Oracle Mobile Workforce Cloud Service

End-User Provisioning Guide

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End-User Provisioning

This guide provides the instructions to be used by the Oracle Mobile Workforce Cloud Service (OMWCS) super-user to add/change/delete other client users in their OMWCS implementation. The screen captures in this guide are only provided as examples and not as specific entries.

For more information, please refer to the most current version of the Fusion Middleware User's Guide for Oracle Identity Manager at http://docs.oracle.com.

This guide includes:

- Logging into Oracle Identity Manager for the First Time

- Creating Client Users in Oracle Identity Manager

- Locking, Disabling or Deleting Users in Oracle Identity Manager

- Accessing Analytics

- Sample User Template

Logging into Oracle Identity Manager for the First Time

The super-user can log into Oracle Identity Manager (OIM) for the first time by following the procedure below:

1. Log into the Oracle Identity Manager (OIM) application with the URL and the Userid / password provided for the environment (Development, QA, Production).
   The URL may need to be appended by "/identity".

2. The system prompts you to change the password.

   The following are the guidelines for the password format:

   The password:

   - must not contain the following string(s): Password, Welcome

   - must not match or contain the first name

   - must not match or contain the last name

   - must contain at least 2 alphabetic characters

   - must be at least 6 characters long

   - must contain at least 1 lowercase letter

   - must contain at least 1 numeric character

   - must contain at least 1 uppercase letter

   - must start with an alphabetic character

   - must not match or contain user ID

   - must not contain special characters

3. Select three security questions and provide the answers to those questions.

4. If you (super user) need access to Oracle Mobile Workforce Cloud Service, then you need to give yourself a role of "cisuser", and add resources to yourself as described in the following sections.

Creating Client Users in Oracle Identity Manager

This section provides the procedure to create an OMWCS user in OIM.

Understanding User Groups and User Templates

The easiest way to create a user is to copy a User Template that has been set up in OMWCS. The User Template defaults the user's Display Profile Code, language, User Groups (which dictates their access), default home screen, etc. However, your company must first create User Templates as appropriate for your users, such as administrators, dispatchers, mobile workers, contract workers, etc. Until the User Template is created, to create a user you will have to specify their appropriate User Groups. Once a User Template(s) is created you can select it when creating a new user.

Creating a Client User in OIM

Follow the procedure listed in this section to create an OMWCS user. You will need to create the user in each of the environments (development, QA, and production) they need.

Oracle recommends that at the beginning of the implementation, only the users needed for the development environment are set up initially. When ready to start QA testing, the users can be added to the QA environment, and then to the production environment.

The procedure consists of the following steps, each of these are detailed in subsequent sections:

- Creating Users

- Requesting Accounts

- Providing Additional OMWCS User Information
  This step will be executed within the OMWCS application.

Creating Users

1. Log into the OIM application with the URL and Userid/password provided.

2. Click **Users** under **Administration** on the left side of the page.
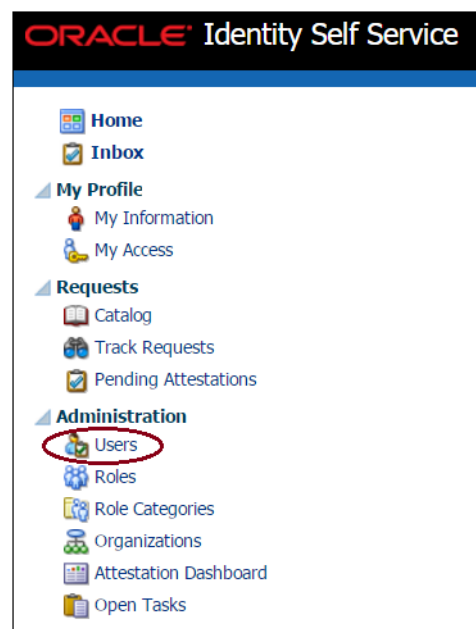
This launches the **Search Users** page.

3. Click **Create**.

4. Enter the following information to create a user:

    •   First name

    •   Last name

    •   User Logon - can be a maximum of 8 characters

    •   Password - set the user's password

    •   Confirm Password - re-enter the password created
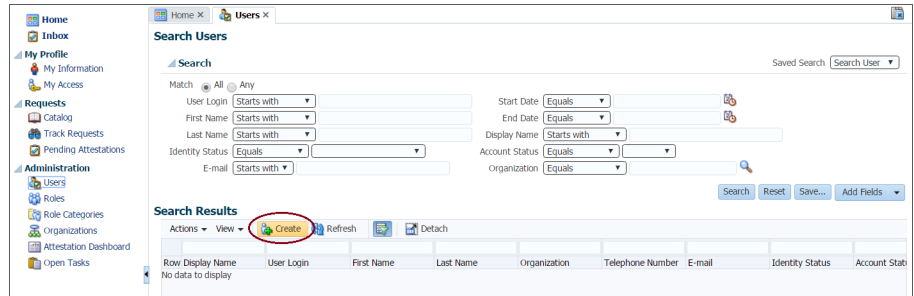
    •   Organization - Click the **Search** icon and select **Cloud Client Users** for client users and **Oracle Users** for Oracle Consultants that will be working on the implementation.

