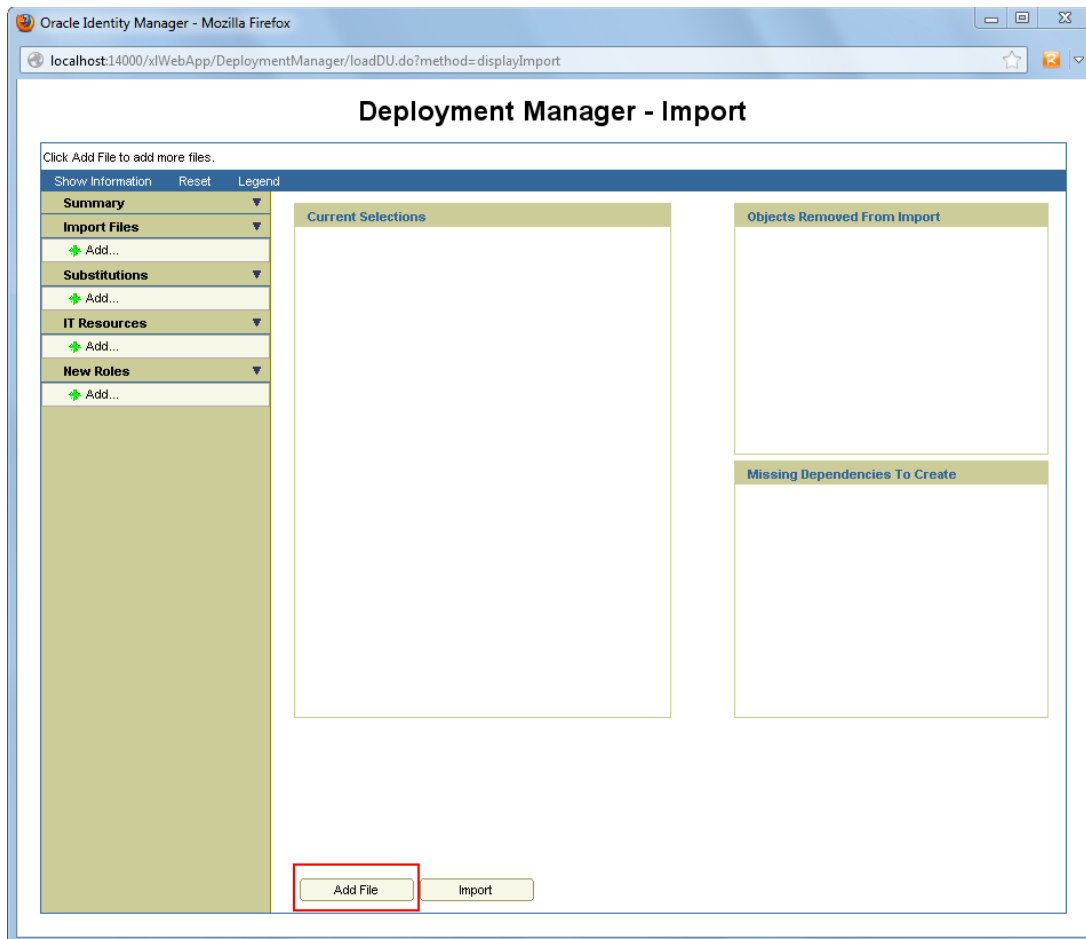
1. Log in to Oracle Identity System Administration.
2. In the left pane, under System Management, click **Import**. The **Deployment Manager - Import** window is displayed.

Figure 2–21 System Management - Import

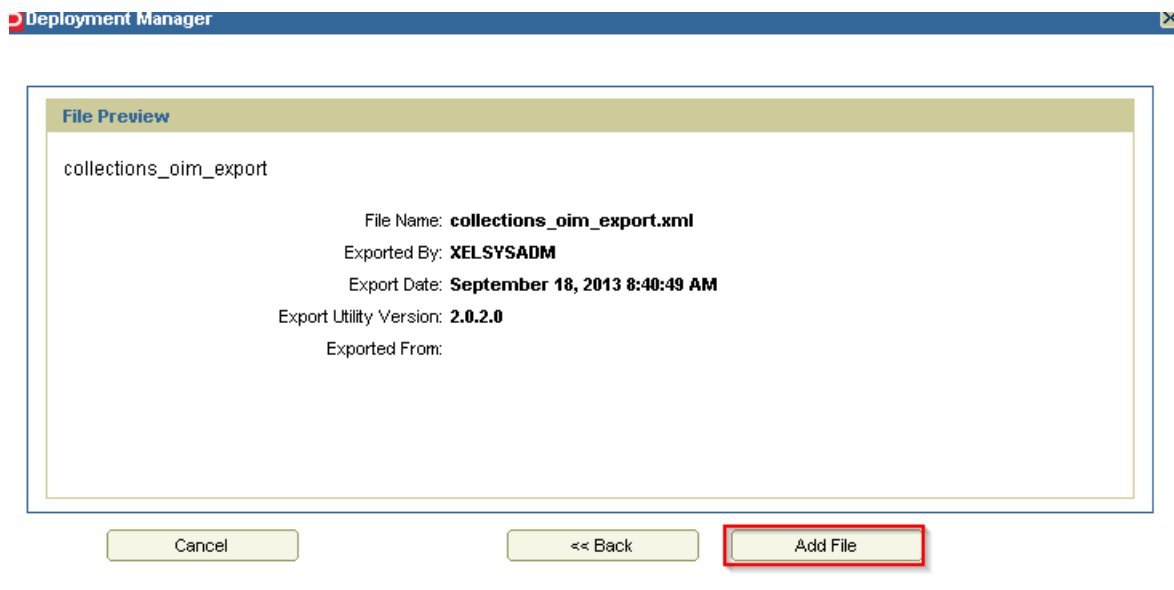


3. In the **Deployment Manager - Import** window, click **Add File** and open configuration file `collections_oim_export.xml` that is saved on your machine.

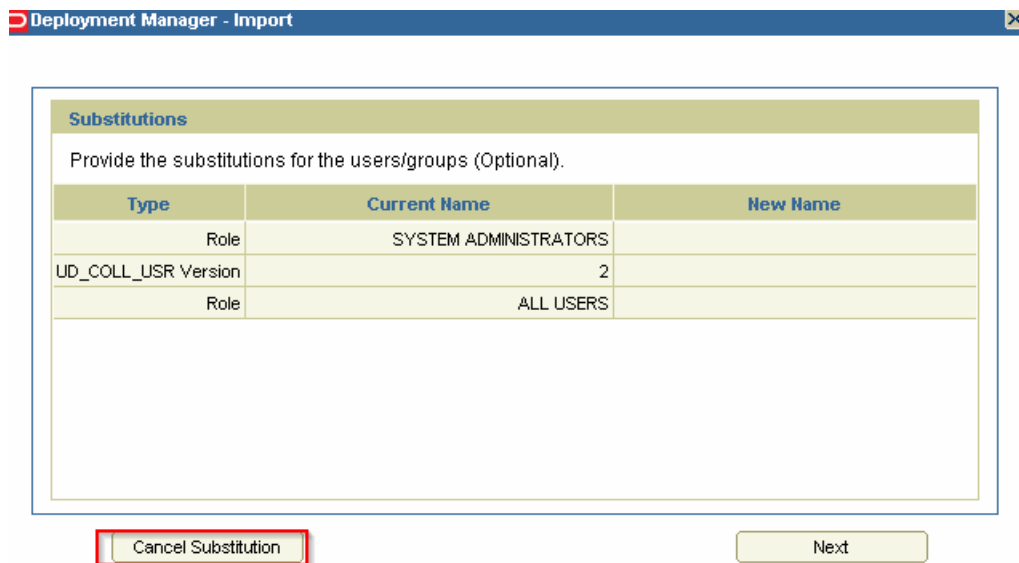
Figure 2-22 *Deployment Manager - Import Screen*



4. The **Deployment Manager** dialog box opens with file name being imported. Click **Add File**.

Figure 2–23 Deployment Manager - File Preview Dialog Box

5. Click **Cancel Substitution**.

Figure 2–24 Deployment Manager - Cancel Substitution Dialog Box

6. Specify values for parameters in **Collection Arguments** section, see [Table 2–1, "OBP Collection Connection Parameters"](#)
7. Click **Next**.

Note: Parameter Value shown in image are sample values. Provide values as per your environment.

Figure 2–25 Deployment Manager - IT Resource Instance Data

Provide IT Resource Instance Data.

Collections

- Collection Arguments
- << New Instance>>

Collection Arguments	
Parameter Name	Parameter Value
webserviceUrl	http://[redacted]/com...
securityPolicy	oracle/wss_username_token...
bankCode	08
channel	BRN
businessUnit	Bank_BU
transactionBranch	8542
sessionUserId	OIMOBPCOLL
securityParamLookup	LOOKUP.COLL.SECURITY.PA
isSecurityEnabled	true
marketEntity	Bank_ME

8. Click Skip.

Figure 2–26 Deployment Manager - Skip Parameter Value

Provide IT Resource Instance Data.

Collections

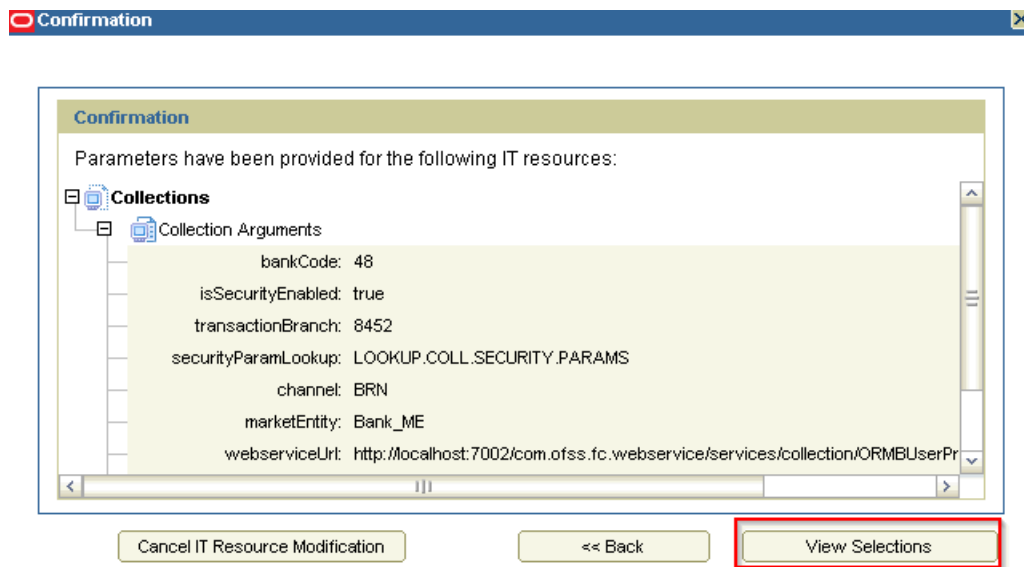
- Collection Arguments
- << New Instance>>

Provide the name of the IT resource instance to be created.

Instance Name:

Parameter Name	Parameter Value
transactionBranch	
securityParamLookup	
marketEntity	
channel	
securityPolicy	
sessionUserId	
webserviceUrl	
isSecurityEnabled	

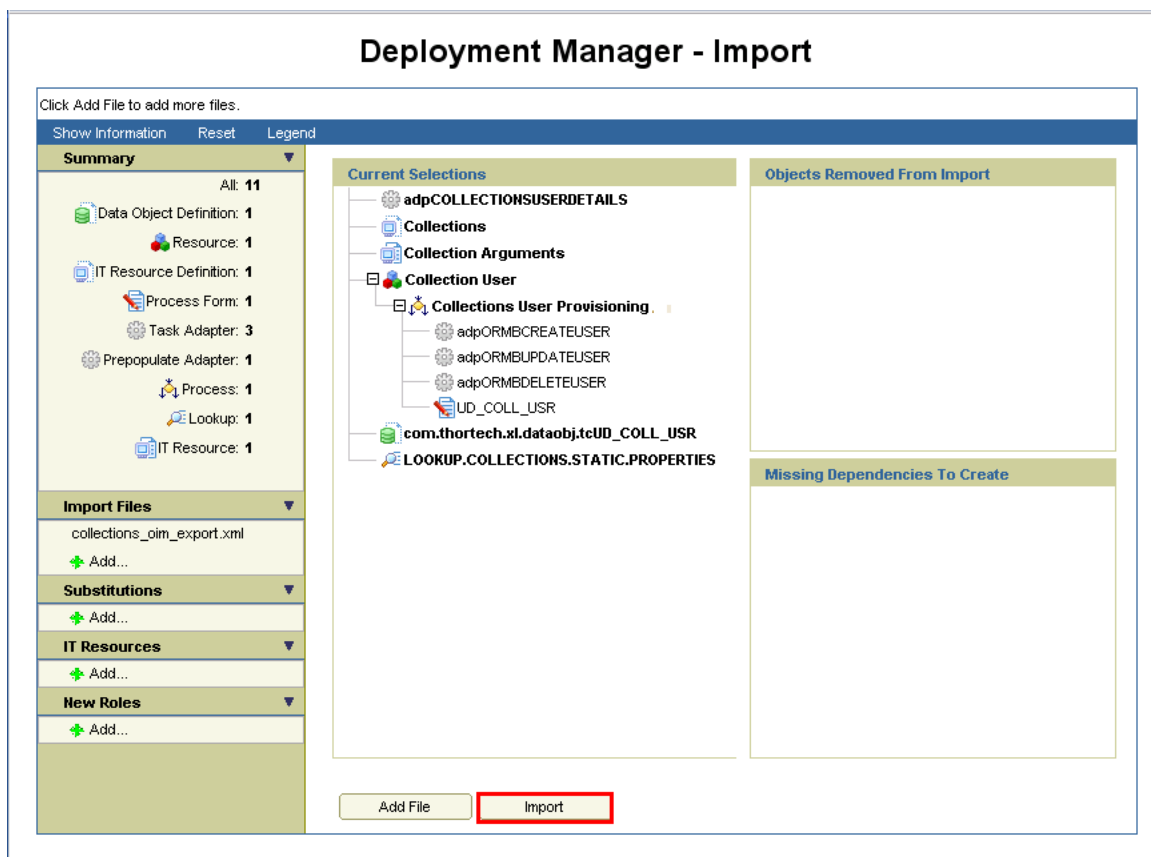
9. Click View Selections.

Figure 2–27 Deployment Manager - View Selections

Overview of all artifacts that have been added will be displayed. Total number of artifacts to be added must be 11. You can verify them in the **Summary** section for **All : 11**.

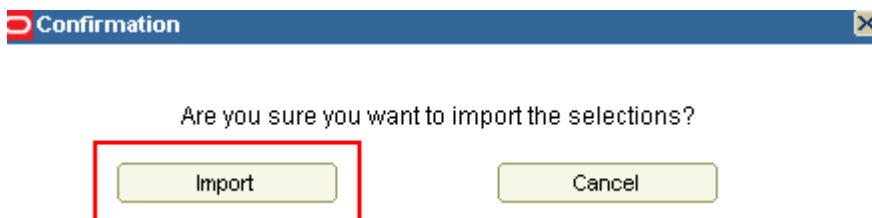
10. Click **Import**.

Figure 2–28 Deployment Manager - Import



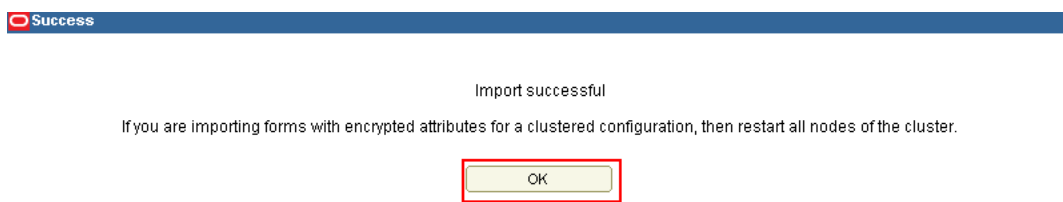
11. A Confirmation dialog box appears. Click **Import**.

Figure 2–29 Import Confirmation



12. On successful import of data, **Import successful** message will be displayed. Click **OK** and close **Deployment Manager - Import** window.

Figure 2–30 Import Confirmation Dialog Box



2.3.5 Verify and Override Date Format Lookup

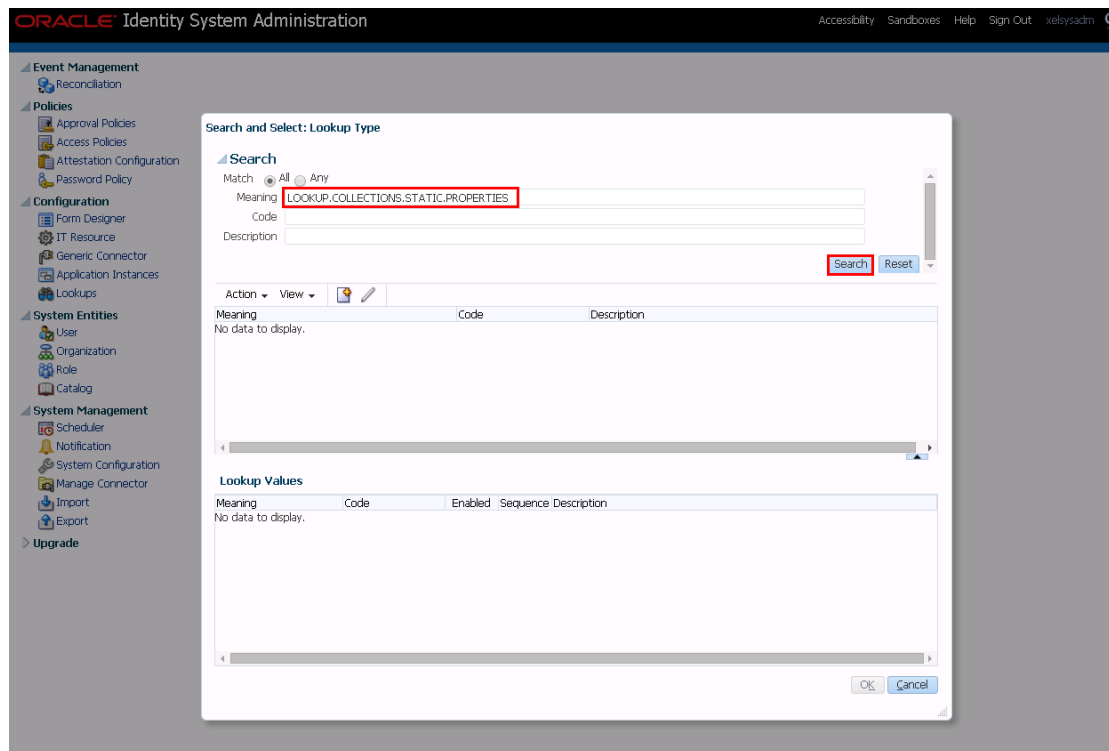
A lookup 'LOOKUP.COLLECTIONS.STATIC.PROPERTIES' has been added to map environment specific properties to OIM.

After successful import, verify whether the lookup type 'LOOKUP.COLLECTIONS.STATIC.PROPERTIES' has been imported properly along with the other configurations.

To verify the lookup type, perform the below mentioned procedures:

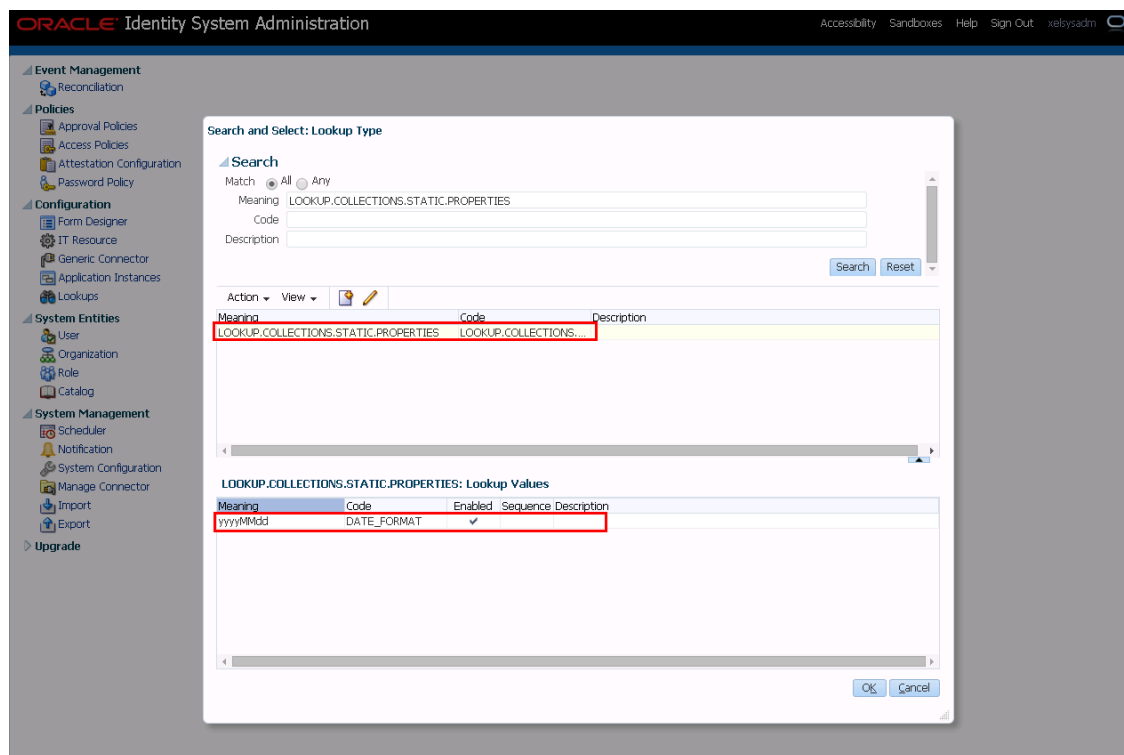
1. Login to **Oracle Identity System Administration**.
2. In the left pane, under Configuration, click Lookups. The Search and Select: Lookup Type window is displayed.
3. In the **Meaning** field, enter the lookup value **LOOKUP.COLLECTIONS.STATIC.PROPERTIES**.

Figure 2–31 Entering Lookup Value



4. Click **Search**. The lookup types that match your search criteria get displayed in a tabular format.

Figure 2–32 Lookup Types Criteria Match



This look up type will be shipped along with the Collections adapter configuration. The default value of the **DATE_FORMAT** code for the lookup type will be 'yyyyMMdd' or the 'End Date' field on User form.

Meaning for the lookup code corresponds to the value for 'client.format.date' property in **root configuration properties**.

Before trying to provision a user, please verify that the Meaning for the DATE_FORMAT Code matches the property value of 'client.format.date' in the root configurations. If not, then edit the lookup type accordingly.

Note:

- If the lookup type is not present, the user will not get provisioned and generic failure message will be displayed in Open tasks for Create User task.
 - If the lookup type is present but the Code is incorrect then the user will not get provisioned and a generic failure message will be displayed in Open tasks for Create User task.
 - If lookup type is present and the code is correct but the Meaning is not in sync with the format in root configurations, user will get provisioned to Collections but with incorrect date. Considering the current JODA date configuration, it will persist current system date.
-

2.3.6 Add Process Trigger

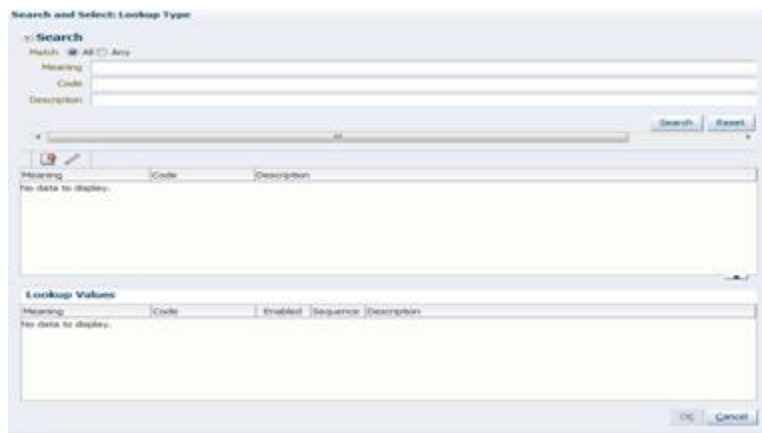
Process Triggers are used to define task name for user fields. This task name could be further configured in process definition and would be invoked when there is change in corresponding field. Below configuration is to add Process Trigger for user fields used for Collections User Provisioning:

1. Log in to Oracle Identity System Administration. In the left pane, under Configuration, click **Lookups**. The **Search and Select: Lookup Type** window is displayed.

