Oracle Utilities Meter Solution Cloud Service

End-User Provisioning Guide

Release 2.1.0.3.1

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Contents

End-User Provisioning

This guide provides the instructions to be used by the Oracle Utilities Meter Solution Cloud Service (OUMSCS) super-user to add/change/delete other client users in their OUMSCS 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 Management

- Accessing Analytics

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).

2. Change the password when prompted.

    The following are the guidelines for the password change:

    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, if prompted.

If you (super user) need access to Oracle Utilities Meter Solution 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 Oracle Utilities Meter Solution Cloud Service 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 Oracle Utilities Meter Solution Cloud Service. 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, BI users 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 OMSCS 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
- Assigning User Roles
- Adding Resources (access to specific OUMSCS environments)
- Providing Additional OUMSCS User Information

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.
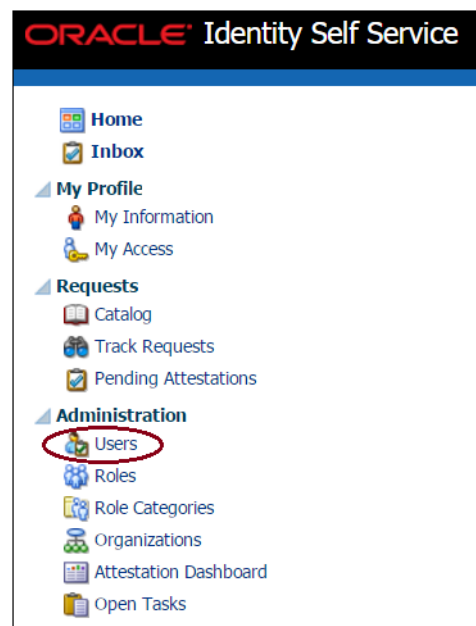
This launches the **Search Users** page.

3. Click **Create**.

4. Enter the following information to create a user:

- First name

- Last name

- E-mail address - Currently, the email address is not copied over from OIM to Oracle Utilities Meter Data Management (MDM) environment. The user will have to manually login to the MDM environments and add the email address.

- User Login - can be a maximum of 8 characters

- Password - set the user's password

- Confirm Password - re-enter the password created

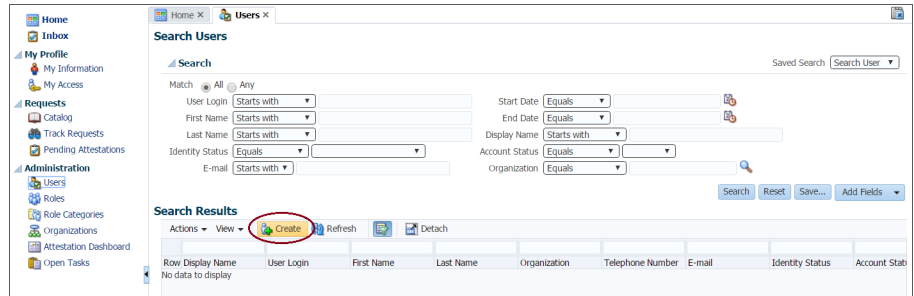- Organization - Click the **Search** icon and select **Cloud Client Users** for client users and **Oracle Users** for Oracle Consultants that will be working on the implementation.

  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 OMSCS, but is required by OIM so any value may be selected.

You do not need to provide any additional information.

5. Click **Submit**.
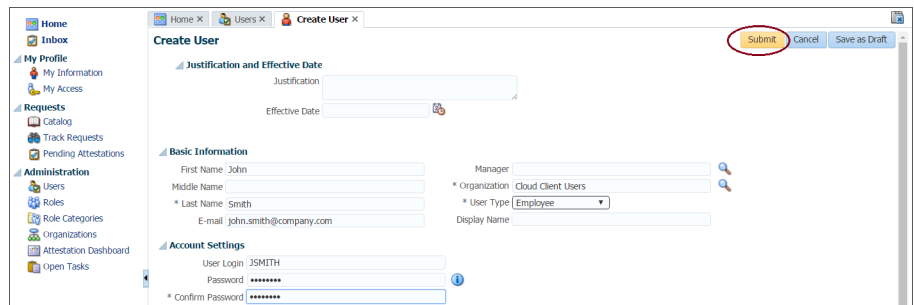
The system displays a message that the user has been successfully created. The **User Details** page is displayed.