        Note: **Oracle Users** should not be granted access to client production environments.

    •   User Type: Select the appropriate user type for this user; this information is not required by OMWCS, but is required by OIM so any value may be selected.

    •   E-mail address

    You do not need to provide any additional information.
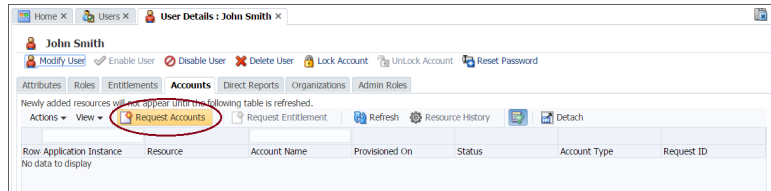
5. Click **Submit**.
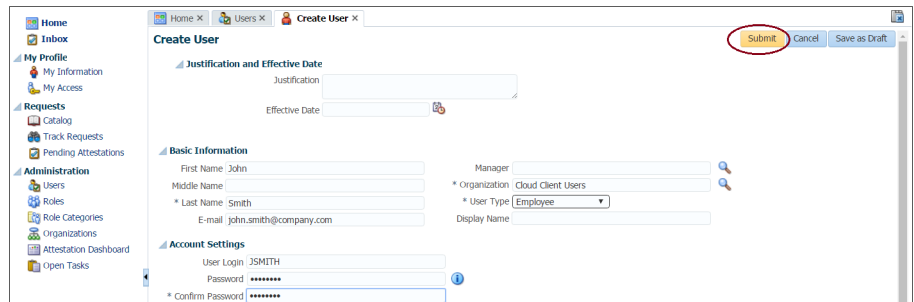
    The system displays a message that the user has been successfully created. The **User Details** page is displayed.

6. Go to the **Attributes** tab and review the **Display Name** field that is generated and make changes if needed.

Requesting Accounts

1. Navigate to the **Accounts** tab and click **Request Accounts**.

The **Catalog** tab appears.

2. Select the **Catalog Item** (also called Resource) that corresponds to the environment (Development, QA, or Production) for this user and whether you are creating the user with User Groups (Catalog Items ending with "_UG") or a User Template (Catalog Items ending with "_UT"). See Understanding User Groups and User Templates section for more information.

3. In the example below we are creating a user with User Groups, so we select a Catalog Item with "_UG" and click **Add to Cart**.
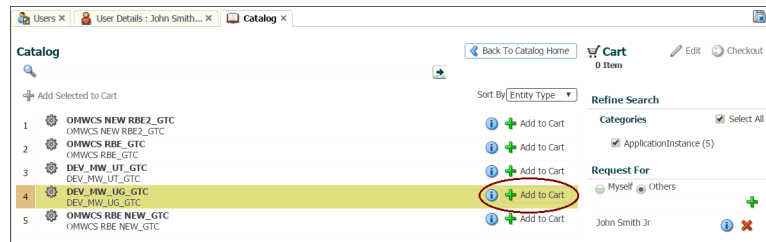
The system displays the message, "**Item added to Cart**"

4. Click **Checkout**.
The **Catalog Details** page is displayed.

5. Click **Add** to add the user groups.
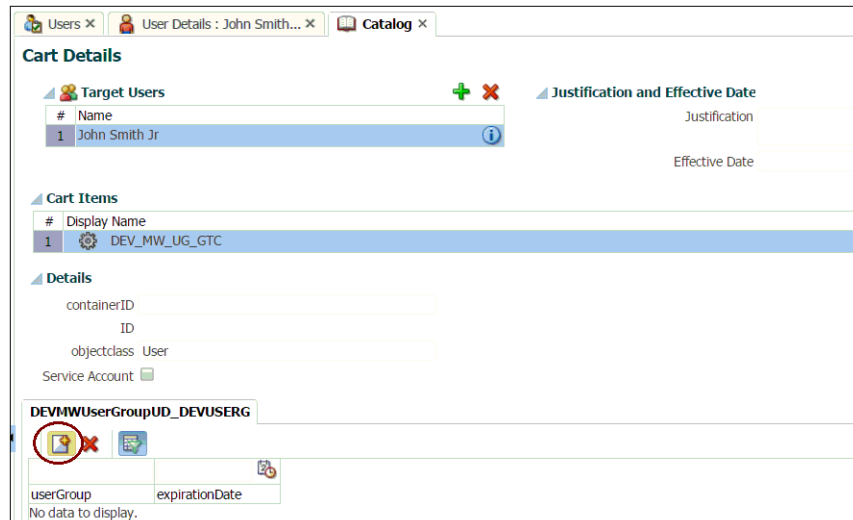
Creating a User With User Groups
In the following example, you will add the User Groups for this user. The User Groups match those that have been set up in OMWCS.

