

Oracle® Banking Platform Collections

User Provisioning Guide

Release 2.7.1.0.0

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Oracle Banking Platform Collections User Provisioning Guide, Release 2.7.1.0.0

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Contents

Preface	10
Audience	10
Documentation Accessibility	10
Organization of the Guide	10
Related Documents	11
Conventions	11
1 Introduction	13
2 Configuration	15
2.1 Prerequisites	15
2.2 Create Oracle Banking Collections and Oracle Banking Recovery System User	15
2.3 OIM Configuration	16
2.3.1 Import Oracle Banking Collections and Oracle Banking Recovery Configuration	16
2.3.2 Manage Generic Technology Connector	19
2.3.3 Oracle Banking Collections and Oracle Banking Recovery Sandbox	24
2.3.3.1 Create Sandbox	25
2.3.3.2 Activate Sandbox	27
2.3.3.3 Deactivate Sandbox	27
2.3.3.4 Publish Sandbox	28
2.3.4 Create Form Associated with Application Instance	29
2.3.5 Create - Oracle Banking Collections and Oracle Banking Recovery Access Policy and Role	36
2.3.5.1 Create Access Policy	36
2.3.5.2 Creating Roles	41
3 User Fields and Constraints	49

3.1 User Fields Provisioned From OIM	49
4 Create, Modify, Delete Users	51
4.1 Creation and provisioning of User from OIM to ORMB	51
4.2 Oracle Banking Collections and Oracle Banking Recovery Configuration	54
4.3 Modify Users in Oracle Banking Collections and Oracle Banking Recovery ...	55
4.4 Delete Users in Oracle Banking Collections and Oracle Banking Recovery ...	60
5 Verification	63
5.1 Verification of OIM Configuration	63
5.2 Verify Users in Native Oracle Banking Collections and Oracle Banking Recovery	64
5.3 Create Users in Oracle Banking Collections and Oracle Banking Recovery ...	66

List of Tables

Table 2–1 Oracle Banking Collections and Oracle Banking Recovery User Provisioning Artifacts	16
Table 2–2 Run Time Connector Parameters	21
Table 2–3 Create Sandbox Parameters	26
Table 3–1 Oracle Banking Collections and Oracle Banking Recovery User Fields ..	49
Table 5–1 OID schema attributes	63

List of Figures

Figure 2–1 Oracle Identity System Administration - Import Configuration Screen	17
Figure 2–2 Browse the file to be imported	17
Figure 2–3 Import Options	18
Figure 2–4 Summary of the import	18
Figure 2–5 Successful Import Message	19
Figure 2–6 Generic Connector	19
Figure 2–7 Search Connectors	20
Figure 2–8 Edit Connector Parameters	20
Figure 2–9 Specify parameter values	21
Figure 2–10 Modify Connector Configuration (Mapping Information)	22
Figure 2–11 Edit Mapping Information	22
Figure 2–12 Provide Mapping Information	23
Figure 2–13 Verify Connector Information	23
Figure 2–14 Successful Configuration Message	24
Figure 2–15 Oracle Identity System Administration - Sandbox tab	25
Figure 2–16 Create Sandbox Dialog Box and Parameters	25
Figure 2–17 Sandbox Creation Confirmation	26
Figure 2–18 Available Sandbox	27
Figure 2–19 Activated Sandbox	27
Figure 2–20 Deactivate Sandbox	28
Figure 2–21 Publish Sandbox	28
Figure 2–22 Published Sandbox	28
Figure 2–23 Create Form - Form Designer	29
Figure 2–24 Create Form - Resource Type	29

Figure 2–25 Create Form - Resource Type (COLL_CONNECTOR_GTC)	30
Figure 2–26 Create Form Resource Type - Available Form Fields	30
Figure 2–27 Search Form	31
Figure 2–28 Manage Collections User Form	31
Figure 2–29 Manage Form	32
Figure 2–30 Manage Child Objects form fields	32
Figure 2–31 Set default values for field- userGroup	33
Figure 2–32 Set default value for field- expirationDate	33
Figure 2–33 Search Application Instances and select COLL_CONNECTOR_GTC	34
Figure 2–34 Application Instance Attributes	35
Figure 2–35 Associate Form with Application instance	35
Figure 2–36 Success message	36
Figure 2–37 Identity Self Service – Manage tab	37
Figure 2–38 Access Policies	37
Figure 2–39 Create Access Policy	38
Figure 2–40 Access Policy details	38
Figure 2–41 Add application instance associated with access policy	39
Figure 2–42 Search Access Policy	39
Figure 2–43 Provisioned applications for the policy	40
Figure 2–44 Application Attributes	41
Figure 2–45 Oracle Identity Self Service- Roles Tab	42
Figure 2–46 Create Role	43
Figure 2–47 Create Role	44
Figure 2–48 Add Access Policy to the role	44
Figure 2–49 Add Access Policy to the role	45
Figure 2–50 Create Membership Rule	45

Figure 2–51 Build Membership Rule Expression	46
Figure 2–52 Build Membership Rule Expression	47
Figure 3–1 Create User - Mandatory and Optional Attributes	50
Figure 4–1 Create User in Oracle Self Service Identity	51
Figure 4–2 Input User Attributes	52
Figure 4–3 Search and select the added User	53
Figure 4–4 Applications provisioned to User	54
Figure 4–5 Collections Configuration	55
Figure 4–6 Searching User	55
Figure 4–7 Detailed Information about the User	56
Figure 4–8 Modify User Confirmation	57
Figure 4–9 Viewing Modified and Provisioned User Details	58
Figure 4–10 Modify Detail Information	58
Figure 4–11 Edit Detail Information	59
Figure 4–12 Viewing Changes	59
Figure 4–13 Searching Users To Delete	60
Figure 4–14 View User Details	61
Figure 5–1 Viewing IT Resource Details and Parameters	63
Figure 5–2 Oracle Banking Collections and Oracle Banking Recovery Native Login screen	64
Figure 5–3 User Screen - User Navigation	65
Figure 5–4 User Screen - Main Tab	65
Figure 5–5 Searching Particular User	66
Figure 5–6 Search Result in User screen	66
Figure 5–7 Oracle Banking Collections and Oracle Banking Recovery Native Login screen	67
Figure 5–8 Oracle Banking Collections and Oracle Banking Recovery native - User67	

Navigation	
Figure 5–9 Oracle Banking Collections and Oracle Banking Recovery native - Main Tab	68
Figure 5–10 User Screen	69

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
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- 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 Oracle Banking Collections and Oracle Banking Recovery.

[Chapter 3 User Fields and Constraints](#)

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

Chapter 4 Create, Modify, Delete Users

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.
<code>monospace</code>	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1 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.

Oracle Banking Collections module has its own authentication and authorization process. Users configured in the OBP require access to some of the services of Oracle Banking Collections and Oracle Banking Recovery. To access those services, user must be present in the Oracle Banking Collections and Oracle Banking Recovery database. Hence, the user provisioned in OBP is required to be provisioned in Oracle Banking Collections and Oracle Banking Recovery module as soon as it is created in OBP. A typical Oracle Banking Collections and Oracle Banking Recovery request flow from online OBP user is authenticated and authorized by the OBP framework and is forwarded to the Oracle Banking Collections and Oracle Banking Recovery module. Oracle Banking Collections and Oracle Banking Recovery 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 Oracle Banking Collections and Oracle Banking Recovery when they are created in OBP.

2 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 12.2.1.3.0
 - SOA Suite 12.2.1.3.0
 - IAM Suite 11gR2 PS2 (12.2.1.3)
 - RCU 12.2.0.1
2. You must have administrative access to the following:
 - 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. Check following artifacts are available as part of Oracle Banking Collections and Oracle Banking Recovery release bundle:
 - collections_oim_export.xml

2.2 Create Oracle Banking Collections and Oracle Banking Recovery System User

The following configuration is to create Oracle Banking Collections and Oracle Banking Recovery System User for OIM. System User is required to authenticate OIM Oracle Banking Collections and Oracle Banking Recovery 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 Oracle Banking Collections and Oracle Banking Recovery using Collections native admin UI. Assign **CLNHOSTUSER** Group to User, to provide minimum access of Oracle

Banking Collections and Oracle Banking Recovery native admin screen. For more information, see [Section 5.3 Create Users in Oracle Banking Collections and Oracle Banking Recovery](#)

2.3 OIM Configuration

This section provides information on OIM Configuration.

2.3.1 Import Oracle Banking Collections and Oracle Banking Recovery Configuration

Oracle Banking Collections and Oracle Banking Recovery connector configuration for User Provisioning must be imported. Below is the list of artifacts developed for Oracle Banking Collections and Oracle Banking Recovery User Provisioning.

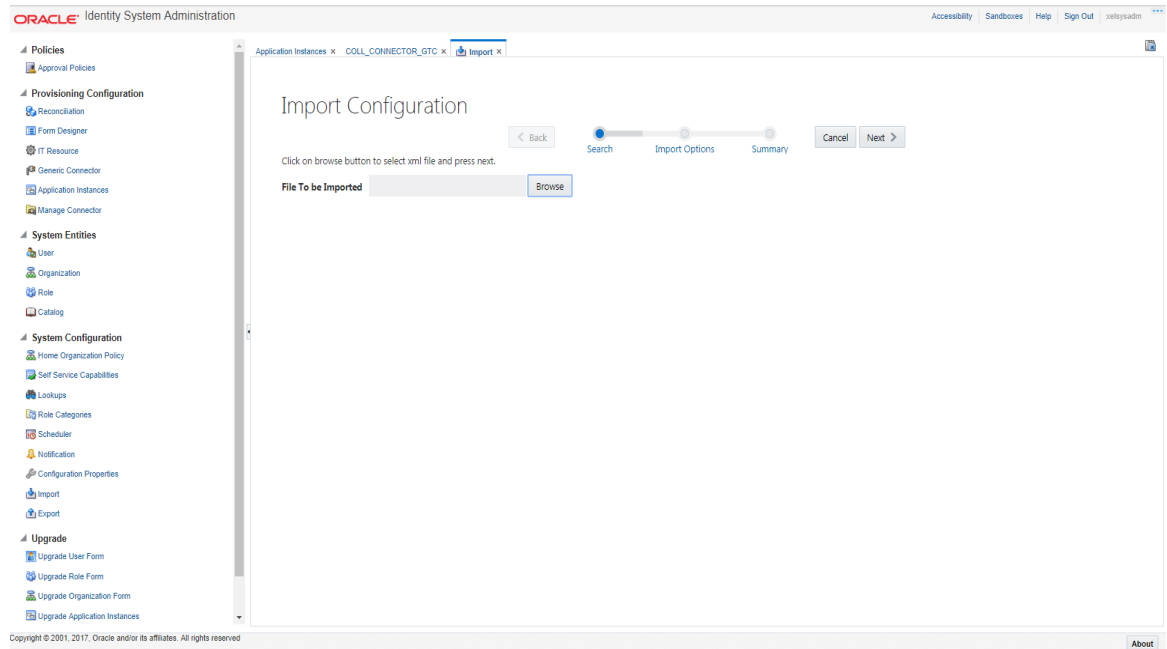
Table 2–1 Oracle Banking Collections and Oracle Banking Recovery User Provisioning Artifacts

Artifact	Artifact Type	Description
COLL_CONNECTOR_GTC	IT Resource Definition	It stores definition of connection parameters to connect Oracle Banking Collections and Oracle Banking Recovery system.
Xellerate Users	Organization	
adpCOLL_CONNECTOR_GTC_AUTOC	Event Handler	
adpCOLL_CONNECTOR_GTC	Event Handler	
UD_ORMBCONN	Form	
UD_ORMUSERG	Form	
COLL_CONNECTOR	Generic Connector	

Oracle Banking Collections and Oracle Banking Recovery's configuration can be imported in OIM by using Oracle Identity System Administration.

1. Log in to Oracle Identity System Administration.
2. In the left pane, under System Management, click **Import**.

Figure 2–1 Oracle Identity System Administration - Import Configuration Screen



3. Click **Browse** to import the configuration xml file and click **Next**.

Figure 2–2 Browse the file to be imported

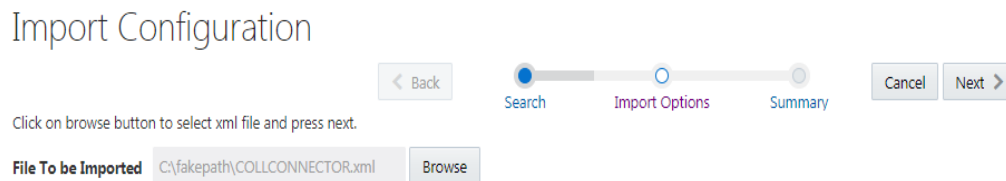
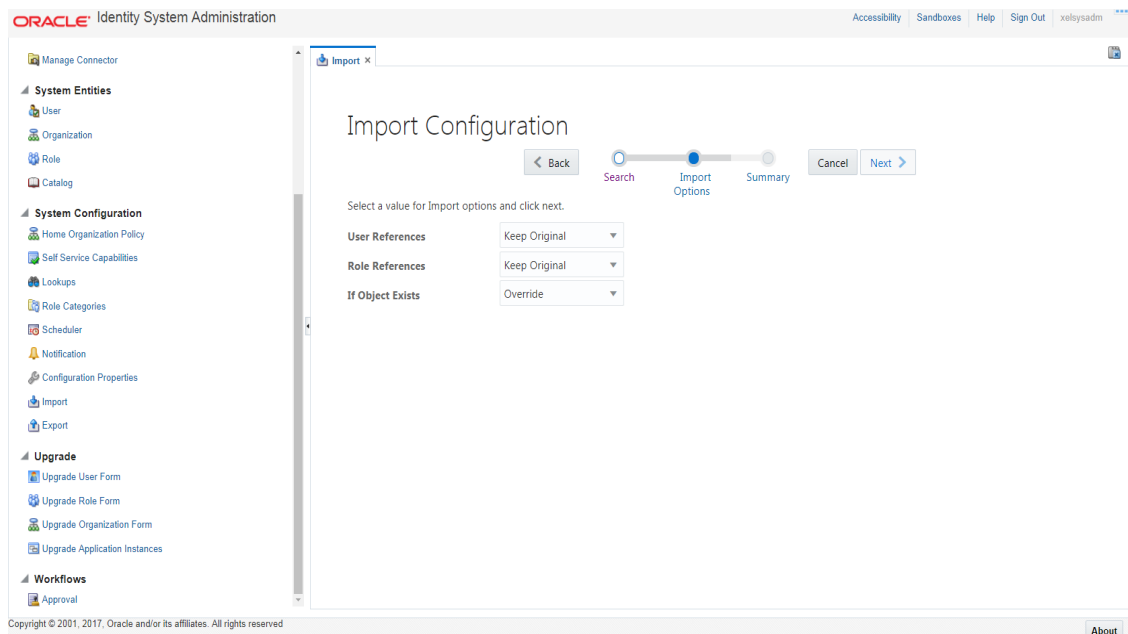
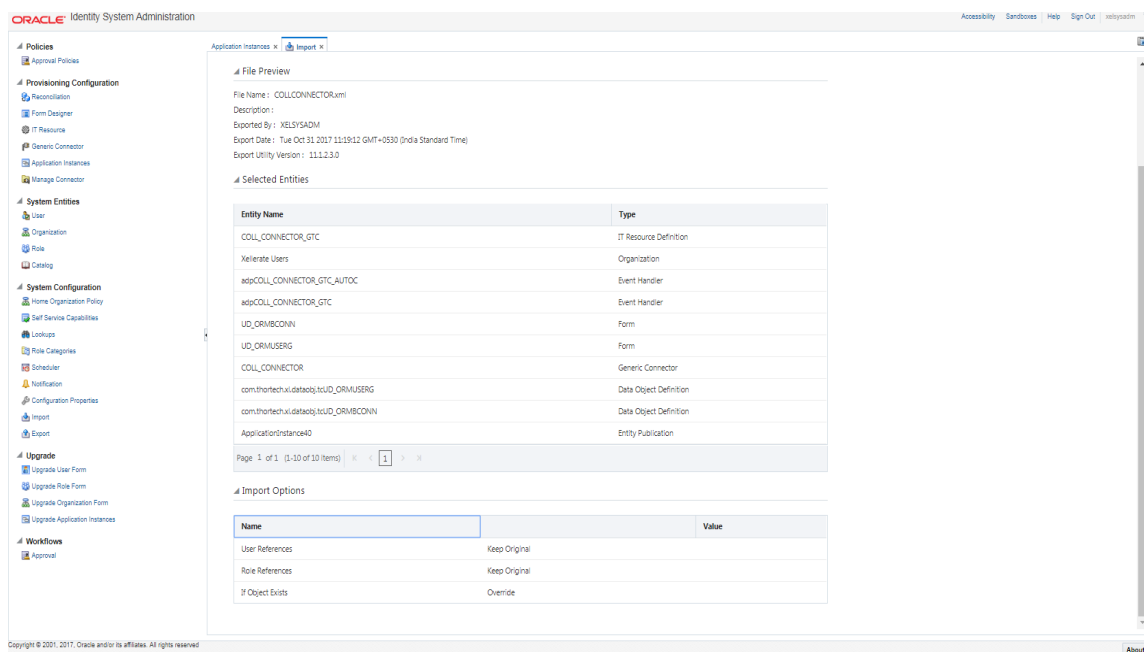


Figure 2–3 Import Options



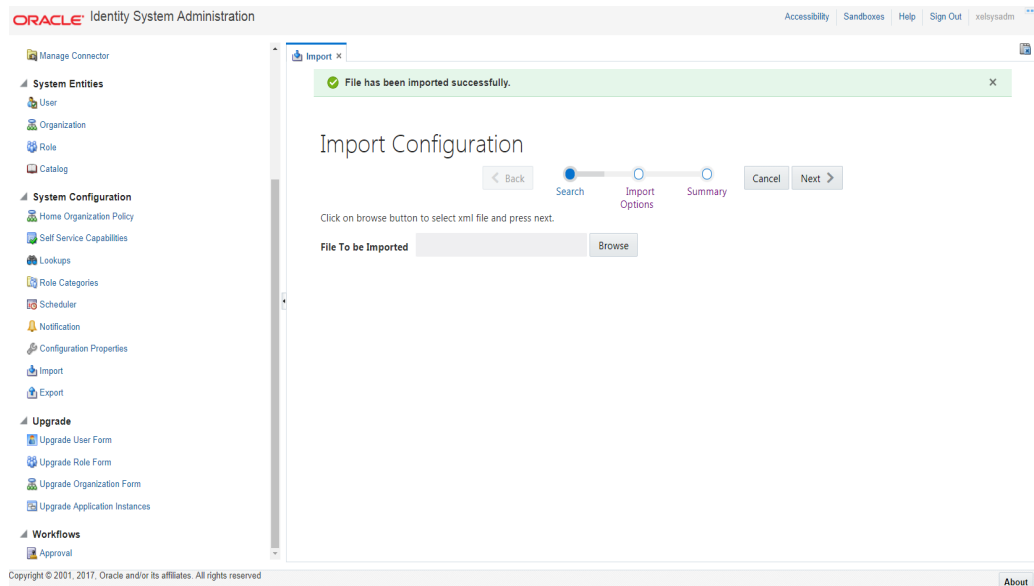
4. Click **Next**.