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

7. Use **Modify User** to modify the user details.
   Note: Password may not be modified.

Assigning User Roles

1. Click the **Roles** tab.
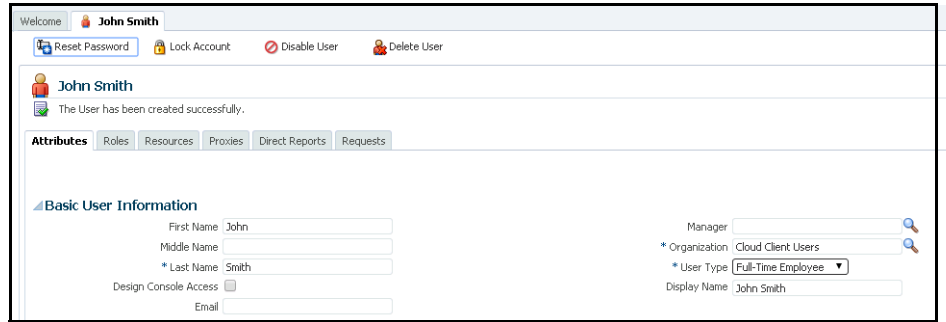
2. Click **+Assign** to add the role **cisusers**. This role is needed for OUMSCS.

   Note that the **All Users** role has already been assigned to this user.
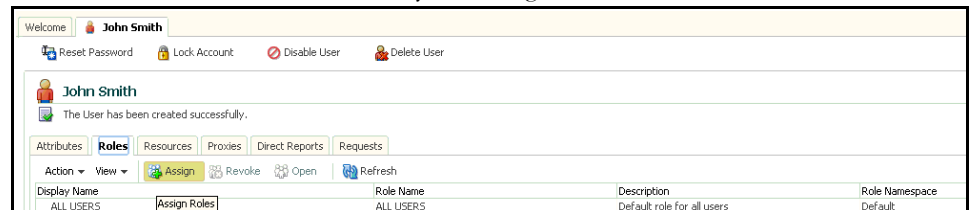
3. Enter cisusers in the **Name** field and click **Search** to search for cisusers role.
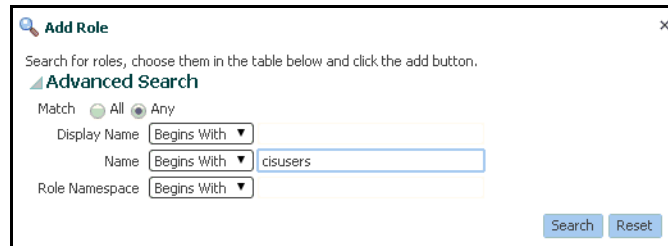
4. Under **Search Results**, click on the **cisusers** row, it will be highlighted.

5. Click **Add**.

   The **Roles** tab should now have the two roles assigned to the user.
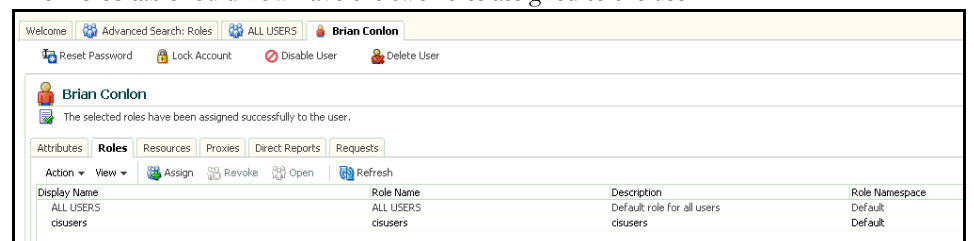
6. If the user needs access to OUMSCS Analytics (Business Intelligence Dashboards), then you need to add an additional role of "MDMBIConsumer" to the user, using the same procedure detailed above.