> **Note**: Until the Oracle Consulting resource user has been created, only the **ALL_SERVICES** User Group is available. The Oracle Consulting resource

will add the remaining User Groups and they will be available when creating additional users.

The following is the list of User Groups:

- **ALL_SERVICES** – used only for Development

- **APPLICATION_ADMINS** – used for people that will administer and maintain the MWM application and meta data

- **DISPATCHERS** – used for dispatchers that access the CDI and the Gantt.

- **SENIOR_DISPATCHERS** – used for dispatchers that access the CDI and the Gantt, and perform crew/shift administrative work.

- **CREW_TEAM_LEADERS** – used for team leaders that access the CDI in read-only mode

- **MOBILE_WORKERS** – used for people that are employed by the client, are scheduled by Oracle Utilities Mobile Workforce Management (MWM), and access the application through a mobile device

- **CONTRACTOR_WORKERS** – same as **MOBILE_WORKERS** except that they work for third party contractors and not the client

- **RESOURCE_PLANNERS** – used for people that administer the MWM resources

- **BI_USERS** – used for people that only have access to MWM through the BI (Mobile Workforce Analytics tool) for purposes of viewing details on a drill back from BI

- **CAPACITY_CONTRACTORS** – is used for capacity-based contractors or third parties

1. Enter the appropriate User Group(s) from the above list and a future date in **expirationDate** field.

2. Add more user groups as needed.

3. Click **Ready to Submit**.
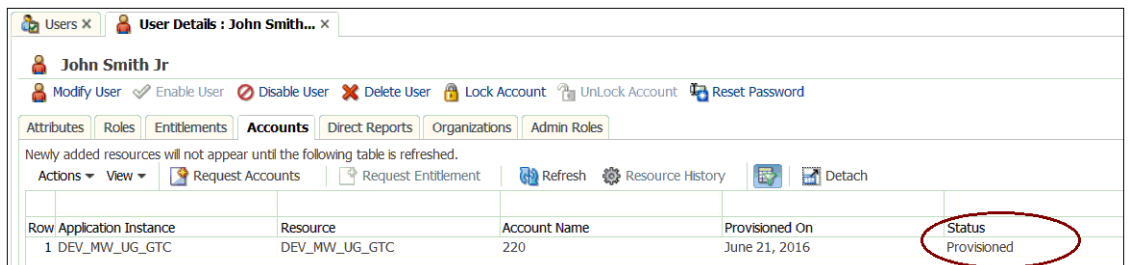
4. Click **Submit**.

5. The **Cart Details** page displays a success message.
   You can close the **Catalog** tab by click on the "**X**" next to it.

6. The **User Details** page is displayed again.
   Click **Refresh**.
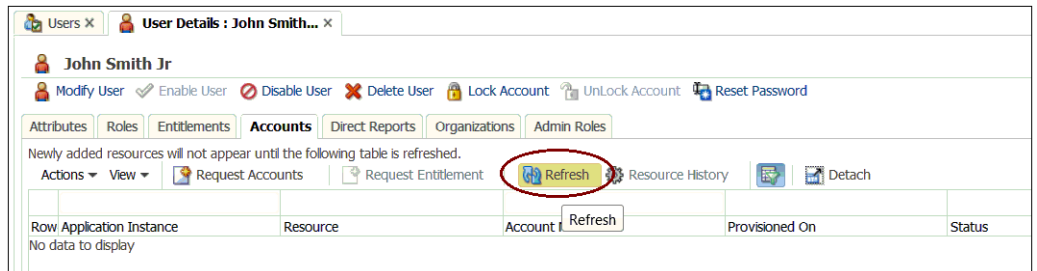
This page displays the results of the account creation.

7. Confirm that the **Task Status** is "**Provisioned**".

If instead the **Task Status** is displayed as "**Provisioning**" then the user was not added. In this scenario, navigate to the **Administration/Open Tasks** menu item on the left. Look for the process for your user and date, and **Open** it. It provides additional details about the error. Contact the UGBU Cloud Engineering team to resolve this issue.