Figure 2–4 Summary of the import



5. Click **Import**.
6. On successful import of data, **File has been imported successfully** message will be displayed.

Figure 2–5 Successful Import Message

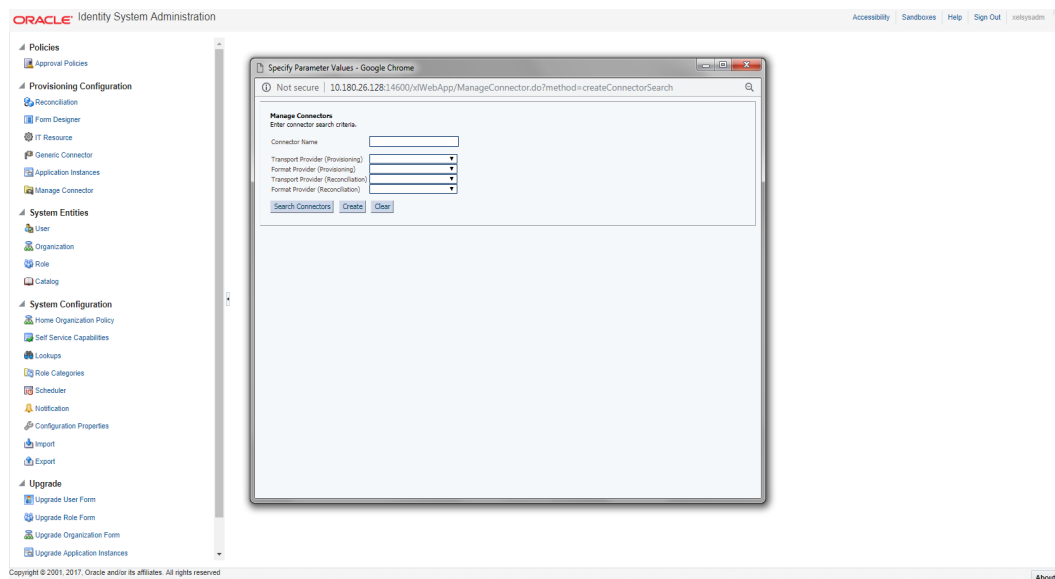


2.3.2 Manage Generic Technology Connector

Following Run-Time Parameters need to be set.

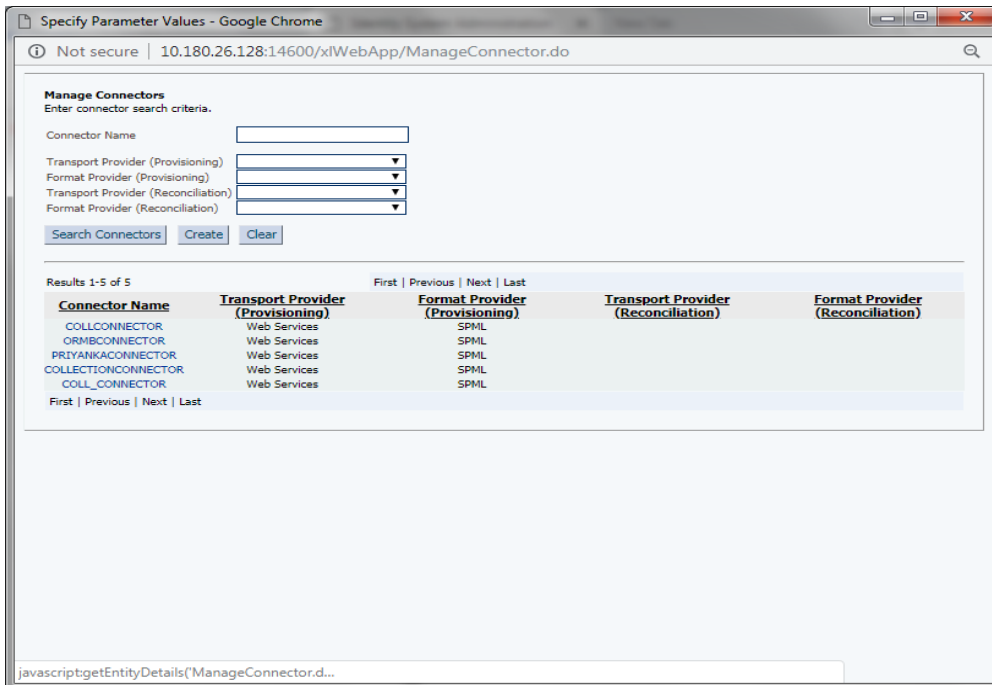
1. In the left pane, click **Generic Connector**. Following window appears.

Figure 2–6 Generic Connector



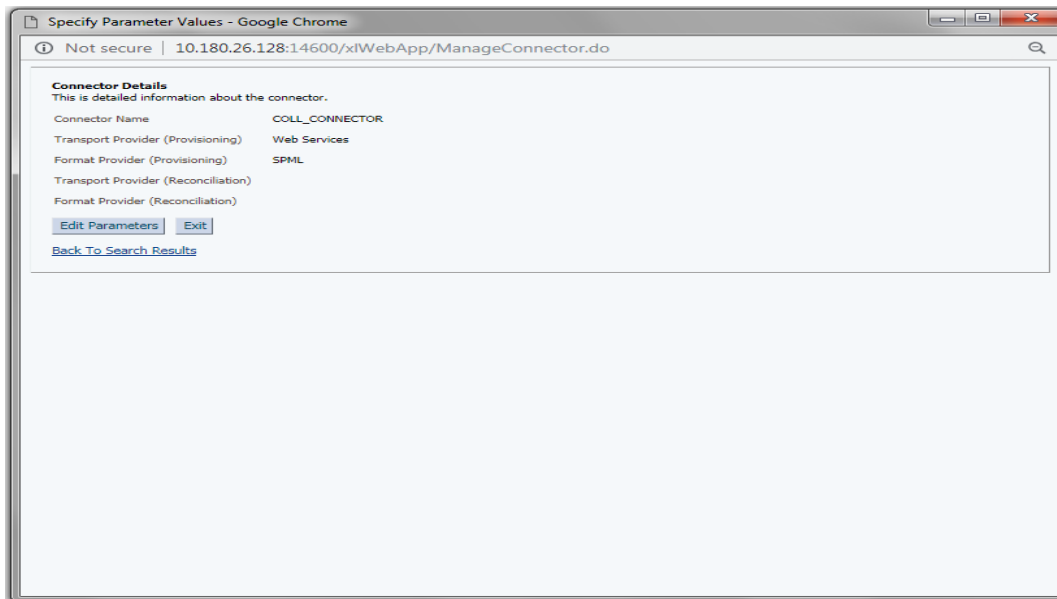
2. Click **Search Connectors** and click **COLL_CONNECTOR**.

Figure 2–7 Search Connectors



3. Click **Edit Parameters**.

Figure 2–8 Edit Connector Parameters



4. Specify parameter values as shown below:

Table 2–2 Run Time Connector Parameters

Parameter Name	Parameter Value	Description
Web Services		
Web Service URL	http://<Host>:<Port>/com.ofss.fc.channel.branch/spml2	This is the URL for the Web service receptor.
SPML		
Target ID	OUIAF	ID of the target system for provisioning operations.
User Name (authentication)	SYSUSER	User name required for authentication by the Web service.
User Password (authentication)	sysuser00	Password required for authentication by the target Web service.

Figure 2–9 Specify parameter values

Specify Parameter Values - Google Chrome
 Not secure | 10.180.26.128:14600/xWebApp/ManageConnector.do

Manage Generic Technology Connector

Step 2: Specify Parameter Values

* Indicates Required Field

Run-Time Parameters

Web Services
 Web Service URL This is the URL for the Web service receptor.

SPML
 Target ID ID of the target system for provisioning operations.
 User Name (authentication) User name required for authentication by the Web service.
 User Password (authentication) Password required for authentication by the target Web service.

Design Parameters

Web Services
 Web Service SOAP Action In the WSDL file, this is the "soapAction" attribute value for the "operation" element.

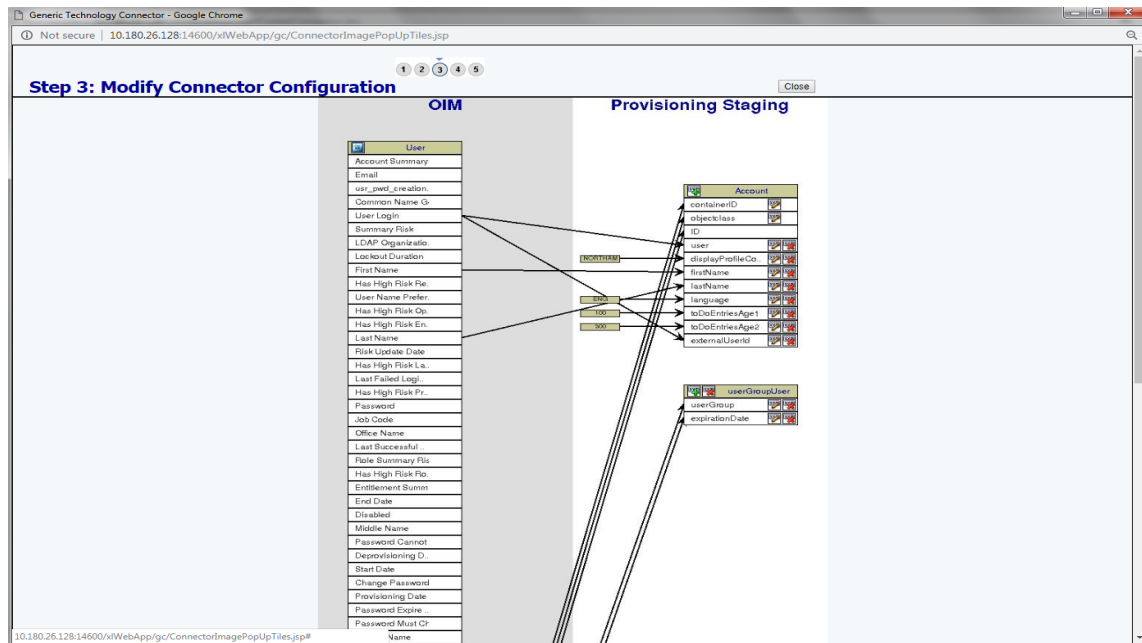
SPML
 WSSSE Configured for SPML Web Service? Specify whether or not the target SPML Web Service is configured to receive WS-Security credentials.
 Custom Authentication Credentials Namespace Namespace that defines custom authentication credentials. Specify a value only if the Web service is not configured for WSSSE.
 Custom Authentication Header Element Name of the header element for the custom authentication section that is to be included in the SOAP header. Specify a value only if the Web service is not configured for WSSSE.
 Custom Element to Store User Name Name of the element in the custom authentication section that will store the user name required for authentication by the Web service. Specify a value only if the Web service is not configured for WSSSE.
 Custom Element to Store Password Name of the element in the custom authentication section that will store the password required for authentication by the Web service. Specify a value only if the Web service is not configured for WSSSE.
 SPML Web Service Binding Style (DOCUMENT or RPC) DOCUMENT In the WSDL file, this is the style attribute value for the binding element.
 SPML Web Service Complex Data Type In the WSDL file, this is the value of the "name" attribute of the "complexType" element. This parameter is applicable only if the binding style is "DOCUMENT".
 SPML Web Service Operation Name In the WSDL file, this is the "name" attribute value for the "operation" element. This parameter is applicable only if the binding style is "RPC".
 SPML Web Service Target Namespace http://xmlns.oracle.com/OIM/provisioning In the WSDL file, this is the "targetNamespace" attribute value for the "definition" element.
 SPML Web Service Soap Message Body Prefix Name of the custom prefix element that contains the soap message body. If the target Web service is running on BBA WebLogic, IBM WebSphere, JBoss Application Server, or OC4J, then you need not specify a value for this parameter.
 ID Attribute for Child Dataset Holding Role Membership Information Name of the ID attribute for a Provisioning Staging child dataset holding role membership information.

Target Date Format Date Format supported by the Date attributes of Provisioning Staging Dataset. Default value is 'yyyy-MM-dd hh:mm:ss.#####'.

Exit Continue >>

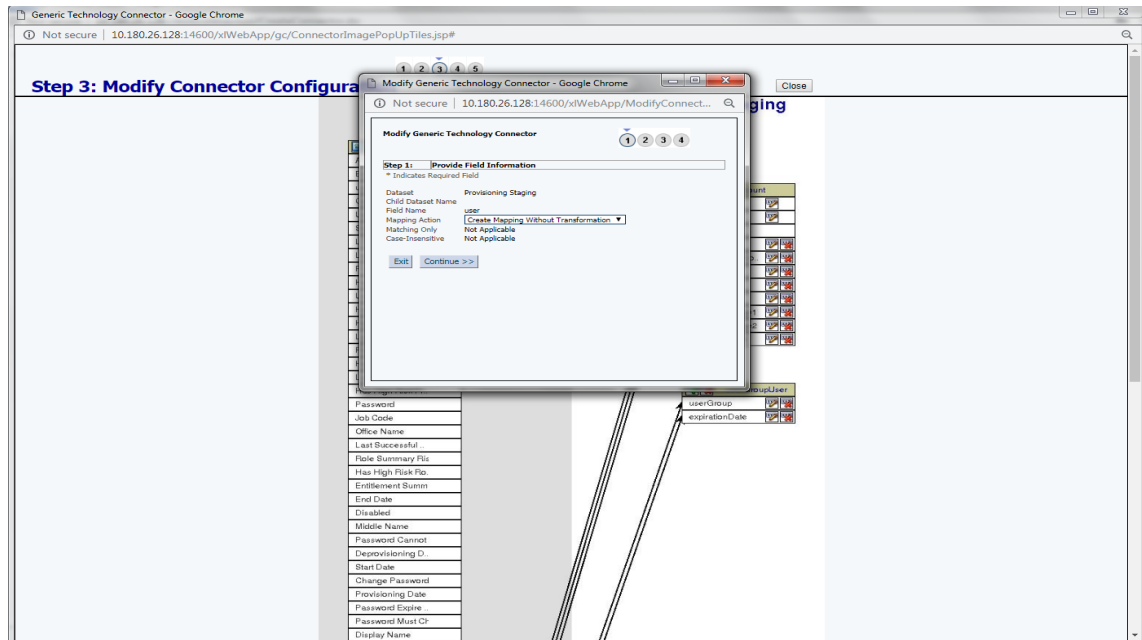
- Click **Continue**. Modify Connector configuration screen appears.

Figure 2–10 Modify Connector Configuration (Mapping Information)



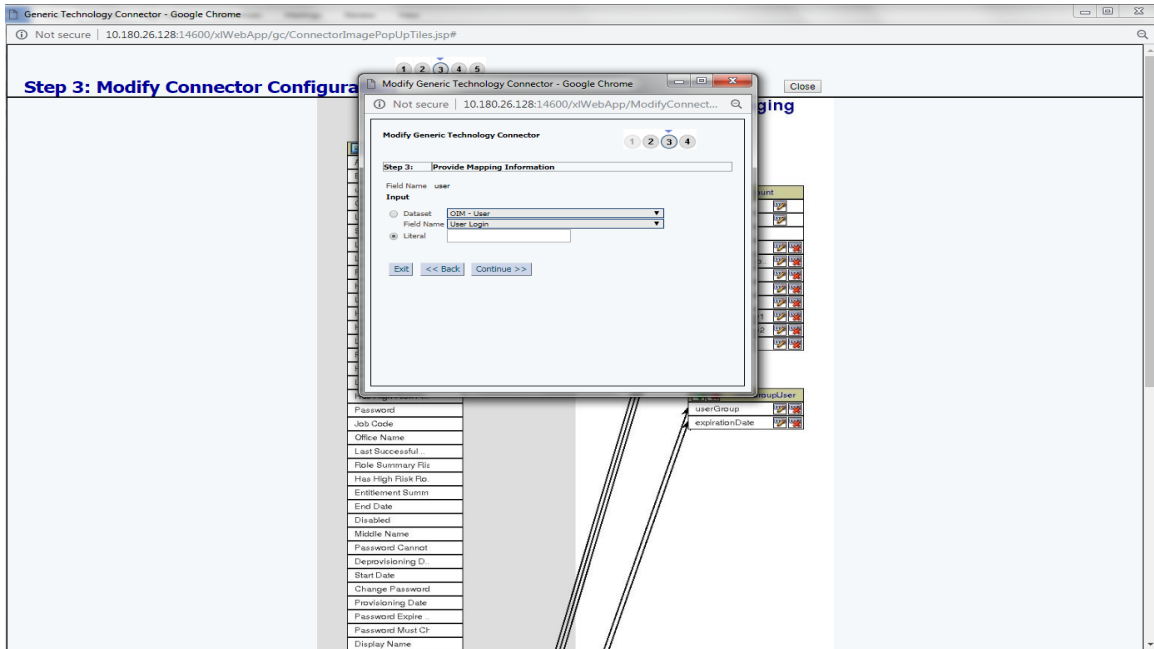
- Click the **Edit** icon for User field name in the provisioning staging column.

Figure 2–11 Edit Mapping Information



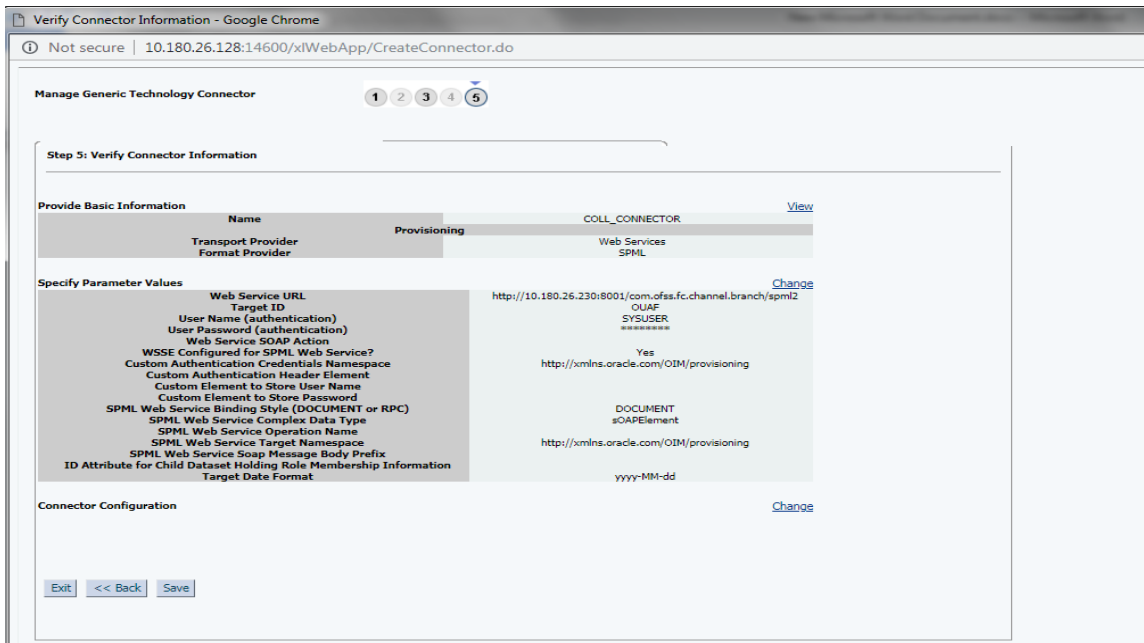
- Click **Continue** to provide mapping information for the User field name. Select the **Literal** radio button and keep the input blank.

Figure 2–12 Provide Mapping Information



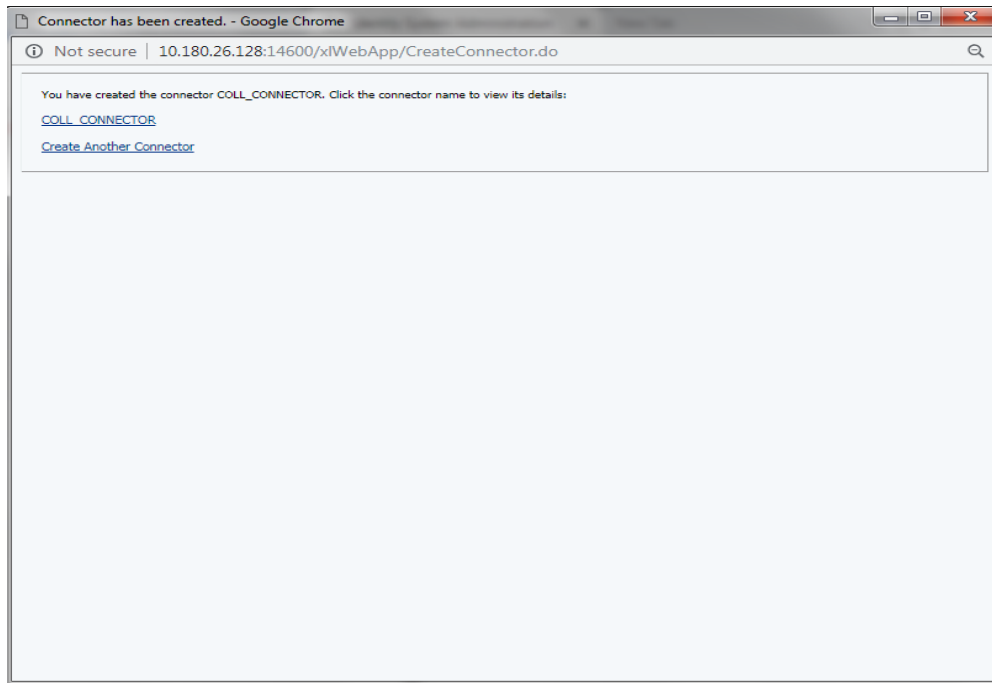
- Click **Continue** and then **Close**. Following window appears where Connector Information can be verified.