Adding Resources

In this procedure, you will be adding resources for this user for the specific OUMSCS environment (development, QA or production). Resources do not need to be added for access to OUMSCS Analytics (just the role added to the user above).
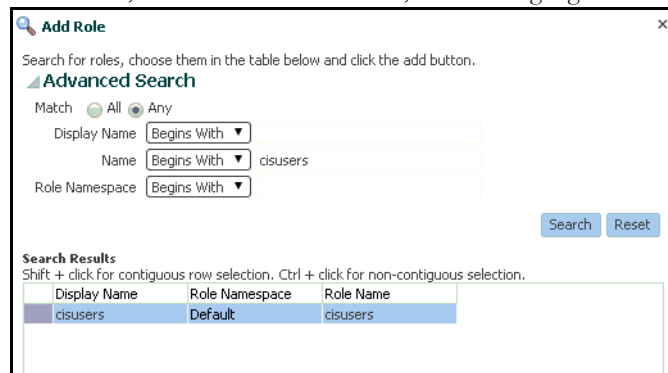
1. Click the **Resources** tab.
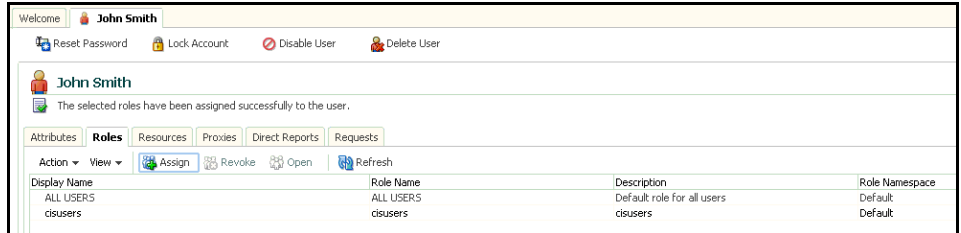
2. Click **+Add.**
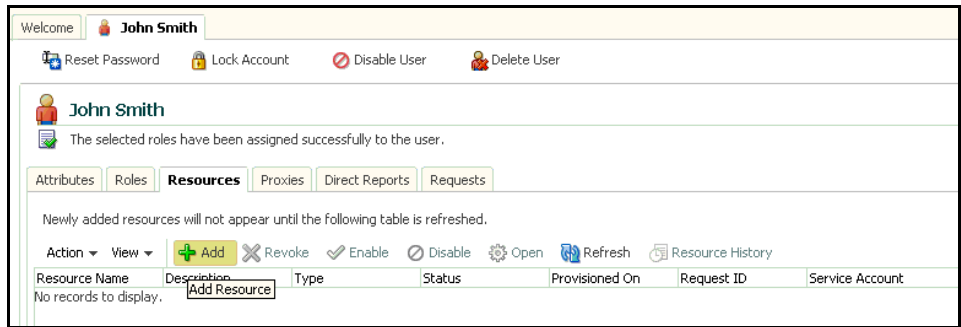
The system displays a list of Generic Technology Connectors (GTCs) for OUMSCS.

A GTC defines the connection between the instance of Oracle Identity Manager and the OUMSCS environment. The screen shot below is a sample; however, on your screen, the selections will be one of:

- DEV_MD_GTC

- QA_MD_GTC

- PROD_MD_GTC

In your implementation, the GTC will not match the one shown in the screen capture, but the fields and values are the same.

3.   Click the radio button next to the first resource you are adding for this user (example: DEV_MD_GTC) and click **Continue**.
The page confirms the GTC selected.

4.   Click **Continue**.

5.   Enter **User** for the "objectclass" and click **Continue**.

In this step, you will add the User Groups for this user. The User Groups match those that have been set up in OUMSCS.

> **Note** -Until the Oracle Consulting resource user has been created, only the ALL_SERVICES User Group is available. Th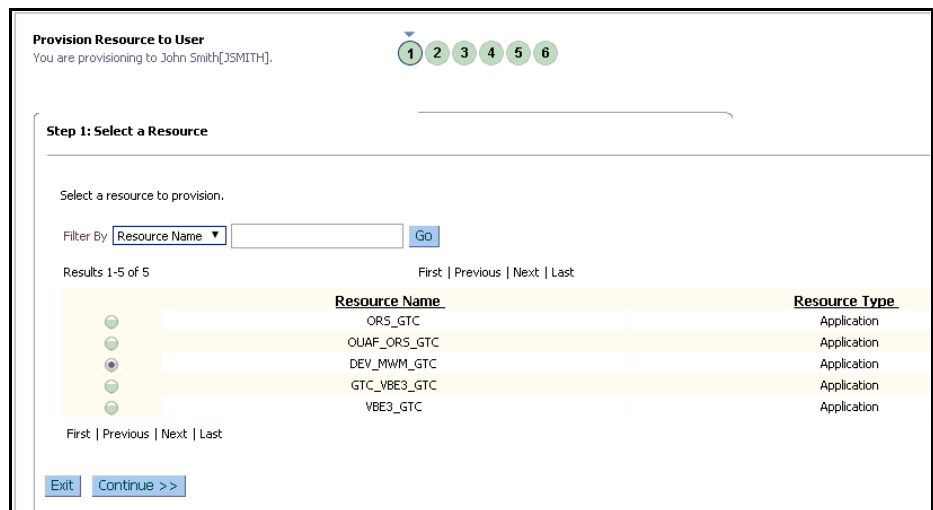e Oracle Consulting resource will add the remaining User Groups and they will be available when creating additional users.

User Groups:

•   **ALL_SERVICES** – used only for Development.

•   **APPLICATION_ADMINS** – used for people that will administer and maintain the MDM application and meta data.

•   **BI_USERS** – used for people that only have access to MDM through the BI (Meter Data Analytics tool) for purposes of viewing details on a drill back from BI.

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

7.   Click **Add**.

The page displays the User Group you entered.

