Oracle
DataRaker Cloud Service

End User Provisioning Guide

Release 3.8.0.3.0

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Chapter 1

Typographical Conventions

The following represents the styles applied to this guide.

Convention	Meaning
Bold	Bold text indicates a user interface element. Examples include window/page titles, keywords, and interactive elements such as menus, buttons, etc.
Hyperlink	A link to another section of the document or to an external document or website.
`Add this text`	Indicates something the user should enter in a field. Typically rendered as constant width font with a shaded background.
varname	Constant width italic indicates a user interface choice.
`constant width type in a shaded block.`	Used for code examples.
`constant width`	Example code in the midst of regular text.
NOTE: Note	A note providing a tip, suggestion, or a general information.
IMPORTANT: Note	A note with additional important information.
CAUTION: Note	A note of caution.

Chapter 2

Introduction

This guide provides instructions for creating and provisioning Oracle DataRaker Cloud Service end users in Oracle Identity Manager (OIM) and in DataRaker (ODR).

NOTE: Only users with Oracle Identity Manager System Administrator **and**DataRaker administrative privileges can add and configure users. If you do not have access to the OIM and DataRaker administration pages described in this guide, contact your Oracle Cloud Engineering representative for support.

Users must be created and configured in Oracle Identity Manager to be available to DataRaker. The user creation and provisioning process encompasses the following steps in OIM and ODR:

Table 1: User Creation and Provisioning Steps

Step	System	Description	User Type
1	OIM	Create the user.	OIM System Administrator
2	OIM	Add the ODR User Provisioning Resource, which adds the user to the ODR database and, consequently, makes them available in the ODR user interface.	OIM System Administrator
3	ODR	Add the user to the groups and roles that will determine the ODR features and functionality available to them.	ODR Administrator or Power User

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

Chapter 3

End User Provisioning Tasks in Oracle Identity Manager

Logging In To Oracle Identity Manager

Log in to Oracle Identity Manager with the URL and the System Administrator username and password provided for the Oracle Identity Manager instance connected to your DataRaker environment.

> **NOTE:** When logging in for the first time, the system will prompt you to change your password. If prompted, select three security questions and provide the answers to those questions.

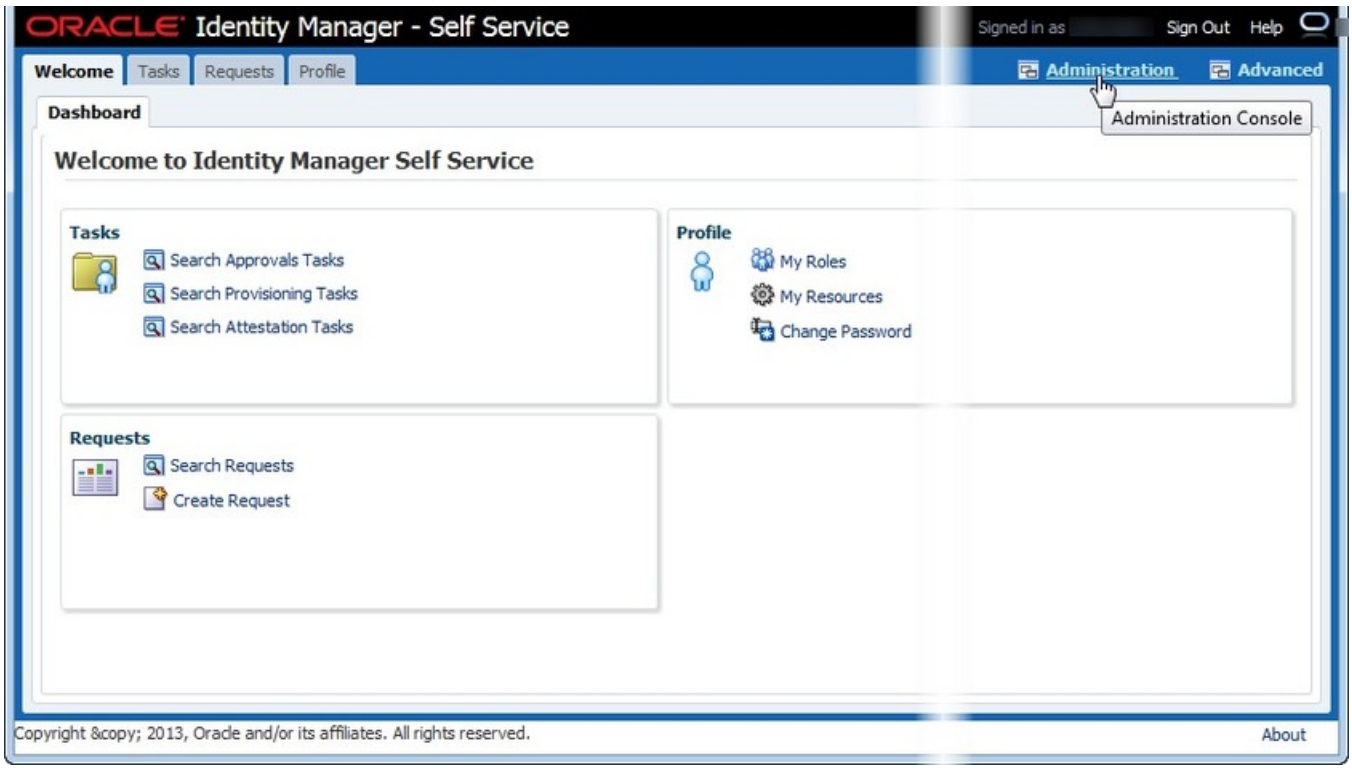
Configuring DataRaker Users in Oracle Identity Manager