Figure 2–13 Verify Connector Information



- Click **Save**.
Following message window appears on successful configuration of run time parameters.

Figure 2–14 Successful Configuration Message

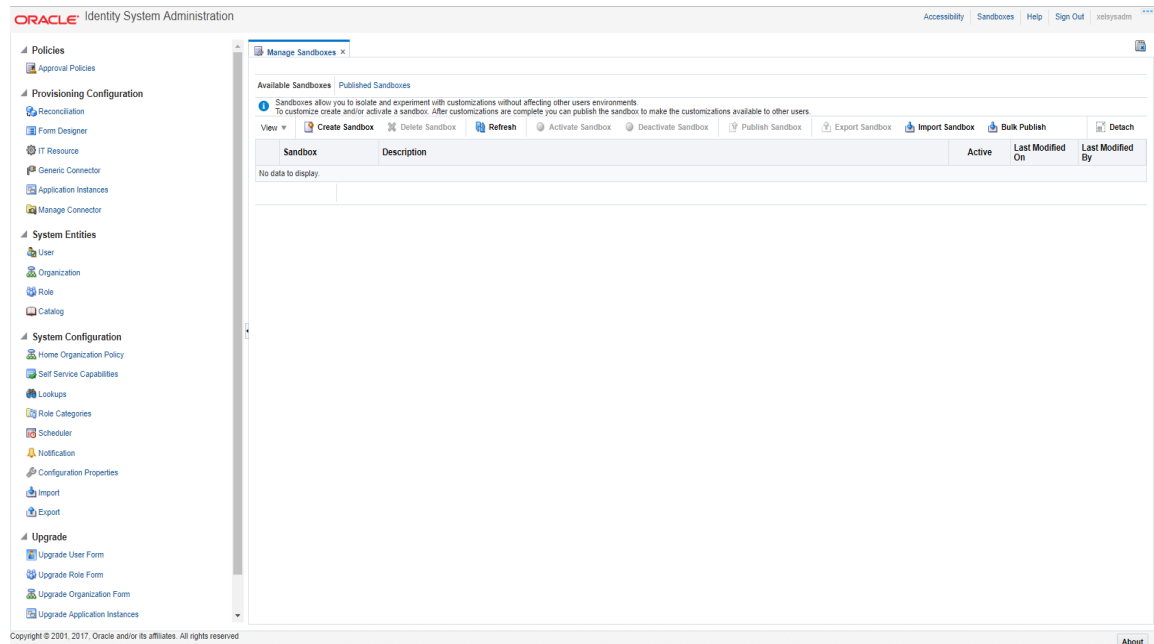


2.3.3 Oracle Banking Collections and Oracle Banking Recovery Sandbox

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

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

Figure 2–15 Oracle Identity System Administration - Sandbox tab

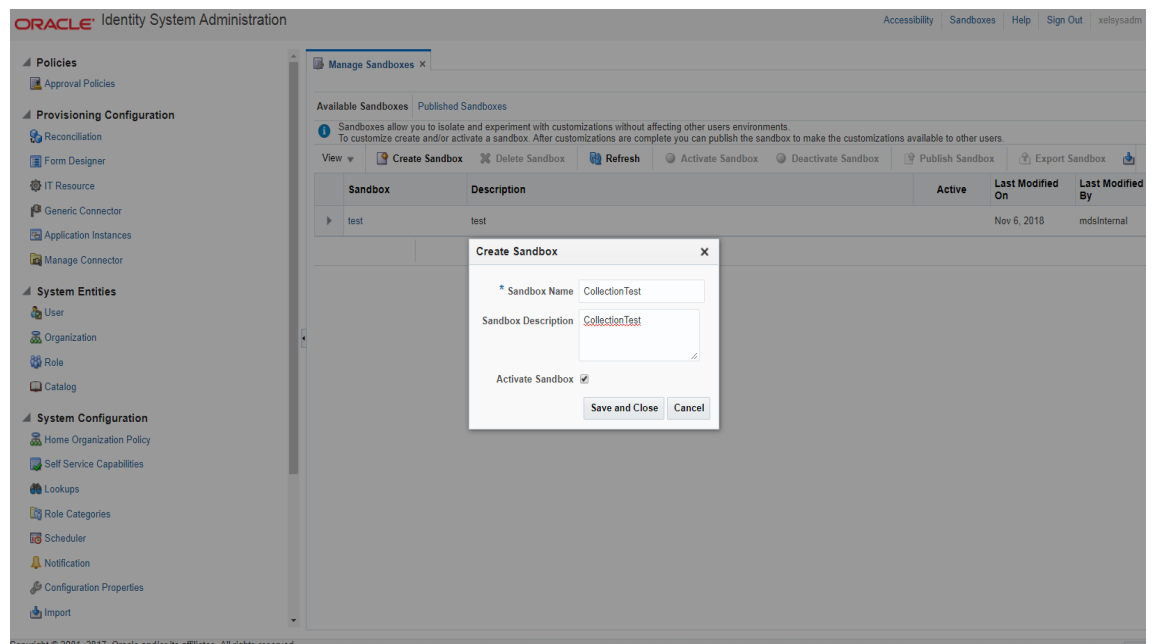


2.3.3.1 Create Sandbox

To create a Sandbox, perform the following steps:

1. Click **Create Sandbox**.
Create Sandbox dialog box is displayed.

Figure 2–16 Create Sandbox Dialog Box and Parameters



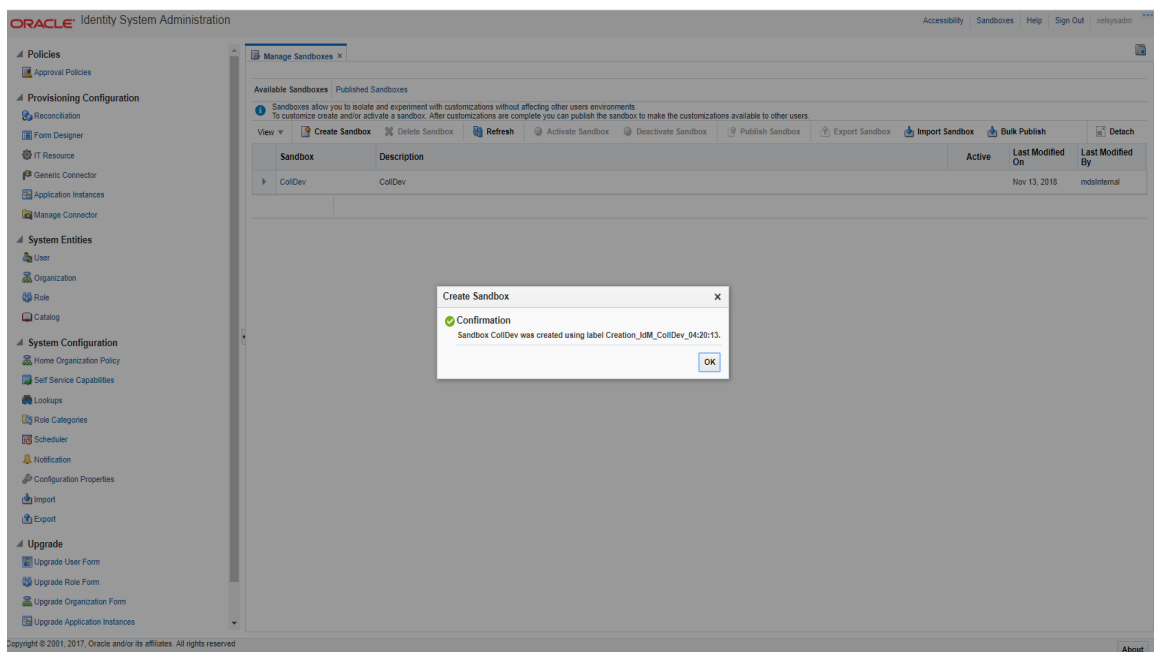
- Specify the following values:

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**.
The Confirmation dialog box appears.

Figure 2–17 Sandbox Creation Confirmation

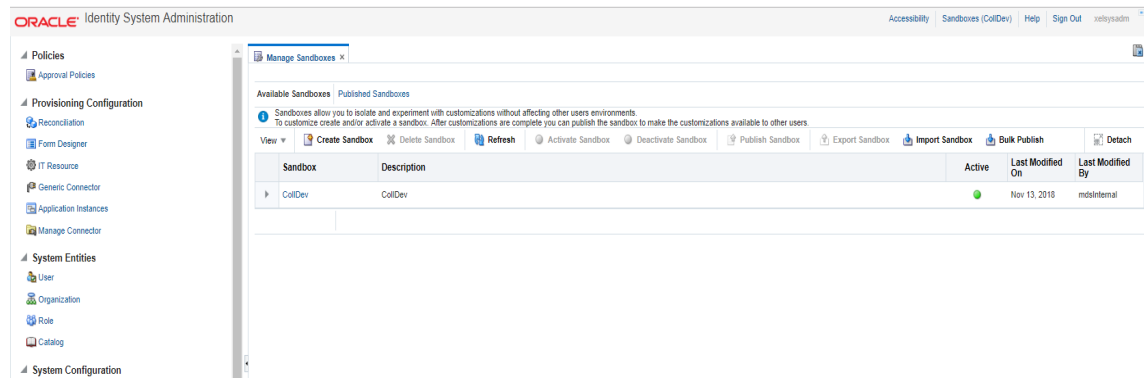


- CollectionsDev sandbox is created and it is activated.

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 2–18 Available Sandbox

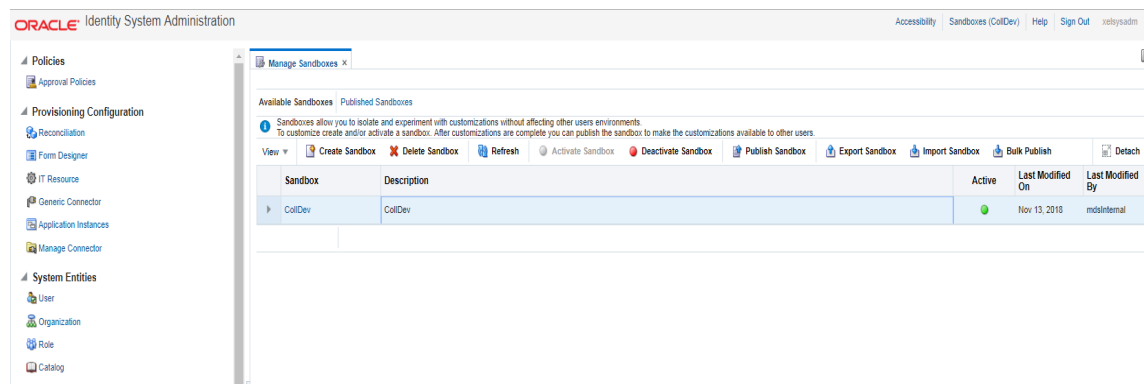


2.3.3.2 Activate Sandbox

To activate a Sandbox, perform the following steps:

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

Figure 2–19 Activated Sandbox

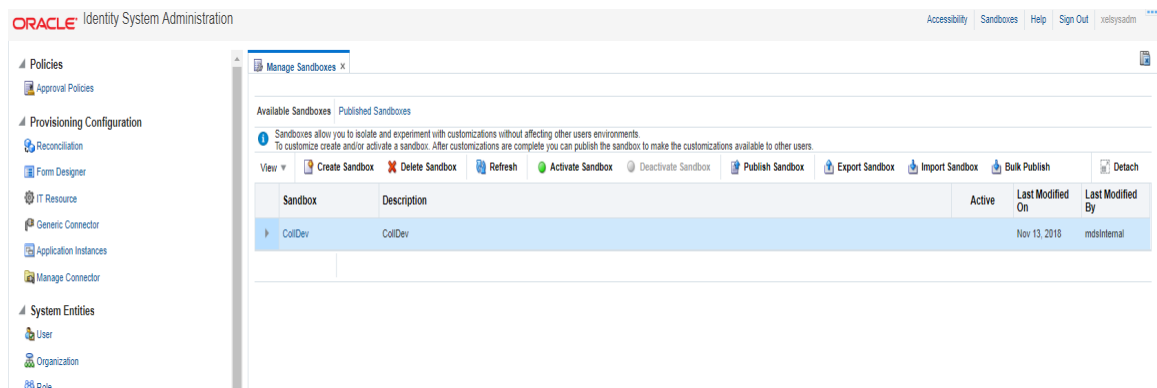


2. Sandbox is active now. It will be highlighted with green dot.

2.3.3.3 Deactivate Sandbox

To deactivate a Sandbox, perform the following steps:

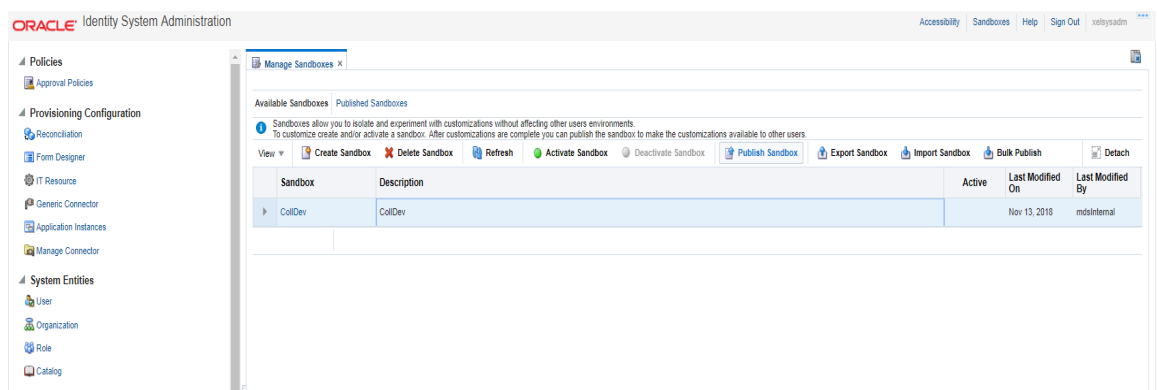
1. Select **CollectionsDev** sandbox.
2. Click **Deactivate Sandbox** to deactivate sandbox.
Sandbox is deactivated now.

Figure 2–20 Deactivate Sandbox

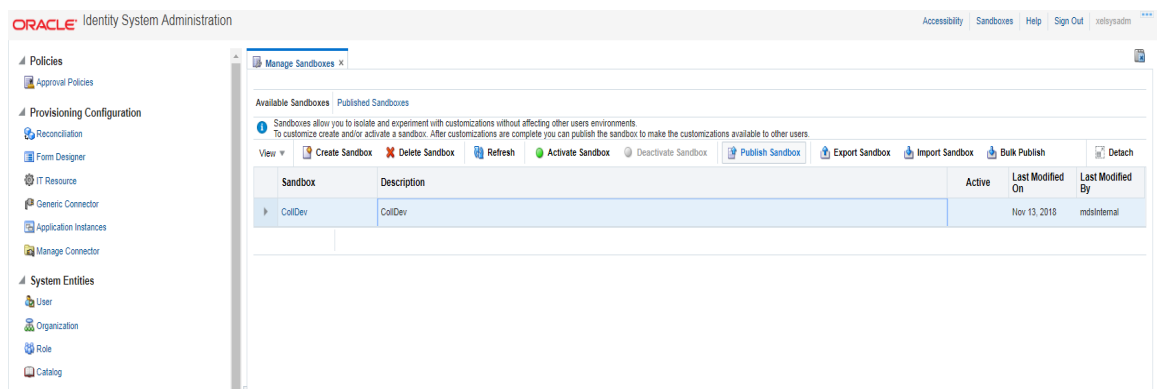
2.3.3.4 Publish Sandbox

To publish a Sandbox, perform the following steps:

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

Figure 2–21 Publish Sandbox

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

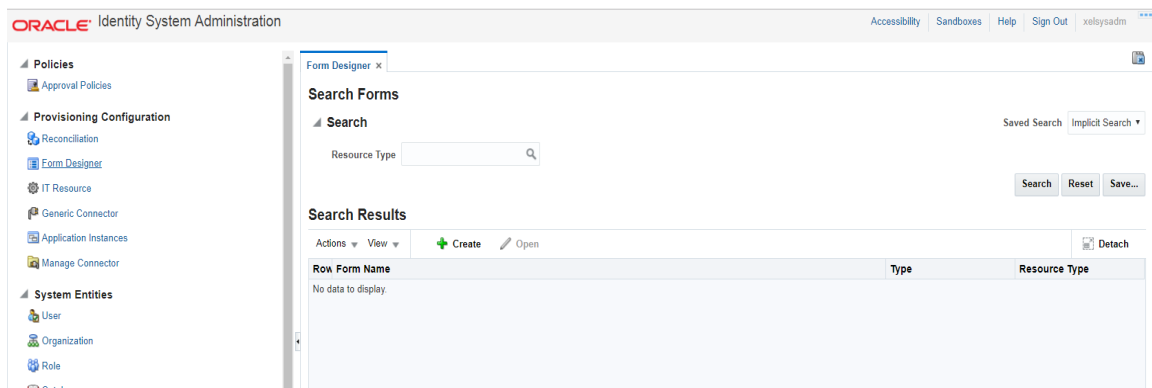
Figure 2–22 Published Sandbox

2.3.4 Create Form Associated with Application Instance

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

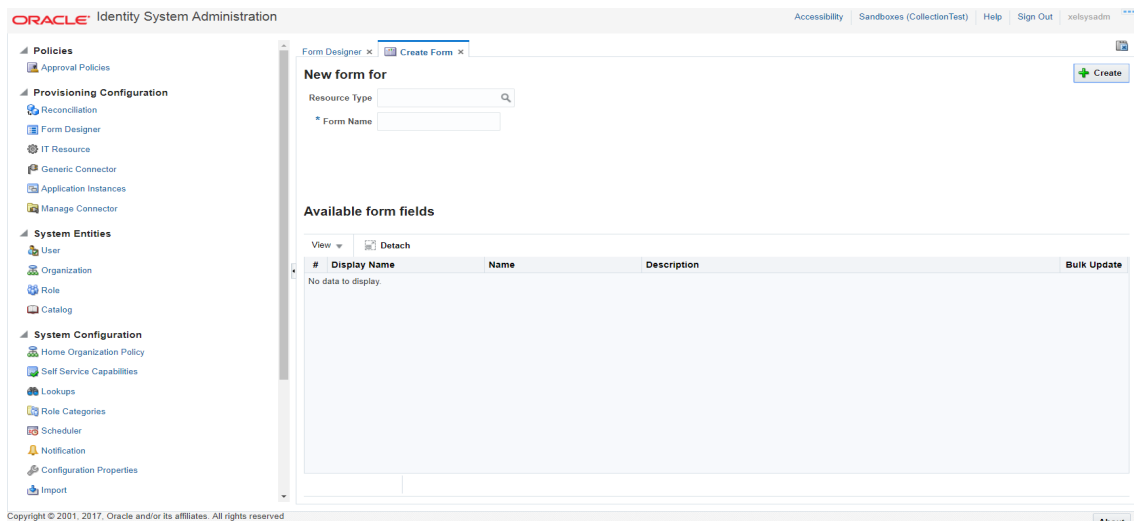
1. Log in to Oracle Identity System Administration.
2. Create and activate a sandbox. For detailed instructions on creating and activating a sandbox, see [Chapter 1.3.3 Oracle Banking Collections and Oracle Banking Recovery Sandbox](#).
3. In the left pane, under Configuration, click **Form Designer**. The **Form Designer** page is displayed.