Figure 2–33 Oracle Identity System - System Administration

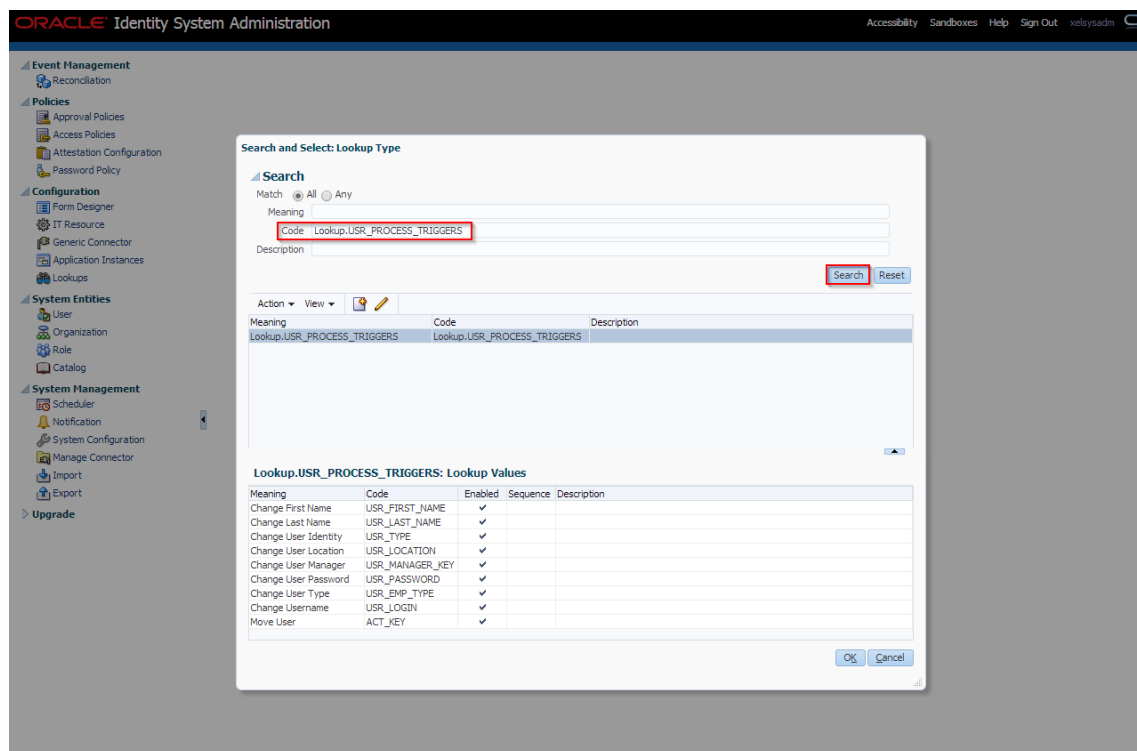


Figure 2–34 Search and Select - Lookup Type



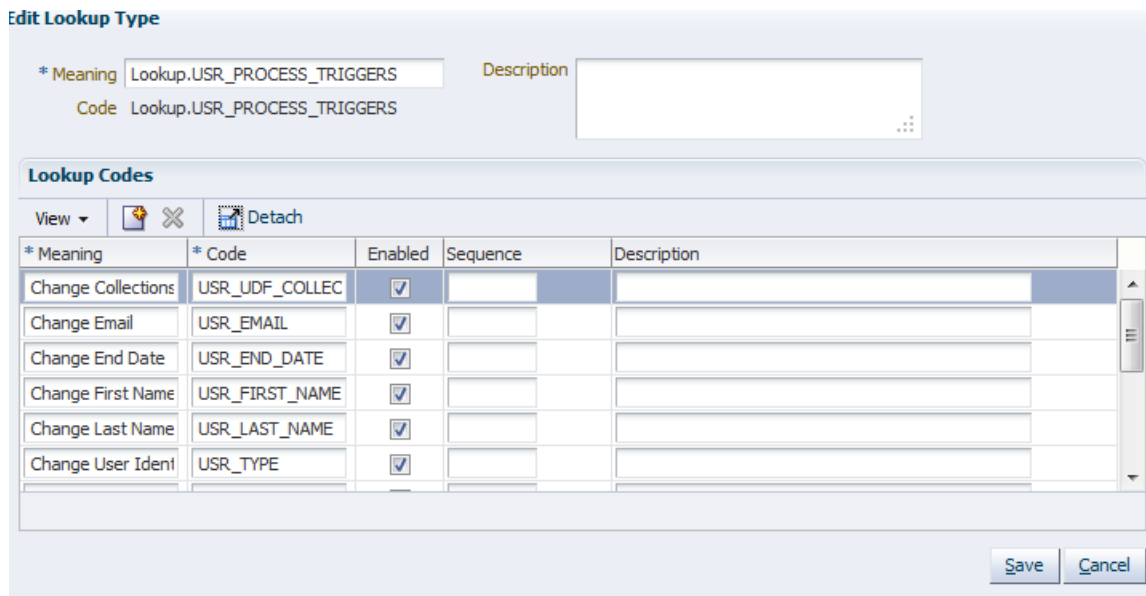
2. Add the following:
Code: Lookup.USR_PROCESS_TRIGGERS
3. Click **Search**.

Figure 2–35 Search Lookup Type



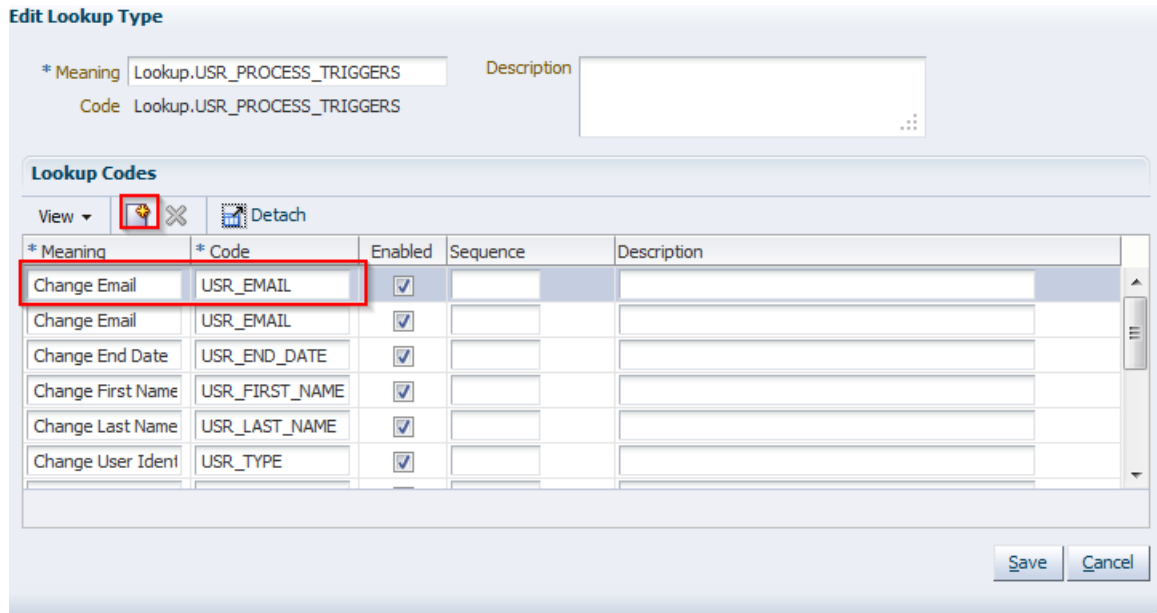
4. Click Edit icon. Edit Lookup Type dialog window will open.

Figure 2–36 Edit Lookup Type



5. Click Add icon. Add the following parameters in the row that appears.
Code: USR_EMAIL
Meaning: Change Email

Figure 2–37 Adding a Lookup Type

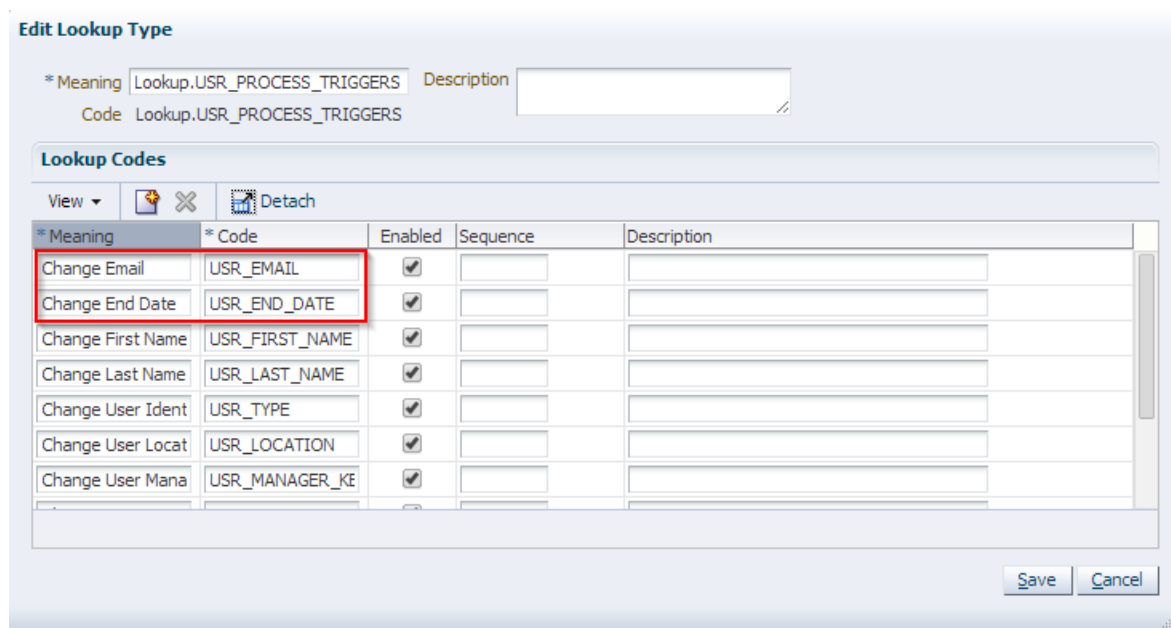


6. Similarly, add the following variables (repeat step 4) and then click **Save**.

Table 2–5 List of variables

Code Key	Meaning
USR_EMAIL	Change Email
USR_END_DATE	Change End Date

Figure 2–38 Edit Lookup Types



Note: Meaning value is used as Process definition Task name. If there is any change in meaning value, then corresponding name change must be done in Process definition task.

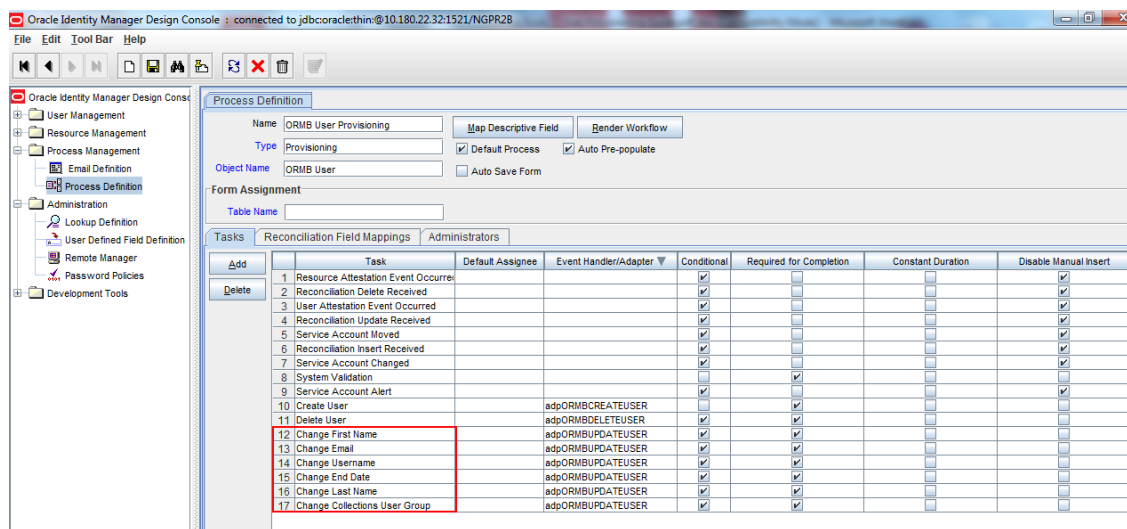
Below table lists the Code Key being used:

Table 2–6 Code Key details

Code	Meaning	Process Definition Task Name
USR_FIRST_NAME	Change First Name	Change First Name
USR_LAST_NAME	Change Last Name	Change Last Name
USR_EMAIL	Change Email	Change Email
USR_LOGIN	Change Username	Change Username
USR_END_DATE	Change End Date	Change End Date

To verify process task name in Process Definition login to design console and open Process Definition tab as shown below:

Figure 2–39 Verifying Process Task Name

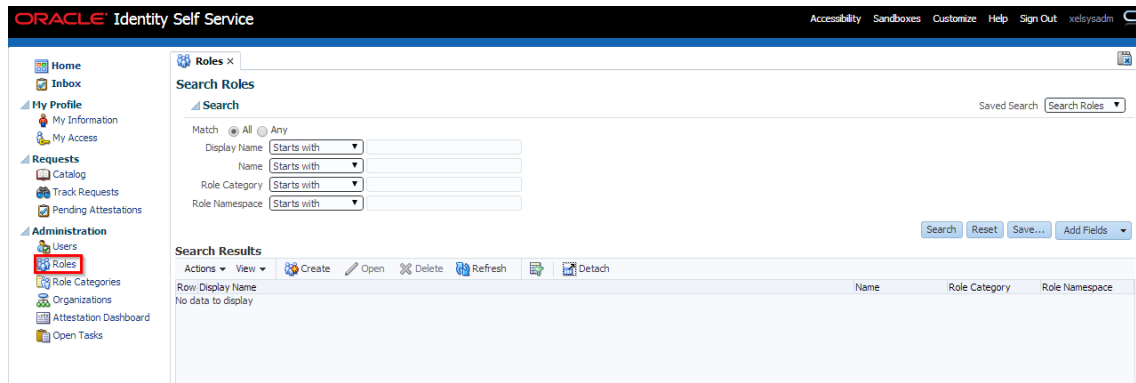


2.3.7 Create Collections Role

This role is used to define access policy. Minimum access should be provided as it would be applied to every user eligible for Collections User provisioning.

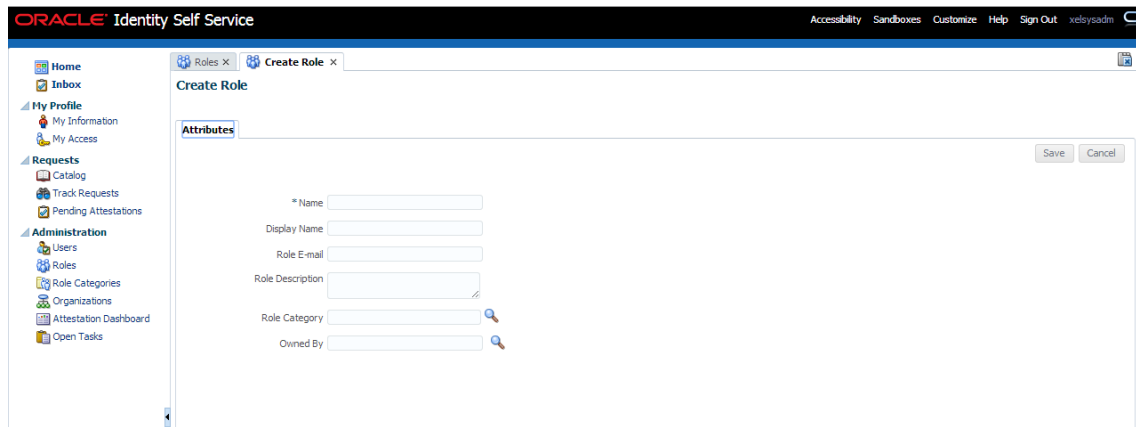
1. Log in to Identity Self Service.
2. Under **Administration**, click **Roles**. The Search Roles page is displayed.

Figure 2–40 Oracle Identity Self Service



3. Click **Create** on the toolbar. The Create Role page is displayed.

Figure 2–41 Create Role



4. Specify the following values and then click Save.
 - Name** : COLL_USER
 - Display Name** : COLL_USER
 - Role Description** : Default Role for all Collections User
 - Role Category**: Default
5. Click **Save**.

Figure 2–42 Create Role - Values

ORACLE Identity Self Service

Roles X | Create Role X

Attributes

* Name: COLL_USER

Display Name: COLL_USER

Role E-mail:

Role Description: Default Role for all Collections User

Role Category: Default

Owned By:

Save Cancel

Figure 2–43 Create Role - Attributes Tab

ORACLE Identity Self Service

Roles X | COLL_USER X

Role: COLL_USER

Delete Access Policy

Attributes Hierarchy Members Organizations

* Name: COLL_USER

Role Namespace: Default

* Display Name: COLL_USER

Role E-mail:

Role Description: Default Role for all Collections User

Role Category: Default

Owned By: System Administrator

Apply Revert

6. Click **Members** tab. The Members tab is displayed.

Figure 2–44 Create Role - Members Tab

ORACLE Identity Self Service

Roles X | COLL_USER X

Role: COLL_USER

Delete Access Policy

Attributes Hierarchy **Members** Organizations

Membership Rule and Members

User Membership Rule

Rule:

Click the Add Rule button to set the rule for this role

Members

Direct Indirect All

The following table displays users that are directly assigned to this role

View Assign Revoke Refresh Detach

Row	Display Name	User Login	Organization	E-mail
No data to display				

Columns Hidden 5

Apply Apply and Evaluate Revert

+ Add Rule - Delete rule

7. Click **Add Rule** under User Membership Rules. The User Membership Rules for COLL_USR dialog box is displayed.

Figure 2–45 Create Role - Add Rule

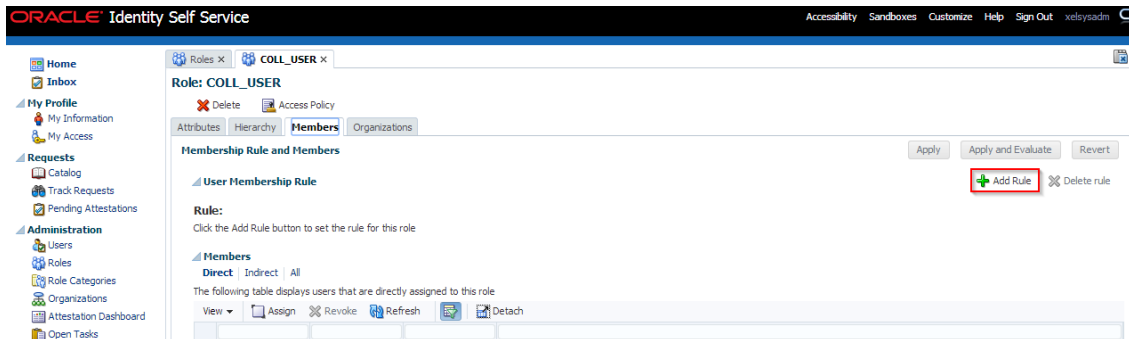
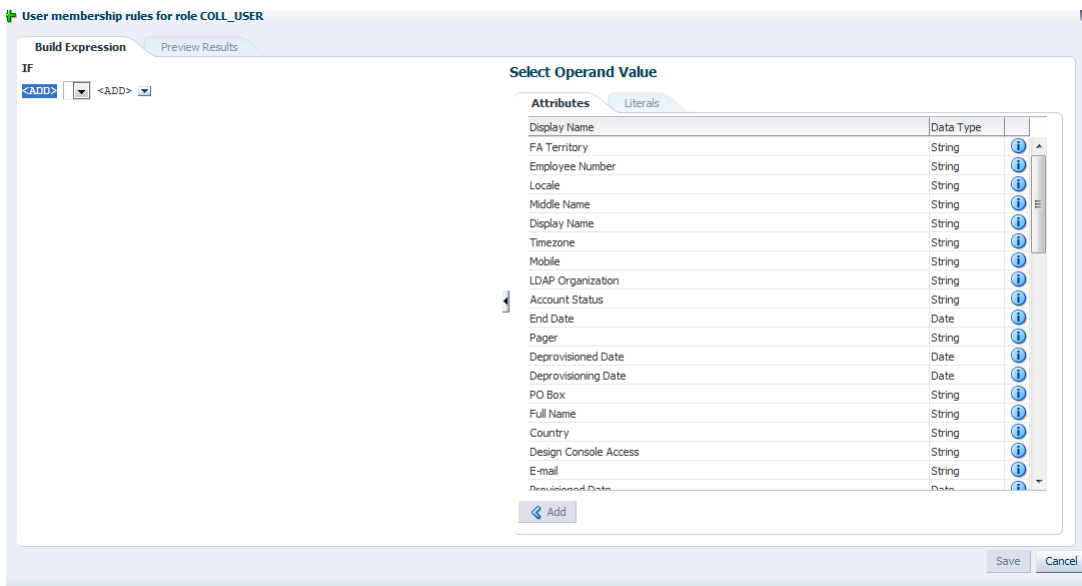


Figure 2–46 Create Role - Build Expression



8. Create Rule such that COLL_USR role is assigned to User that need to be provisioned to Collections. Here we have defined Rule Based on Organization.

Figure 2–47 Create Rule - Add

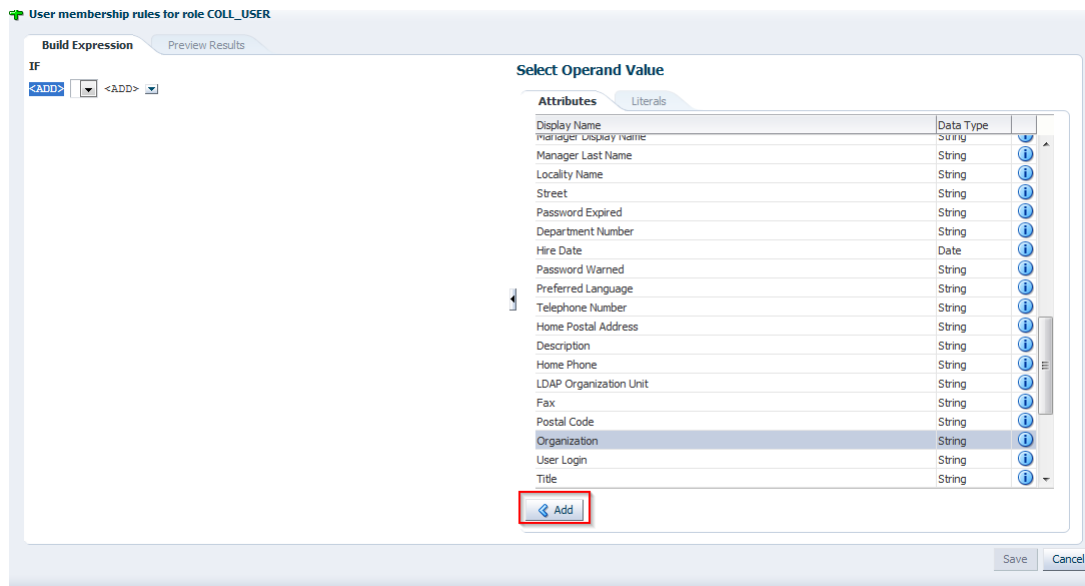


Figure 2–48 Create Rule - Select Operand Values

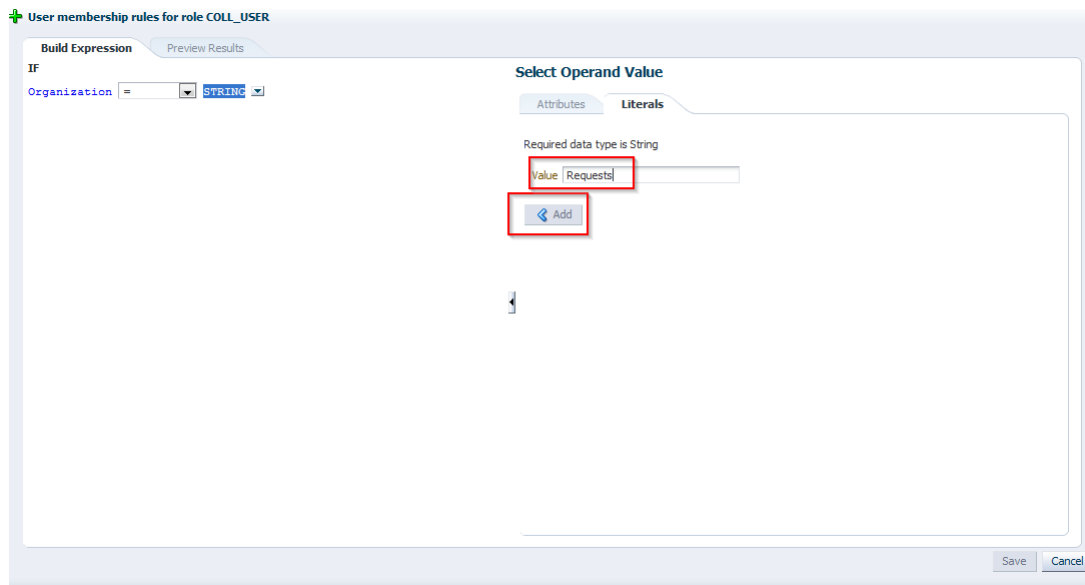


Figure 2–49 Create Rule - Build Expression

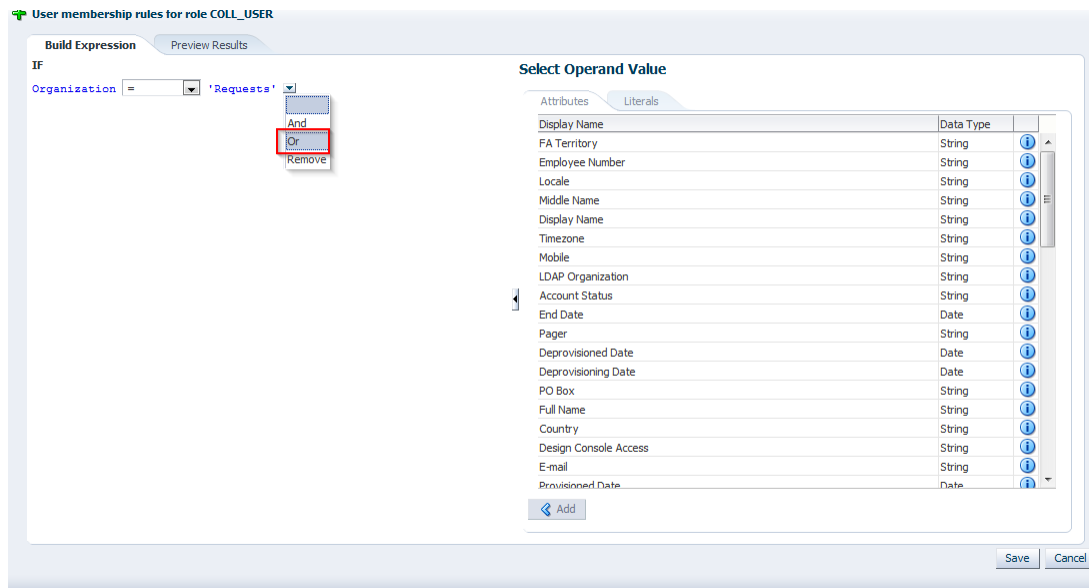
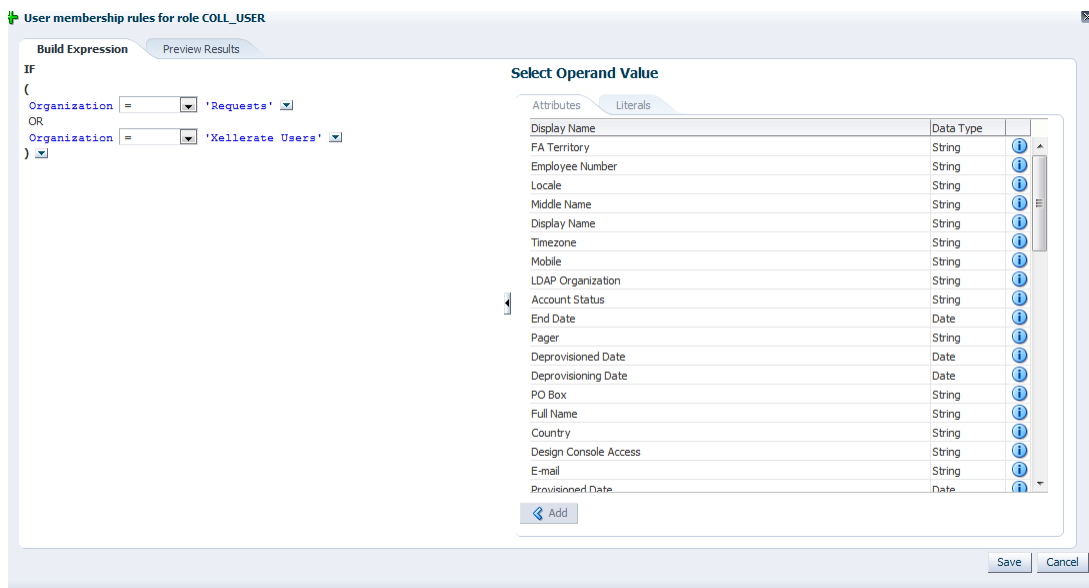


Figure 2–50 Create Rule - Build Expression Updated



Note: It is been observed that when Role membership rule is applied to a user its membership is not pushed to OID (that is, user is not added to Role in OID). To overcome this behavior enable schedule job 'LDAPSync Post Enable Provision Role Memberships to LDAP' in periodic mode (as per requirement).