The Oracle Identity Manager user creation process consists of the following steps:

1. Creating a User
2. Adding an ODR User Provisioning Resource

Creating a User

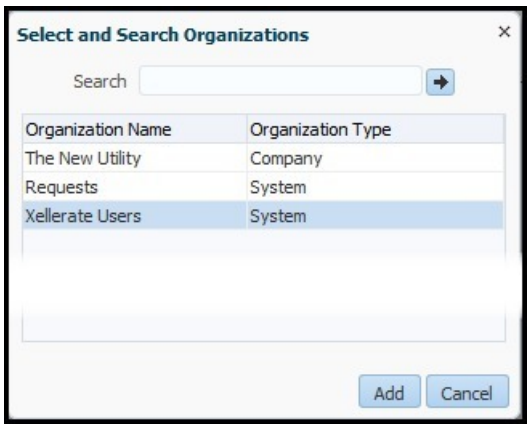
1. On the **Oracle Identity Manager - Self Service Welcome Dashboard** page, click the **Administration** link.



2. In the Administration Welcome page's User pane, click **Create User**.
3. Enter the following information:
   - First Name
   - Last Name (required)
   - User Login
   - Password - set the user's password
   - Confirm Password - re-enter the password
4. Select the Organization (required):
   - Click the Organization field's **Search** () button. The **Select and Search Organizations** dialog will open.
   - To search for all available organizations, click the Search () button. A list of all available organizations will be displayed.

     NOTE: If your organization is not in the list, contact your Oracle Cloud Engineering representative for support.

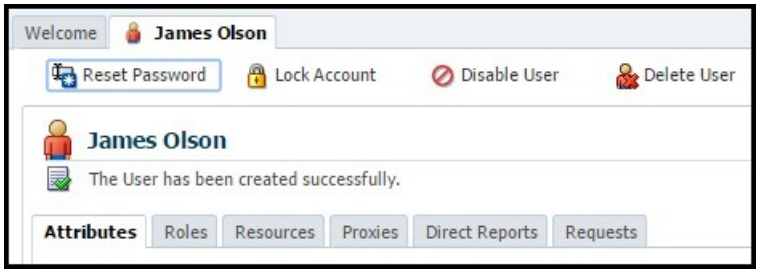
   - Select your organization and click **Add**.



5. Select a **User Type** from the drop-down list (required).

   NOTE: Oracle DataRaker Cloud Service does not require or use the User Type, but it is required by OIM.

6. Click **Save**. The tab will update from Create User to the user's username and the page will provide tabbed links for user **Attributes**, **Roles**, **Resources**, **Proxies**, **Direct Reports**, and **Requests**.