Figure 2–23 Create Form - Form Designer



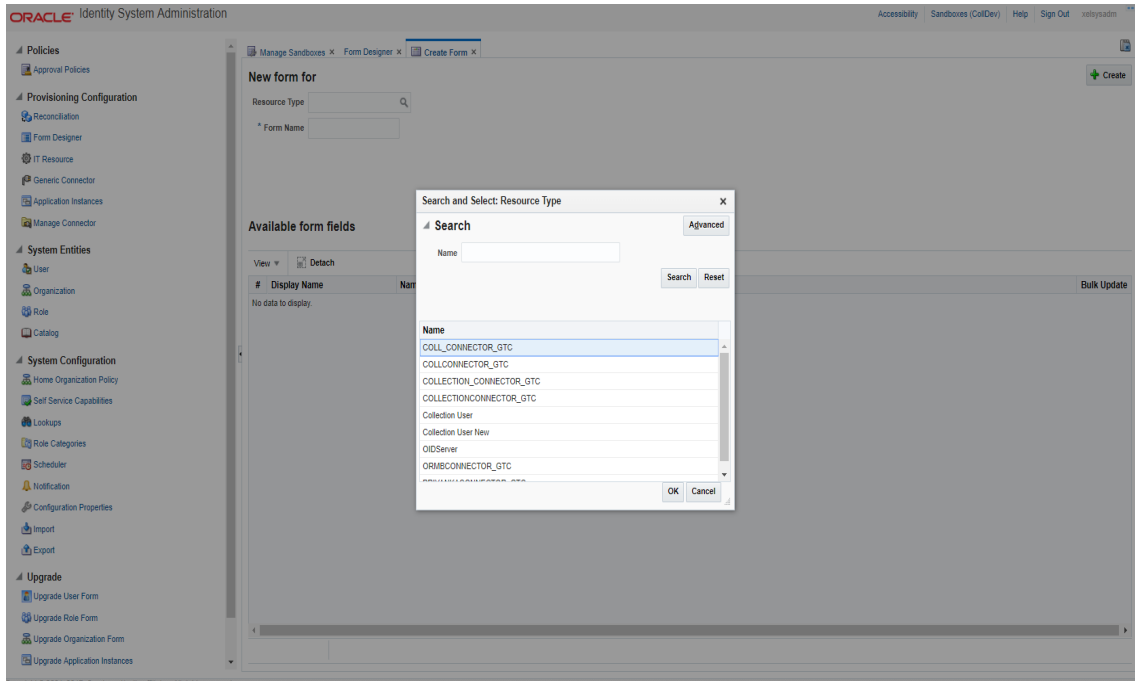
4. Click **Create** on the toolbar. The **Create Form** page is displayed.
5. In the **Resource Type** field, verify the name of the resource object with which the form is associated is displayed. To change the resource object name, click the Search icon next to the **Resource Type** field, and search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

Figure 2–24 Create Form - Resource Type



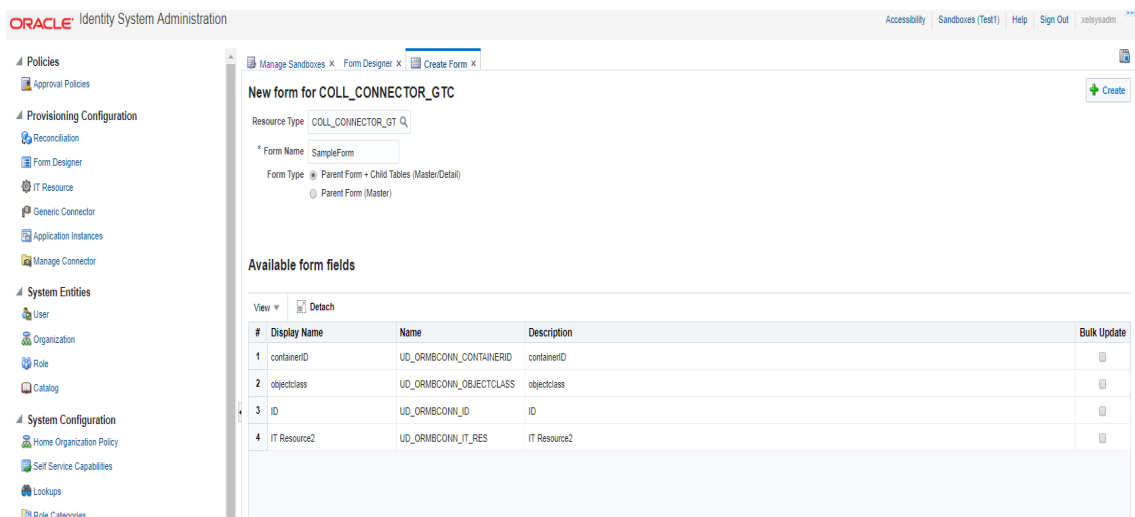
6. Select **Resource Type** as **COLL_CONNECTOR_GTC** and provide a name for the form (for example, SampleForm).

Figure 2–25 Create Form - Resource Type (COLL_CONNECTOR_GTC)



7. **Available Form Fields** will be displayed in the below section of the page.

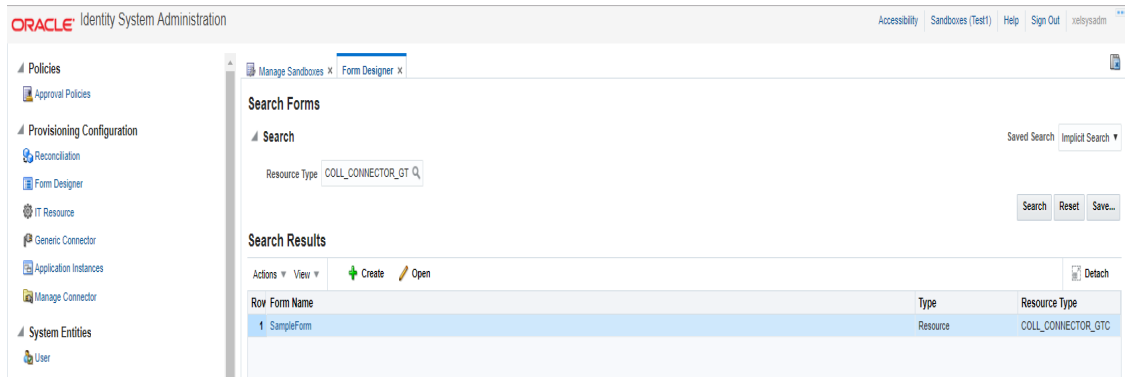
Figure 2–26 Create Form Resource Type - Available Form Fields



8. Click **Create**.
A message is displayed stating that the form is created.

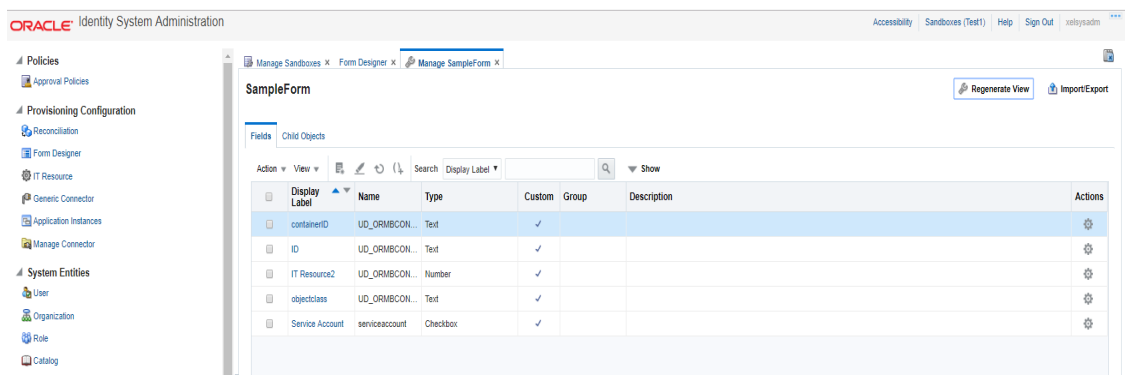
9. Refresh the **Search Results** in **Form Designer** page for resource type : `COLL_CONNECTOR_GTC`.
10. Select the **SampleForm** from the results.

Figure 2–27 Search Form



11. **Manage SampleForm** page is displayed.

Figure 2–28 Manage Collections User Form



12. In the Fields tab click the **objectClass**.
Edit Text Field page appears.
13. Enter Default Value as **User**. Click **Save** and **Close**.
14. In the Child Objects tab, click **ORMUSERG** (child form).
expirationDate and userGroup fields are displayed.

Figure 2–29 Manage Form

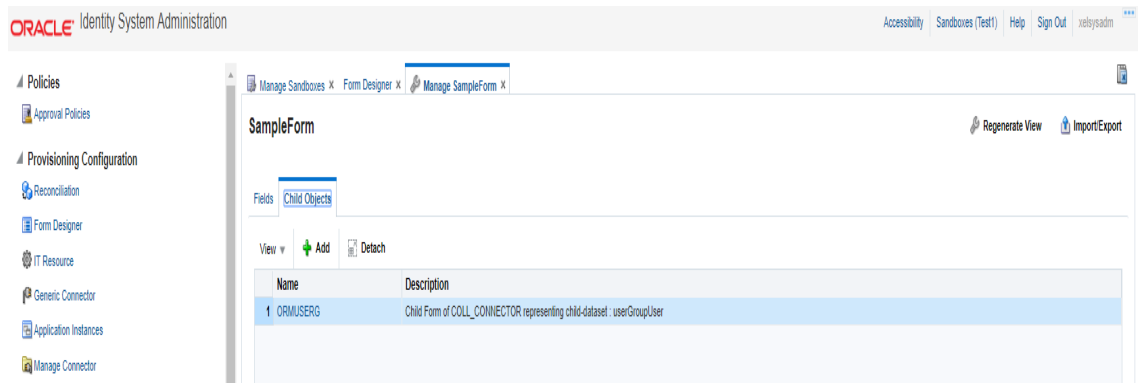
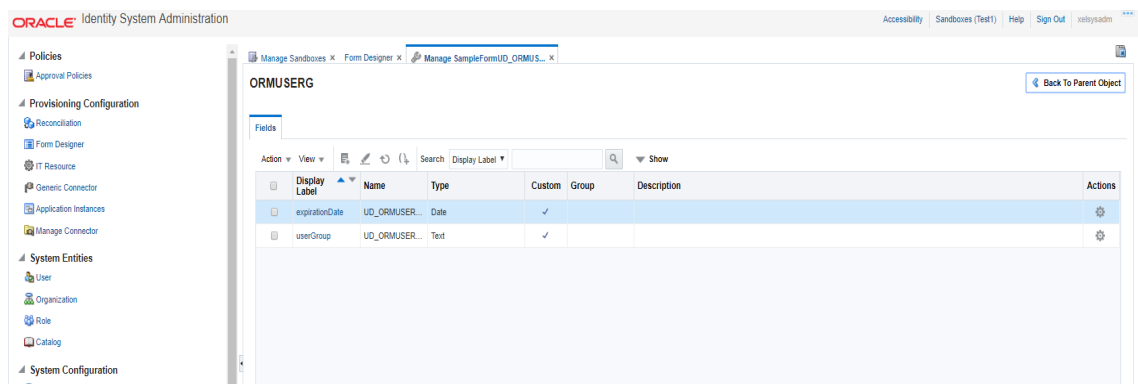


Figure 2–30 Manage Child Objects form fields



- Click the userGroup and give default value as ALL_SERVICES.

Figure 2–31 Set default values for field- userGroup

The screenshot shows the Oracle Identity System Administration interface. The left sidebar contains a navigation menu with categories like Policies, Provisioning Configuration, System Entities, System Configuration, and Upgrade. The main content area is titled "Edit Text Field : userGroup". It has several sections:

- Appearance:** "Display Label" is set to "userGroup" and "Display Width" is 40 Characters.
- Name:** "Name" is "UD_ORMUSERG_USERGROUP" and "API Name" is "UD_ORMUSERG_USERGROUP__c".
- Constraints:** "Searchable" is checked and "Maximum Length" is 20 Characters.
- Default Value:** The value is set to "ALL_SERVICES".
- Advanced:** "Encrypt" and "Use in Bulk" are unchecked.

 Buttons for "Save and Close" and "Cancel" are in the top right. The URL at the bottom is "10.180.26.128:14600/sysadmin/faces/home?_af=manage_sandboxes#".

- Click **expirationDate** and give default value as 2100-01-01.

Figure 2–32 Set default value for field- expirationDate

The screenshot shows the Oracle Identity System Administration interface. The left sidebar is the same as in Figure 2-31. The main content area is titled "Edit Date Field : expirationDate". It has several sections:

- Appearance:** "Display Label" is set to "expirationDate".
- Name:** "Name" is "UD_ORMUSERG_EXPIRATIONDATE" and "API Name" is "UD_ORMUSERG_EXPIRATIONDATE__c".
- Constraints:** "Searchable" is checked.
- Default Value:** The value is set to "2023-11-29".
- Advanced:** "Use in Bulk" is unchecked.

 Buttons for "Save and Close" and "Cancel" are in the top right. The URL at the bottom is "10.180.26.128:14600/sysadmin/faces/home?_af=manage_sandboxes#".

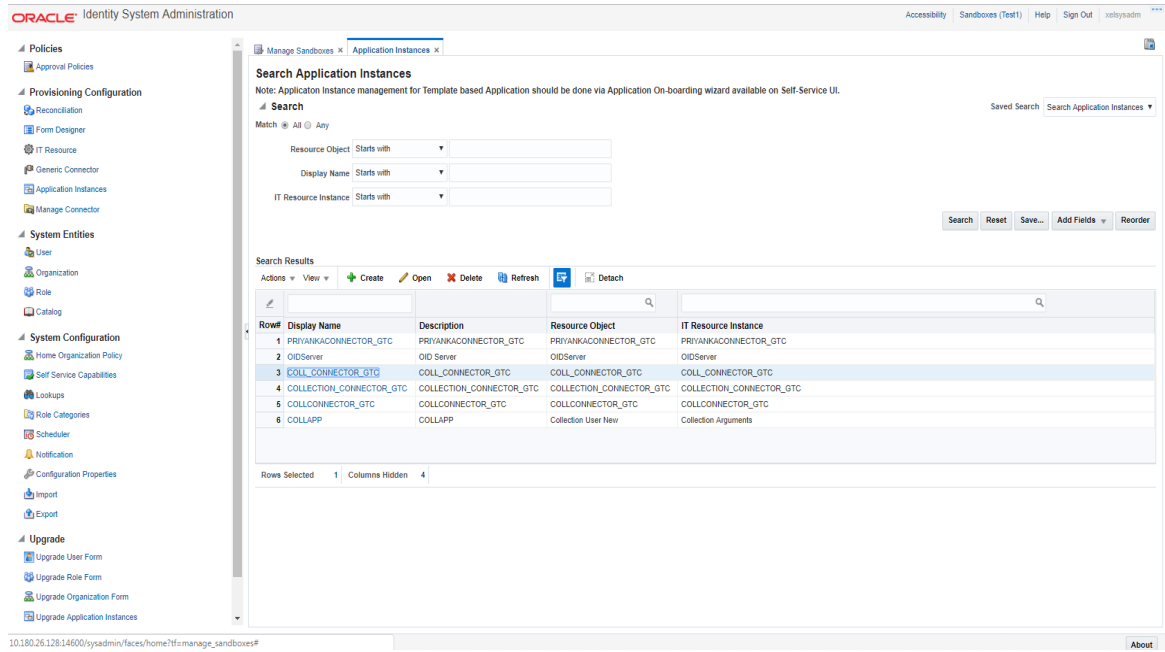
- Click **Save and Close**.
- Click the **Back to Parent Object** Link.

19. Close **Manage SampleForm** tab.

Steps to associate the form with the application instance:

1. Click the **Application Instances** Menu. Click **Search** and select **COLL_CONNECTOR_GTC**.

Figure 2–33 Search Application Instances and select COLL_CONNECTOR_GTC



2. Click the **Attributes** tab.

Figure 2–34 Application Instance Attributes

The screenshot shows the Oracle Identity System Administration interface. The left sidebar contains a navigation menu with categories: Policies, Provisioning Configuration, System Entities, System Configuration, and Upgrade. The main content area is titled 'Application Instance: COLL_CONNECTOR_GTC' and has three tabs: 'Attributes' (selected), 'Organizations', and 'Entitlements'. Below the tabs are buttons for '*Required Field', 'Apply', and 'Revert'. The form fields are as follows:

- Name: COLL_CONNECTOR_GTC
- * Display Name: COLL_CONNECTOR_GTC
- Description: COLL_CONNECTOR_GTC
- Resource Object: COLL_CONNECTOR_GTC
- IT Resource Instance: COLL_CONNECTOR_GTC
- Form: (dropdown menu)
- Parent Appliance: (dropdown menu)

At the bottom of the page, there is a footer with the text: 'Copyright © 2001, 2017, Oracle and/or its affiliates. All rights reserved.'

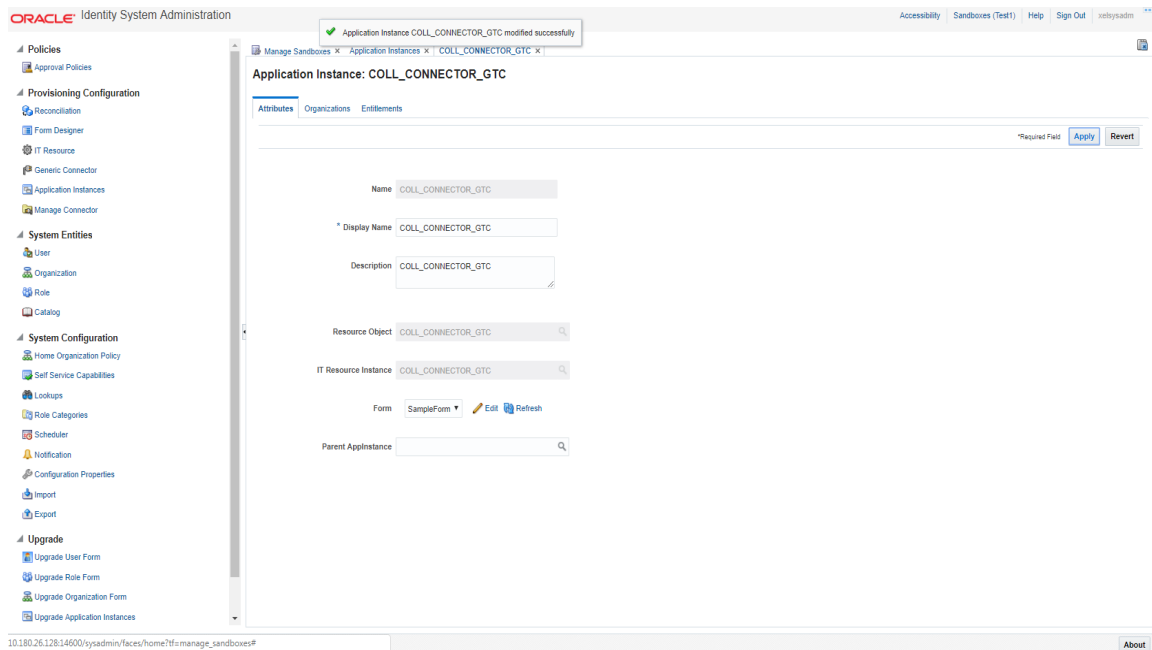
3. In Form dropdown select above created form and click **Apply**.

Figure 2–35 Associate Form with Application instance

This screenshot is similar to Figure 2-34, but the 'Form' dropdown menu is now open, and 'SampleForm' is selected. The 'Parent Appliance' dropdown menu also shows 'SampleForm' as an option. The rest of the interface, including the sidebar and other form fields, remains the same as in Figure 2-34.