2.3.8 Create Access Policy

Policy based provisioning is being used, that is whenever policy is applied, the user is directly provisioned to resource.

This policy is applied whenever a user is made part of specified role COLL_USR. Also, COLL_USR is applied to user through membership rule. Thus, policy will be applied to user and the user would be provisioned to resource - Collection User.

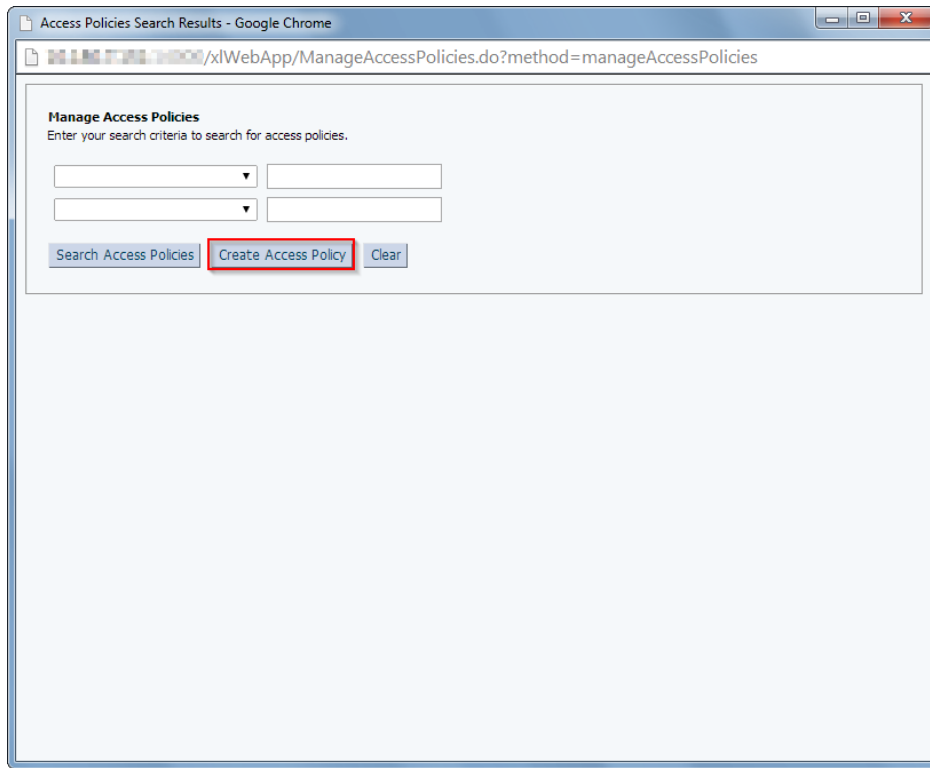
Note: Here, we have used COLL_USR Role, but it can be changed as required.

1. Login to the Oracle Identity System Administration.
2. To open the Create Access Policies page, under Policies, click **Access Policies**. This displays Manage Access Policies dialog box.

Figure 2–51 Create Access Policy - Access Policies



3. Click Create Access Policy.

Figure 2–52 Create Access Policy

4. In the **Create Access Policy** dialog box, specify the following:
 - Access Policy Name:** Collection User - Access Policy
 - Access Policy Description:** Collection User - Access Policy
 - Provision:** Select radio button Without Approval
5. Click **Continue**.

Figure 2-53 Create Access Policy - Continue

Select Resources to Be Provisioned by This Access Policy - Mozilla Firefox

ofss310654:14000/xlWebApp/CreateAccessPolicy.do

Create Access Policy

1 2 3 4 5

Step 1: Create Access Policy

* Indicates Required Field

Access Policy Name: Collection User - Access Policy

Access Policy Description: Collection User - Access Policy

Provision: Without Approval With Approval

Retrofit Access Policy:

Priority: * 1 Current Lowest Priority=0

Exit Continue >>

6. Select **Collection User** check box.

7. Click **Add**.

Figure 2-54 Create Access Policy - Select Resources

Create Access Policy

1 2 3 4 5

Step 2: Select Resources

Specify the resources to be provisioned by this access policy.

* Indicates Required Field

Filter By: [] [] Go

Results 1-1 of 1 First | Previous | Next | Last

<input type="checkbox"/>	Resource Name
<input checked="" type="checkbox"/>	Collection User

First | Previous | Next | Last

Add >>

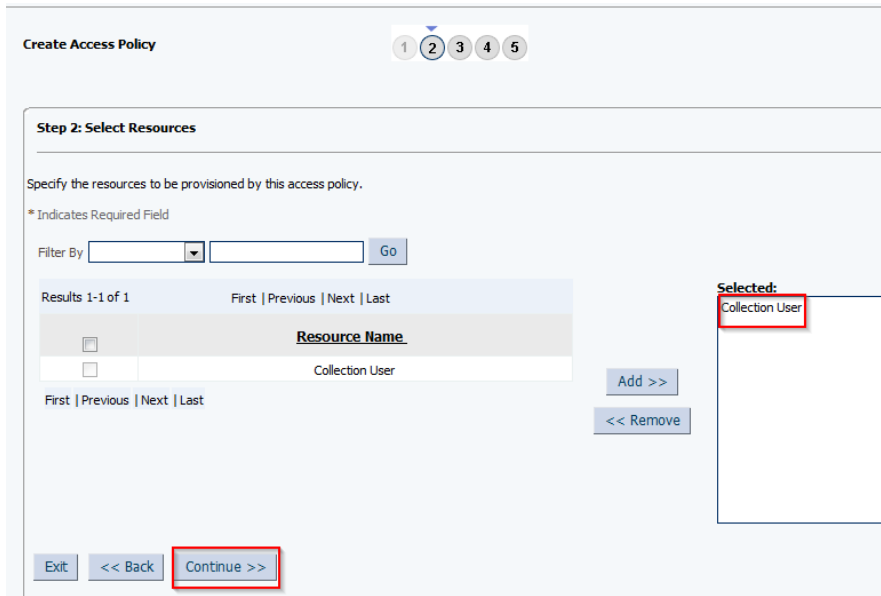
<< Remove

Selected:

Exit << Back Continue >>

8. Click **Continue**.

Figure 2–55 Create Access Policy - Selected Resource



9. Click **Continue**.

Figure 2–56 Create Access Policy - Select Resource

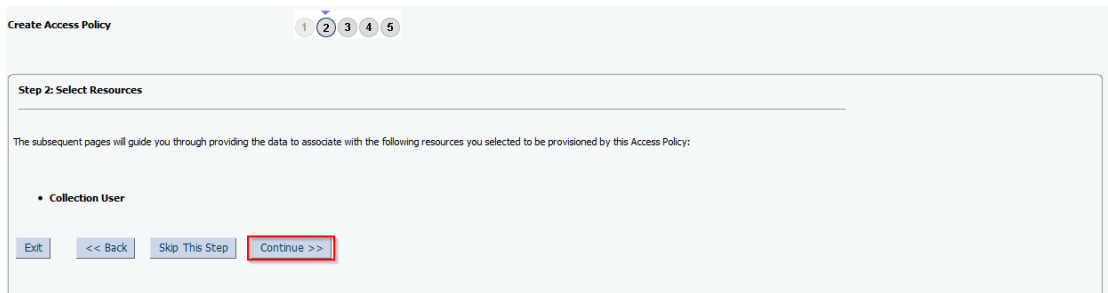


Figure 2–57 Select Resources - Process Details

Create Access Policy

1 2 3 4 5

Step 2: Select Resources

Provide the following process details for resource **Collection User**:

Collections Server Instance [Clear](#)

First Name

Last Name

User Login

Email Id

End Date

Collections User Group [Clear](#)

[Exit](#) [<< Back](#) [Skip All Forms](#) [Continue >>](#)

10. Select instance name for **Collection Server Instance** field from the lookup.

Figure 2–58 Selecting Instance Name

Lookup Form - Google Chrome

/xlWebApp/ITResourceLookupForm.do?method:

Select Collections Server Instance

Select the value to use in the field.

Filter By: Instance Name [Go](#)

[Instance Name](#)

Collection Arguments

[Select](#) [Close](#)

11. Select **Collection Arguments** as Collections Server Instance (IT Resource to be used to Provision User to Collections).
12. Click **Continue**.

Figure 2–59 Create Access Policy - Server Instance

Create Access Policy 1 2 3 4 5

Step 2: Select Resources

Provide the following process details for resource: **Collection User**:

Collections Server Instance: **Collection Arguments** [Clear](#)

First Name:

Last Name:

User Login:

Email Id:

End Date:

Collections User Group: [Clear](#)

[Exit](#) [<< Back](#) [Skip All Forms](#) **[Continue >>](#)**

13. Select radio button **Revoke if no longer applies**.

Figure 2–60 Create Access Policy - Select Revoke or Disable Flag

Create Access Policy 1 2 3 4 5

Step 2: Select Revoke Or Disable Flag

Select if the resources need to be revoked or disabled if the access policy no longer applies.

Resource Name	Revoke if no longer applies	Disable if no longer applies
Collection User	<input checked="" type="radio"/>	<input type="radio"/>

[Exit](#) [<< Back](#) **[Continue >>](#)**

14. Click **Continue**.

Figure 2–61 Create Access Policy - Continue

Create Access Policy 1 2 3 4 5

Step 3: Select Resources

Specify the resources to be denied by this access policy.

* Indicates Required Field

Filter By

Results 1-1 of 1 First | Previous | Next | Last

<input type="checkbox"/>	Resource Name
<input type="checkbox"/>	Collection User

First | Previous | Next | Last

Selected:

15. Select COLL_USERS check box.

16. Click Add.

17. Click Continue.

Figure 2–62 Create Access Policy - Add

Create Access Policy 1 2 3 4 5

Step 4: Select Roles

Specify roles for this access policy.

* Indicates Required Field

Filter By

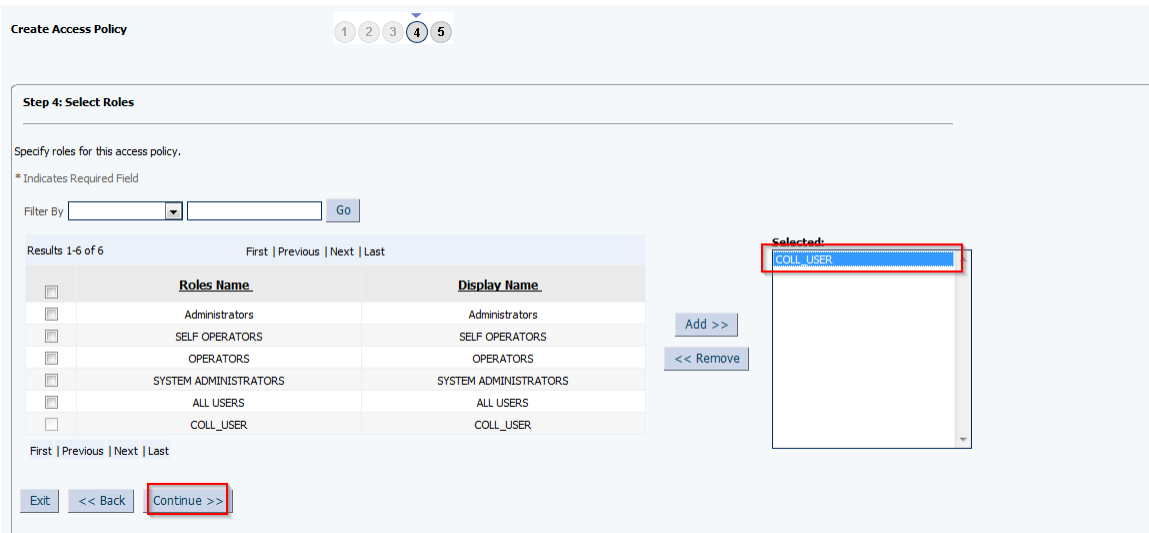
Results 1-6 of 6 First | Previous | Next | Last

<input type="checkbox"/>	Roles Name	Display Name
<input type="checkbox"/>	Administrators	Administrators
<input type="checkbox"/>	SELF OPERATORS	SELF OPERATORS
<input type="checkbox"/>	OPERATORS	OPERATORS
<input type="checkbox"/>	SYSTEM ADMINISTRATORS	SYSTEM ADMINISTRATORS
<input type="checkbox"/>	ALL USERS	ALL USERS
<input checked="" type="checkbox"/>	COLL_USER	COLL_USER

First | Previous | Next | Last

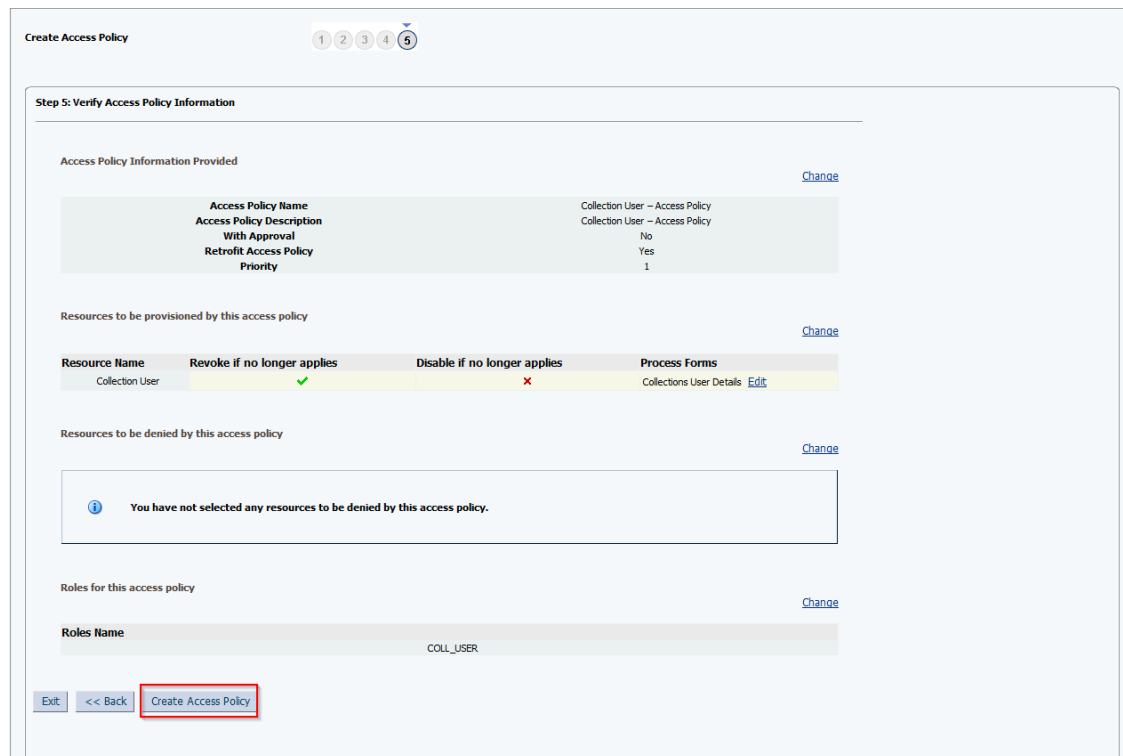
Selected:

Figure 2–63 Create Access Policy - Select Roles



18. Verify access policy details. Click **Create Access Policy**. It creates **Access Policy**.

Figure 2–64 Create Access Policy - Verify Access Policy Information



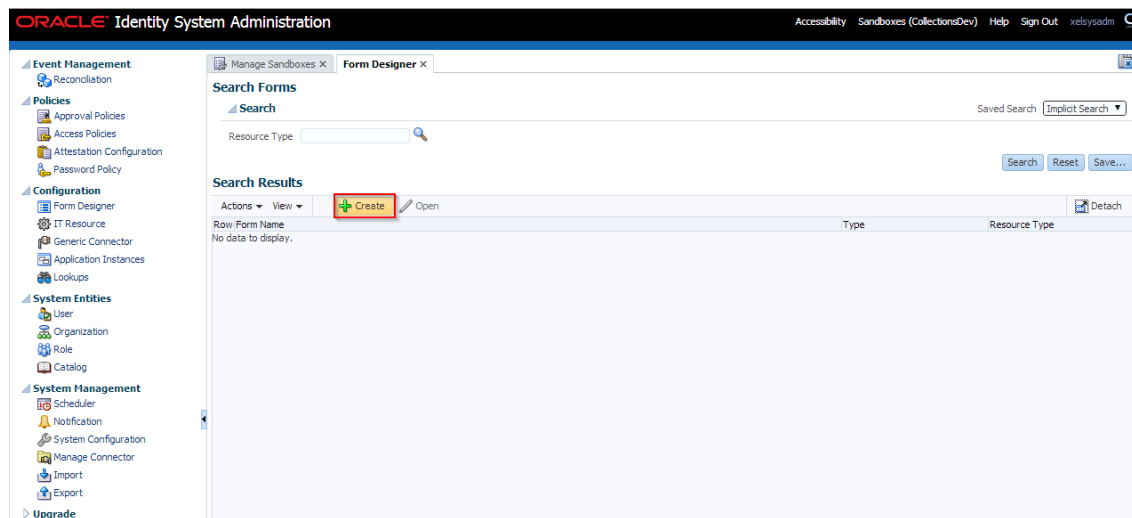
19. Restart OIM Admin and Managed Servers.

2.3.9 Create Form Associated with Application Instance

To create forms associated with the resource objects, and subsequently with the application instances, follow the below steps:

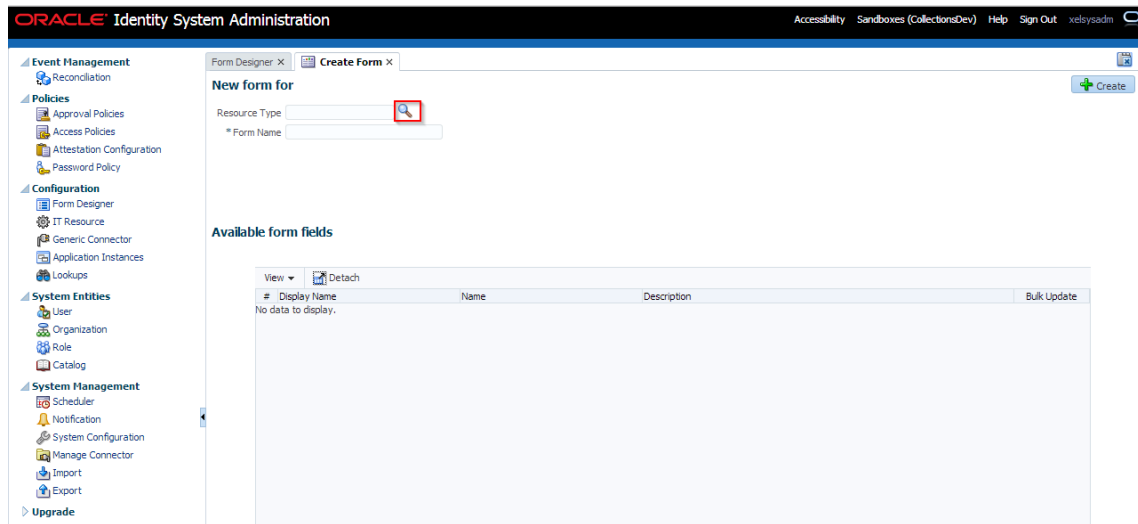
1. Login to Oracle Identity System Administration.
2. Create and activate a sandbox. For detailed instructions on creating and activating a sandbox, see section [Chapter 2.3.3, "Collection Sandbox"](#)
3. In the left pane, under Configuration, click **Form Designer**. The **Form Designer** page is displayed.

Figure 2–65 Create Form - Form Designer



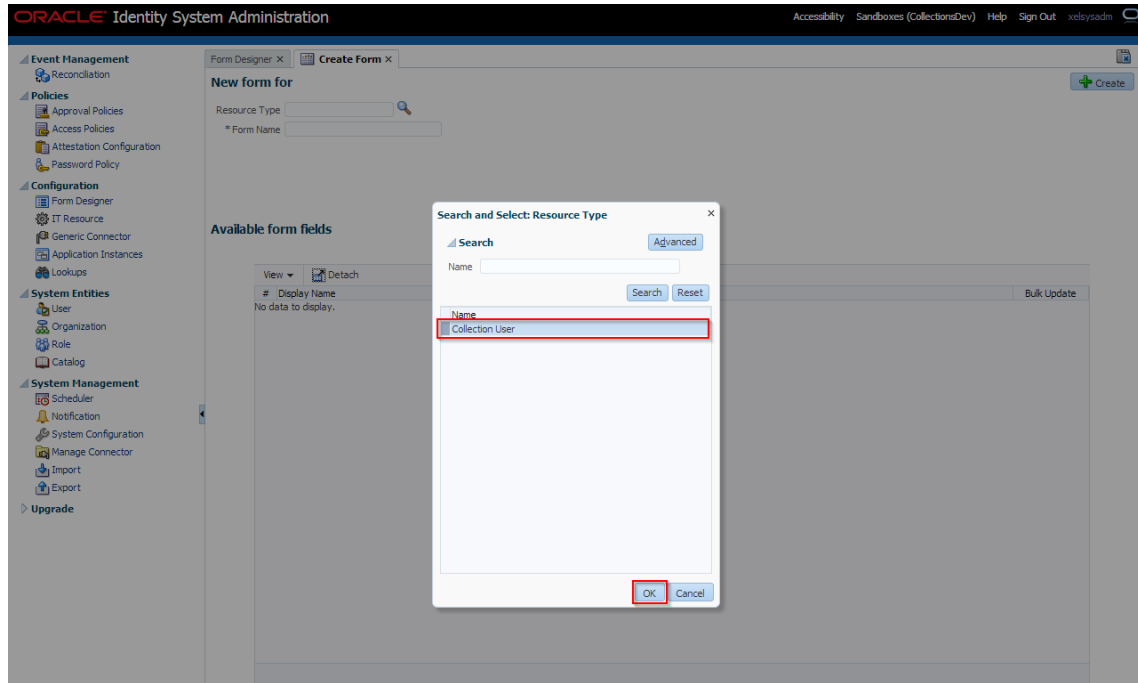
4. Click **Create** on the toolbar. The **Create Form** page is displayed.
5. In the **Resource Type** field, verify that the name of the resource object with which the form is associated is displayed. To change the resource object name, click the search icon next to the **Resource Type** field, and search and select a name from the **Search and Select: Resource Type** dialog box.

Figure 2-66 Create Form - Resource Type

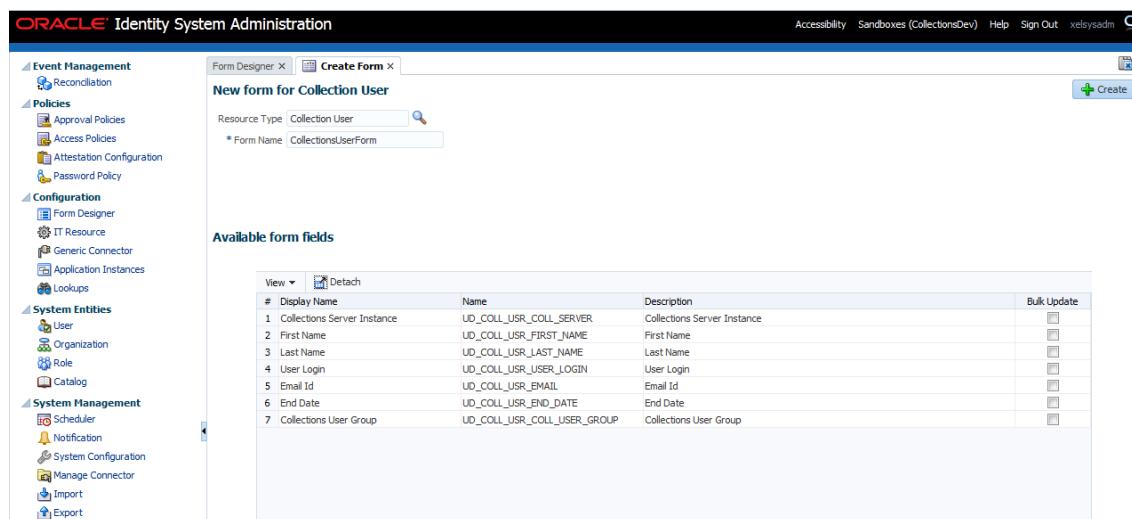


6. Select **Resource Type** as **Collections User** and provide a name for the form (for example, CollectionsUserForm).

Figure 2-67 Create Form - Resource Type (Collection User)



Available Form Fields will get displayed in the below section of the page.

Figure 2–68 Create Form Resource Type - Available Form Fields

Form fields corresponding to the UD_COLL_USR process form fields.