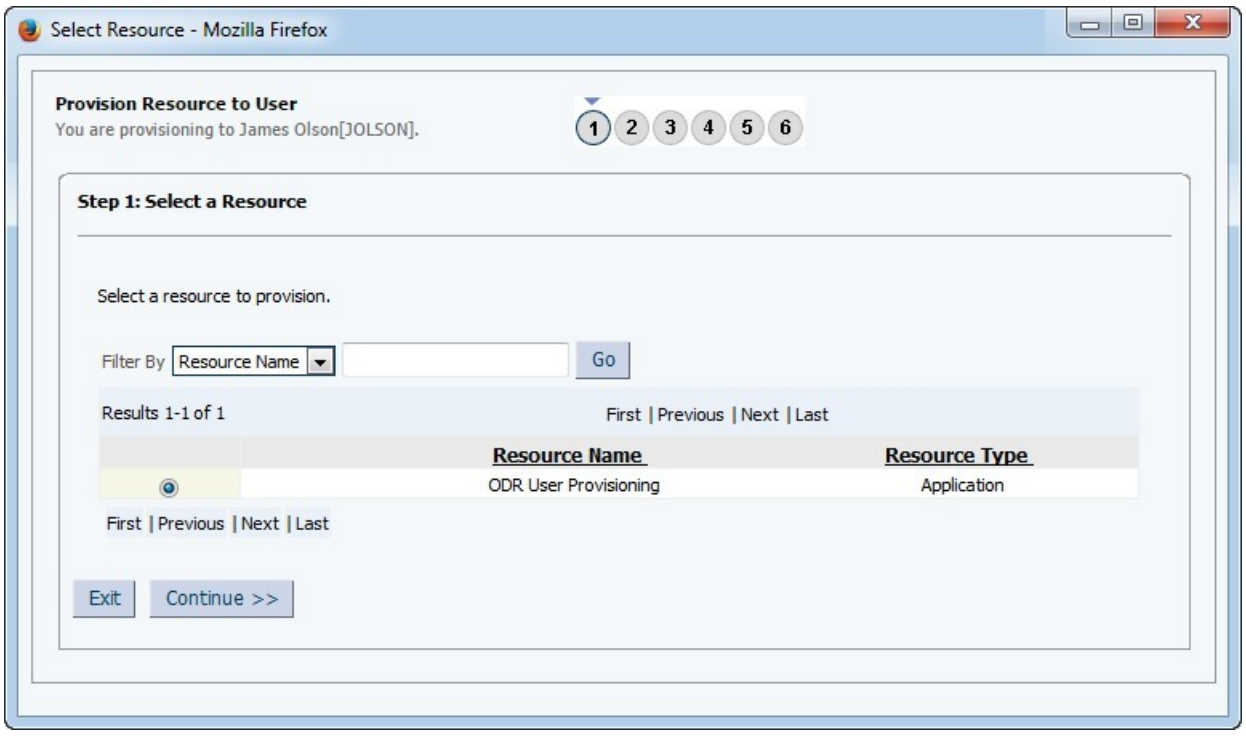


   NOTE: Oracle DataRaker Cloud Service uses an Oracle Identity Manager resource to link the user profile to the DataRaker database (see Adding an ODR User Provisioning Resource for details); Roles, Proxies, Direct Reports, and Requests are not applicable.

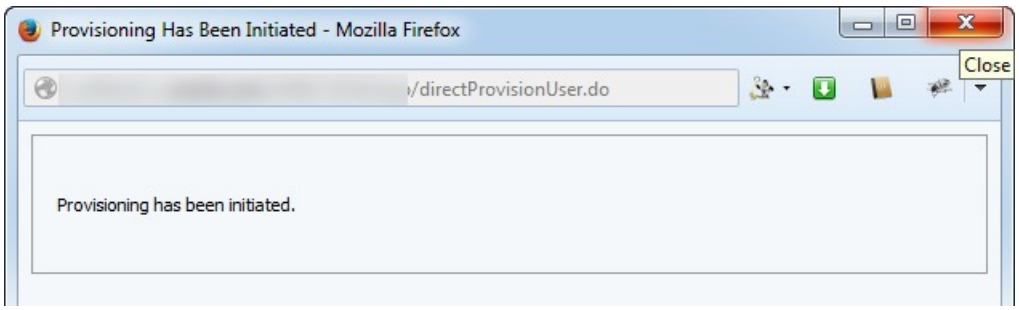
Adding an ODR User Provisioning Resource