4. Message 'Application instance modified successfully' is displayed.

Figure 2–36 Success message



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

2.3.5 Create - Oracle Banking Collections and Oracle Banking Recovery Access Policy and Role

2.3.5.1 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 For example: Collection_Users. Also, Collection_Users is applied to user through membership rule. Thus, policy will be applied to user and the user would be provisioned to resource - Oracle Banking Collections and Oracle Banking Recovery User.

Note

Here, we have used Collection_Users Role, but it can be changed as required. See [Section 2.3.5.2 Creating Roles](#) for Role Creation.

1. Log in to the Identity Self Service.
2. Click **Manage** and then click **Roles and Access Policies**.

3. Select the **Access Policies**. The Search Access Policies page is displayed.

Figure 2–37 Identity Self Service – Manage tab

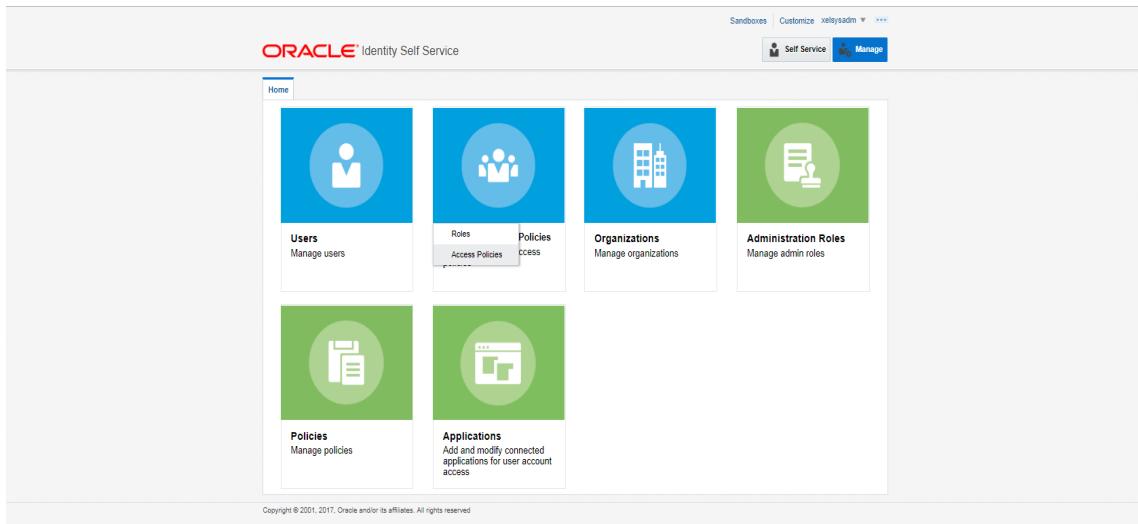
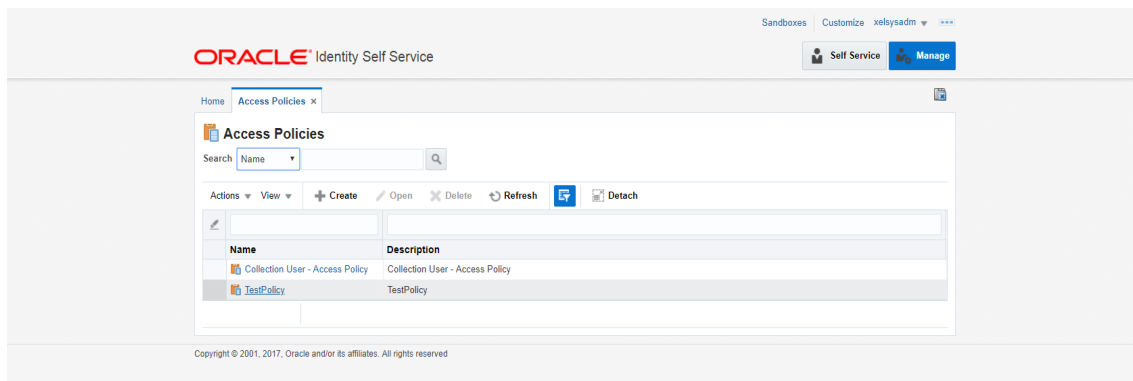


Figure 2–38 Access Policies



- Click **Create**. Create Access Policy Page is displayed.

Figure 2–39 Create Access Policy

The screenshot shows the Oracle Identity Self Service interface. At the top, there's a navigation bar with 'Sandboxes', 'Customize', and 'xelsysadm'. Below that, the 'Create Access Policy' page is displayed. A progress bar indicates the current step is 'Attributes', with 'Applications' as the next step. The 'General Attributes' section includes the following fields:

- Name:** A text input field.
- Description:** A larger text input field.
- Owner:** A dropdown menu set to 'User' and a search field containing 'System Administrator'.
- Retrofit:** A checkbox that is checked.
- Priority Level:** A dropdown menu set to '3'.

- Enter following details (for example) and click **Next**.
 - Name:** Coll_AccessPolicy
 - Description:** Coll_AccessPolicy

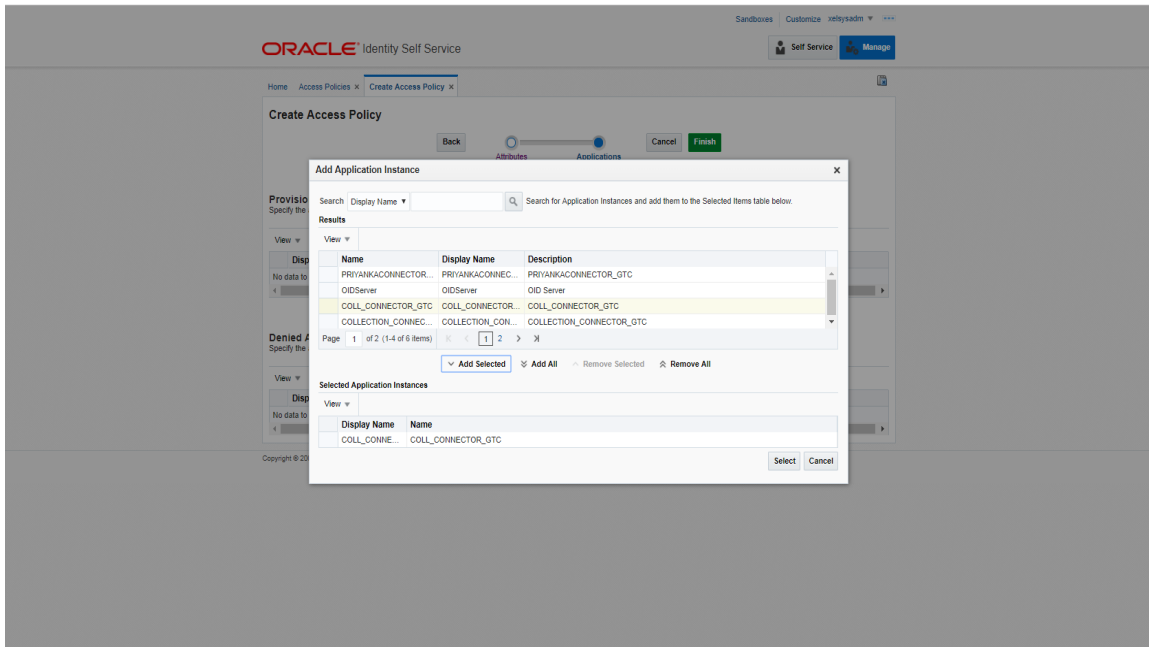
Figure 2–40 Access Policy details

This screenshot shows the same 'Create Access Policy' page as Figure 2-39, but with the 'General Attributes' section populated with the following values:

- Name:** Coll_AccessPolicy
- Description:** Coll_AccessPolicy
- Owner:** System Administrator
- Retrofit:** Checked
- Priority Level:** 3

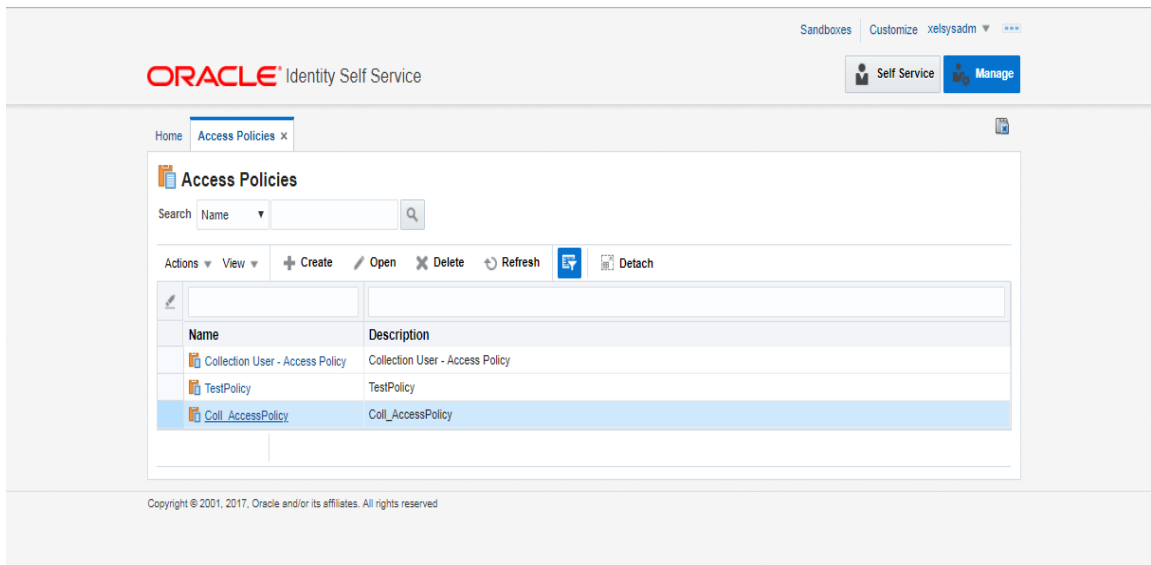
- To specify the application instances provisioned by this access policy, click **Add** and select **COLL_CONNECTOR_GTC** Application Instance. Click **Select**.

Figure 2–41 Add application instance associated with access policy



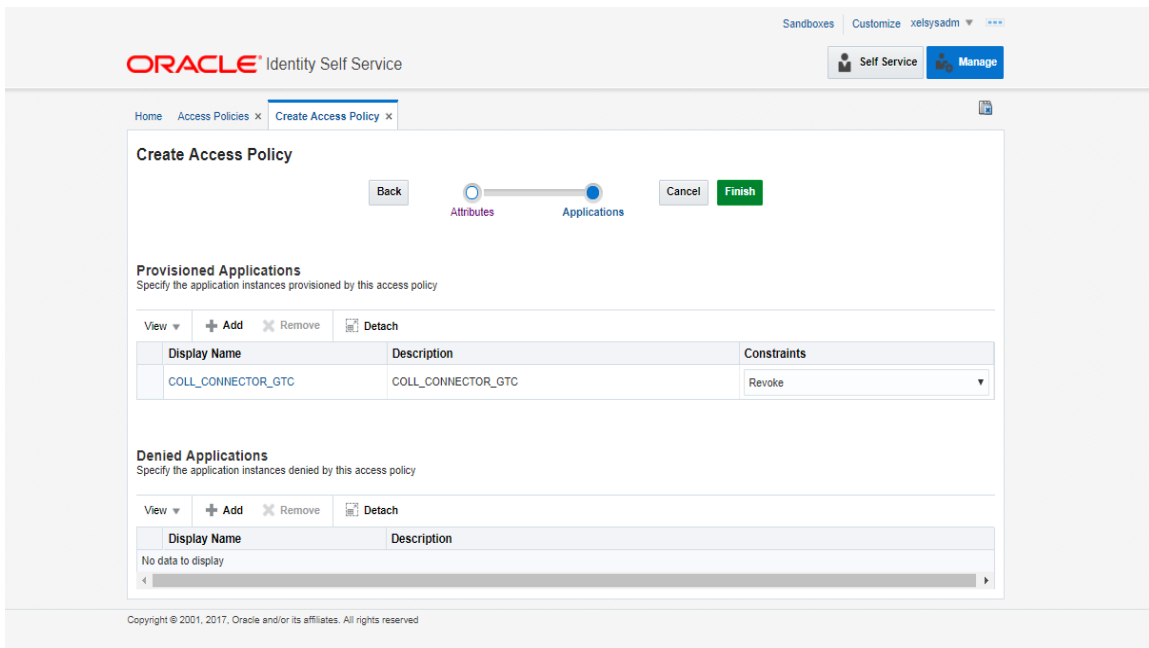
7. Click **Finish**.
8. In the Search Access Policies Page, select the above created policy and click the **Applications** tab.

Figure 2–42 Search Access Policy



9. COLL_CONNECTOR_GTC application would be listed in the Provisioned Applications list.

Figure 2–43 Provisioned applications for the policy



10. Click the COLL_CONNECTOR_GTC application. Provide default values for the General Attributes and Child Form fields.
 - **objectClass: User**
 - **userGroup: ALL_SERVICES**
 - **expirationDate: 2100-01-01**

Figure 2–44 Application Attributes

ORACLE Identity Self Service

Sandboxes Customize xelsysadm

Self Service Manage

Home Access Policies x Access Policy - Coll_Acce... x

Access Policy - Coll_AccessPolicy

Attributes Applications Roles

Save Cancel

General Attributes

containerID ID

objectclass User IT Resource2 122

Child Form of COLL_CONNECTOR representing child-dataset : userGroupUser

Select Search

View + Add X Delete X Delete All Detach

	userGroup ^ v	expirationDate ^ v	Pending Action ^ v
1	ALL_SERVICES	11/30/2021	Add

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11. Click **Save** and **Apply**.

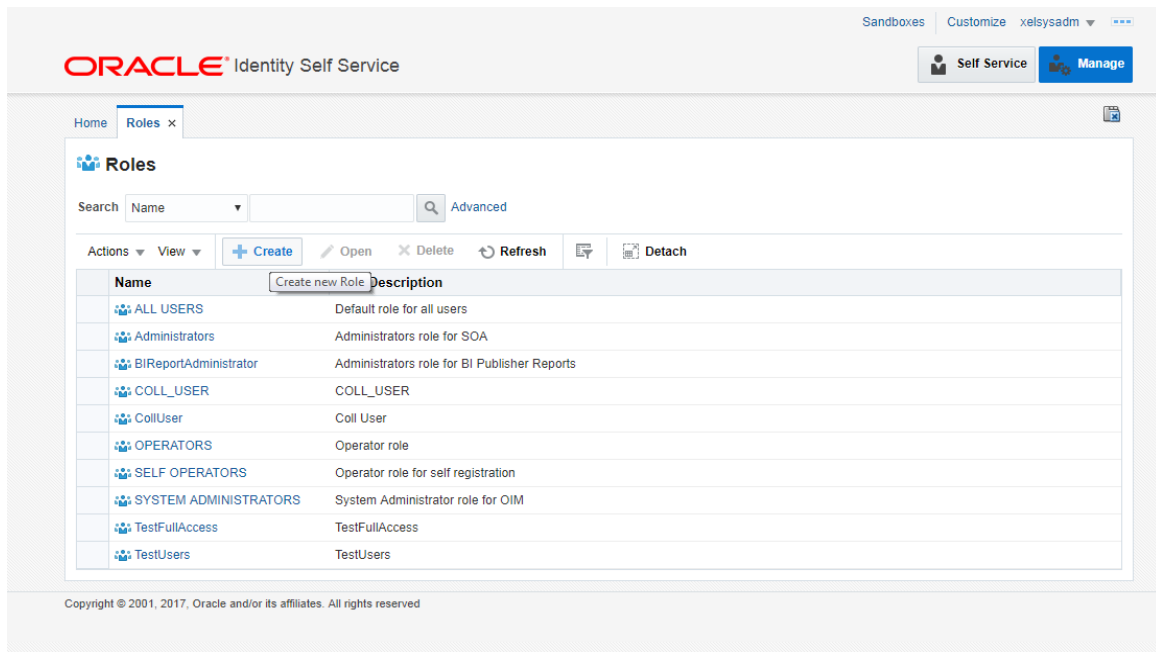
2.3.5.2 Creating Roles

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

1. Log in to Identity Self Service.
2. Click **Manage** and then, click **Roles and Access Policies**.

3. Select **Roles**. The Search Roles page is displayed.

Figure 2–45 Oracle Identity Self Service- Roles Tab



4. Click **Create** on the toolbar. The Create Role page is displayed.
5. Specify the following values and then click **Next**.
 - **Name:** Collection_Users
 - **Display Name:** Collection_Users
 - **Role Description:** Default Role for all Oracle Banking Collections and Oracle Banking RecoveryUser.
 - **Role Category:** Default

Figure 2–46 Create Role

ORACLE Identity Self Service

Sandboxes Customize xelsysadm

Self Service Manage

Home Roles x Create Role x

Create Role

This wizard walks you through the steps to create a Role.

Back Attributes Hierarchy Access Policy Members Organizations Summary Cancel Next

General Role Information

* Name

* Display Name

Role E-mail

Role Description

* Owned By

▾ Catalog Attributes

* Category

Audit Objective

Risk Level

User Defined Tags

Approver User

Approver Role

Certifier User

Certifier Role

Fulfillment User

Fulfillment Role

Certifiable

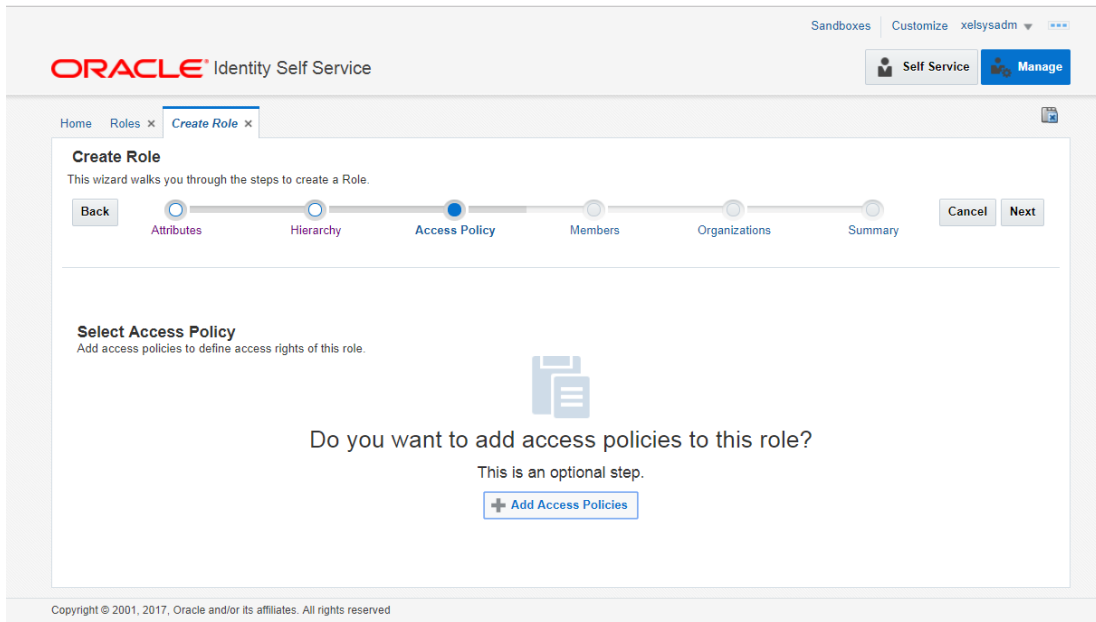
Auditable

Requestable

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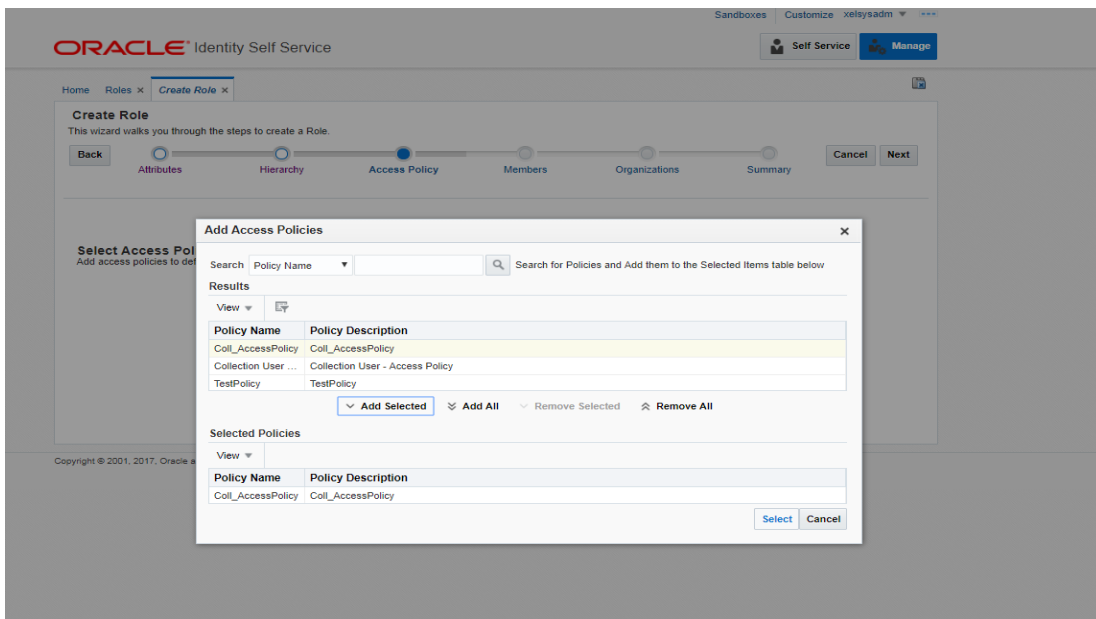
- Click **Next** to go to the Access Policy step.