Below are the fields available for the form:

Table 2–7 UD_COLL_USR process form fields

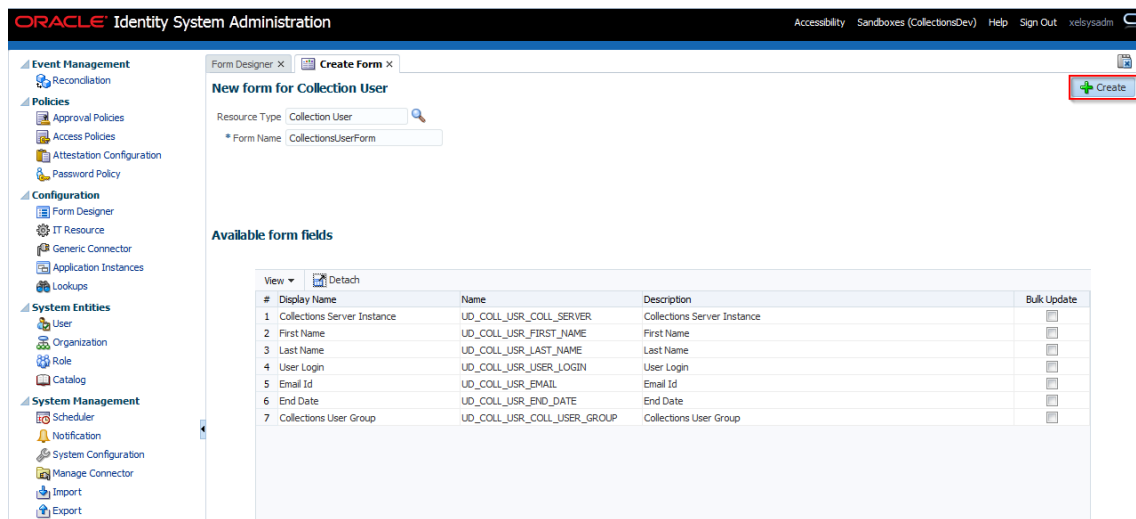
Display Name	Name	Length	Field Type
Collections Server Instance	UD_COLL_USR_COLL_SERVER		ITResourceLookupField
First Name	UD_COLL_USR_FIRST_NAME	256	Display Only Field
Last Name	UD_COLL_USR_LAST_NAME	256	Display Only Field
User Login	UD_COLL_USR_USER_LOGIN	256	Display Only Field
Email ID	UD_COLL_USR_EMAIL	256	Display Only Field
End Date	UD_COLL_USR_END_DATE	256	Display Only Field
Collections User Group	UD_COLL_USR_COLL_USER_GROUP	20	LookUpField

The **Collections Server Instance** field is used to specify the type of server for the IT resource. This field will not be visible in the **User Details** page.

7. Click Create.

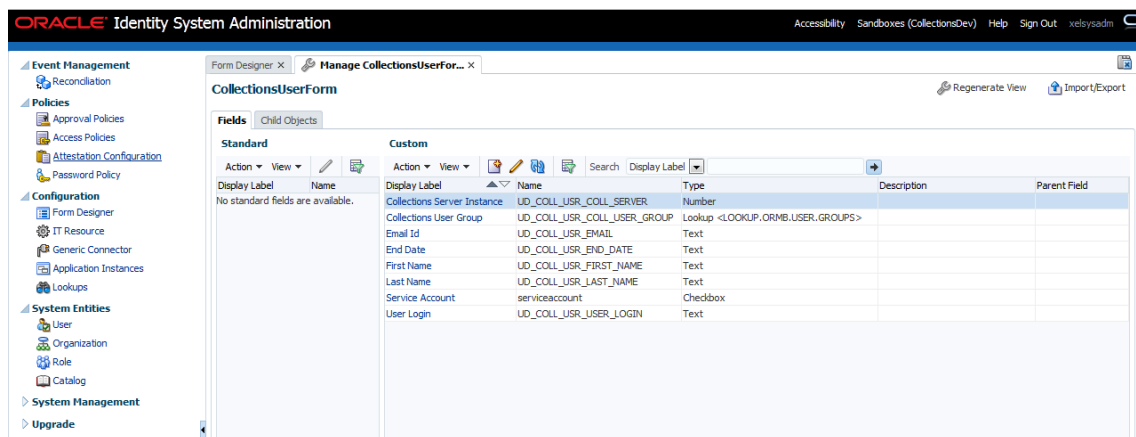
A message is displayed stating that the form is created.

Figure 2–69 Create Form Resource Type - Create



8. Refresh the Search Results in Form Designer page.
9. Select the CollectionsUserForm from the results.
Manage CollectionsUserForm page is displayed.

Figure 2–70 Manage Collections User Form



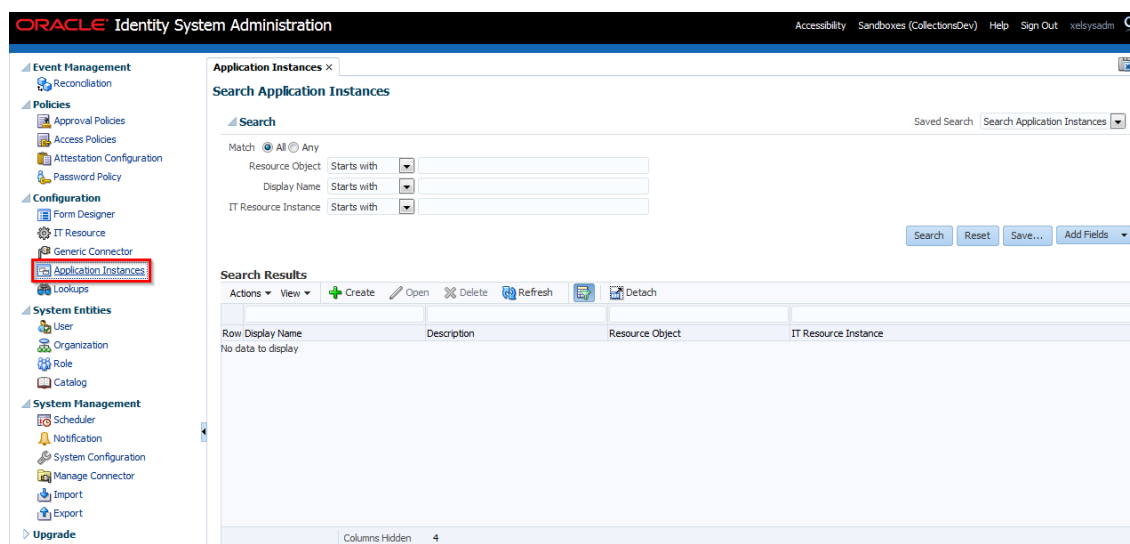
10. If required, you can export the sandbox to store all the changes made in your sandbox.
11. Publish the sandbox.

2.3.10 Create Application Instance

Application Instance wraps IT resource collection arguments and resource object collection user. Below is the configuration to create Collections Application Instance:

1. Login to Oracle Identity System Administration.
2. In the left pane, under Configuration, click **Application Instances**. The Application Instances page is displayed.

Figure 2–71 Creating Application Instance

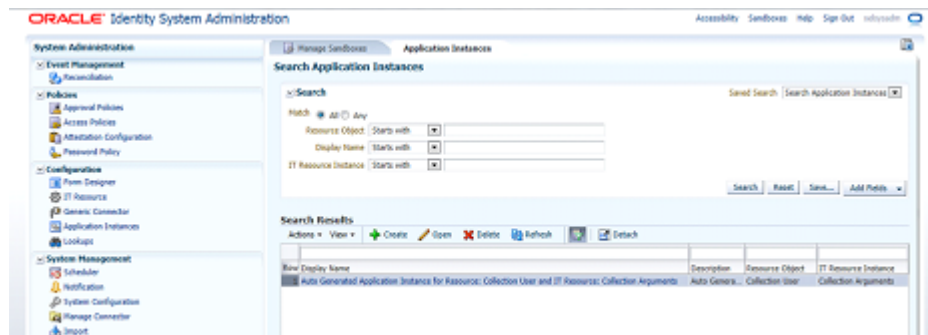


3. Click **Search**. The search result is displayed in a tabular format.

If an **Auto Generated Application Instance for Resource** appears in the search results, you have to delete it using the steps below. If **Auto Generated Application Instance for Resource** does not show in the search results, skip below steps and move to step 4.

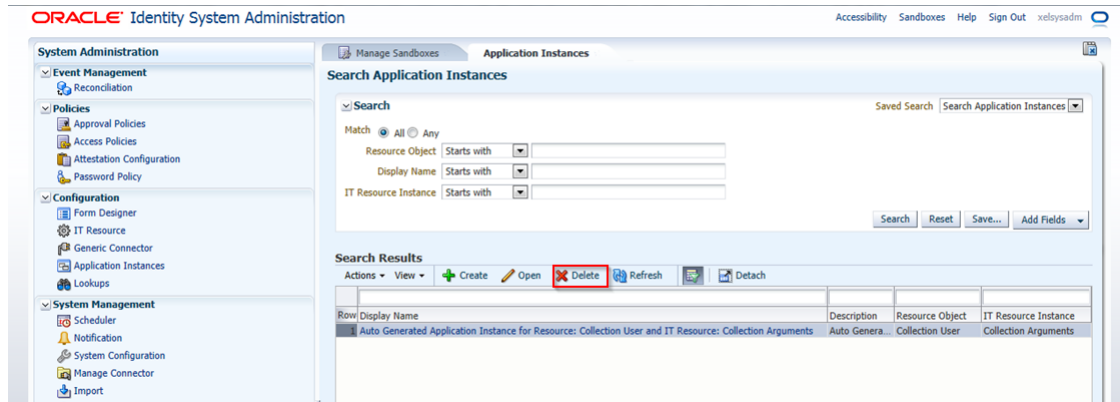
- a. Select **Auto Generated Application Instance for Resource: Collection User** and **IT Resource: Collection Arguments** row from the search results.

Figure 2–72 Creating Application Instance - Search

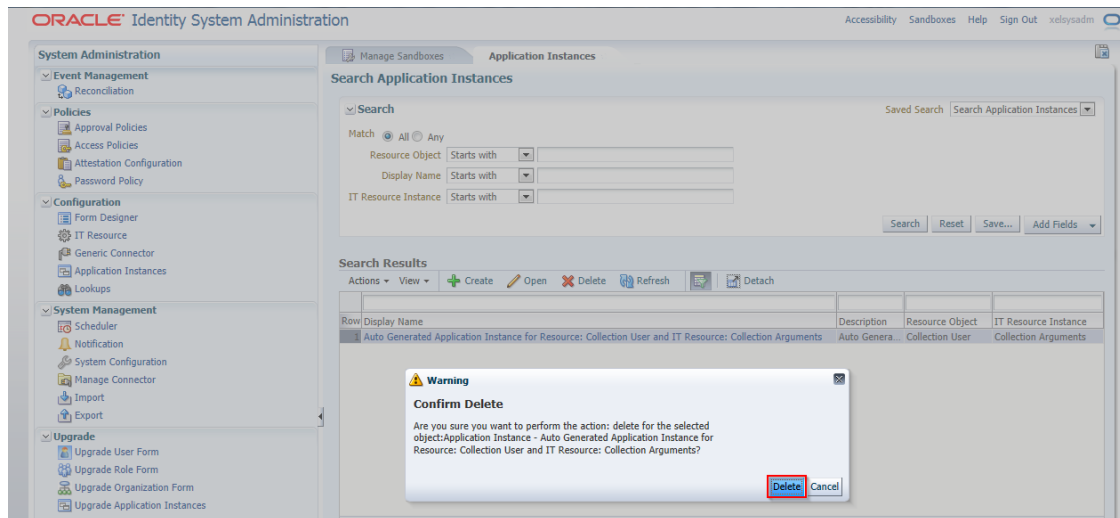


- b. From the Actions menu, select **Delete**. Alternatively, click **Delete** on the toolbar.

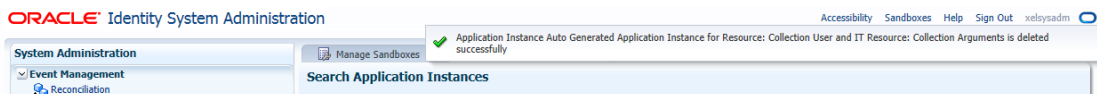
A message box is displayed asking for confirmation.

Figure 2–73 Creating Application Instance - Delete

- c. Click **Delete** to confirm. The application instance is soft-deleted in Oracle Identity Manager.

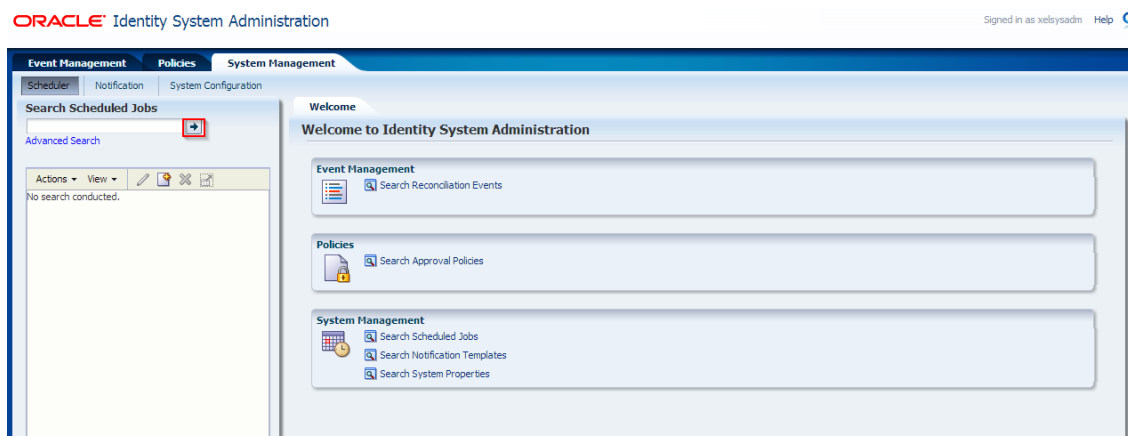
Figure 2–74 Creating Application Instance - Confirm Delete

A message gets displayed that the application instance got deleted successfully.

Figure 2–75 Creating Application Instance - Delete Message

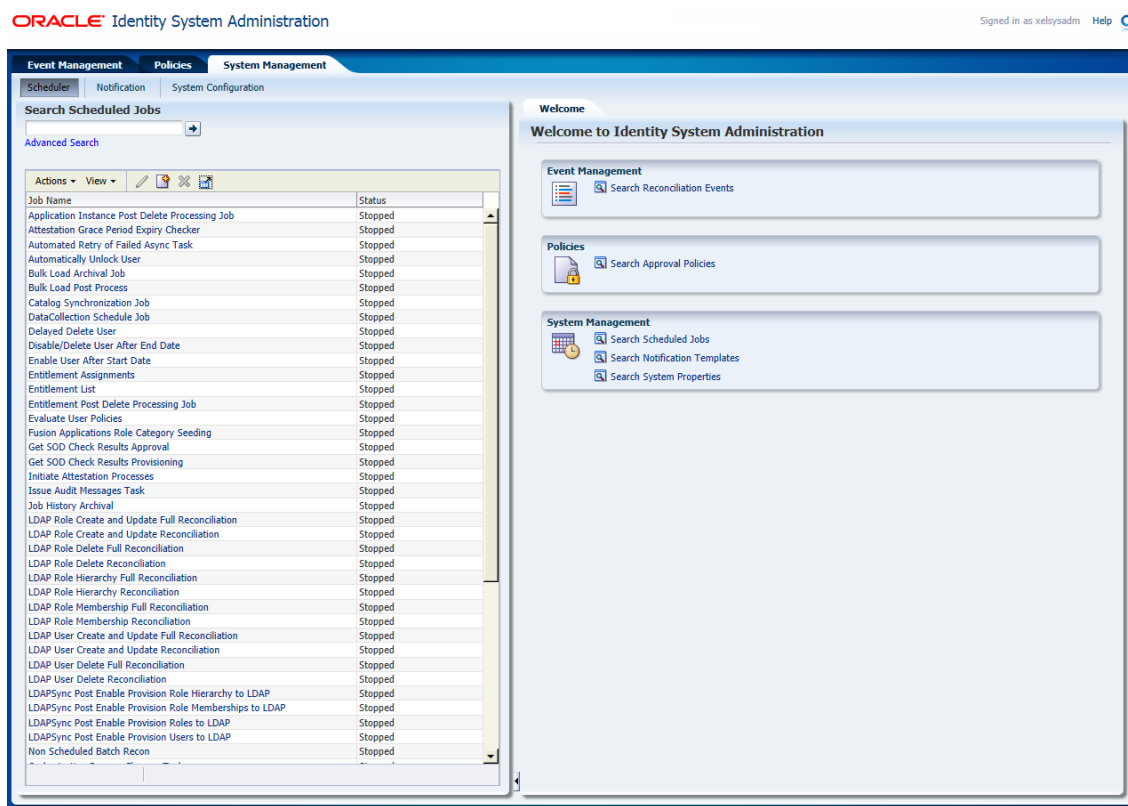
- d. Login to Oracle Identity System Administration. In the left pane, click **Scheduler** under **System Management**.
- e. A new window opens for Advanced System Administration. Click the **System Management** tab, and then click **Scheduler** tab.
- f. Click the search icon next to the Search Scheduled Jobs field.

Figure 2–76 Creating Application Instance - System Management Tab



A list of all predefined scheduled jobs is displayed.

Figure 2–77 Creating Application Instance - Predefined Scheduled Jobs



- g. Select **Application Instance Post Delete Processing Job** from the list.
- h. Run the Application Instance Post Delete Processing Job scheduled job using the Delete Mode. For this, enter Mode as **Delete** in Job Details page.

Note: Using the Delete mode hard-deletes the accounts from all provisioning tasks and targets, and subsequently from Oracle Identity Manager.

Figure 2–78 *Creating Application Instance - Mode Selection (Delete)*

ORACLE Identity System Administration Signed in as xelsysadm Help

The screenshot displays the 'Job Details' page for the 'Application Instance Post Delete Processing Job'. The interface includes a left-hand navigation pane with a search bar and a list of jobs. The main content area is divided into several sections:

- Job Information:** Shows the job name, task, and schedule type. The 'Schedule Type' is set to 'No pre-defined schedule'.
- Job Status:** Shows the current status as 'Stopped', last run start and end times, and the next scheduled run.
- Parameters:** Includes fields for 'Application Instance Name' (set to 'ALL') and 'Batch Size' (set to '500'). The 'Mode' dropdown is currently set to 'Delete', which is highlighted with a red box. A tooltip below it indicates 'Possible values are 'Revoke'/'Delete'/'Decommission''.
- Job History:** A table showing the execution history of the job.

Start Time	End Time	Job Status	Execution Status
September 17, 20...	September 17, 20...	Stopped	Success

- i. Click **Refresh** to check the Job Status.
- j. Change the value of mode back to 'Revoke'.
- k. Click **Apply**.

Figure 2–79 Creating Application Instance - Mode Selection (Revoke)

ORACLE Identity System Administration Signed in as xelsysadm Help

The screenshot shows the 'Job Details' page for the 'Application Instance Post Delete Processing Job'. The 'Mode' dropdown menu is set to 'Revoke' and is highlighted with a red box. The 'Run Now' button is also highlighted with a red box. The job status is 'Stopped' and the last run was on September 17, 2013. The parameters section shows 'Application Instance Name' as 'ALL' and 'Batch Size' as '500'. The job history table shows a single entry for September 17, 2013, with a status of 'Stopped' and 'Success'.

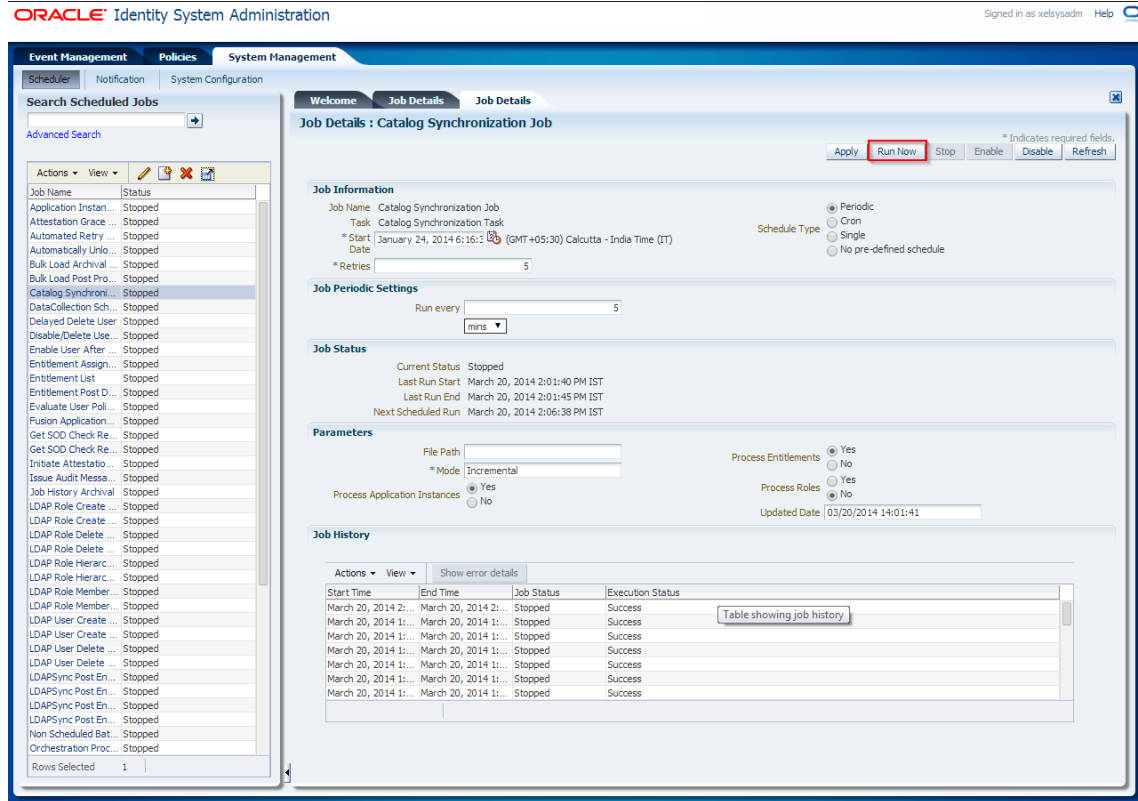
Start Time	End Time	Job Status	Execution Status
September 17, 20...	September 17, 20...	Stopped	Success

- I. Run the Catalog Synchronization Job scheduled job.

To do this, select **Catalog Synchronization Job** from the Search scheduled tasks list.

- m. Click **Run Now** from the Job Details page.

Figure 2–80 Creating Application Instance - Catalog Synchronization



This scheduled job identifies the soft-deleted application instances, and removes them from the catalog list.

4. Click **Create** on the toolbar. The **Create Application Instance** page is displayed.

Figure 2–81 Creating Application Instance - Create

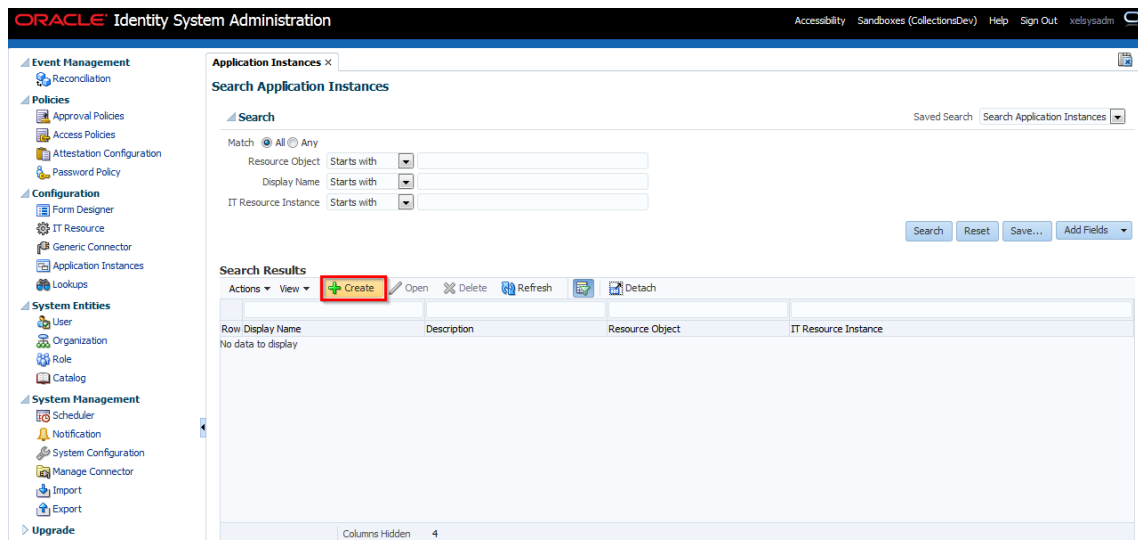


Figure 2–82 Creating Application Instance - Attributes Tab

The screenshot shows the Oracle Identity System Administration console. The main window is titled "Create Application Instance" and is in the "Attributes" tab. The left sidebar contains a navigation tree with categories: Event Management (Reconciliation), Policies (Approval Policies, Access Policies, Attestation Configuration, Password Policy), Configuration (Form Designer, IT Resource, Generic Connector, Application Instances, Lookups), System Entities (User, Organization, Role, Catalog), and System Management (Scheduler, Notification, System Configuration, Manage Connector, Import, Export, Upgrade). The main content area includes the following fields and controls:

- Name**: Text input field (required).
- Display Name**: Text input field (required).
- Description**: Text area.
- Disconnected**: Check box.
- Resource Object**: Text input field with a search icon (required).
- IT Resource Instance**: Text input field with a search icon (required).
- Form**: Dropdown menu with "Edit" and "Refresh" icons.
- Parent App Instance**: Text input field with a search icon.

Buttons for "Save" and "Cancel" are located at the top right of the dialog. A "*Required Field" label is also present.