8. Add more User Groups if needed. When finished, click **Continue**.
The page displays the summary for this Resource.

9. Click **Continue**.
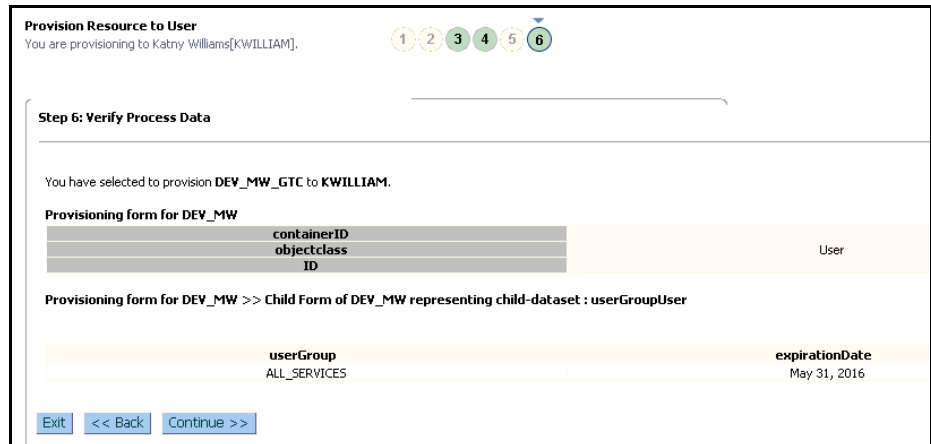
A dialog is displayed which informs you that the user is being provisioned.

10. Close the dialog.

11. Click **Refresh** to display the Resource Groups added.
The page displays the Resource Groups that were added.

12. Select the **Resource Group** row by clicking on it, which will highlight the row and click the **Resource History** tab.
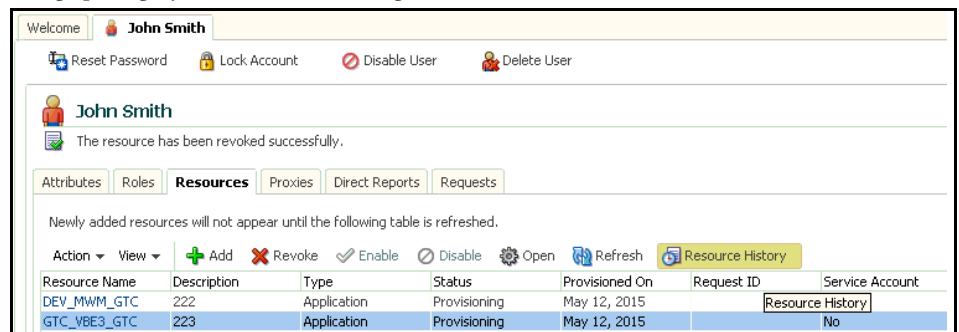
The page displays the results of the user, roles, and resource group creation.

13. Confirm that all Task Status are equal to **Completed**. If they are not **Completed** then click on that row to show the **Task Details.**
The **Task Details** page should display further information to help resolve any issues. If you cannot resolve the issue, please contact UGBU Cloud Engineering team.

14. To return to the **User Details** page, click the **Back to Resource Provisioning Details** link.

15. Click **Exit**.

A confirmation dialog is displayed asking if you want to exit the **Resource Provisioning Details** page for this user.

16. Click **Yes** on the confirmation dialog.
When complete, you can close this user by clicking on the **X** in the upper right hand corner of the page.

Providing Additional OUMSCS User Information

These instructions are for additional tasks that need to be done in the OUMSCS application to complete a user set up.

1. For some users, you will need to set their home page on the Oracle Utilities Meter Data Management User screen. The default home page is the User screen 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 OUMSCS, the user's language will need to be changed from ENG to the new language.

Locking, Disabling or Deleting Users in Oracle Identity Management

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

2. Click **Administration** in the top-right corner and search for the user.

3. From the search results, click on the user. The following options are available:
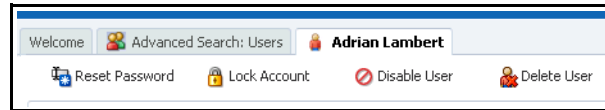
- **Lock Account:** The user can no longer log into OUMSCS; however the user record is still available in OUMSCS and the user can be unlocked in OIM at a future date.

- **Disable User**: The user can no longer log into OUMSCS; the user record is still available in OUMSCS, 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 OUMSCS and the user record is deleted in OUMSCS.

Choose your option based on whether or not you want to keep the user record in OUMSCS, 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 using **Delete User**.

Accessing Analytics

If the user needs access to OMSCS Meter Data 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 Meter Data Management.

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.