To connect a user to the OracleDataRaker Cloud Service database, do the following:

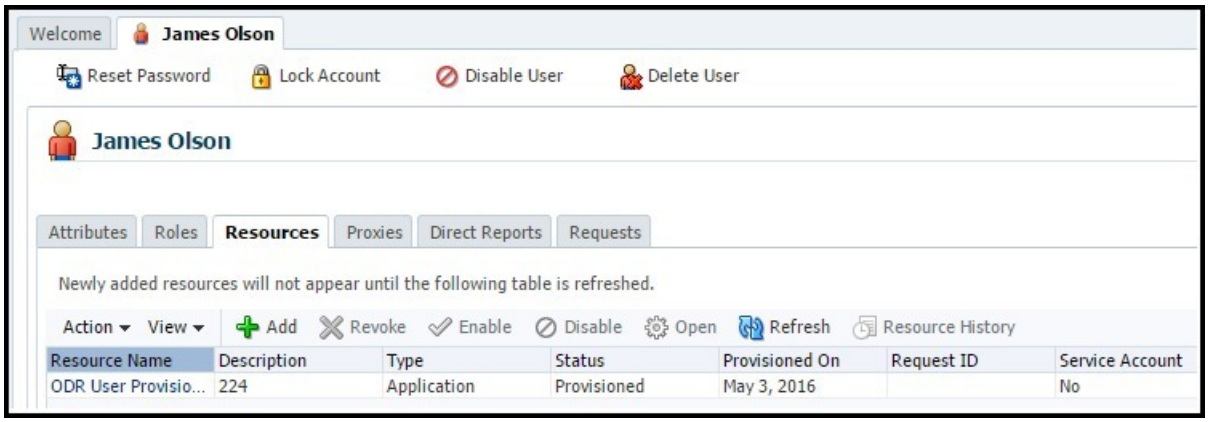
1. Click the **Resources** tab.
2. Click **+Add**.
3. Select **ODR User Provisioning**.



4. Click **Continue** on each step until you reach the Provisioning Has Been Initiated page.



5. Close the window.
6. Click **Refresh** on the **Resource** tab to populate the new resource provisioning data in the resource table.



Now that the user has been provisioned, their environment access and features may be configured in DataRaker.

Chapter 4

End User Provisioning Tasks in OracleDataRaker

Configuring Users In DataRaker

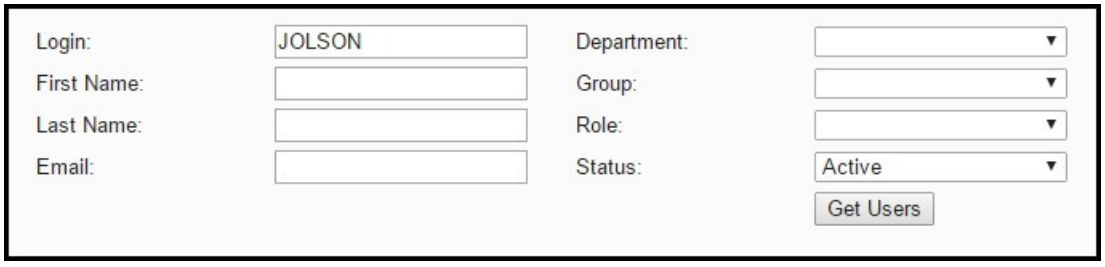
Once users have been created in Oracle Identity Manager, you need to configure their groups and roles in DataRaker. The configuration process is as follows:

1. Log in to DataRaker.
2. Navigate to the Administer Users page by selecting the **Administer** menu, then selecting **Security**, and then selecting **Users**.