8. Test to make sure the new user can log on to OMWCS and has the correct User Group.

9. Close the **User Details** tab and exit the OIM application.

Creating a User With User Templates
The following example show how to create a user with a **User Template**, thus a Catalog Item with "_UT" is selected and **Add to Cart** is clicked.
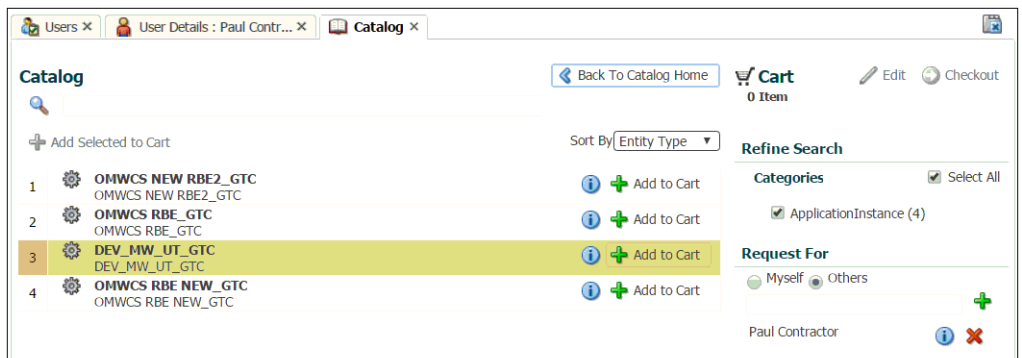
The system displays the message "**Item added to Cart**".

1. Click **Checkout**.
   The **Catalog Details** page is displayed.

2. In the **Template** field, enter the name of the **User Template** you want to use for this user; all of the information on the User Template will be copied to this user. Click **Ready to submit**.
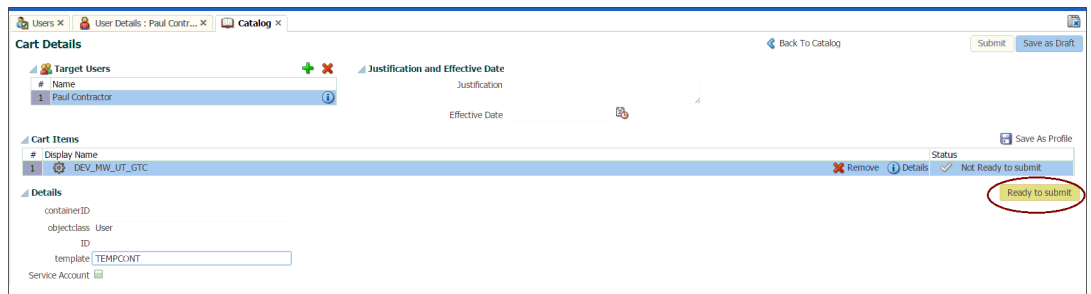
3. Click **Submit**.

4. The rest of the procedure is the same as creating a user with a user group. Please refer to steps 5 - 10 of the procedure Creating a User With User Groups above to complete the sequence.

Providing Additional OMWCS User Information

These instructions are for additional tasks that need to be done in the OMWCS application to complete a user set up, if User Templates are not being used.

1. For some users, you will need to set their home page on the Oracle Utilities Mobile Workforce Management User page. The default home page is the User page and some users, for e.g. contractors, do not have access to this screen.

2. If the language being used is not English, once Oracle Consulting creates the language in OMWCS, the user's language will need to be changed from ENG to the new language.

Locking, Disabling or Deleting Users in Oracle Identity Manager

1. Log into the Oracle Identify Manager (OIM) application with URL and userid/password provided.

2. In **Administration,** search for the user.

3. The following options are available:

   - **Lock Account:** The user can no longer log into OMWCS; however the user record is still available in OMWCS and the user can be unlocked in OIM at a future date.

   - **Disable User**: The user can no longer log into OMWCS; the user record is still available in OMWCS, but has "**Enable User**" set to "**Disabled**". The user can be enabled in OIM at a future date.

   - **Delete User**: The user can no longer log into OMWCS and the user record is deleted in OMWCS. However, the same User cannot be added back at a later date into OIM.

   Choose your option based on whether or not you want to keep the user record in OMWCS, and whether you want to re-activate the user at a future date. Because deleted users cannot be added back at a later date into OIM, consider using **Disable User** instead of **Delete User**.

Accessing Analytics

If the user needs access to OMWCS Mobile Workforce Analytics (Business Intelligence Dashboards), then refer to the instructions for provisioning users in Oracle Utilities Analytics.

Sample User Template

The following is a sample User Template created in Oracle Utilities Mobile Workforce Management, in this case to be used for Capacity Contractors.

The Time Zone, language, Display Profile Code, User Groups, Home Page, etc. are copied from this User Template.

When a user is created with a **User Template**, under the **Characteristics** tab on the **User** page, the **User Template** used is identified.