Figure 2–47 Create Role



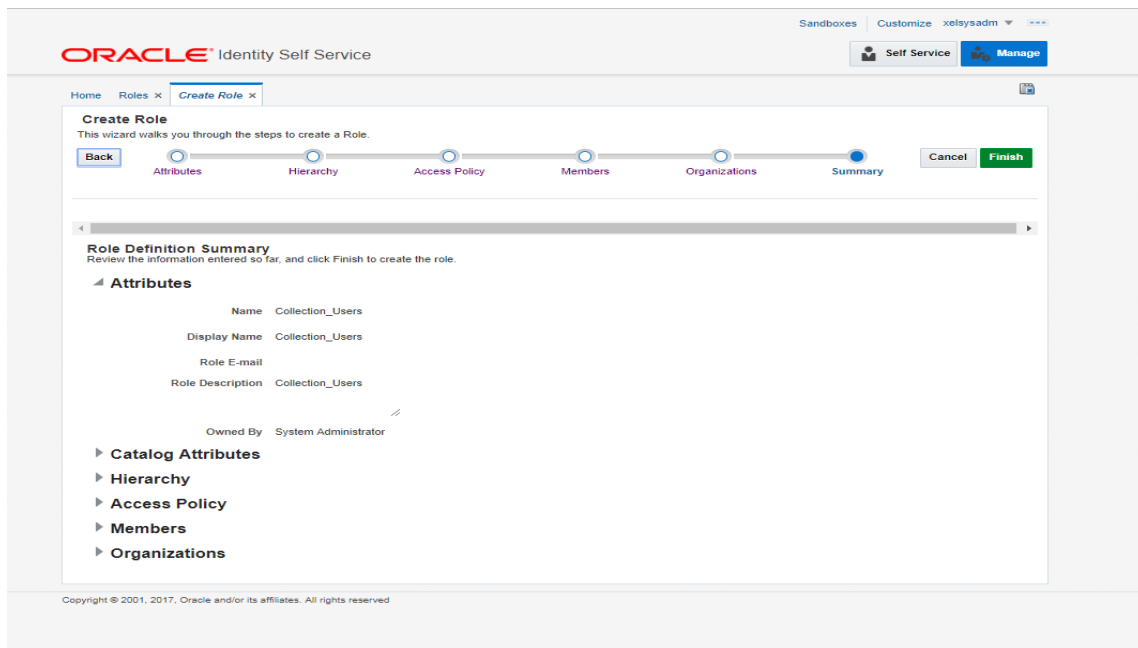
- Click **Add Access Policies**. List of access policies is displayed on clicking the search icon.

Figure 2–48 Add Access Policy to the role



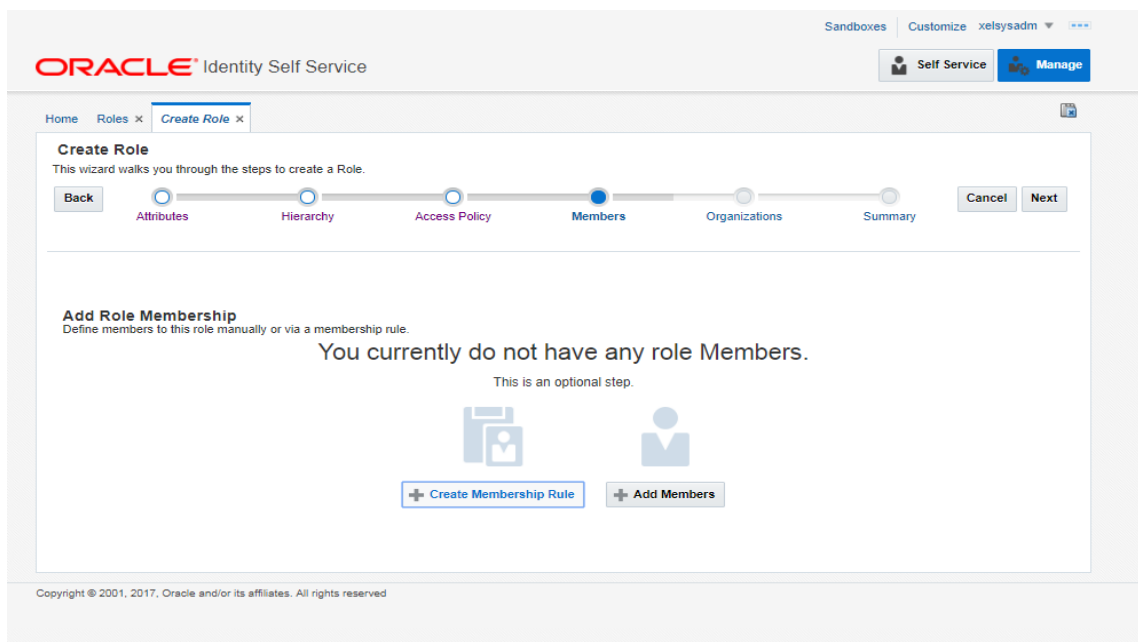
8. Select above created access policy (eg: Coll_AccessPolicy) and click **Next**.

Figure 2–49 Add Access Policy to the role



9. In the Members Step, click **Create Membership Rule**.

Figure 2–50 Create Membership Rule



10. Create rule such that Collection_Users role is assigned to a User that needs to be provisioned to Oracle Banking Collections and Oracle Banking Recovery. Here we have defined Rule Based on Organization.

Build the rule expression as follows:

Select **Organization** attribute, operand: '=' and RHS operand value='Xellerate Users' (literal)

Figure 2–51 Build Membership Rule Expression

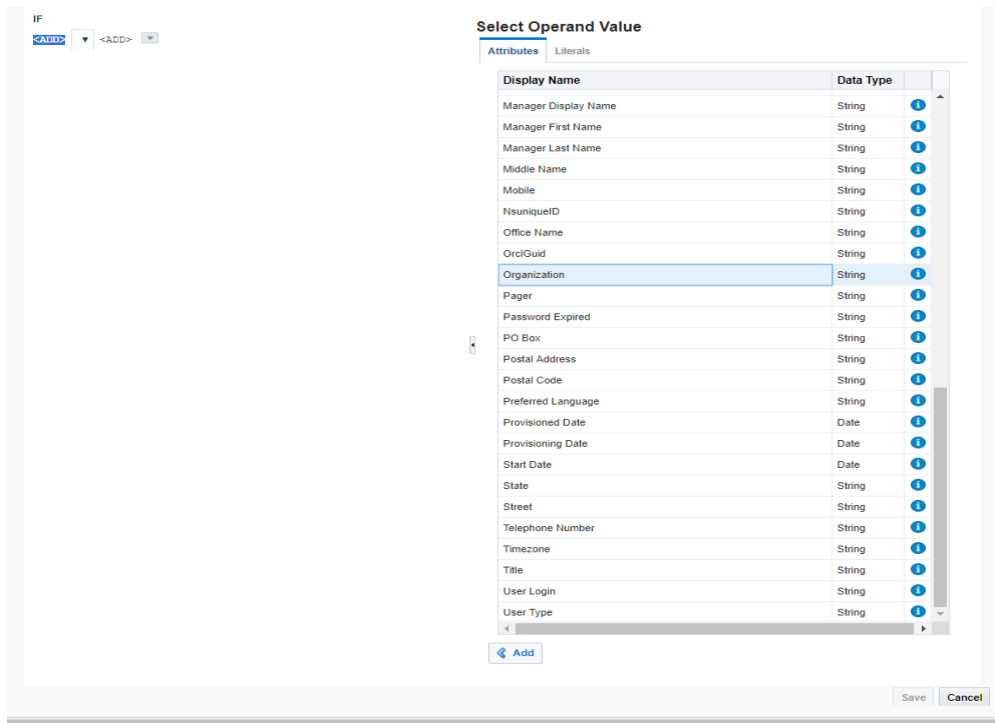
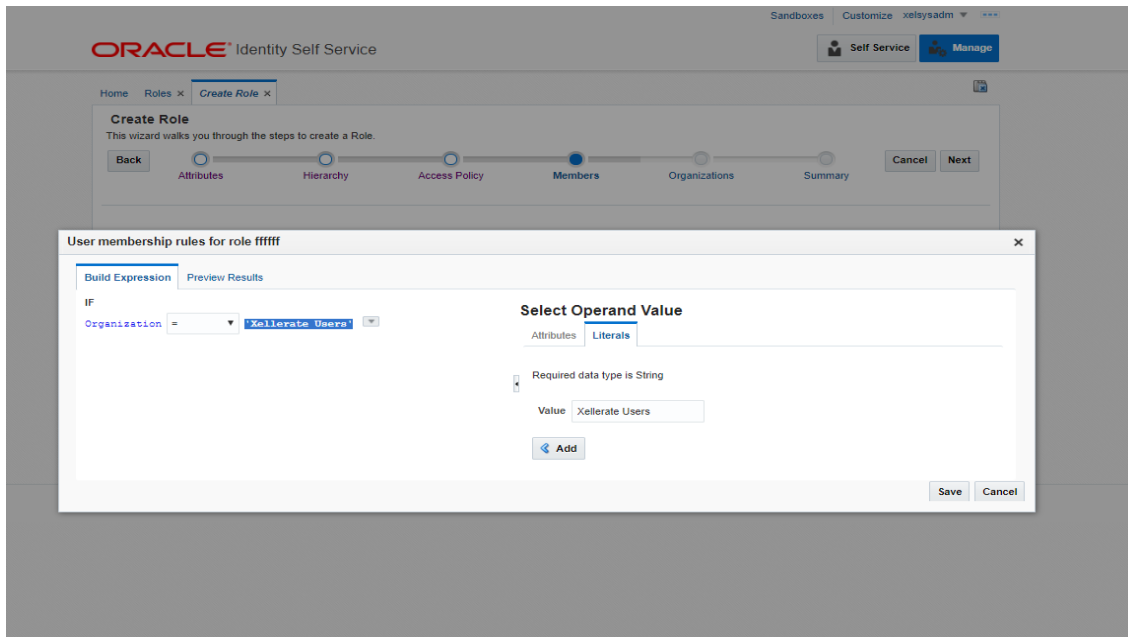


Figure 2–52 Build Membership Rule Expression

11. Click **Save**.

3 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 Oracle Banking Collections and Oracle Banking Recovery 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 Oracle Banking Collections and Oracle Banking Recovery.

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

Table 3–1 Oracle Banking Collections and Oracle Banking Recovery 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	Oracle Banking Collections and Oracle Banking Recovery User Group represents User Group in Oracle Banking Collections and Oracle Banking Recovery. For every User, default User Group is populated in Oracle Banking Collections and Oracle Banking Recovery.
End Date	Date	N	Y	User's Log in expiry date.	

Note

- User creation from Native Oracle Banking Collections and Oracle Banking Recovery is primarily discouraged. But in case of any failure in provisioning through OIM you can create or update the users through Native Oracle Banking Collections and
-

Oracle Banking Recovery screen. Below are the constraints to be followed when user is to be created through Native Oracle Banking Collections and Oracle Banking Recovery:

- Oracle Banking Collections and Oracle Banking Recovery 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 Oracle Banking Collections and Oracle Banking Recovery screen.

Figure 3–1 Create User - Mandatory and Optional Attributes

The screenshot shows the Oracle Identity Self Service 'Create User' form. The form is titled 'Create User' and includes sections for Request Information, Basic Information, Account Settings, Account Effective Dates, and Provisioning Dates. Fields include Effective Date, Justification, First Name, Middle Name, Last Name, E-mail, Manager, Organization, User Type, Display Name, User Login, Password, Confirm Password, Start Date, End Date, and Provisioning Date. Buttons for Submit, Save As..., and Cancel are visible at the top right.

Collections Mandatory Attributes:

1. First Name
2. Last Name
3. Email
4. User Login

Collections Optional Attribute:

1. End Date

4 Create, Modify, Delete Users

4.1 Creation and provisioning of User from OIM to ORMB

1. Login OIM Self Service Identity.
2. Click **Users** and then click **Create**.
The Create User tab opens.

Figure 4–1 Create User in Oracle Self Service Identity

The screenshot shows the 'Create User' form in the Oracle Identity Self Service interface. The form is organized into several sections:

- Request Information:** Includes 'Effective Date' (11/13/2018) and 'Justification' (Test User).
- Basic Information:** Includes 'First Name' (Bela), 'Middle Name', 'Last Name' (Swan), 'E-mail', 'Manager', 'Organization' (Xellerate Users), 'User Type' (Full-Time Employee), and 'Display Name'.
- Account Settings:** Includes 'User Login' (BelaSwan), 'Password', and 'Confirm Password'.
- Account Effective Dates:** Includes 'Start Date' and 'End Date'.
- Provisioning Dates:** Includes 'Provisioning Date'.

At the top right of the form area, there are buttons for 'Submit', 'Save As...', and 'Cancel'. The Oracle logo and 'Identity Self Service' text are visible at the top left of the page.

3. Provide the user details such as FirstName, LastName, UserLogin, Password, Organization='Xellerate Users', UserType and so on.

Figure 4–2 Input User Attributes

The screenshot displays the Oracle Identity Self Service 'Create User' form. The form is titled 'Create User' and includes a 'Submit' button. The form is organized into several sections:

- Request Information:** Includes 'Effective Date' (11/13/2016) and 'Justification' (Test User).
- Basic Information:** Includes 'First Name' (Bella), 'Middle Name', 'Last Name' (Svan), 'E-mail', 'Manager', 'Organization' (Xelerate Users), 'User Type' (Full-Time Employee), and 'Display Name'.
- Account Settings:** Includes 'User Login' (BellaSvan), 'Password', and 'Confirm Password'.
- Account Effective Dates:** Includes 'Start Date' and 'End Date'.
- Provisioning Dates:** Includes 'Provisioning Date'.

The form also includes a 'Show all' button at the bottom right and an 'export (1).xml' button at the bottom left.

4. Click **Submit**.
5. In the Search Users page, click **refresh**. The above created user is visible.

- Click on the above created User.

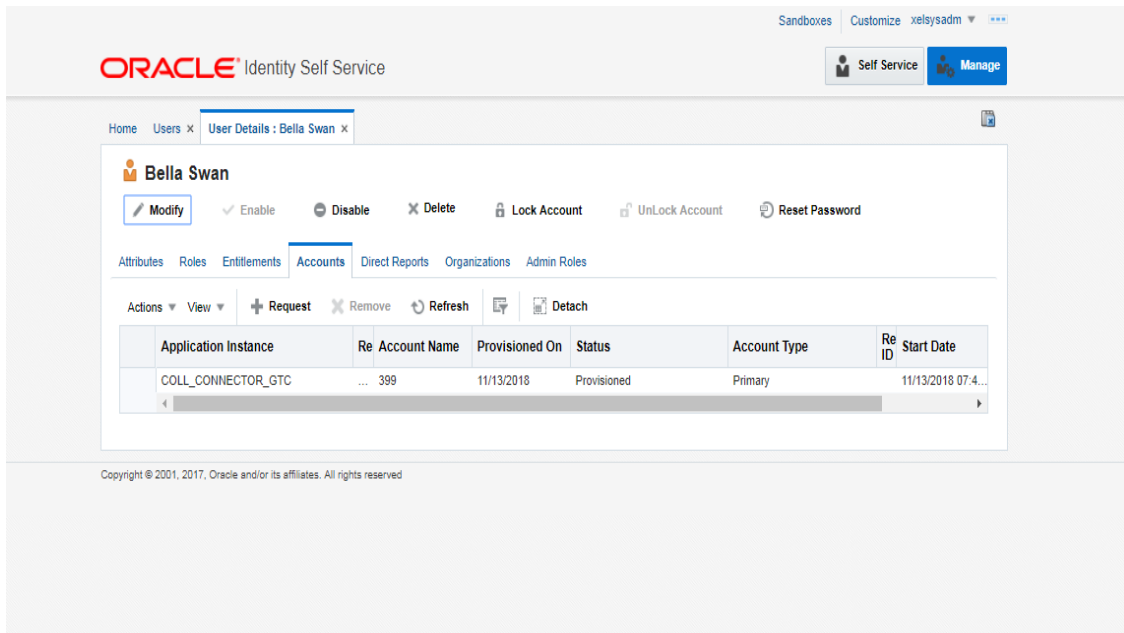
Figure 4–3 Search and select the added User

The screenshot displays the Oracle Identity Self Service interface for managing users. The main content area is titled 'Users' and features a search bar with the text 'Display Name' and an 'Advanced' search option. Below the search bar is a toolbar with various actions: Create, Edit, Enable, Disable, Delete, Lock Account, Unlock Account, and Reset Password. The user list table has the following columns: User Login, DN, First Name, Last Name, Organization, Telephone Number, E-mail, Identity Status, and Account Status. The user 'BELLASWAN' is selected, with a blue highlight. The user details for 'BELLASWAN' are: User Login: BELLASWAN, DN: B Swam, First Name: B, Last Name: Swam, Organization: Xelerate Users, Identity Status: Active, and Account Status: Unlocked. The page footer includes the text 'Copyright © 2011, 2017, Oracle and/or its affiliates. All rights reserved.' and a 'Show all' button.