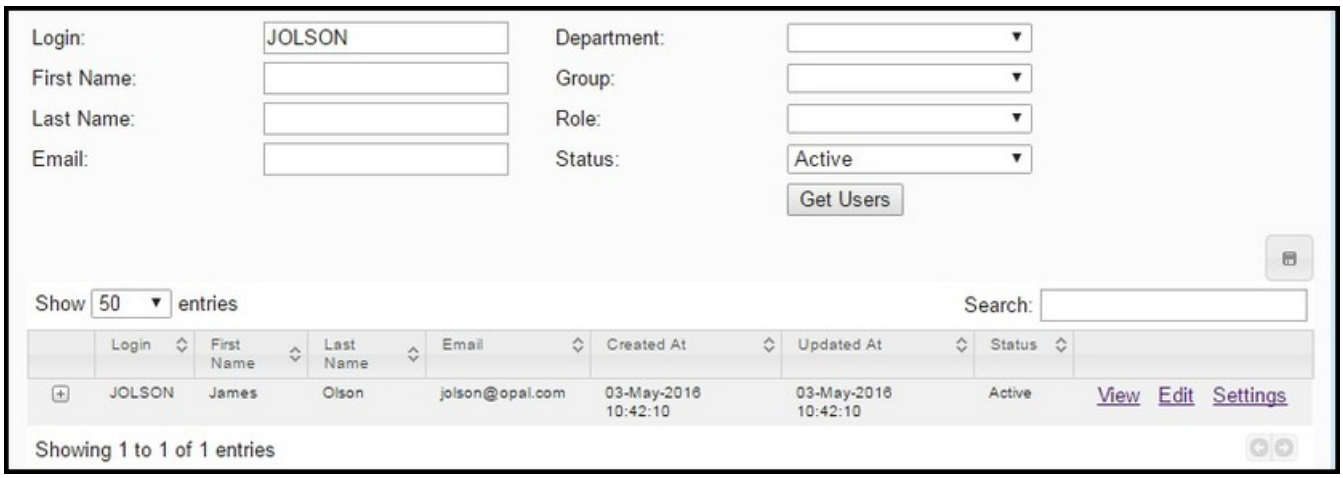
   NOTE: You need to have customer administration rights to configure users. If you do not have access to the **Administer** menu, contact your Oracle Cloud Engineering representative for support.

3. Search for the user in the data table by entering their login name in the **Login** field and clicking the **Get Users** button.

   NOTE: You may search by any data entered when creating the user.



   The data table will return with the user information and links that allow you to assign their user environment.



NOTE: For additional information on the Administer Users page, see the *OracleDataRaker Cloud Service Power User's Guide*.

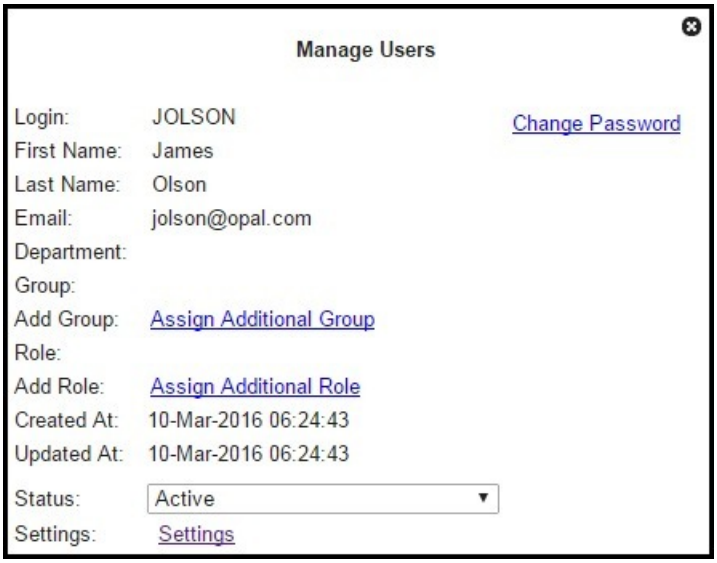
4. In the user's row, click the **Edit** link to open the **Manage Users** dialog box.

Adding Group and Role Assignments

From the **Manage Users** dialog box, you can edit the user's environment access through the **Add Group** and **Add Role** fields:

- **Add Group**: allows you to assign the group, which determines general user interface characteristics (such as the menus that are displayed) and, consequently, which pages are accessible to the user.
- **Add Role**: allows you to assign the role, which determines the features that are available on the pages made available by the user's group privileges.

NOTE: Roles are unique to DataRaker modules so assigning a role automatically associates the user to a module.



For example, generally end users (non-power users) have access to environments with menus only for **Explore** and **Export** functionality based on their group assignment; what they see on the **Explore** and **Export** pages is determined by their role (for example, a user with a **Billing** role in the **Meter to Bill** module has different algorithms and panels on the **Explore** page than a user assigned to the **Distribution Planning** role in the **Distribution Planning and Operations** module).

