Oracle Utilities Operational Device Cloud Service

End-User Provisioning Guide

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Contents

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This guide provides the instructions to be used by the super-user to add/change/delete other client users in their implementation.

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

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 application with the URL and the Userid / password provided.
   The URL may need to be appended with "/identity".

2. Change the password when prompted.
   Note the password requirements on the screen.

3. Answer the security questions when prompted.

If you need access to Oracle Utilities Operational Device Cloud Service, then you need to give yourself a role of "cisuser" and add resources to yourself as described in the following sections.

Managing Users in Oracle Identity Manager

This section provides the procedure to create an Oracle Utilities Operational Device Cloud Service user in **Oracle Identify Manager (OIM)**.

Understanding User Groups and Template Users

The easiest way to create a user is to copy a Template User that has been set up in Oracle Utilities Operational Device Cloud Service. The Template User defaults the user's display profile code, language, user groups (which dictates their access), default home screen, etc. When a template user is linked to a "real" user, the real user's preferences are inherited from the "template" user and the "real" user cannot change their preferences.

Your implementation must first create template users as appropriate for your business, such as administrators, planners, buyers, crew members and employees, etc. Once user templates are created you can select them when creating a new user.

Refer to the Administrative User's Guide under the Oracle Identity Manager Integration section for information on setting up Template Users.

Creating and Managing Users

Follow the procedure in this section to create Oracle Utilities Operational Device Cloud Service users. You must create the user in each of the environments (development, QA, and production), as needed.

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

Creating and managing users in OIM involves the following:

- Initial User Creation
- Requesting Accounts
- Creating a User With User Groups
- Creating a User With User Templates
- Locking, Disabling or Deleting Users in Oracle Identity Manager

Initial User Creation

Complete the following procedure to create new users.

1. Log into the Oracle Identify Manager 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 required fields to create a user according to your business practices. Required fields are denoted with an asterisk (*).

   - The **User Logon** and **Password** fields create the user login credentials.

- • **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 the application, but is required by Oracle Identify Manager so any value may be selected.

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

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

Requesting Accounts

Complete the following procedure to request user 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 Template Users 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

Complete the following procedure to add **User Groups** for this user. The **User Groups** indicated here match those that are delivered as default with the application:

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

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

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

1. Enter the appropriate User Group 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 the application and has the correct User Group.

9. Close the **User Details** tab and exit the Oracle Identify Manager application.

Creating a User With User Templates

As mentioned previously in Understanding User Groups and Template Users you have the option of creating users using templates. To do this, select the previously created catalog items for the template users. A best practice would be to create these items with "_UT" so that they are easy to distinguish in the catalog list.

1. Select a user template from the catalog and select **Add to Cart**.
   The system displays the message "**Item added to Cart**".

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

3. 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.

4. Click **Ready to Submit**.

5. Click **Submit.**
   The rest of the procedure is the same as creating a user with a user group. Please refer to the corresponding steps in the Creating a User With User Groups procedure above.

Locking, Disabling or Deleting Users in Oracle Identity Manager

This section provides information on how to lock, disable or delete users.

1. Log into the Oracle Identify Manager 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 the application; however the user record is still available in the application and the user can be unlocked in Oracle Identify Manager at a future date.

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

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

Choose your option based on whether or not you want to keep the user record in the application, 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 Oracle Identify Manager, consider using **Disable User** instead of **Delete User**.

Accessing Analytics

If the user needs access to Oracle Utilities Operational Device Cloud Service Analytics (Business Intelligence Dashboards), refer to the instructions for provisioning users in Oracle Utilities Analytics.