User Login	DN	F Name	Last Name	Organization	Telephone Number	E-mail	Identity Status	Account Status
12JUNE_PARTYID	...	12June_PartyId	Xelerate Users				Active	Unlocked
12JUNE_PARTYID_2	...	12June_PartyId_2	Xelerate Users				Active	Unlocked
17JUL_1_TIMEZONE	...	17Jul_1_timezone	Xelerate Users				Active	Unlocked
18MAY_1	...	18May_1	Xelerate Users				Active	Unlocked
21MAY_1	...	21May_1	Xelerate Users				Active	Unlocked
21MAY_TARGETUNIT1	...	21May_targetunit1	Xelerate Users				Active	Unlocked
21MAY_TARGETUNIT2	...	21May_target...	Xelerate Users				Active	Unlocked
21_MAY_CUSTOM1	...	21_May_Custom1	Xelerate Users				Active	Unlocked
22NDMAY_ACCESSIBLEBU	...	22ndMay_Acces...	Xelerate Users				Active	Unlocked
40CT2018_1	...	40c2018_1	Xelerate Users				Active	Unlocked
40CT2018_2@ORACLE.COM	...	40c2018_2	Xelerate Users				Active	Unlocked
6_OCT_2018_1@ORACLE.COM	...	6_Oct_2018_1	Xelerate Users				Active	Unlocked
8JAN@ORACLE.COM	...	8jan	Xelerate Users				Active	Unlocked
8OCT_2018	...	8oct_2018	Xelerate Users				Active	Unlocked
ACC_BU_TAR	...	Acc_Bu_TAR	Xelerate Users			Acc_Bu_TAR@...	Active	Unlocked
AMT1.LNAME@ORACLE.COM	...	A Lname	Xelerate Users				Active	Unlocked
AMT3.LNAME@ORACLE.COM	...	A Lname	Xelerate Users				Active	Unlocked
AMT4.LNAME@ORACLE.COM	...	A Lname	Xelerate Users				Active	Unlocked
AMT5.LNAME@ORACLE.COM	...	A Lname	Xelerate Users				Active	Unlocked
AMT6.LNAME@ORACLE.COM	...	A Lname	Xelerate Users				Active	Unlocked
AMT7.LNAME@ORACLE.COM	...	A Lname	Xelerate Users				Active	Unlocked
AMT8.LNAME@ORACLE.COM	...	A Lname	Xelerate Users				Active	Unlocked
ANILK	...	anilk	Xelerate Users			anilk@oracle.com	Active	Unlocked
ANIL_NEW	...	anil_new	Xelerate Users				Active	Unlocked
BELLASWAN	...	B Swam	Xelerate Users				Active	Unlocked

7. Go to the Applications tab.

Figure 4–4 Applications provisioned to User



8. Verify the COLL_CONNECTOR_GTC application is in 'Provisioned' status.

4.2 Oracle Banking Collections and Oracle Banking Recovery Configuration

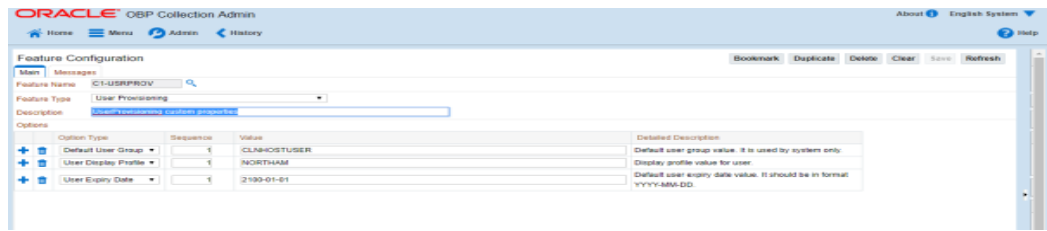
Oracle Banking Collections and Oracle Banking Recovery provides feature configuration C1-USRPROV to specify default values of the following:

- **Default User Group:** Default Oracle Banking Collections and Oracle Banking Recovery User Group. It is used by system only; user should not add it manually. See the Oracle Banking Collections and Oracle Banking Recovery Day Zero Setup guide to get configured default user group.
- **User Display Profile:** Display profile value for Oracle Banking Collections and Oracle Banking Recovery 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 4–5 Collections Configuration



4.3 Modify Users in Oracle Banking Collections and Oracle Banking Recovery

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. Login to Oracle Self Service Identity. In the Manage tab, you can search for the user from Users tab and then click the searched user data to view its detail.

Figure 4–6 Searching User

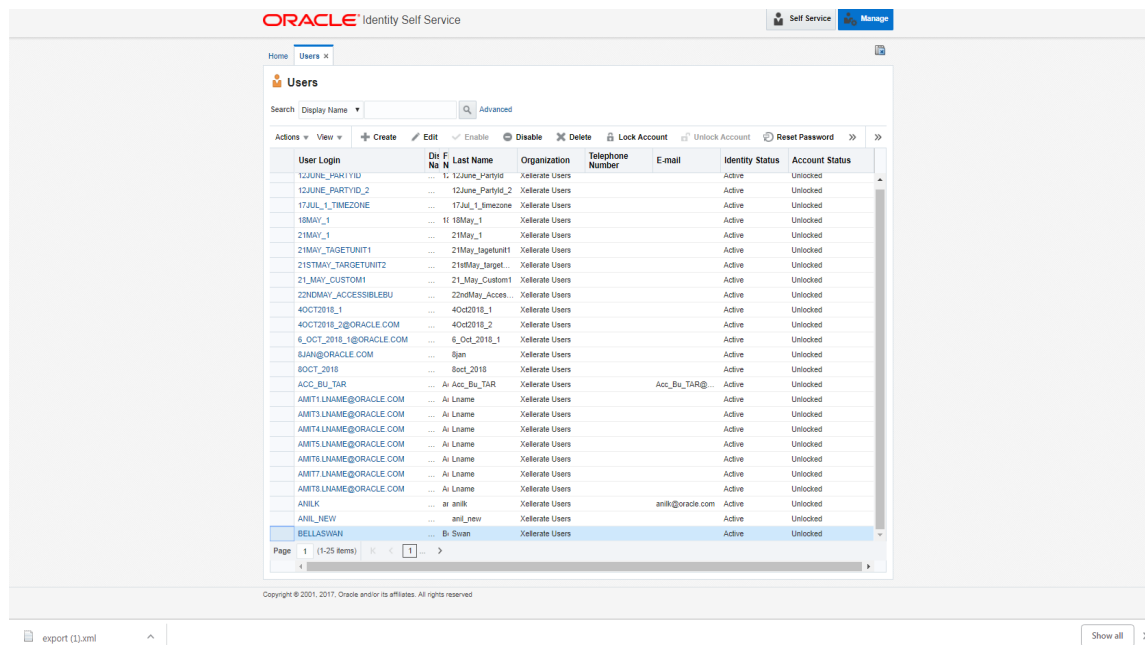
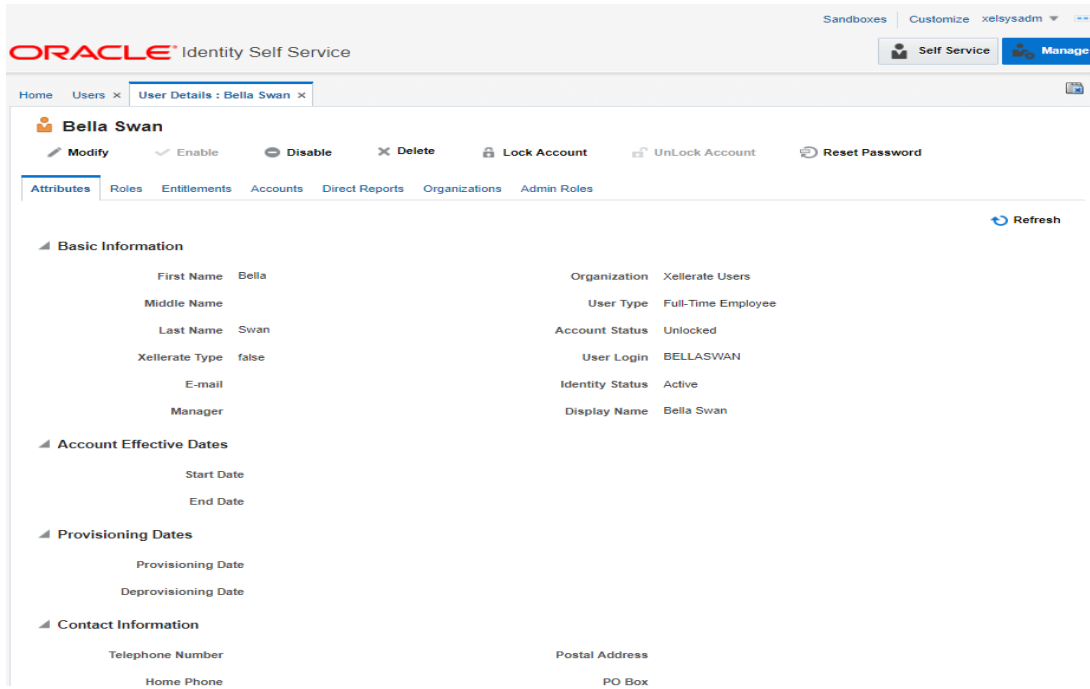


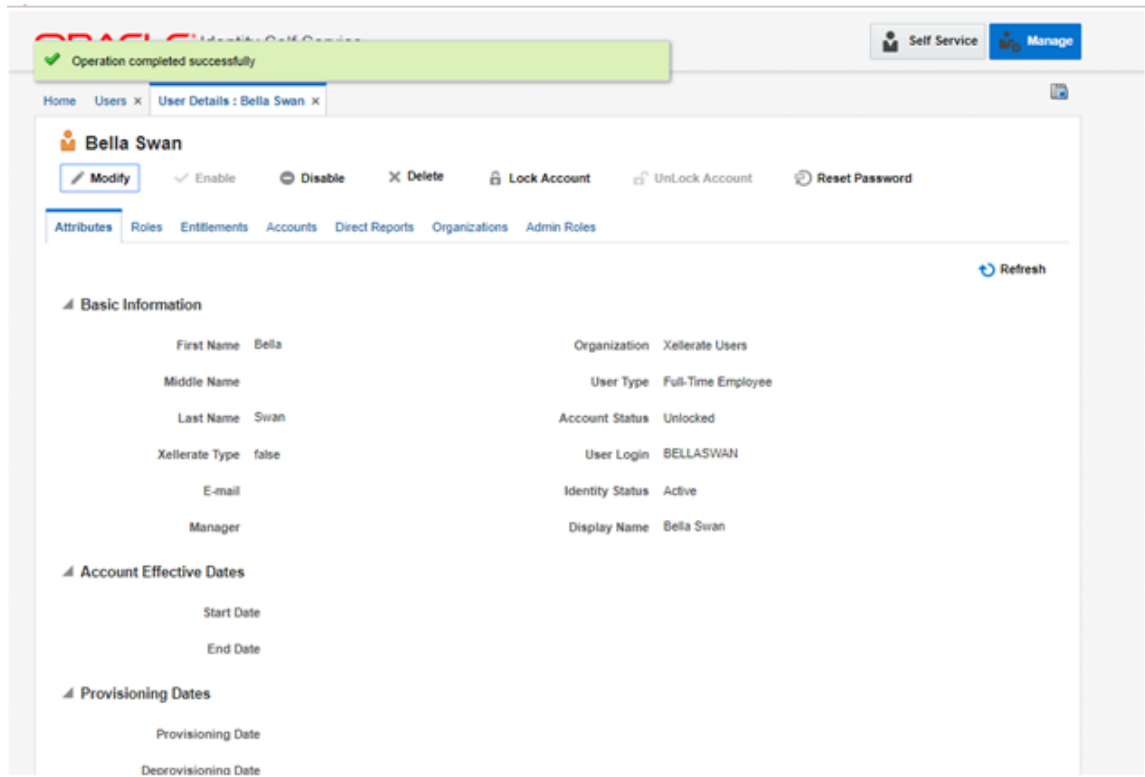
Figure 4–7 Detailed Information about the User



To modify a user, perform the below steps:

1. Click **Modify** 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 Oracle Banking Collections and Oracle Banking Recovery.

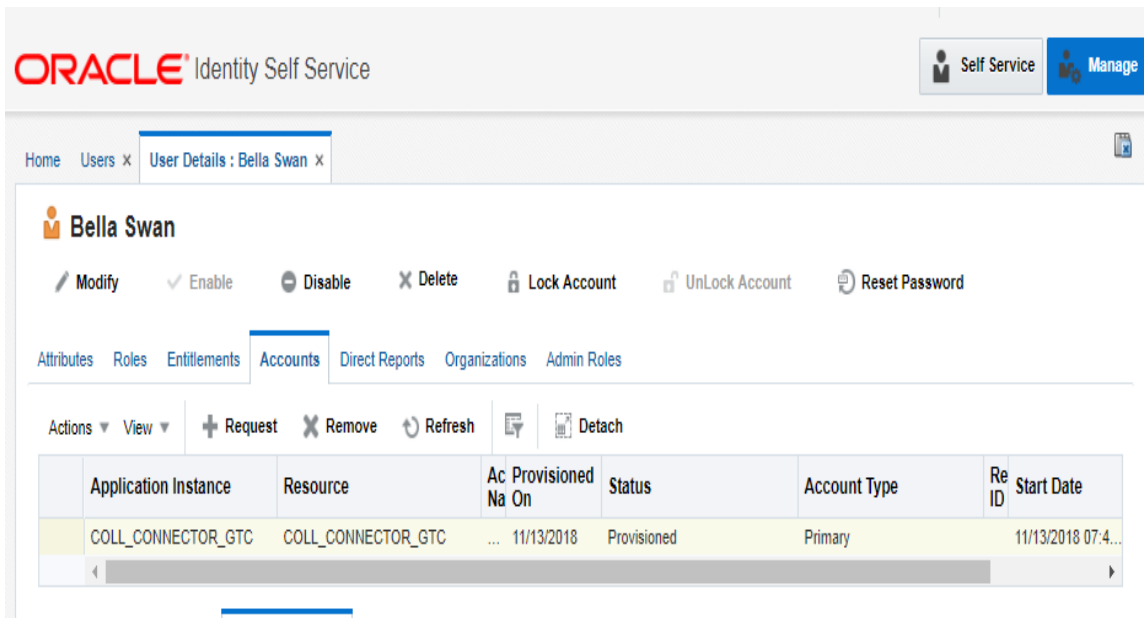
Figure 4–8 Modify User Confirmation



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

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

Figure 4–9 Viewing Modified and Provisioned User Details



5. Select the account to view the modified values in **Detail Information** section.
6. To modify the Oracle Banking Collections and Oracle Banking Recovery 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**.

Figure 4–10 Modify Detail Information

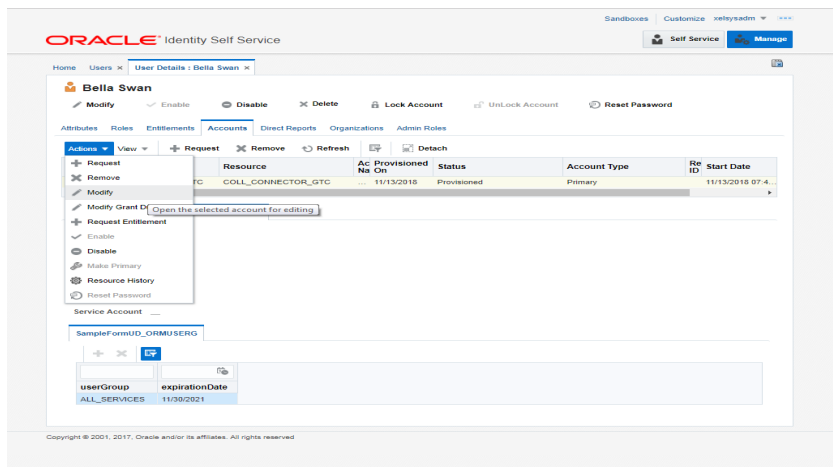


Figure 4–11 Edit Detail Information

ORACLE Identity Self Service

Home Users x User Details : Bella Swan x **Modify Account** x

Submit Save As...

Modify Account

Target Users

Name
Bella Swan

Request Information

Effective Date

Justification

Cart Items

Display Name
399@COLL_CONNECTOR_GTC
COLL_CONNECTOR_GTC

Request Details 399@COLL_CONNECTOR_GTC Update

Edit Account details

containerID

objectclass User

ID
SampleFormUD_ORMUSERG

userGroup expirationDate
ALL_SERVICES 11/30/2021

- c. Click Update and then Submit.
- d. 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 4–12 Viewing Changes

ORACLE Identity Self Service

Home Users x **User Details : Bella Swan** x

Bella Swan

Modify Enable Disable Delete Lock Account UnLock Account Reset Password

Attributes Roles Entitlements **Accounts** Direct Reports Organizations Admin Roles

Actions View Request Remove Refresh Detach

Application Instance	Resource	Ac Na	Provisioned On	Status	Account Type	Re ID	Start Date
COLL_CONNECTOR_GTC	COLL_CONNECTOR_GTC	...	11/13/2018	Provisioned	Primary		11/13/2018 0

COLL_CONNECTOR_GTC Detail Information

Details

containerID

objectclass User

ID

Service Account

SampleFormUD_ORMUSERG

userGroup expirationDate
ALL_SERVICES 11/28/2024

4.4 Delete Users in Oracle Banking Collections and Oracle Banking Recovery

Once user is successfully provisioned it can be deleted from Oracle Banking Collections and Oracle Banking Recovery supports soft delete that is, it only expires User. User deletion request for Oracle Banking Collections and Oracle Banking Recovery 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.

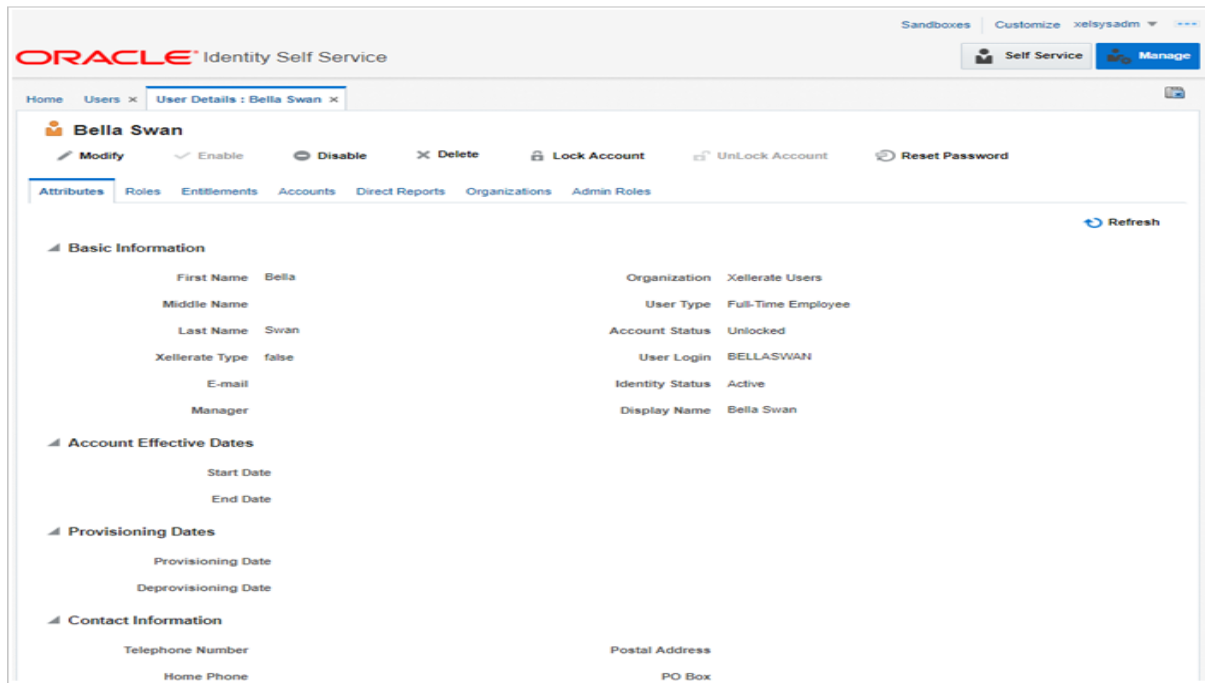
You can search and delete user. You can search for the user from **Search** panel and then click the searched user data to view its detail.

Figure 4–13 Searching Users To Delete

The screenshot displays the Oracle Identity Self Service interface for user management. The 'Users' tab is selected, and a search bar is present at the top. Below the search bar, there is a table of users with the following columns: User Login, Dis No, Last Name, Organization, Telephone Number, E-mail, Identity Status, and Account Status. The table contains a list of users, with the 'BELLASWAN' user highlighted at the bottom. The interface also includes action buttons such as 'Create', 'Edit', 'Enable', 'Disable', 'Delete', 'Lock Account', 'Unlock Account', and 'Reset Password'.