5. Specify following values:

Name: Collections

Display Name: Collections

Description: Collections application instance

Resource Object: Collection User (click search icon to search)

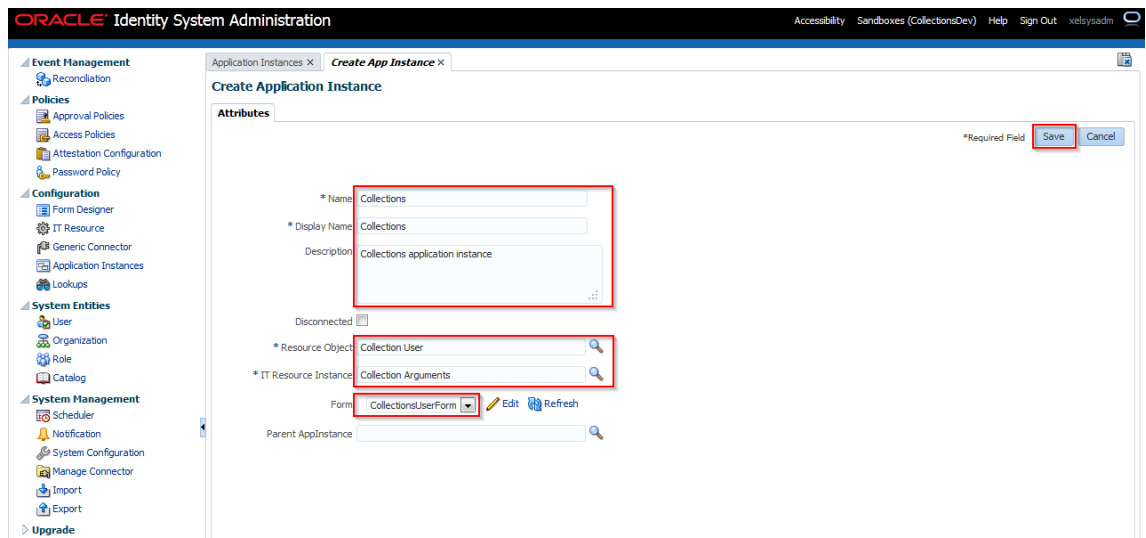
IT Resource Instance: Collection Arguments (click search icon to search)

Form: CollectionsUserForm

Note: The form attached to the application instance is created in section [Chapter 2.3.9, "Create Form Associated with Application Instance"](#).

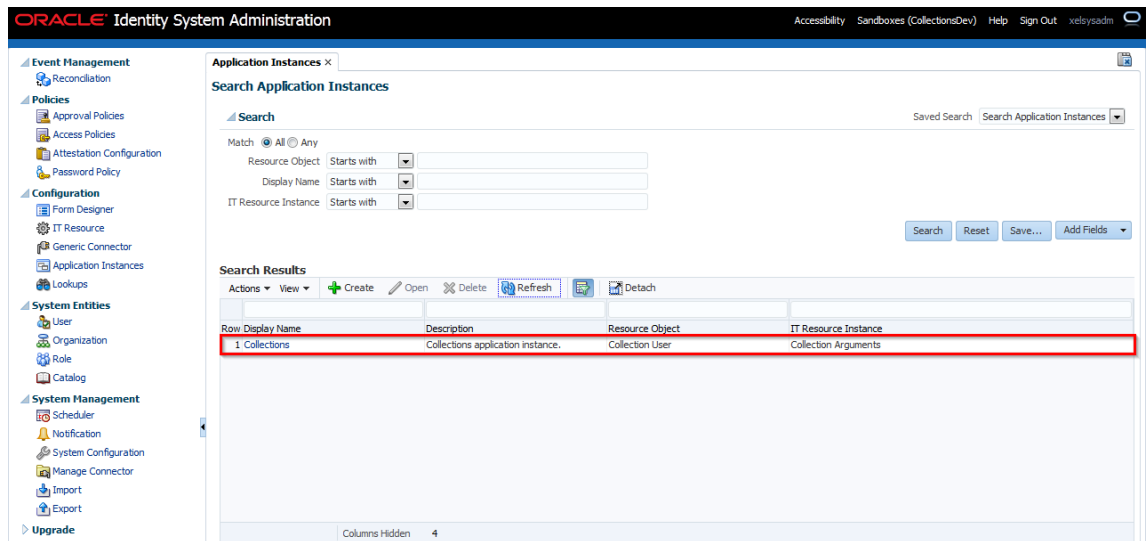
6. Click Save.

Figure 2–83 Creating Application Instance - Save



Application instance is created successfully

Figure 2–84 Creating Application Instance - Created Successfully



2.3.11 Security Configuration

Relevant client security policy must be configured mapping to service policy.

Default service policy configured for Collections User Provisioning is '**oracle/wss_saml_or_username_token_service_policy**'. Below configuration is required to configure client security policy.

Note: Current implementation is tested with '**oracle/wss_username_token_client_policy**' client security policy.

1. You must enable security flag to **true** in IT Resource Collections Arguments (isSecurityEnabled = true). If isSecurityEnabled flag is false then security policies are not applied.
2. Provide relevant client side policy name in IT Resource Collections Arguments (securityPolicy = **oracle/wss_username_token_client_policy**).
3. Required properties for policy are to be provided in the form of key-value pair in Lookup.

Create lookup LOOKUP.COLL.SECURITY.PARAMS and add properties in Code and meaning fields. Configured Lookup name must be provided in IT Resource Collections Arguments (securityParamLookup = LOOKUP.COLL.SECURITY.PARAMS).

Meaning: oracle.wsm.csf-key

Code: obp-collections

Figure 2–85 Create Lookup Type

Edit Lookup Type

* Meaning: LOOKUP.COLL.SECURITY.PARAMS
Code: LOOKUP.COLL.SECURITY.PARAMS

Description: [Empty field]

Lookup Codes

View [Icons] Detach

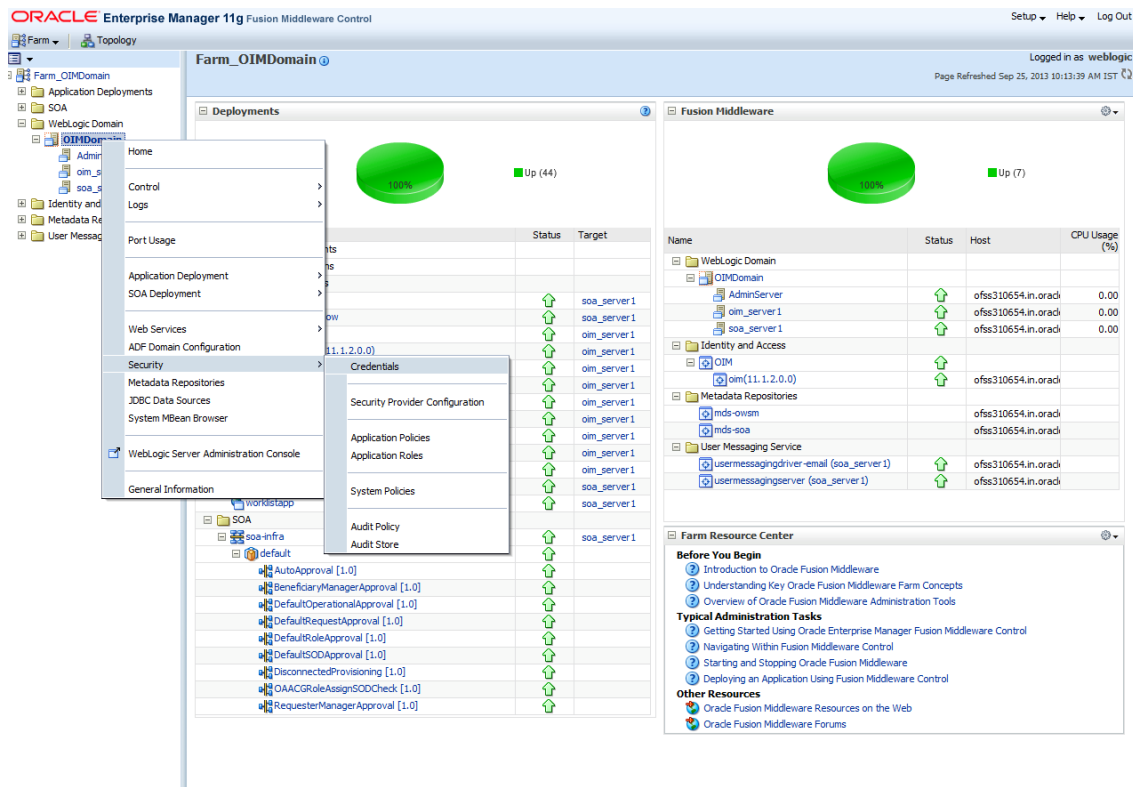
* Meaning	* Code	Enabled	Sequence	Description
orade.wsm.csf-ke	obp-collections	<input checked="" type="checkbox"/>		

Save Cancel

Further configured key value pair would be added programmatically in **BindingProvider Request Context**.

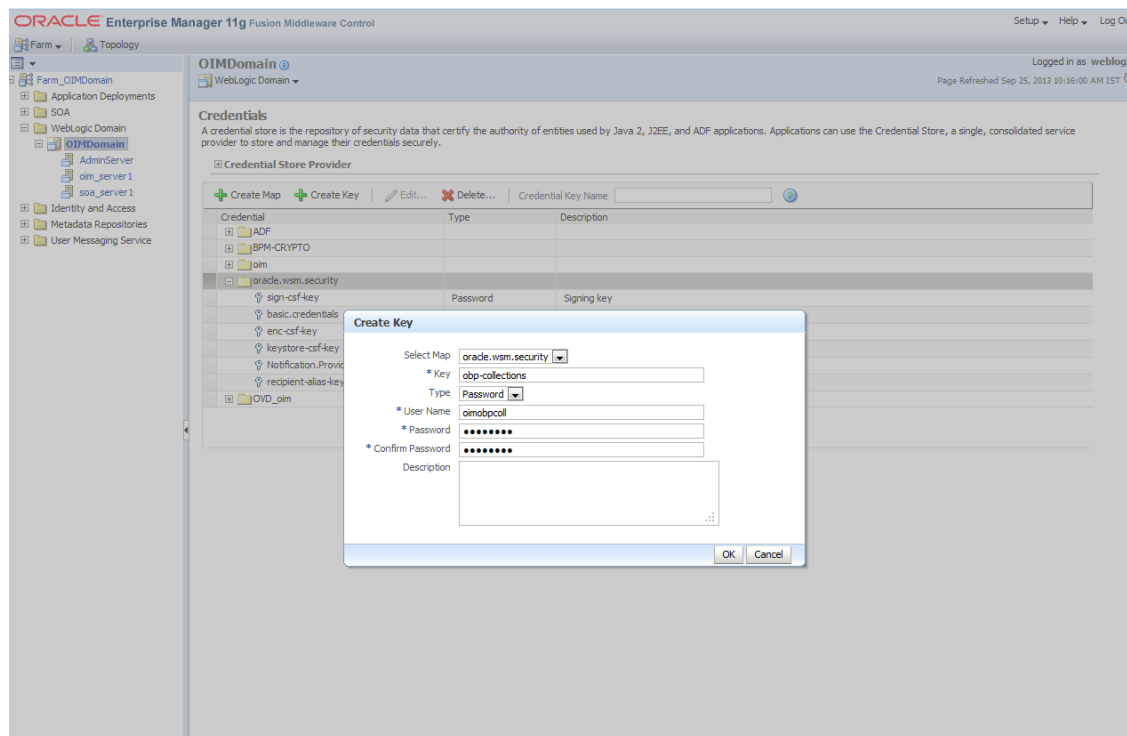
4. User credentials must be stored in the Weblogic Credential Store for **oracle/wss_username_token_client_policy** client policy.
 - Login to weblogic domain Enterprise Manager where OIM is deployed `http://<host>:<port>/em/`.
 - Navigate to **Farm_OIMDomain > Weblogic Domain > OIMDomain**.
 - Right click to open **Security > Credentials**.

Figure 2–86 Farm_OIM Domain



5. Create key under **oracle.wsm.security** node named **obp-collections** as shown below. Provide system user (**OIMOBPCOLL**) and password as created above.

Figure 2–87 OIM Domain - Create Key



Note: Service policies are configured in **OBPSecurityAnnotations.properties**. Collections User Provisioning service policy is configured by adding below entry in the properties file:

```
com.ofss.fc.app.collection.service.userprovisioning.ORMBUser
ProvisioningApplicationService=oracle/wss_saml_or_username_
token_service_policy
```

Further this configuration would be read in OBP programmatically and '**oracle/wss_saml_or_username_token_service_policy**' policy would be attached to '**com.ofss.fc.app.collection.service.userprovisioning.ORMBUserProvisioningApplicationService**' service.

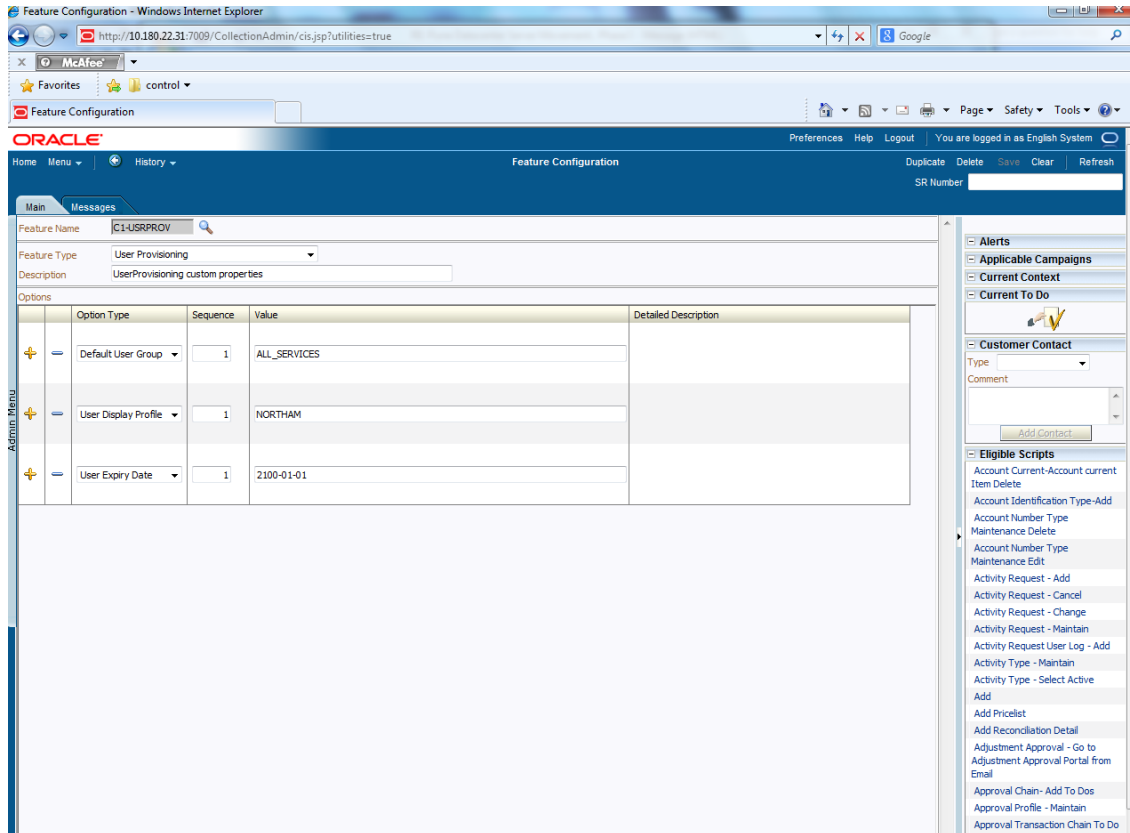
2.4 OBP-Collections Configuration

OBP Collections provides feature configuration C1-USRPROV to specify default values of the following:

- **Default User Group:** Default Collections User Group. It is used by system only; user should not add it manually. See the OBP Collections Day Zero Setup guide to get configured default user group.
- **User Display Profile:** Display profile value for OBP Collection User, configure as per your environment.
- **User Expiry Date:** Default value of User expiry date. If expiry date is not provided this value is used. It should be in format YYYY-MM-dd.

Note: Feature Configuration can be updated using native OBP Collections admin screens.

Figure 2-88 Collections Configuration



User Fields and Constraints

This chapter provides information on the user provisioning fields and related constraints.

3.1 User Fields Provisioned From OIM

You must follow the constraints (listed in the table below) to provision user to OBP Collections irrespective of the constraints in OIM.

Irrespective of the field length allowed in OIM, you should restrict the field length to the specified values (in table below) for successful provisioning of user data. In case, if field length exceeds the specified limit, then data would be truncated and stored in OBP Collections.

The following table lists OBP Collections User fields (provisioned from OIM) and its constraints.

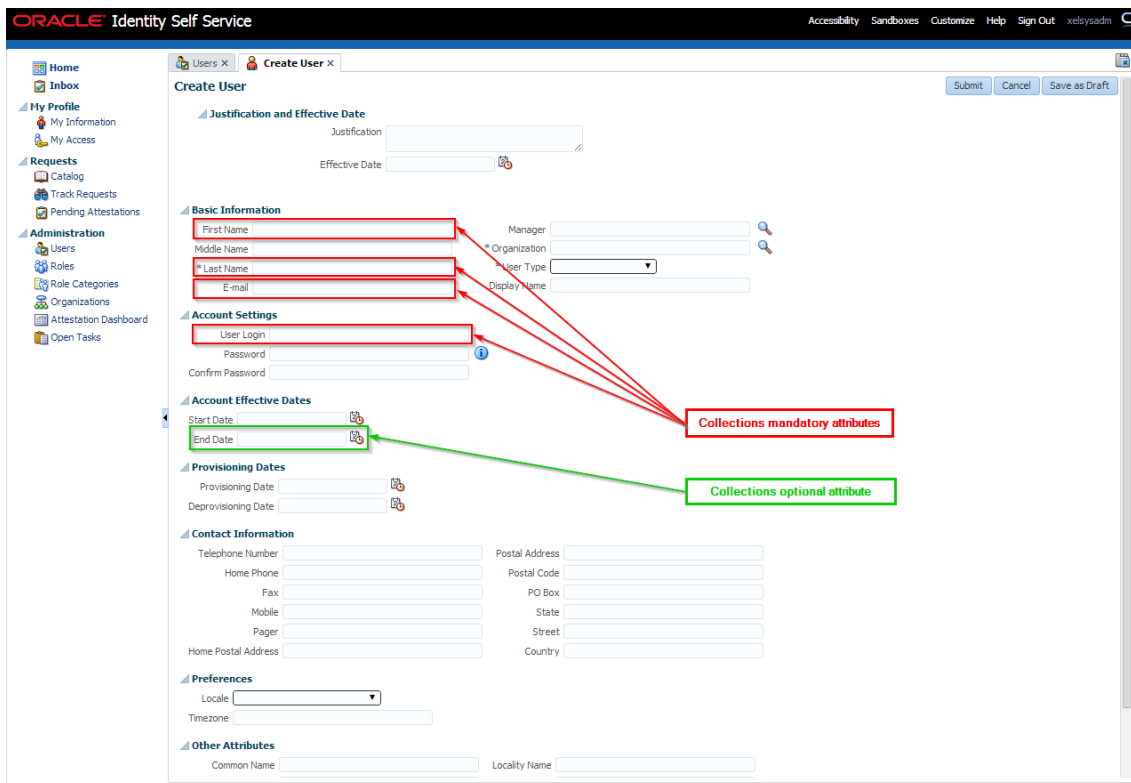
Table 3–1 OBP Collections User Fields

Field Name in OIM	Field Name in ORMB	Length	Mandatory (Y/N)	Modifiable (Y/N)	Comments
User Login	User Id	255	Y	N	You can modify this field name.
First Name	First Name	50	Y	Y	Users First Name
Last Name	Last Name	50	Y	Y	Users Last Name
Email	Email Address	70	Y	Y	Users Email address
Collections User Group	User Group	20	N	Y	Collections User Group represents User Group in OBP Collections. For every User, default User Group is populated in OBP Collections.
End Date	Date	N	Y	Y	User's Log in expiry date.

Note: User creation from Native Collections is primarily discouraged. But in case of any failure in provisioning through OIM you can create or update the users through Native Collections screen. Below are the constraints to be followed when user is to be created through Native Collections:

- Collections does not support User login in lowercase. User Login must be entered in uppercase only. (Same should be taken into account while creating user through OID or OIM.)
- Only system admin users will have access to create or modify users via Native Collections screen.

Figure 3–1 Create User - Mandatory and Optional Attributes



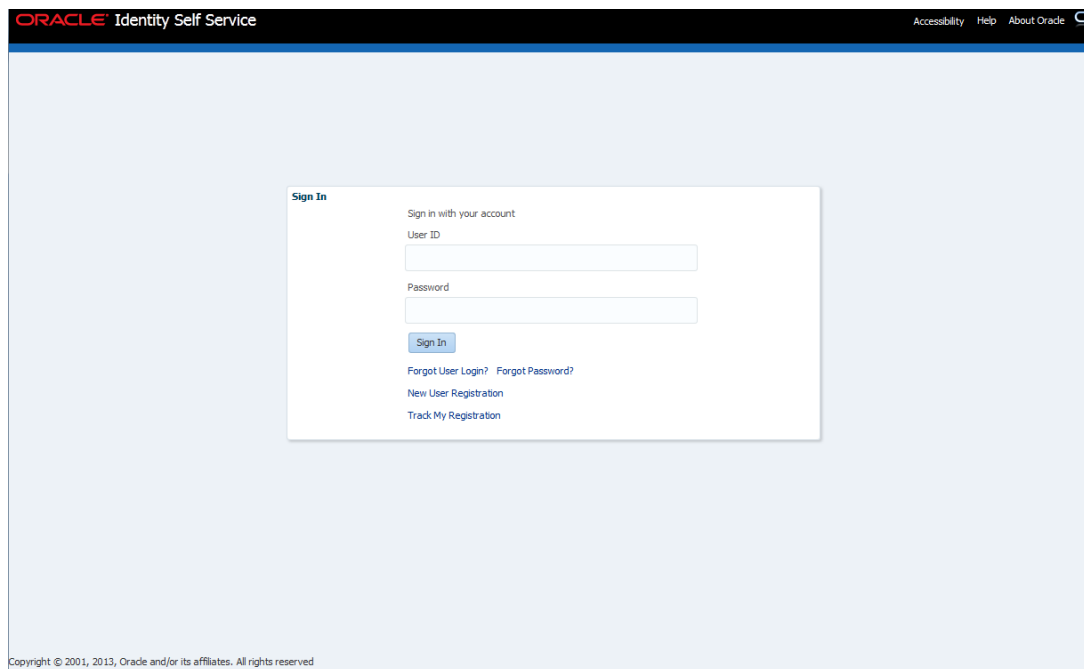
This chapter provides information on user provisioning activities.

4.1 Add Users in Collections

To add a user in OBP Collections, follow the steps:

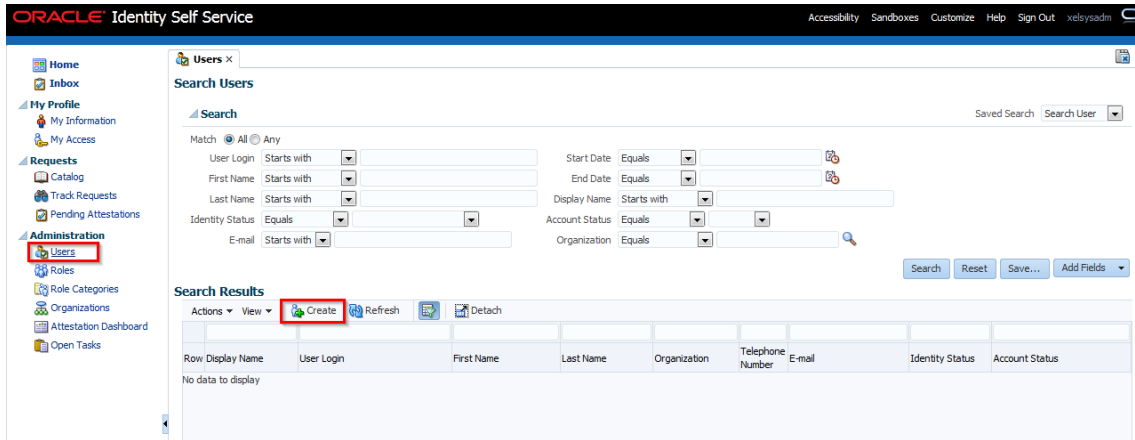
1. Login to Oracle Identity Self Service.

Figure 4–1 Oracle Identity Self Service Login Screen



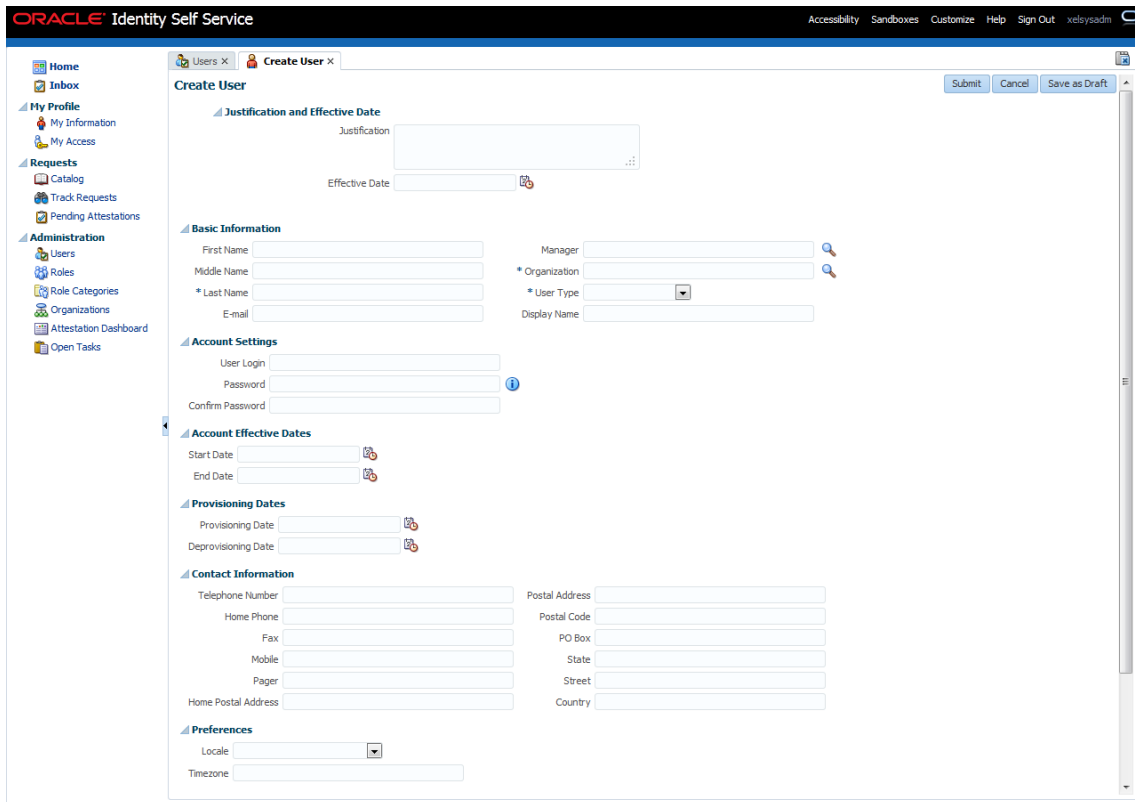
2. In the left pane, under Administration, click **Users**.
The **Users** page is displayed.