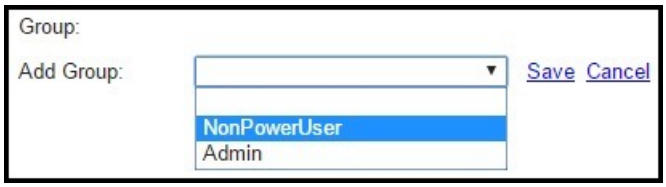
NOTE: The user interface features defined for groups and roles are not customer configurable; rather, they are determined by licensing and implementation.

Assigning a User to a Group

1. Click **Assign Additional Group**. The dialog will update with a drop-down list of the available groups.

   NOTE: The Group options in this section are provided as examples only; your environment may have different group types or group names.

2. Select the appropriate group from the list.



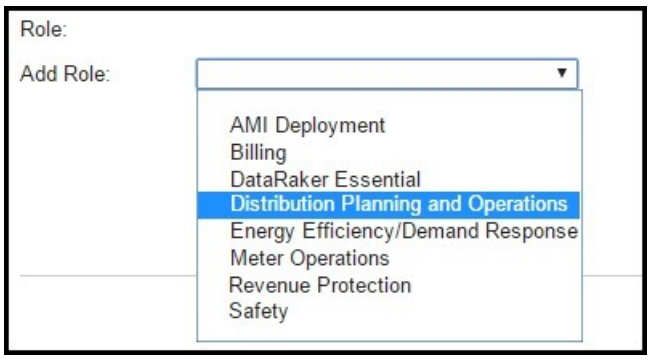
3. Click **Save** to assign the user to the selected group.
   The **Manage Users** dialog box will update the **Group** field with the assigned group.

4. If applicable, repeat the previous steps to assign the user to additional groups.
5. When finished adding groups, you may click the **Cancel** link next to the group selection to close the drop-down list, click the **Cancel** button on the dialog box to close the dialog box, or select an area in the browser window outside of the dialog box to close the dialog box.

NOTE: To remove a group assignment, click the **Remove** link next to the group name.

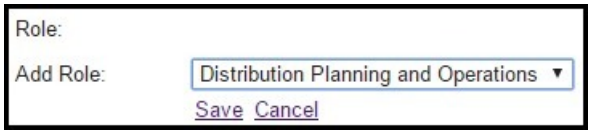
Assigning a User to a Role

1. Click **Assign Additional Role**. The dialog will update with a drop-down list of the available roles (based on the licensed module(s)).
2. Select the appropriate role from the drop-down list.

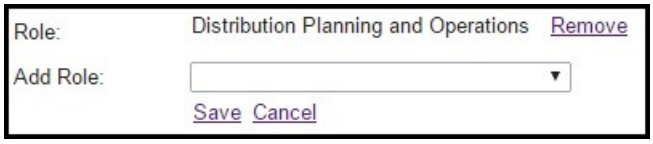


NOTE: See OracleDataRaker Cloud Service Module to Role Matrix for the roles that are associated with the modules.

The dialog box will update with the selected role:



3. Click **Save** to assign the user to the selected role. The **Manage Users** dialog box will update the **Role** field with the newly assigned role.