User Login	Dis No	Last Name	Organization	Telephone Number	E-mail	Identity Status	Account Status
12JUNE_PARTYID	1	12June_Partyid	Xelerate Users			Active	Unlocked
12JUNE_PARTYID_2		12June_Partyid_2	Xelerate Users			Active	Unlocked
17JUL_1_TIMEZONE		17Jul_1_timezone	Xelerate Users			Active	Unlocked
18MAY_1	1	18May_1	Xelerate Users			Active	Unlocked
21MAY_1		21May_1	Xelerate Users			Active	Unlocked
21MAY_TAGETUNIT1		21May_tagetunit1	Xelerate Users			Active	Unlocked
21STMAY_TARGETUNIT2		21stMay_target...	Xelerate Users			Active	Unlocked
21_MAY_CUSTOM1		21_May_Custom1	Xelerate Users			Active	Unlocked
22NDMAY_ACCESSIBLEBU		22ndMay_Acces...	Xelerate Users			Active	Unlocked
4OCT2018_1		4Oct2018_1	Xelerate Users			Active	Unlocked
4OCT2018_2@ORACLE.COM		4Oct2018_2	Xelerate Users			Active	Unlocked
6_OCT_2018_1@ORACLE.COM		6_Oct_2018_1	Xelerate Users			Active	Unlocked
8JAN@ORACLE.COM		8jan	Xelerate Users			Active	Unlocked
8OCT_2018		8Oct_2018	Xelerate Users			Active	Unlocked
ACC_BU_TAR	A	Acc_Bu_TAR	Xelerate Users		Acc_Bu_TAR@...	Active	Unlocked
AMIT1 LNAME@ORACLE.COM	A	Lname	Xelerate Users			Active	Unlocked
AMIT3 LNAME@ORACLE.COM	A	Lname	Xelerate Users			Active	Unlocked
AMIT4 LNAME@ORACLE.COM	A	Lname	Xelerate Users			Active	Unlocked
AMIT5 LNAME@ORACLE.COM	A	Lname	Xelerate Users			Active	Unlocked
AMIT6 LNAME@ORACLE.COM	A	Lname	Xelerate Users			Active	Unlocked
AMIT7 LNAME@ORACLE.COM	A	Lname	Xelerate Users			Active	Unlocked
AMIT8 LNAME@ORACLE.COM	A	Lname	Xelerate Users			Active	Unlocked
ANILK	a	anilk	Xelerate Users		anilk@oracle.com	Active	Unlocked
ANIL_NEW	a	anil_new	Xelerate Users			Active	Unlocked
BELLASWAN	B	Swan	Xelerate Users			Active	Unlocked

Figure 4–14 View User Details



1. Click Delete Icon to delete user.
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.

5 Verification

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

5.1 Verification of OIM Configuration

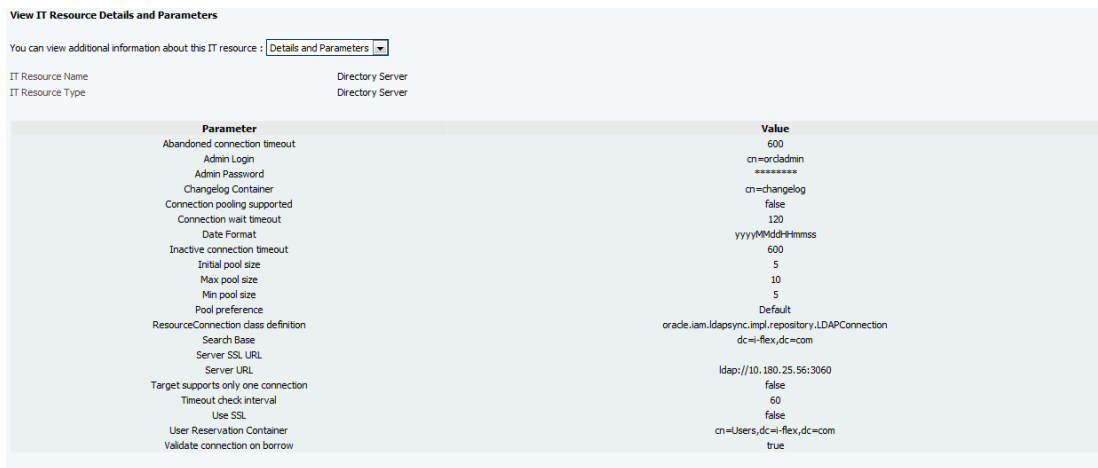
To verify OIM configuration, follow the steps:

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



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 Oracle Banking Collections and Oracle Banking Recovery

Following steps are required to verify users in native Oracle Banking Collections and Oracle Banking Recovery after provisioning:

1. Log in to Oracle Banking Collections and Oracle Banking Recovery Native UI using administrative credentials.

`http://<Host>:<Port>/CollectionAdmin/cis.jsp`

Figure 5–2 Oracle Banking Collections and Oracle Banking Recovery Native Login screen



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

Figure 5–3 User Screen - User Navigation

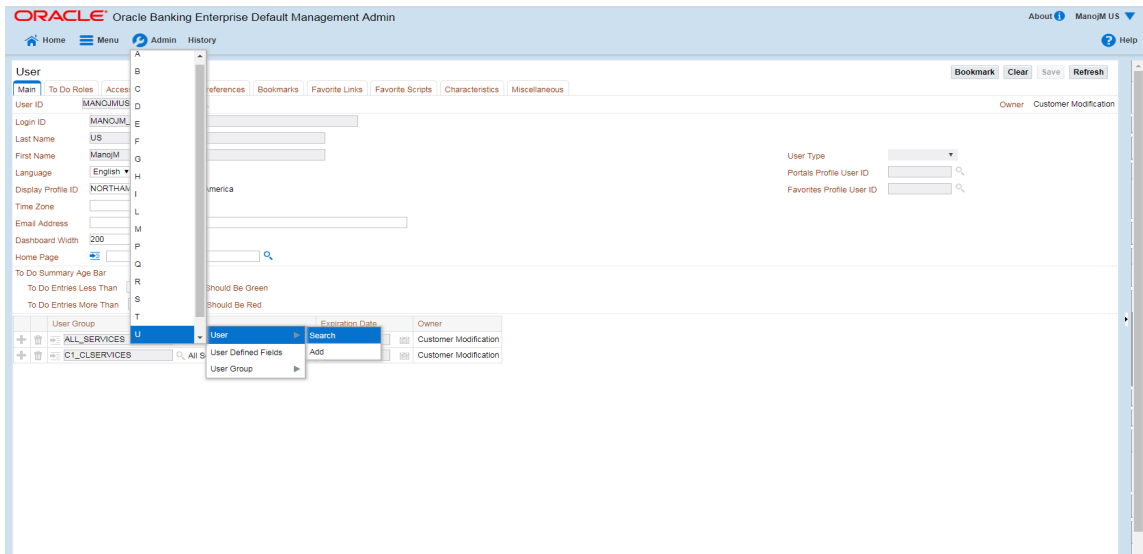
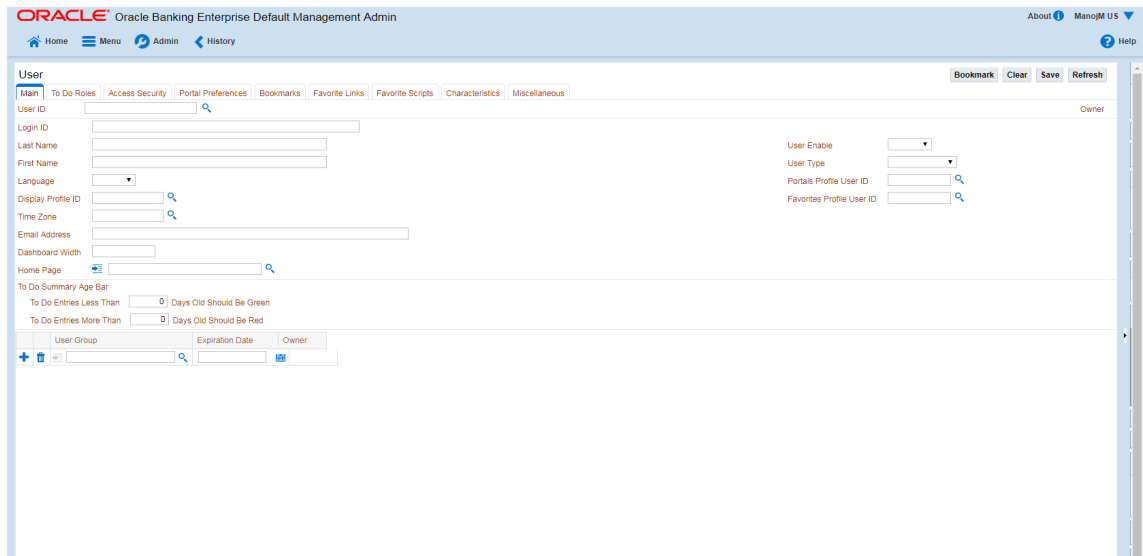


Figure 5–4 User Screen - Main Tab



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

Figure 5–5 Searching Particular User

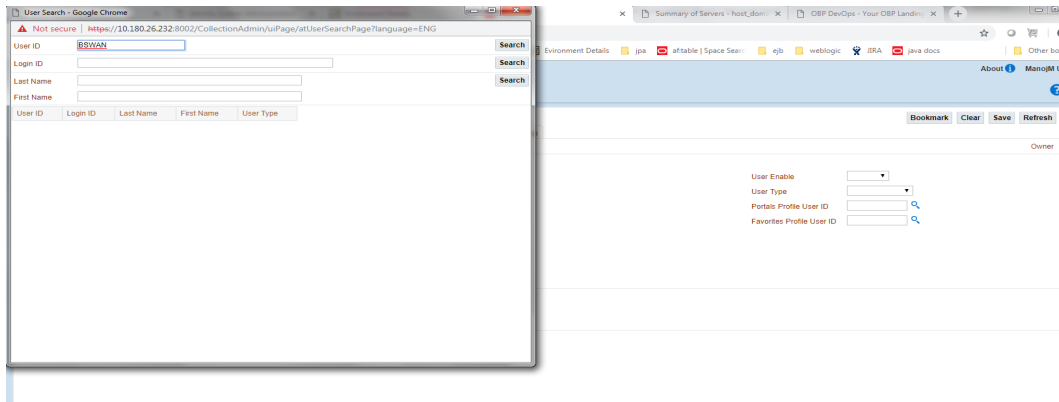
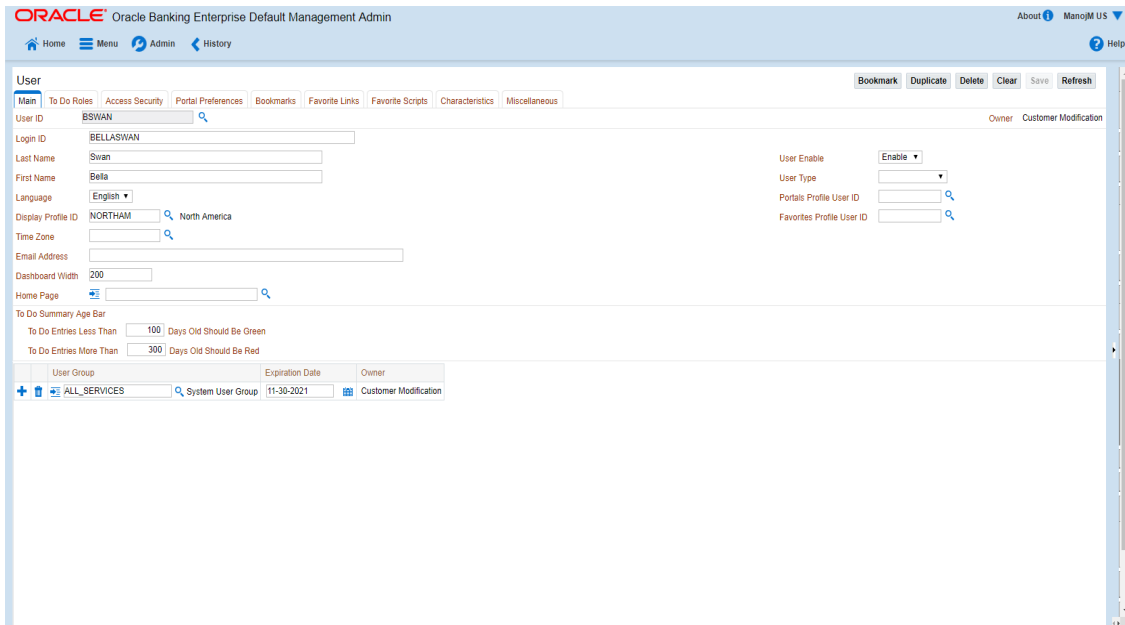


Figure 5–6 Search Result in User screen



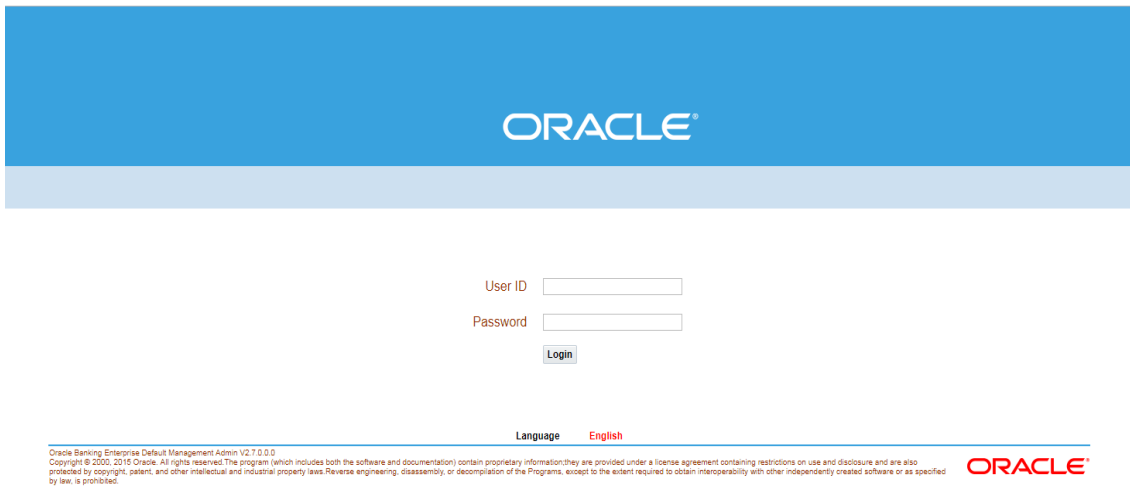
5.3 Create Users in Oracle Banking Collections and Oracle Banking Recovery

Follow below steps to create user in Collections.

1. Log in to Oracle Banking Collections and Oracle Banking Recovery native UI using administrative credentials.

<http://<Host>:<Port>/CollectionAdmin/cis.jsp>

Figure 5–7 Oracle Banking Collections and Oracle Banking Recovery Native Login screen



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

Figure 5–8 Oracle Banking Collections and Oracle Banking Recovery native - User Navigation

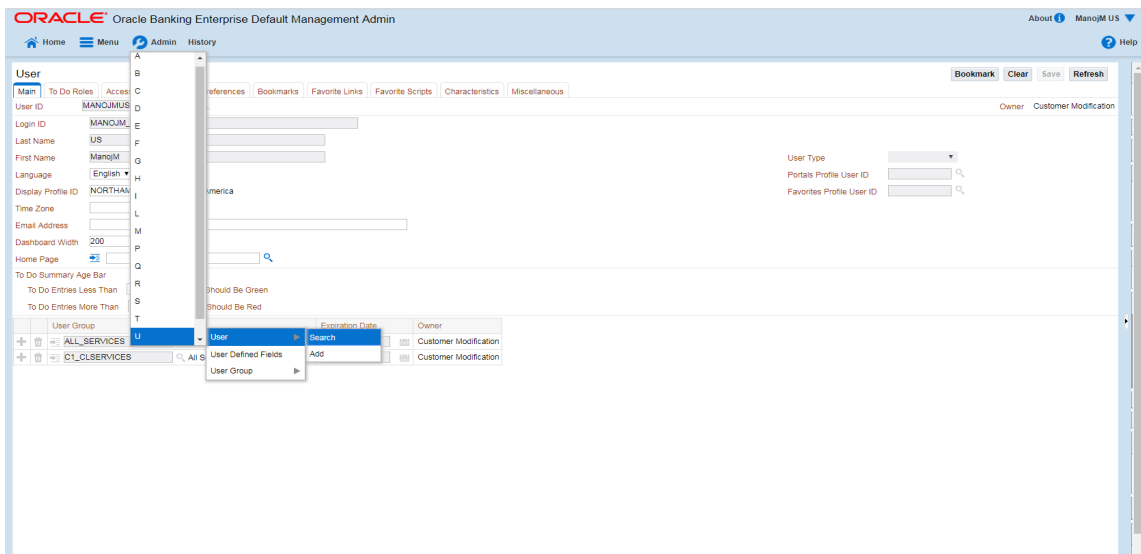


Figure 5–9 Oracle Banking Collections and Oracle Banking Recovery native - Main Tab

The screenshot shows the Oracle Banking Enterprise Default Management Admin interface. The main content area is titled "User" and contains a form for creating a user. The form includes the following fields and options:

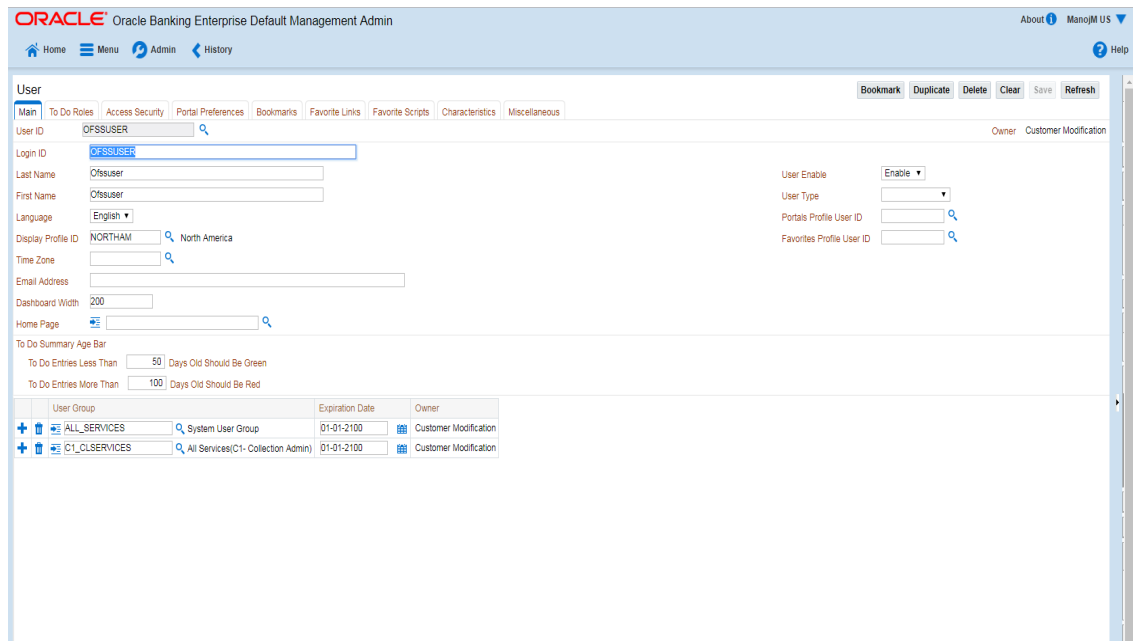
- User ID: [Text input]
- Login ID: [Text input]
- Last Name: [Text input]
- First Name: [Text input]
- Language: [Dropdown menu]
- Display Profile ID: [Text input]
- Time Zone: [Text input]
- Email Address: [Text input]
- Dashboard Width: [Text input]
- Home Page: [Text input]
- To Do Summary Age Bar: [Text input]
- To Do Entries Less Than: [Text input] Days Old Should Be Green
- To Do Entries More Than: [Text input] Days Old Should Be Red
- User Group: [Text input]
- Expiration Date: [Text input]
- Owner: [Text input]
- User Enable: [Dropdown menu]
- User Type: [Dropdown menu]
- Portals Profile User ID: [Text input]
- Favorites Profile User ID: [Text input]

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

- **User Id:** OIMOBPCO
- **Login Id:** OIMOBPCOLL
- **First Name:** OIMOBPCOLL
- **Last Name:** OIMOBPCOLL
- **Language:** English
- **Display Profile ID Tender Source:** NORTHAM
- **Email Address:** OIMOBPCOLL@oracle.com (This is a 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)
- **User Enable:** Select Enable

4. Click **Save**.

Figure 5–10 User Screen



5. OIMOBPCOLL User is successfully created in Oracle Banking Collections and Oracle Banking Recovery.