Figure 4–2 OID User Screen



3. Click **Create** on the toolbar to display the **Create User** page.

Figure 4–3 Create User Screen



4. In the **Create User** screen, specify the following values. For example:

First Name: Harry

Last Name: Potter

Email: harry.potter@oracle.com

Organization: Requests (required for OIM)

User Type: Employee (required for OIM)

User Login: HARRYPOTTER
Password: *****
Confirm Password: *****
End Date: Oct 30, 2014

Figure 4-4 Search and Select Organization

Search and Select: Organization

Search Advanced

Match All Any

Organization Name

Type

Organization Status

Parent Organization Name

Search Reset

Organization Name	Type
Xellerate Users	System
Top	System
Requests	System

OK Cancel

Figure 4–5 Create User

5. Click **Submit** to save user details in OID.

Once user data is saved successfully, the **Attributes** screen appears. A confirmation message appears to confirm that user is successfully added to OID.

Note: Successful user creation in OID does not guarantee that the user is provisioned to Collections.

Figure 4–6 User Created

The screenshot displays the Oracle Identity Self Service interface for a user named Harry Potter. The left sidebar contains navigation options like Home, My Profile, Requests, and Administration. The main content area shows the user's details under the 'Attributes' tab, with sub-sections for Basic Information, Account Effective Dates, Provisioning Dates, Contact Information, Preferences, and Other Attributes.

Attribute	Value
First Name	Harry
Middle Name	
Last Name	Potter
Xellerate Type	false
E-mail	harry.potter@oracle.com
Manager	
Organization	Requests
User Type	Employee
Account Status	Unlocked
User Login	HARRYPOTTER
Identity Status	Active
Display Name	Harry Potter
Start Date	
End Date	10/30/2014
Provisioning Date	
Deprovisioning Date	
Telephone Number	
Home Phone	
Fax	
Mobile	
Pager	
Home Postal Address	
Postal Address	
PO Box	
Street	
State	
Postal Code	
Country	
Locale	
Timezone	
Common Name	Harry Potter
Initials	
Department Number	
Employee Number	
Hire Date	
Title	
Locality Name	
Generation Qualifier	

OIM Schedule job Evaluate User Polices ran at scheduled interval. Access policy is applied and Process Task **Create User** of Process Definition **Collections User Provisioning** is triggered to provision user in Collections. If user data is successfully validated then user would be added to Collections.

6. Search added User and browse to **Accounts** tab. In the Browse tab, if the Resource Name is **Collections User** and Status is **Provisioned** then user is successfully added to OBP Collections.

Figure 4–7 Verifying User name

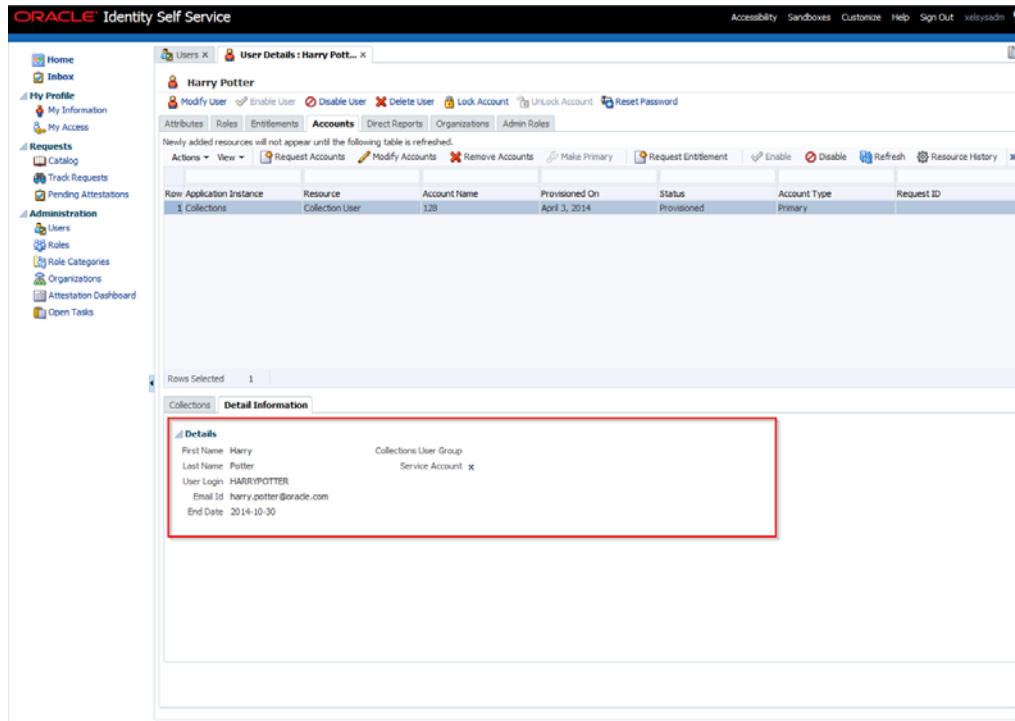
The screenshot shows the Oracle Identity Self Service interface with the 'Accounts' tab selected for the user Harry Potter. A table displays the account details, with 'Collection User' and 'Provisioned' highlighted in red boxes.

Row	Application Instance	Resource	Account Name	Provisioned On	Status	Account Type	Request ID
1	Collections	Collection User	128	April 3, 2014	Provisioned	Primary	

For more information, see [Chapter 5.2, "Verify Users in Native Collections"](#).

- In the **Accounts** tab, click each account to view a summary of the account.

Figure 4–8 View Account Summary



The fields and values displayed in **Detail Information** of the account are as below:

- **First Name:** Harry
- **Last Name:** Potter
- **User Login:** HARRYPOTTER
- **Email Id:** harry.potter@oracle.com
- **End Date:** 2014-05-30
- **Collections User Group:** (Blank)
- **Service Account:** (Disabled)

Note: Service accounts are general administrator accounts that are used for maintenance purposes. It differs from a regular account by a flag. This flag is set by the user requesting the resource, or by the administrator directly provisioning the resource. Since this feature is not used currently, this checkbox will be disabled on the **User Details** page.

- To add a user group, select the account for which you want to add the User Group.
- From the **Actions** menu, select **Modify**. Alternatively, click **Modify Accounts** on the toolbar.

The **Modify Account** page is displayed.

10. Select the required group from the **Collections User Group** lookup (for example, C1_BSERVICES) and submit the request from the Catalog page (Modify Account page). For this, select the required group from the **Search and Select: Collections User Group** pop up and click Ok.

Figure 4–9 Modifying Account

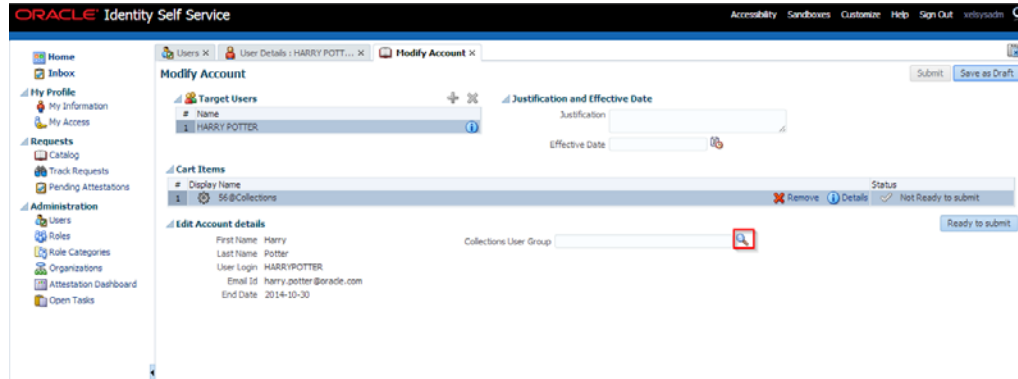
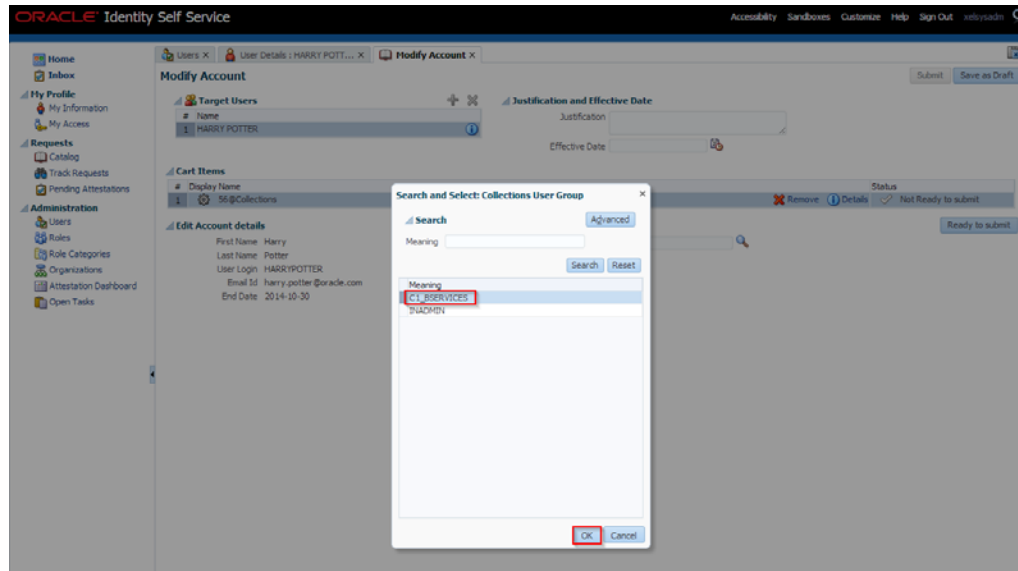
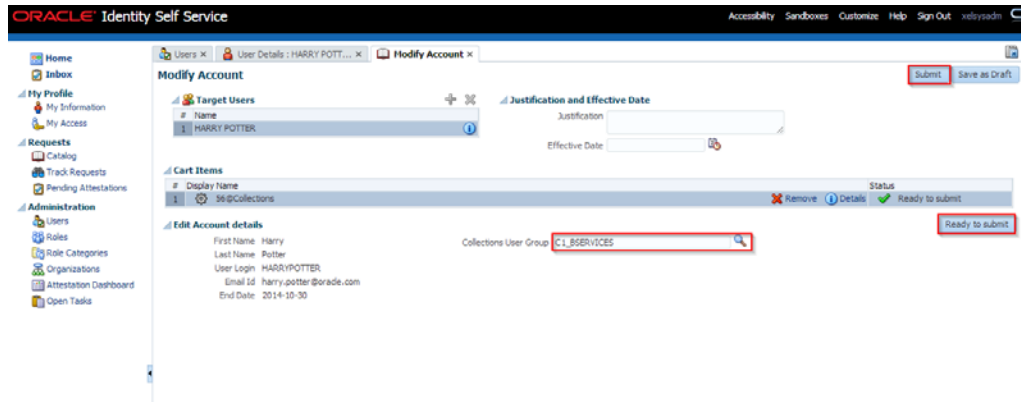


Figure 4–10 Selecting Collections User Group



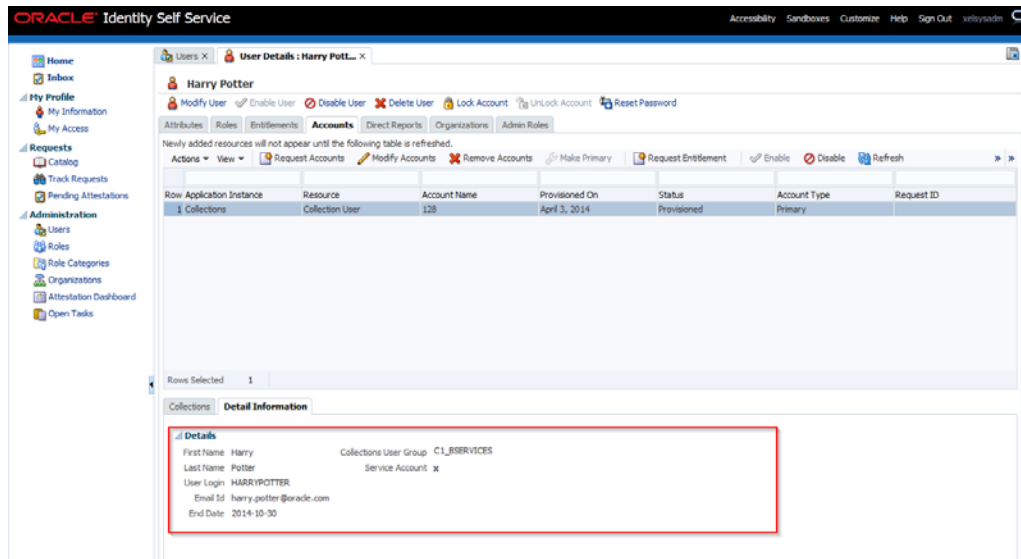
11. Click **Ready to Submit** and **Submit**, respectively to submit the request.

Figure 4–11 Submitting Request



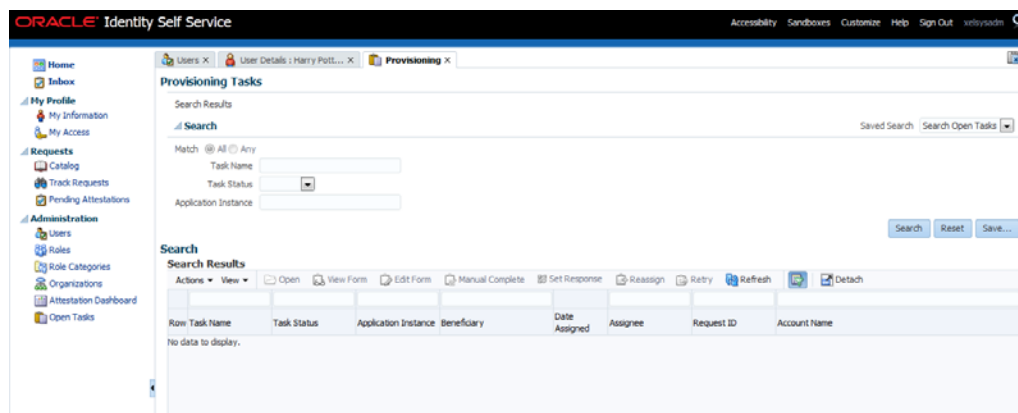
12. Go back to **Accounts** tab in **User Details** page and refresh the resources table. Click the required account's row to view the latest changes in the **Detail Information** section.

Figure 4–12 Viewing Updated User Details



13. To view status of all User provisioning tasks, navigate to **Open Tasks** and search for **Collections** Application Instance. All failed Collections provisioning task will be shown (Task Status = Rejected) and successful task are not shown.

Figure 4–13 Viewing User Provisioning Tasks



If task status is **Rejected** then check all mandatory attributes required for Collections User Provisioning are populated. For more information, see [Chapter 3, "User Fields and Constraints"](#)

Open the Rejected task in **Provisioning Tasks** page to check the cause of failure while creating the user.

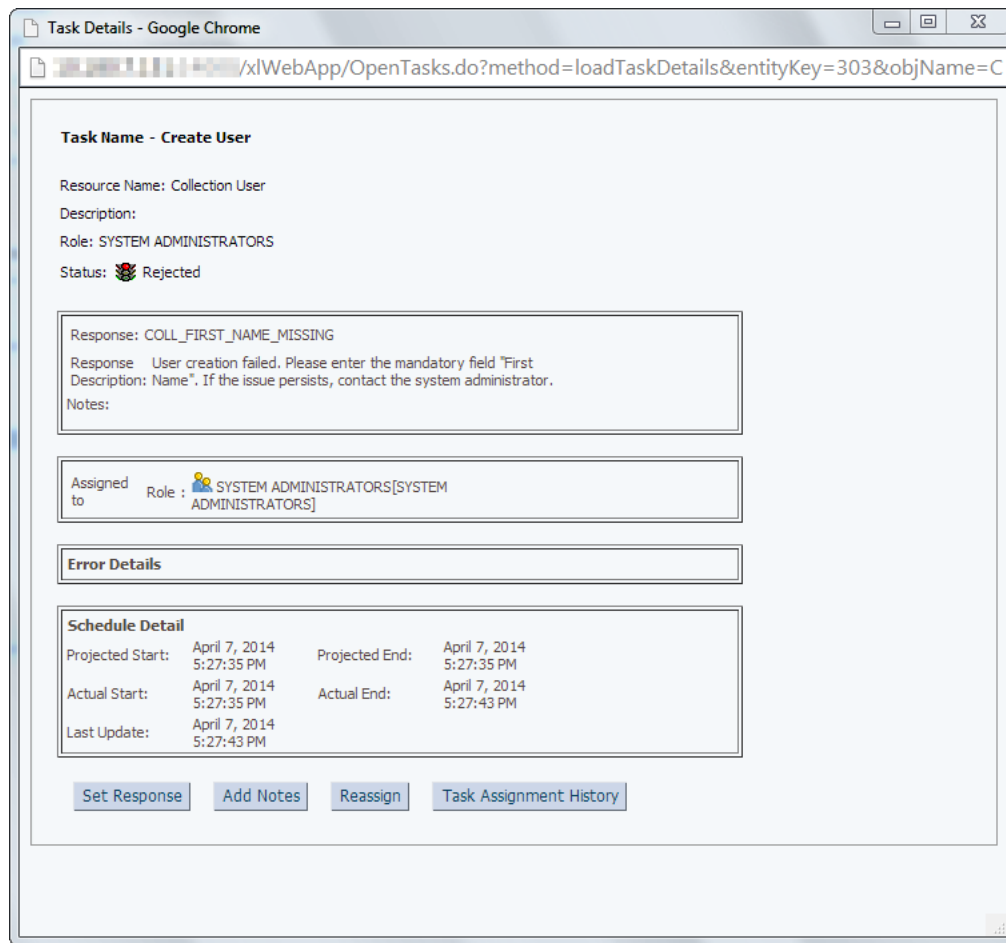
Below are the response codes and descriptions shown in the **Task Details** page for a Rejected Create User task:

Table 4–1 Response Codes for a Rejected Create User Task

S. No.	Scenario	Response	Response Description
1	User already exists in Collections but not in OIM/OID	COLL_DUPLICATE_USR	User creation failed. User with the given 'User Login' already exists in Collections. Please provide a unique User Login Id. If the issue persists, contact the system administrator.
2	First Name is missing	COLL_FIRST_NAME_MISSING	User creation failed. Please enter the mandatory field 'First Name'. If the issue persists, contact the system administrator.
3	Last Name is missing	COLL_LAST_NAME_MISSING	User creation failed. Please enter the mandatory field 'Last Name'. If the issue persists, contact the system administrator.
4	Email Id is missing	COLL_EMAIL_ID_MISSING	User creation failed. Please enter the mandatory field 'E-mail'. If the issue persists, contact the system administrator.

For example, if the **First Name** is missing while creating user, task details will appear as below for that **Create User** task.

Figure 4–14 Task Details



- If mandatory attributes are missing, populate them and resubmit the request. Check Resource status in Accounts tab, if status is **Provisioned**, then user details are successfully provisioned to Collections. Further, user can mark that Provisioning task as **Manual Complete** to remove task from rejected list.
- If all mandatory attributes are present and still provisioning task statuses is **Rejected**, then contact your administrator. Administrator can check log files and resolve problem. Further User can **Retry** provisioning task.

14. Alternate Flow:

- **Populated Mandatory Fields only:** See [Chapter 3, "User Fields and Constraints"](#)
 - All required fields are populated with valid data.
 - User will be successfully added to Collections.
 - See **Step 6** to validate successful addition of user.
- **Collections User Group not added:**
 - All fields are populated with valid data, except Collections User Group is not added.
 - User will be successfully added to Collections with default User Group (default access is provided).

- See [Chapter 5.2, "Verify Users in Native Collections"](#) to validate successful addition of user.
- **Fields constraints are Violated:** See [Chapter 3, "User Fields and Constraints"](#).
 - a. Mandatory fields missing or fields length is not valid or incorrect email format data is populated.
See [Chapter 3, "User Fields and Constraints"](#) for complete list of fields and its constraints.
 - b. Click **Save**.
Some of the fields that have client side validation would be highlighted with error on **Create User** screen. Note that only some validations belong to client side.
 - c. After rectifying validations errors, click **Save**.
Only client side errors are resolved and some of the fields may still violate constraints.
 - d. After Evaluate User Polices job run is completed, check the status of user provisioning to Collections, locate Accounts tab. If the **Resource Name** is **Collection User** and the **Status** is **Provide Information**, then user is not provisioned to Collections.

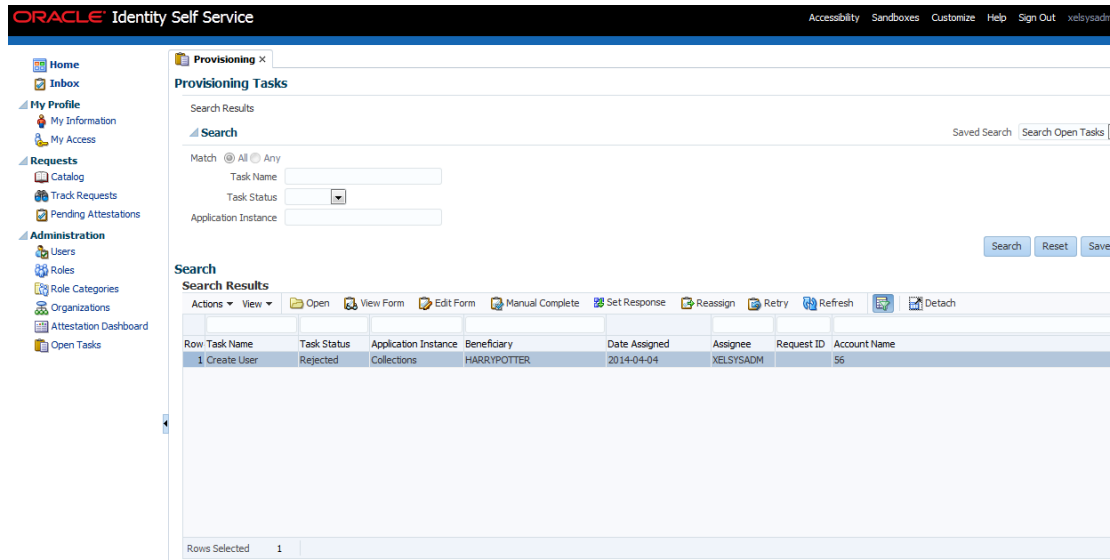
Figure 4–15 Status of User Provisioning to Collections

The screenshot shows the Oracle Identity Self Service interface for user 'Harry Potter'. The 'Accounts' tab is active, displaying a table with the following data:

Row	Application Instance	Resource	Account Name	Provisioned On	Status	Account Type	Request ID
1	Collections	Collection User	128	April 3, 2014	Provide Information	Primary	

- e. Also, check open provisioning tasks. Create User task status would be **Rejected** for user whose details need to be provisioned.

Figure 4–16 Open Provisioning Tasks

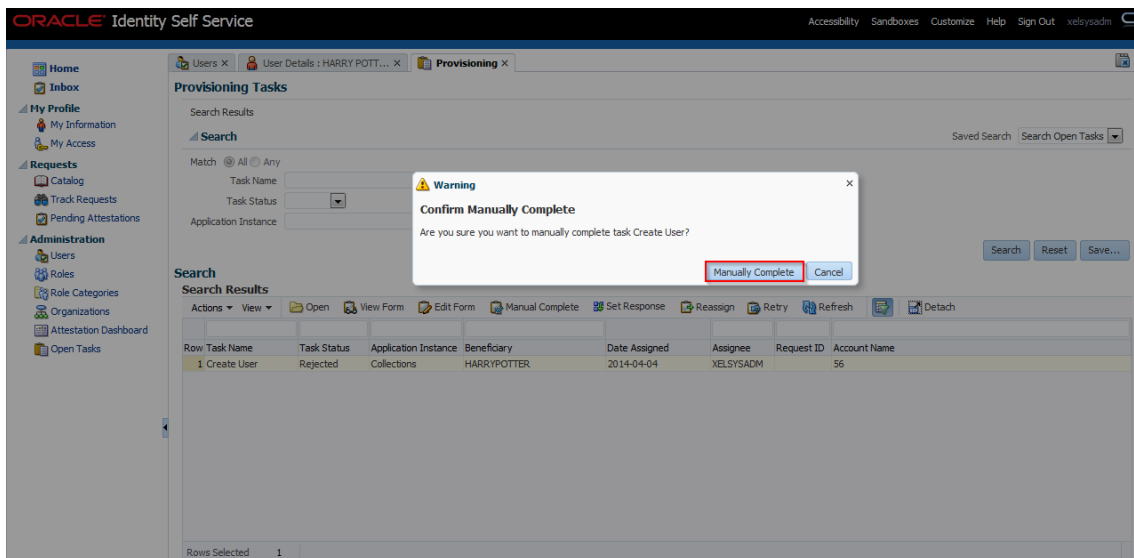


- f. Modify user details to make it valid. See Chapter 3, "User Fields and Constraints".
- g. Click **Submit**. If all fields are valid, user would be provisioned to Collections.

Note: If the field length exceeds specified limit then it would be truncated and saved in OBP Collections.

- h. See Step g to validate successful addition of user. If the user details are successfully provisioned then mark Create User provisioning task of user as **Manually Complete** to remove entry from rejected task status list.

Figure 4–17 Manual Completion - Create User Provisioning Task



- **Duplicate User Login/Email Not Allowed:**
 - Duplicate User Login Id and Email is not allowed.
 - If user tries to add duplicate user login error will be displayed.
- **User is expired on addition (When End Date is less than or equal to Current Date):**
 - All fields are populated with valid data. End date is populated with less than or equal to current date/today's date.
 - Since the user is already expired, it is not provisioned to Collections and there is no Status available in Resource tab.
 - There is no way to bring the user to Collections (even by modifying end date to greater than current date). As the expired user is considered in delete state.
 - If there is a need to activate the user again, delete the earlier user details and add the user with end date > current date.