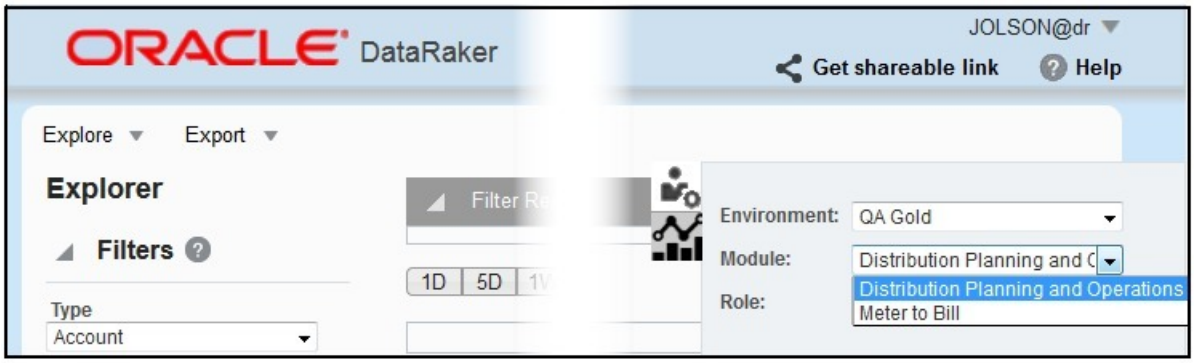


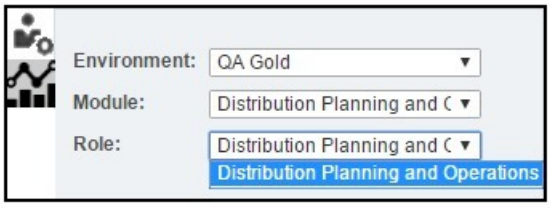
4. If applicable, repeat the previous steps to assign the user to additional roles.
5. When finished adding roles, you may click the **Cancel** link under the role selection to close the drop-down list, click the **Cancel** button on the dialog box to close the dialog box, or select an area in the browser window outside of the dialog box to close the dialog box.

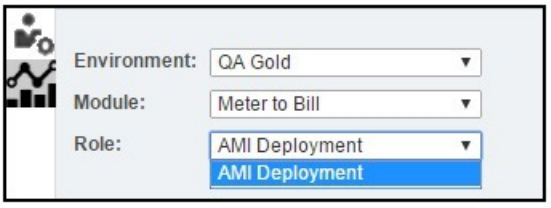
NOTE: To remove a role assignment, click the **Remove** link next to the role name.

The user is now configured to access the environment with the configuration for their assigned role. Since roles are unique to a module, when they log in, they will be able to choose from the modules that correspond to their assigned roles.

For example, if user JOLSON has been assigned to the **NonPowerUser** group and the **Distribution Planning and Operations** and **AMI Deployment** roles, they will have an environment with the **Explore** and **Export** menus and they will be able to select either **Distribution Planning and Operations** or **Meter to Bill** from the **Module** drop-down list.


ORACLE DataRaker
JOLSON@dr
Get shareable link
Help
Explore
Export
Explorer
Filters
Type
Account
1D
5D
Environment:
QA Gold
Module:
Distribution Planning and
Role:
Distribution Planning and Operations
Meter to Bill


Environment:
QA Gold
Module:
Distribution Planning and
Role:
Distribution Planning and
Distribution Planning and Operations


Environment:
QA Gold
Module:
Meter to Bill
Role:
AMI Deployment
AMI Deployment

Chapter 5

Appendices

User Access Auditing and Reporting

Oracle Identity Manager provides a powerful audit engine to collect extensive data for audit and compliance purposes. The audit functionality is used to capture, archive, and view entity and transactional data for compliance monitoring and IT-centric processes and forensic auditing. The collected information is then available to a limited-use version of Oracle Business Intelligence (BI) Publisher, which is Oracle's primary reporting tool for authoring, managing, and delivering highly formatted documents.

NOTE: The auditing functionality must be enabled by OracleDataRaker Cloud Service cloud engineering for your environment. For information on running Oracle BI Publisher reports, see the "**Running Reports**" section of the *Oracle® Fusion Middleware Performing Self Service Tasks with Oracle Identity Manager* guide (available on docs.oracle.com).

Once auditing has been enabled and Oracle BI Publisher has been associated to your OIM environment, you will have a link to the Oracle BI Publisher reports. The Oracle Identity Manager's implementation of Oracle BI Publisher reports provides the following features:

- Highly formatted and professional quality reports with pagination and headers/footers.
- PDF, Word, and HTML output of reports.
- Capability to develop your own custom reports against the Oracle Identity Manager repository (read-only repository access).

NOTE: For the auditing data that is available and a list of the standard reports that are provided, please refer to the "**Configuring Auditing**" and the "**Using Reporting Features**" chapters, respectively, of the *Oracle® Fusion Middleware Administering Oracle Identity Manager* guide (available on docs.oracle.com).

OracleDataRaker Cloud Service Module to Role Matrix

Module	Role
Meter to Bill	AMI Deployment
	Billing
	Meter Operations
	Safety
Revenue Protection	Revenue Protection
Distribution Planning and Operations	Distribution Planning
Demand Response and Energy Efficiency	Demand Response
	Energy Efficiency