4.2 Modify Users in Collections

Once user is added, it can be modified. Following are the modifiable fields:

- First Name
- Last Name
- Collections User Group
- Email
- End Date

You can search and modify the user. You can search for the user from **Search Users** panel and then click the searched user data to view its detail.

Figure 4–18 Searching User

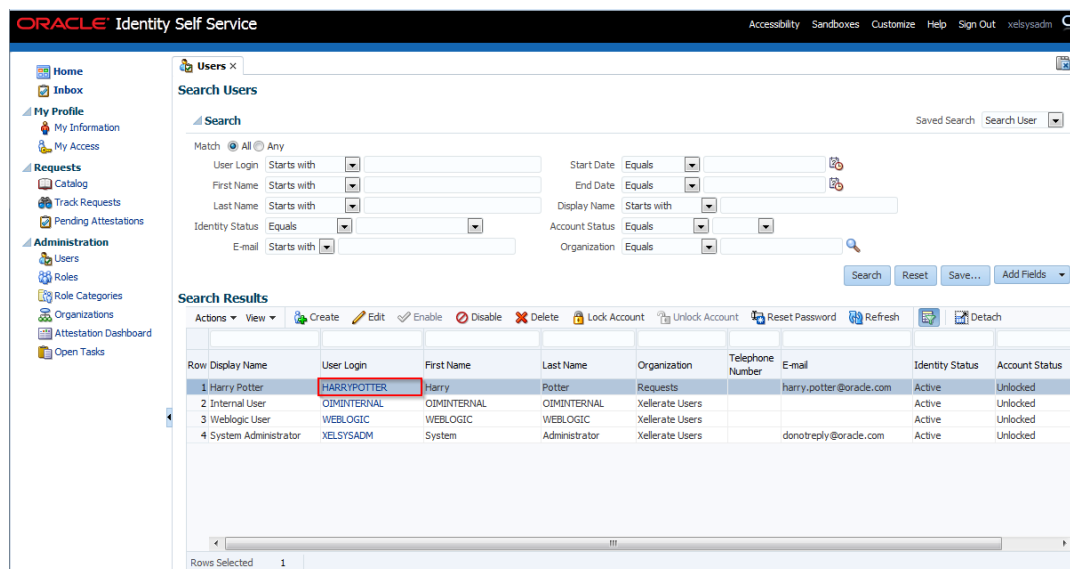
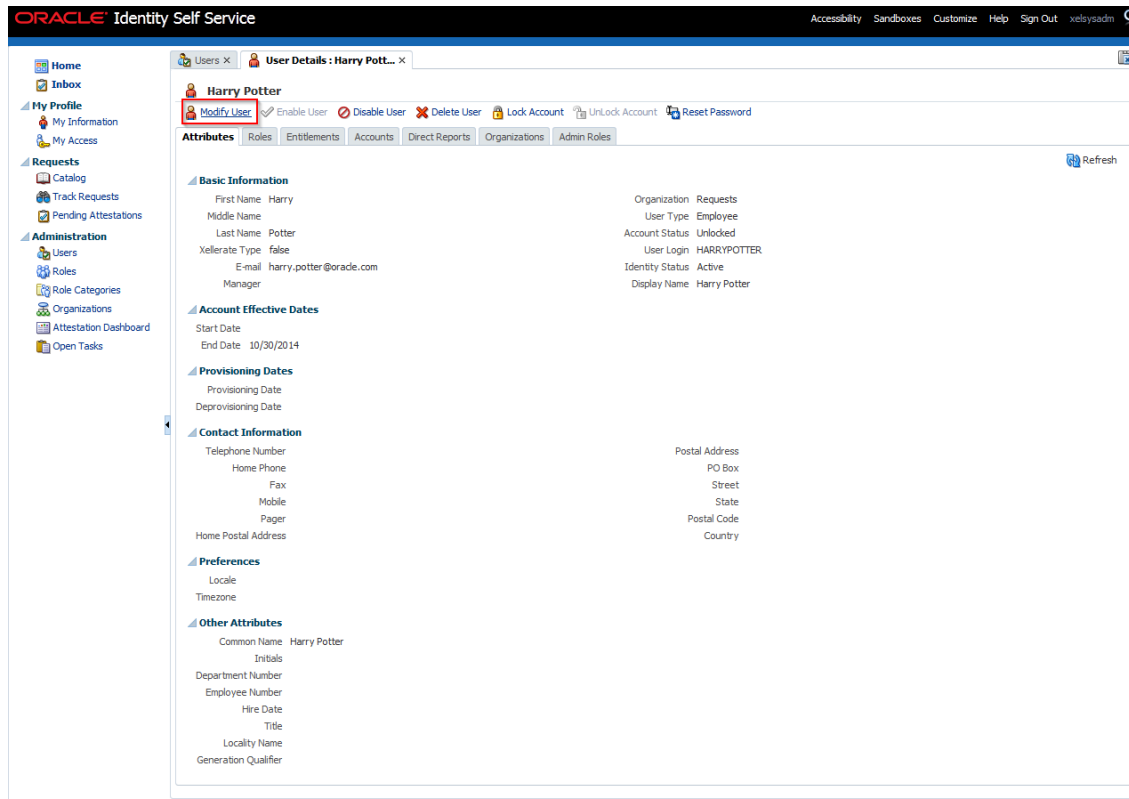


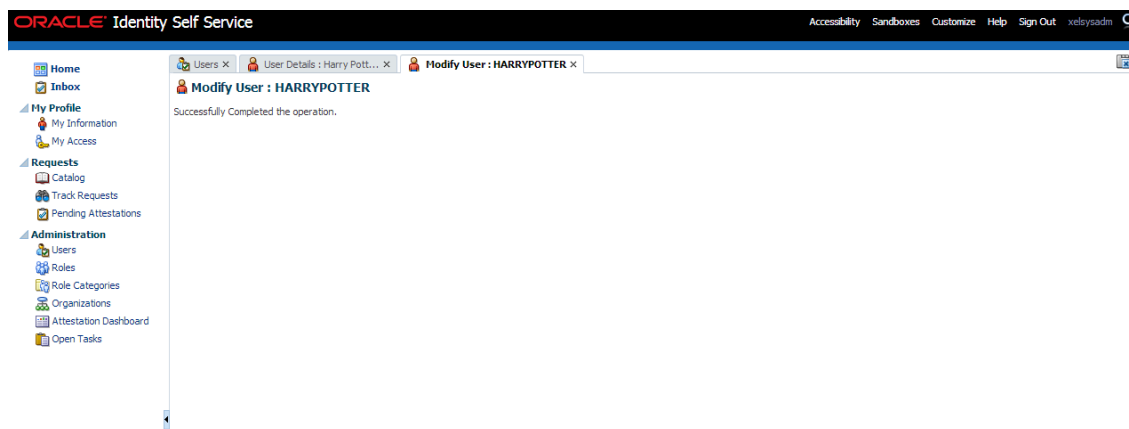
Figure 4–19 Detailed Information about the User



To modify a user, perform the below steps:

1. Click **Modify User** to open Modify User page. Modify the user details as per the requirement.
2. Click **Submit**. If the user details are valid (that is, if it does not violate any validation) then user details would be modified. A message will be displayed on successful completion of the modify operation. This does not guarantee successful modification of the user in Collections.

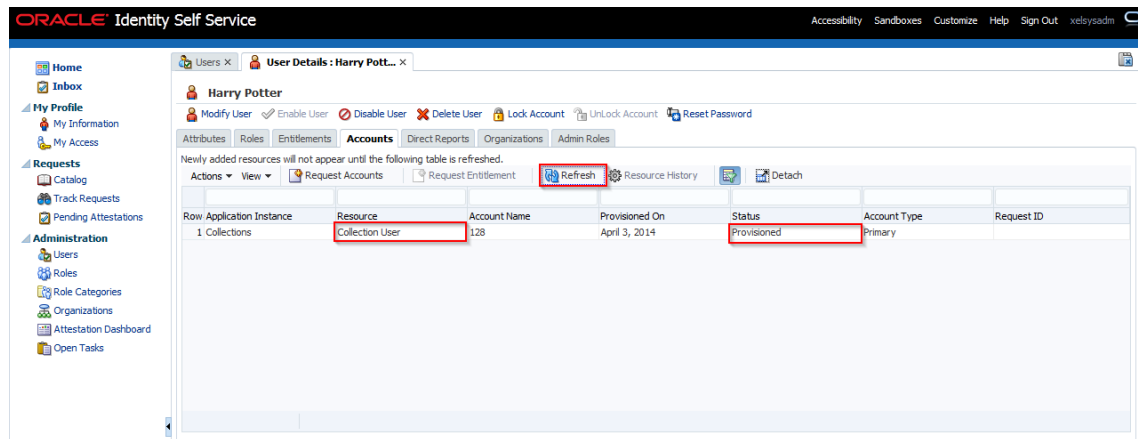
Figure 4–20 Modify User Confirmation



3. In User Details page locate **Accounts** tab. If Resource Name is **Collection User** and Status is **Provisioned** then user details are successfully modified and provisioned to Collections.

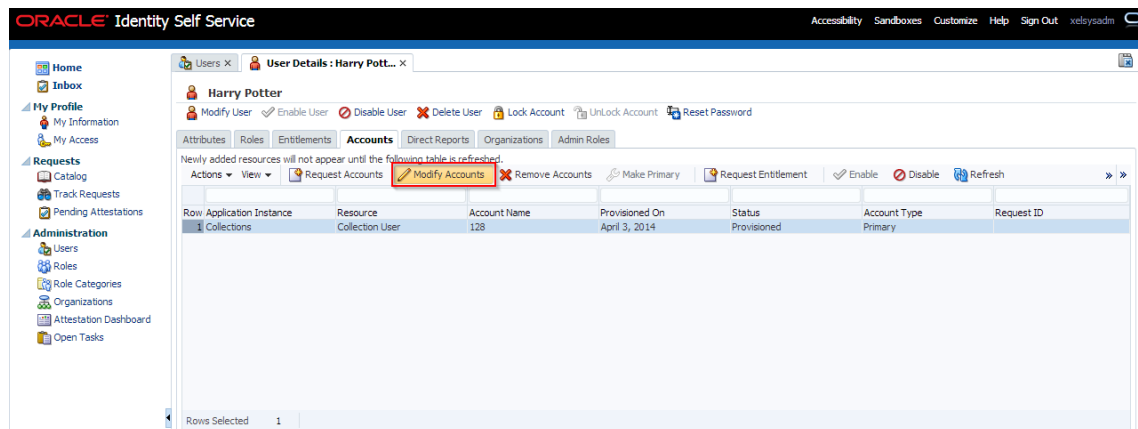
4. If the data does not appear when the user is added, click **Refresh**.

Figure 4–21 Viewing Modified and Provisioned User Details



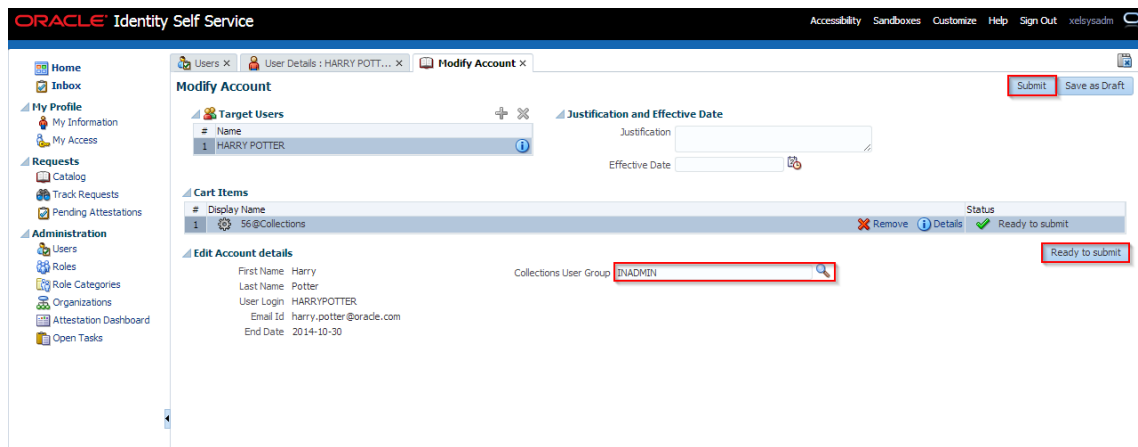
5. Select the account to view the modified values in **Detail Information** section.
6. To modify the Collections User Group, follow the below steps:
 - a. In the **Accounts** tab, select the account that you want to modify.
 - b. From the **Actions** menu, select **Modify**. Alternatively, click **Modify Accounts** on the toolbar. The **Catalog** page is displayed.

Figure 4–22 Catalog page



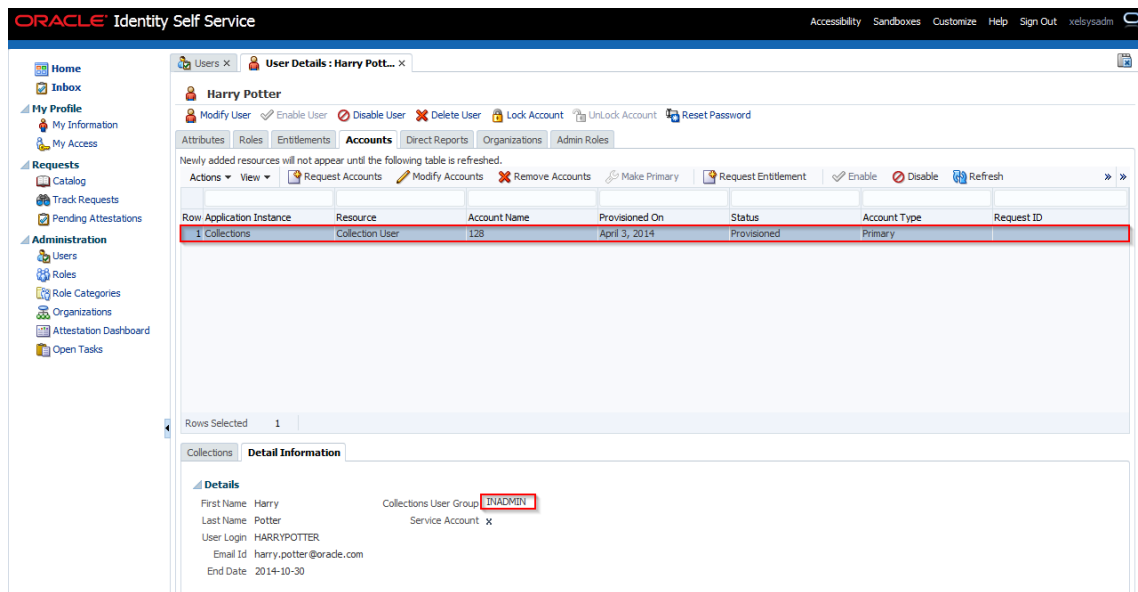
- c. Select the required group (for example, INADMIN) from **Collections User Group**, lookup and submit the request from the **Catalog** page. The account will be modified after the request is approved.
- d. Select the required group from the **Search and Select: Collections User Group** pop up
- e. Click **Ok**.
- f. Click **Ready to Submit** and **Submit**, respectively to submit the request.

Figure 4–23 Submitting Request



- g. To view the changes, go to the **Accounts** tab in **User Details** page and click **Refresh**. Select the account again to view the modified group in **Detail Information** section.

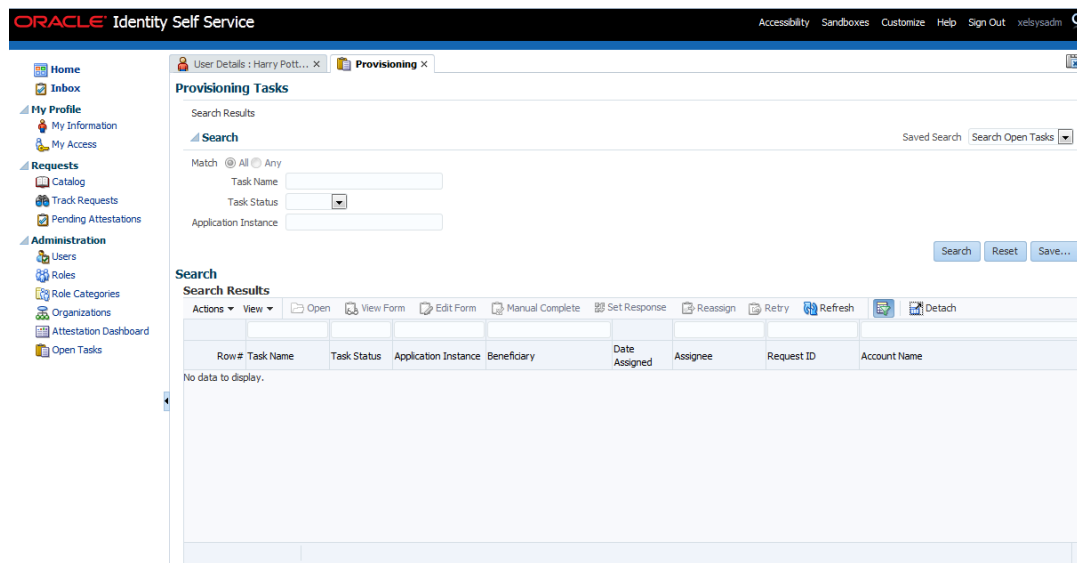
Figure 4–24 Viewing Changes



Currently, we are not making use of the Service Account feature, so the check box will remain disabled on the **User Details** page.

7. To view status of all User Provisioning tasks, navigate to **Open Tasks** and search for **Collections** Application Instance. All failed Collections provisioning task will be shown (Task Status = Rejected) and successful task are not shown.

Figure 4–25 Viewing User Provisioning Task



If task status is **Rejected** then check all mandatory attributes required for Collections User Provisioning are populated. See [Chapter 3, "User Fields and Constraints"](#).

- If mandatory attributes are missing, populate them and resubmit the request. Check Resource status in Accounts tab, if status is **Provisioned**, then user details are successfully provisioned to Collections. Further, the user can mark that provisioning task as **Manual Complete** to remove the task from rejected list.
- If all mandatory attributes are present and still provisioning task statuses is **Rejected**, then contact your administrator. Administrator can check log files and resolve problem. Further, user can **Retry** provisioning task.

For each field modification, OIM triggers different Process Task. So in all, if six fields are modified then six requests for modification will be sent to OBP Collections. This is technical limitation with current implementation.

Each provisioning task holds all user provisioning fields. If the number of user fields are modified, then all provisioning task for particular request will either fail or success.

Following table lists task invoked when user field is modified:

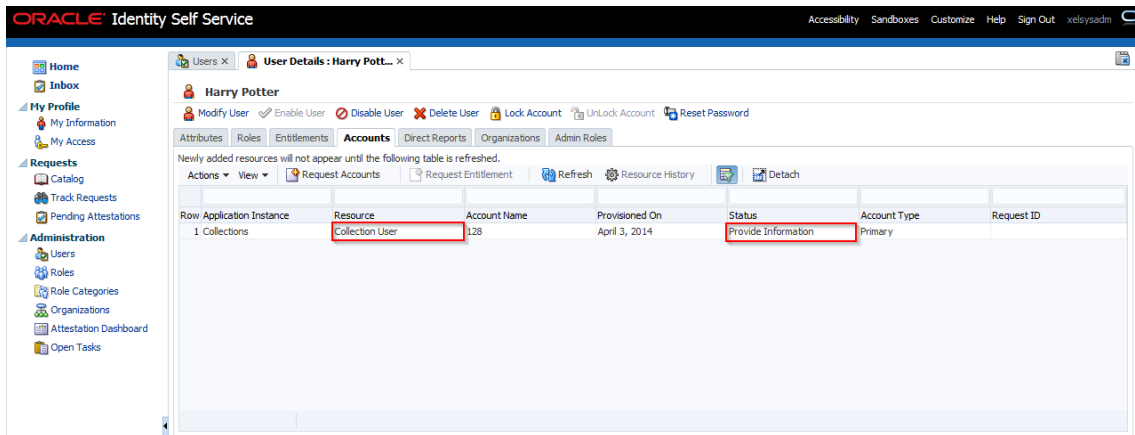
Table 4–2 Tasks involved while modifying User fields

User Field	Task Name
First Name	Change First Name
Last Name	Change Last Name
Collection User Group	Collections User Group Updated
Email	Change Email
End Date	Change End Date
User Login	Change User Name

8. Alternate Flow:

- **Fields constraints are Violated:** See [Chapter 3, "User Fields and Constraints"](#)
 - a. Mandatory fields removed or updated field's length is not valid or incorrect email format data is populated.
See [Chapter 3, "User Fields and Constraints"](#) for complete list of fields and its constraints.
 - b. Click **Submit**.
 - c. Some of the fields having client side validation would be highlighted with error on Modify User form. Note, only some validations are client side.
 - d. After rectifying validations errors, click **Submit**. User would be updated to OID.
 - e. Only client side errors are resolved and some of the fields are still violating constraints.
 - f. To check the status of user provisioning to Collections, traverse to Accounts tab. Resource Name is **Collection User** and Status is **Provide Information** then user is not provisioned to Collections.
Sometimes data doesn't appear as soon as user is added. Click **Refresh**.
For example, First Name is removed and Last Name is modified. Since one of mandatory field is missing for Collections User Provisioning, provisioning request failed.

Figure 4–26 User Provisioning Status



The failed provisioning task will be listed in open tasks list. Provisioning task will be equal to number of fields modified.

Figure 4–27 Failed provisioning tasks

The screenshot shows the Oracle Identity Self Service interface. The main content area is titled "Provisioning Tasks" and displays search results for tasks. The search criteria are: Task Name (Change Email), Task Status (Rejected), and Application Instance (Collections). The search results table shows two rows of failed tasks:

Row#	Task Name	Task Status	Application Instance	Beneficiary	Date Assigned	Assignee	Request ID	Account Name
1	Change Email	Rejected	Collections	HARRYPOTTER	2014-04-04	XELSYSADM		128
2	Change First Name	Rejected	Collections	HARRYPOTTER	2014-04-04	XELSYSADM		128

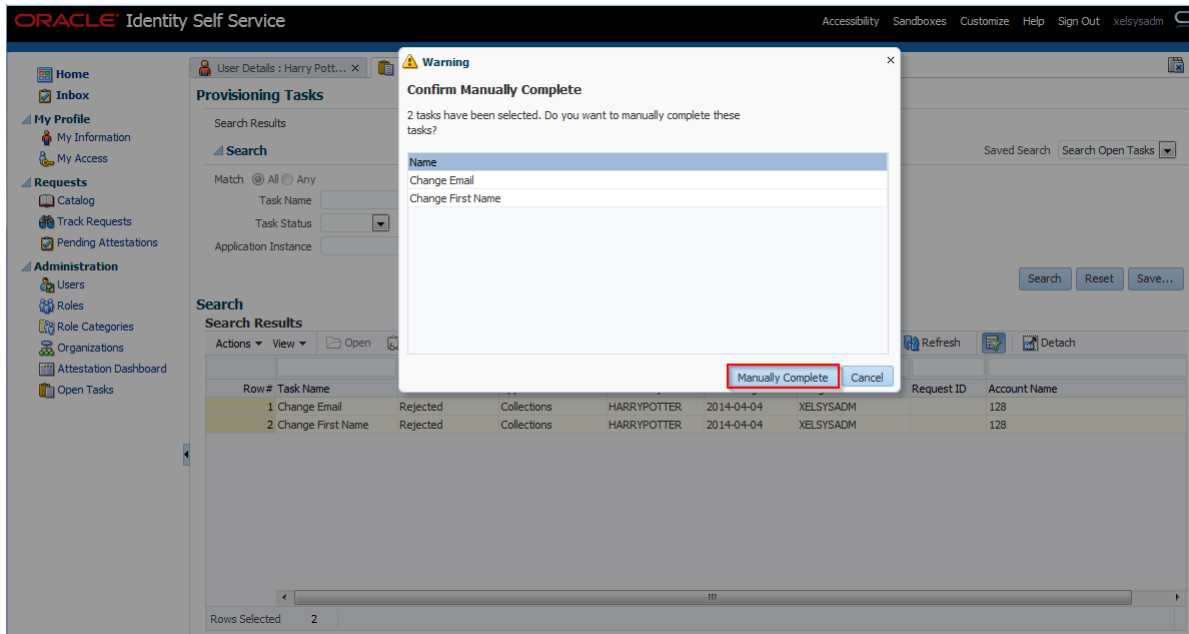
The interface also includes a left-hand navigation menu with options like Home, My Profile, Requests, and Administration. The top navigation bar shows the user's name (xelsysadm) and various utility links.

- g. Modify the user details to make it valid. See [Chapter 3, "User Fields and Constraints"](#).
- h. Click **Submit**. If all fields are valid, user would be provisioned to Collections.

Note: If field length exceeds specified limit, then it would be truncated and saved in Collections.

- i. See Step 4 to validate successful modification of User.
- j. Once modified, user details are successfully provisioned. User can mark failed provisioning task as Manually Complete.

Figure 4–28 Task confirmation dialog box



- **Modify User Login (Not Supported):**
 - Though user can modify the User Login from User form, it is not supported in Collections. **User Login** is primary key in Collections.
 - If the user tries to modify User Login then new user would be created in Collections with new **User Login**. Earlier user still persists.
 - User has to manually delete earlier user (User Login before modification) in Collections.

Note: If some manual changes have been done from the Collections Admin screens to earlier user, then the same has to be done to new user.

- Duplicate User Login is not allowed.
- **Modify Collections User Group:**
 - If **User Group** value is changed, then earlier would be updated with new Group in Collections.
 - If User Group selection is removed from the drop-down list, then unselected group would be deleted from Collections. Only default group would be present, that is groups populated from native Collections native Admin Screen.
 - Collection modifies User Group value based on old and new value of Collections User Group received from OIM. It deletes old value and adds new value send for User Group. Old value of User Group is value being modified and new value is value been added from OIM. If Collection User Group of successfully provisioned user is modified multiple times when user provisioning to Collections is failing due to some error. Then user rectifies the problem, user is provisioned successfully but its last provisioned User Group wouldn't be deleted; only new user Group would

be added. This is because last provisioned old values state is lost from OIM as it has been modified multiple times in between. User must delete last provision User Group by using Collections Admin screens.

It is recommend whenever user is modified and provisioning status for Collections User is **Provide Information** (exception occurred /validation failed) then user should first rectify the problem (for example, if field validation is failing then correct it) and provision user successfully (resource **Collection User** status is **Provisioned**) before making further modifications to User Group.

- **Modify End Date:**
 - End Date represents User expiry in Collections.
 - Once User is successfully provisioned then User can be deactivated by modifying end date \leq current date/today's date. Similarly, user can be activated again by modifying end date $>$ current date/today's date.

4.3 Delete Users in Collections

Once user is successfully provisioned it can be deleted from OBP Collections. Collections supports soft delete that is, it only expires User. User deletion request for Collections will only trigger when **Create User** provisioning task is complete for that particular request i.e., it doesn't appear in open task list.

- If User provisioning request has failed then rectify the problem and complete Create User provisioning request, if required.
- If User is already provisioned then mark **Create User** provisioning task as manually complete.

Figure 4–29 Manual Completion - Create User Provisioning Task

The screenshot shows the Oracle Identity Self Service interface. The main content area is titled 'Provisioning Tasks' and contains a search panel and a search results table. The search panel has fields for 'Task Name', 'Task Status', and 'Application Instance'. The search results table has the following data:

Row	Task Name	Task Status	Application Instance	Beneficiary	Date Assigned	Assignee	Request ID	Account Name
1	Create User	Rejected	Collections	HARRYPOTTER	2014-04-04	XELSYSADM	56	

The table also includes columns for 'Actions' and 'View'. The 'Manual Complete' action is visible above the table. The bottom of the page shows 'Rows Selected: 1'.

You can search and delete user. You can search for the user from **Search** panel and then click the searched user data to view its detail.

Figure 4–30 Searching Users To Delete

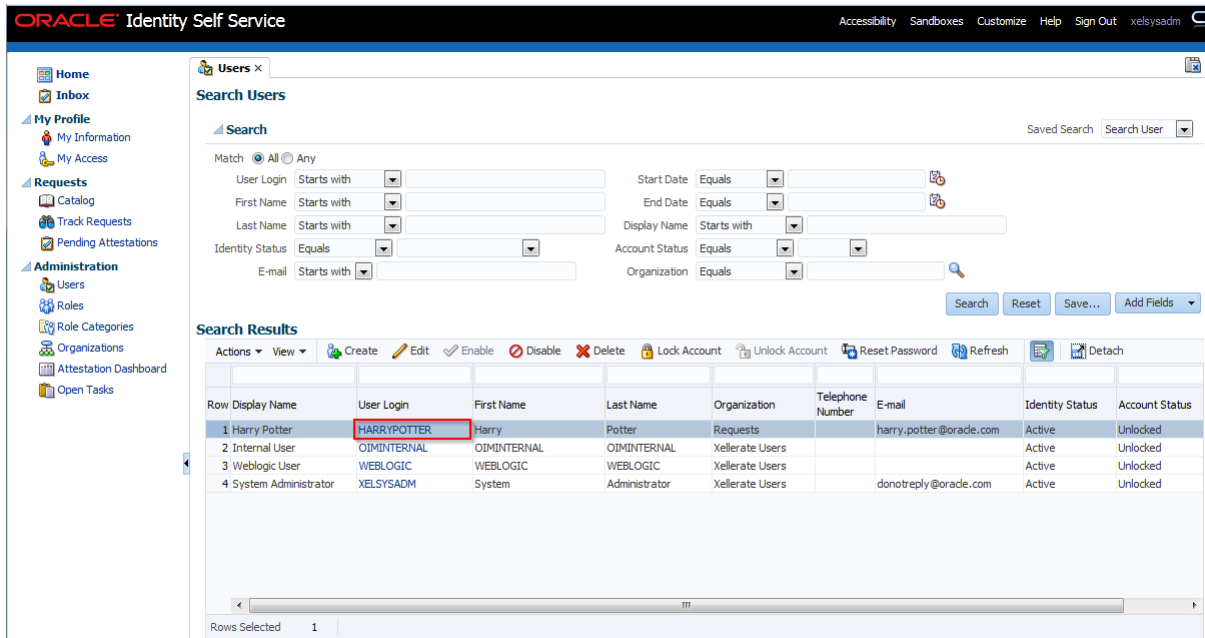
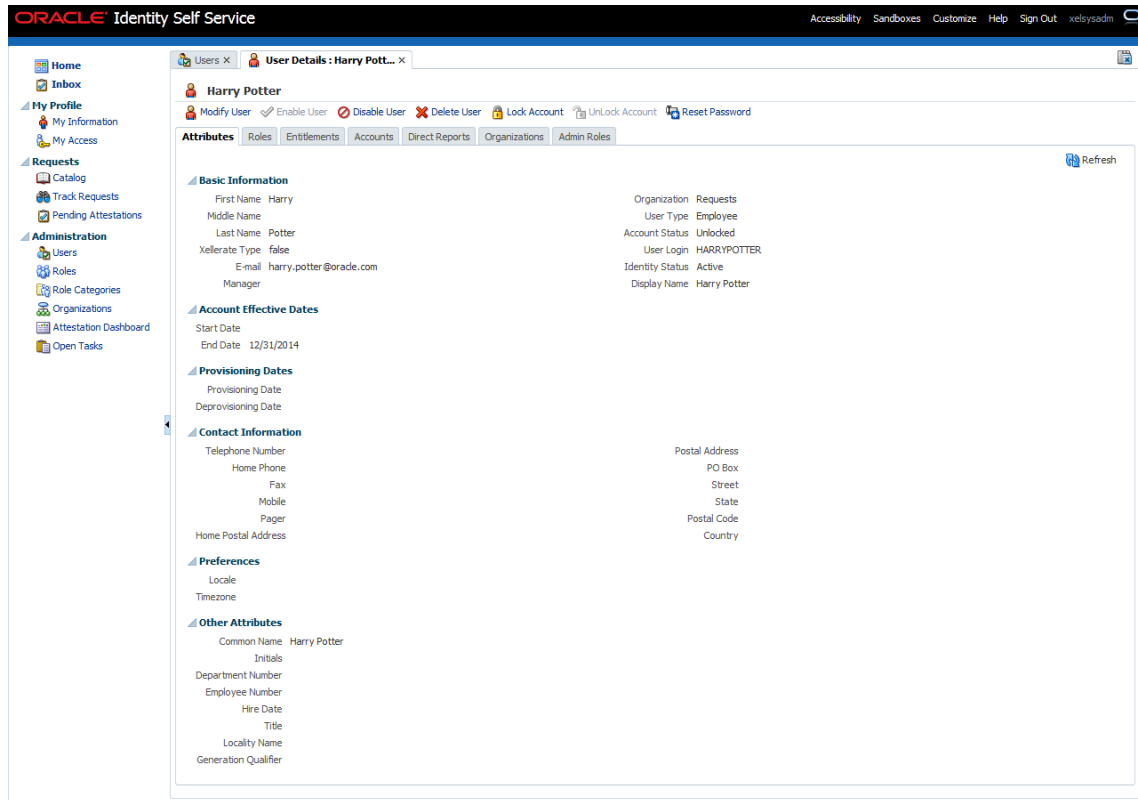
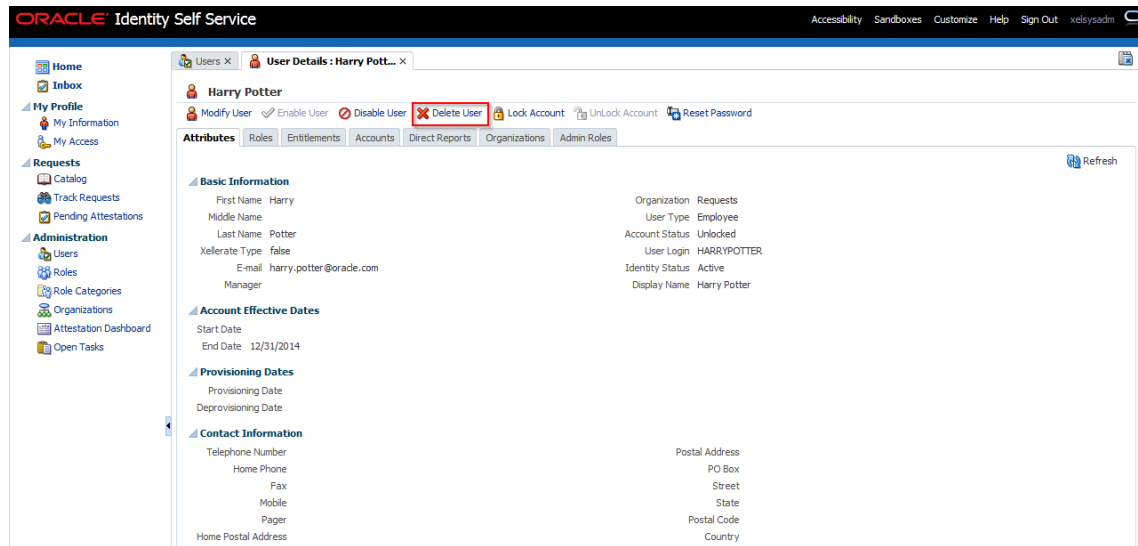


Figure 4–31 View User Details



Click **Delete User** link to delete user.

Figure 4–32 Delete User Screen



User authentication happens on data stored in OID. If user details are not available in OID then the user will no more be an authenticated user.

This chapter details the verification of the configurations performed for OIM.

5.1 Verification of OIM Configuration

To verify OIM configuration, follow the steps:

1. Ensure that OID details are populated properly as per the environment used (under IT Resource details for Directory Server). Verify whether the server URL is in the following format:

`ldap://<OID IP>:<OID PORT>`.

If **Connection pooling supported** flag is true, then update the parameter value to false. Current implementation is tested with Connection pooling supported flag to be false.

Figure 5–1 Viewing IT Resource Details and Parameters

View IT Resource Details and Parameters

You can view additional information about this IT resource: Details and Parameters

IT Resource Name: Directory Server
IT Resource Type: Directory Server

Parameter	Value
Abandoned connection timeout	600
Admin Login	cn=orcladmin
Admin Password	*****
Changelog Container	cn=changelog
Connection pooling supported	false
Connection wait timeout	120
Date Format	yyyyMMddHhmmss
Inactive connection timeout	600
Initial pool size	5
Max pool size	10
Min pool size	5
Pool preference	Default
ResourceConnection class definition	oracle.iam.idpsync.impl.repository.LDAPConnection
Search Base	dc=flex,dc=com
Server SSL URL	
Server URL	ldap://10.190.25.56:3060
Target supports only one connection	false
Timeout check interval	60
Use SSL	false
User Reservation Container	cn=Users,dc=flex,dc=com
Validate connection on borrow	true

2. When tried to create User from OIM, exception was thrown '*Unable to find attributes in OID schema.*' for following attributes. If similar issue is faced, ensure the following attributes are present in OID Schema and are added to object class **orclIDXPerson** as optional attributes. (Required for OIM functioning).

Table 5–1 *OID schema attributes*

Attribute Name	Syntax
orclpwdexpirationdate	Generalized Time
orclpwdchangerequired	Boolean
orclaccountenabled	Boolean
orclaccountlocked	Integer

Note: The above mentioned attributes are added only for OIM functioning.

5.2 Verify Users in Native Collections

Following steps are required to verify users in native OBP Collections after provisioning:

1. Login to OBP Collections Native UI using administrative credentials.
<http://<Host>:<Port>/CollectionAdmin/cis.jsp>

Figure 5–2 *OBP Collections Native Login screen*



2. Navigate to User screen from **Menu > Admin > U > User**.

Figure 5–3 *User Screen Menu*

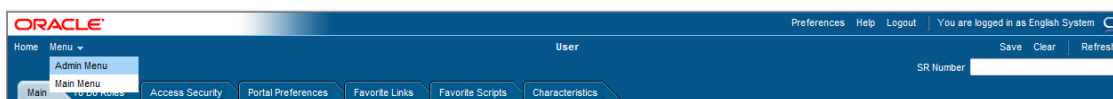


Figure 5-4 User Screen - User Navigation

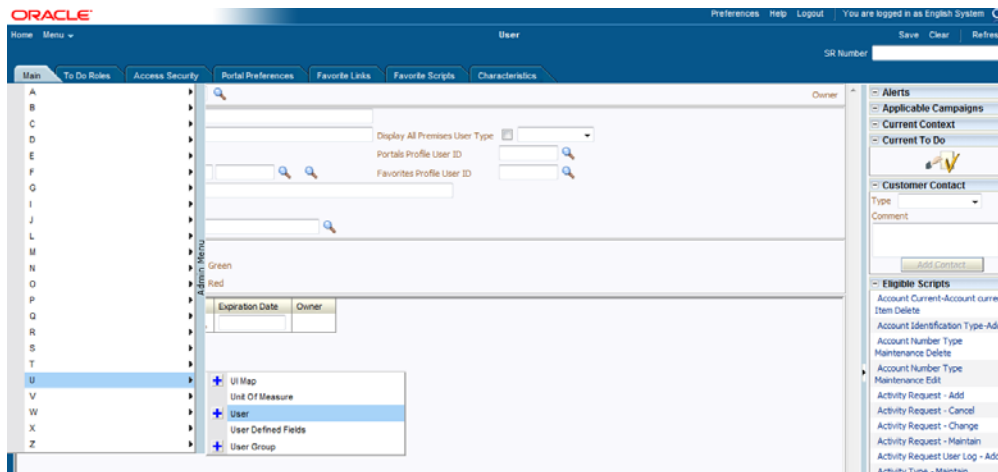
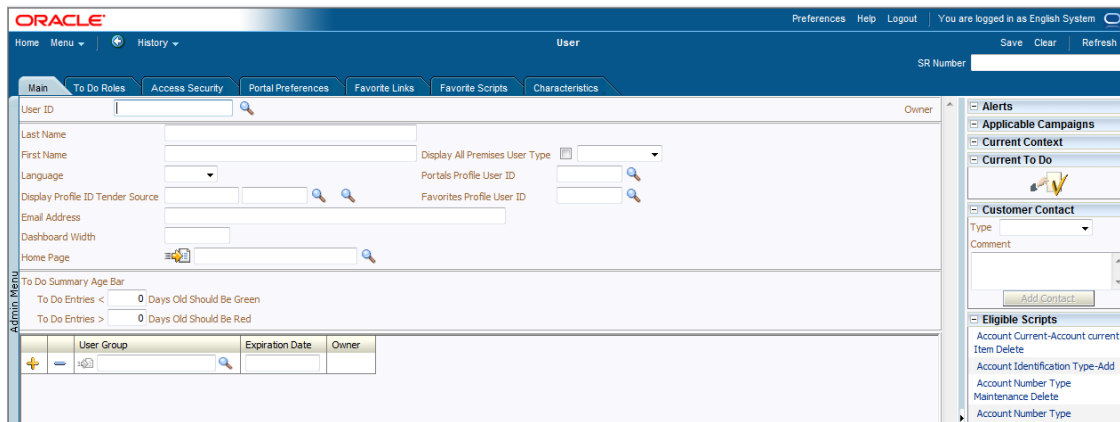


Figure 5-5 User Screen - Main Tab



3. Click **Search** icon. User Search dialog window is displayed. To search for a user, enter User ID and click **Search**.

Figure 5–6 Searching Particular User

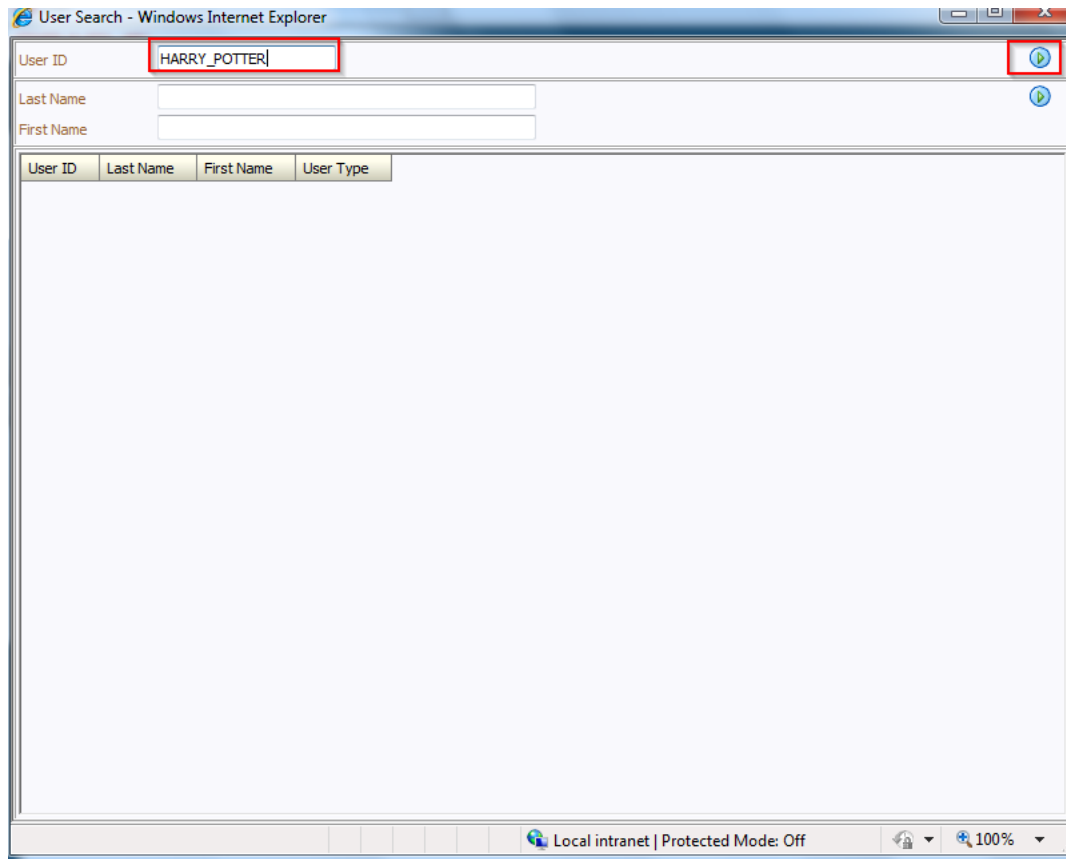
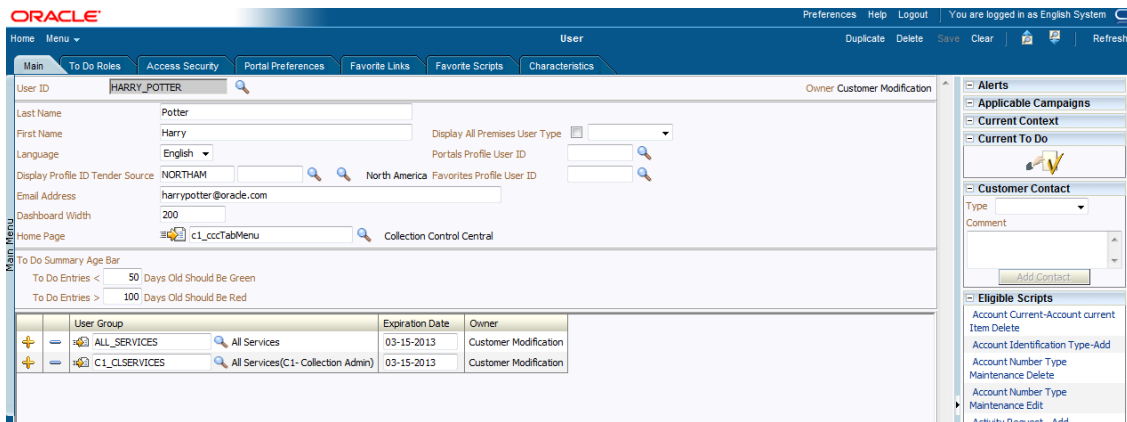


Figure 5–7 Search Result in User screen



5.3 Create Users in Collections

Follow below steps to create user in Collections.

1. Login to OBP Collections native UI using administrative credentials.
<http://<Host>:<Port>/CollectionAdmin/cis.jsp>

Figure 5–8 OBP Collections native login



Oracle Revenue Management and Billing for Financial Services

Please enter your User ID and Password to login.

User ID

Password **Login**

Language: **English** |

Oracle Revenue Management and Billing for Financial Services V2.2.5.2
 Copyright © 2011, Oracle. All rights reserved. The program (which includes both the software and documentation) contain proprietary information; they are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright, patent, and other intellectual and industrial property laws. Reverse engineering, disassembly, or decompilation of the Programs, except to the extent required to obtain interoperability with other independently created software or as specified by law, is prohibited.

2. Navigate to User screen from **Menu > Admin > U > User**.

Figure 5–9 OBP Collections native - Menu



Figure 5–10 OBP Collections native - User Navigation

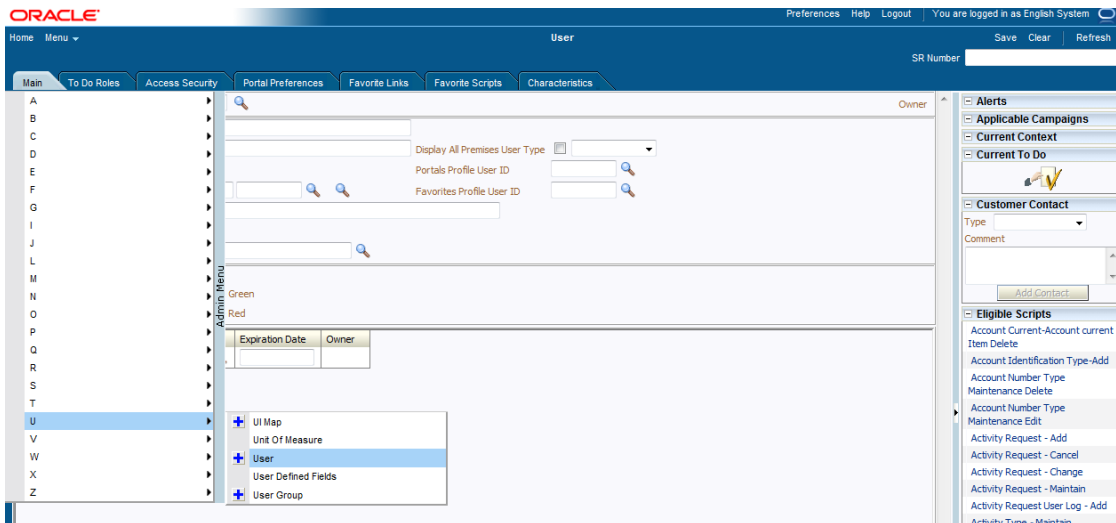
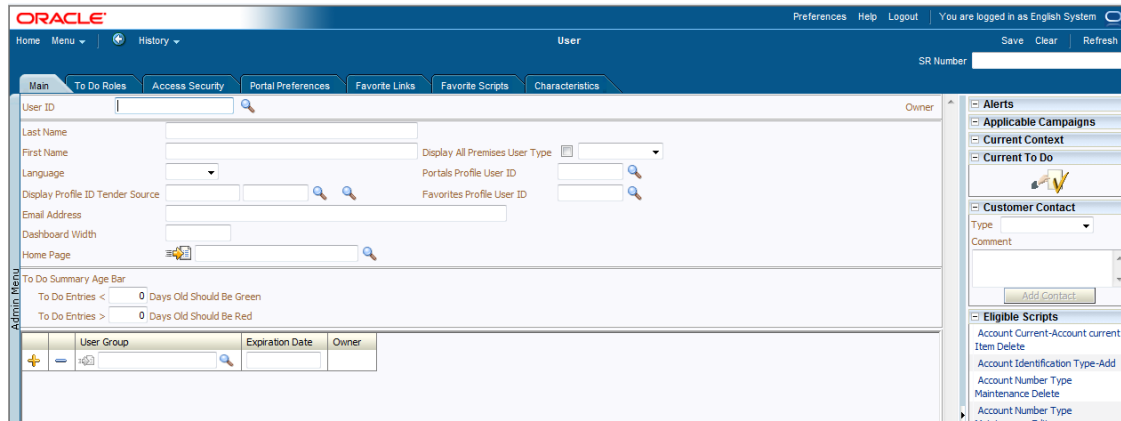


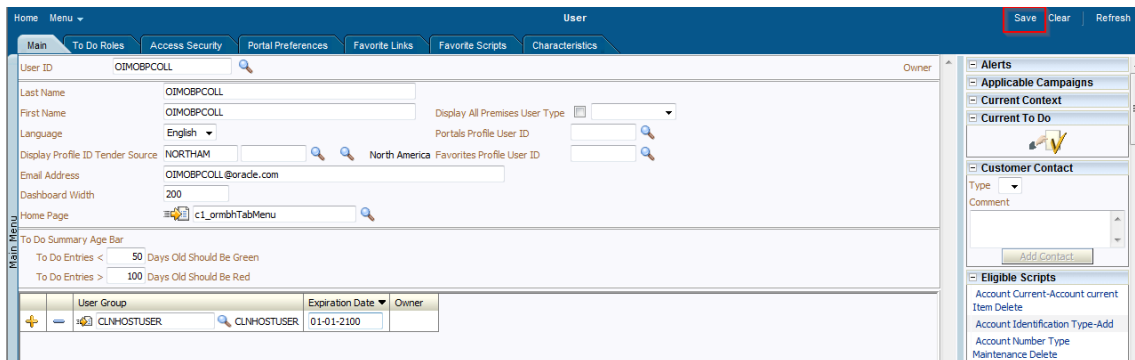
Figure 5–11 OBP Collections native - Main Tab



- In the User page, enter the following details in the respective fields:

 - User Id:** OIMOBPCOLL
 - First Name:** OIMOBPCOLL
 - Last Name:** OIMOBPCOLL
 - Language:** English
 - Display Profile ID Tender Source:** NORTHAM
 - Email Address:** OIMOBPCOLL@oracle.com (sample email address. Provide valid administrator email address)
 - Dashboard Width:** 200
 - Home Page:** c1_ormbhTabMenu
 - To Do Entries <:**50
 - To Do Entries >:**100
 - User Group:** CLNHOSTUSER with Expiration Date : 01-01-2100 (add expiration date as per requirement)
- Click **Save**.

Figure 5–12 User Screen



OIMOBPCOLL User is successfully created in Collections.