Oracle Financial Services Admin Console

User Guide

Release 8.1.1.0.0

Oct 2021

ORACLE
Financial Services

ORACLE

OFS Admin Console User Guide

Copyright © 2021 Oracle and/or its affiliates. All rights reserved.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or de-compilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable.

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

For information on third party licenses, click here.

Document Control

Version Number	Revision Date	Change Log
1.0	Oct 2021	Created the user guide for release 8.1.1.0.0.

Table of Contents

1 Preface

This preface provides information for the Oracle Financial Services Admin Console User Guide.

Topics:

- [Access to Oracle Support](#)
- [Audience](#)
- [Conventions Used](#)
- [Acronyms](#)

1.1 Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit:

- http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info
- http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

1.2 Audience

This document is intended for the system administrators and users configuring the IDCS.

1.3 Conventions Used

The following table lists the conventions used in this guide.

Table 1: Conventions Used in this Guide

Convention	Meaning
Italics	- Names of books, chapters, and sections as references - Emphasis
Bold	- The object of an action (menu names, field names, options, button names) in a step-by-step procedure - Commands typed at a prompt - User input
`Monospace`	- Directories and subdirectories - File names and extensions - Process names - Code sample, including keywords and variables within the text and as separate paragraphs, and user-defined program elements within the text
[Hyperlink](#)	Hyperlink type indicates the links to external websites, internal document links to sections.

1.4 Acronyms Used

The following table lists the acronyms used in this guide.
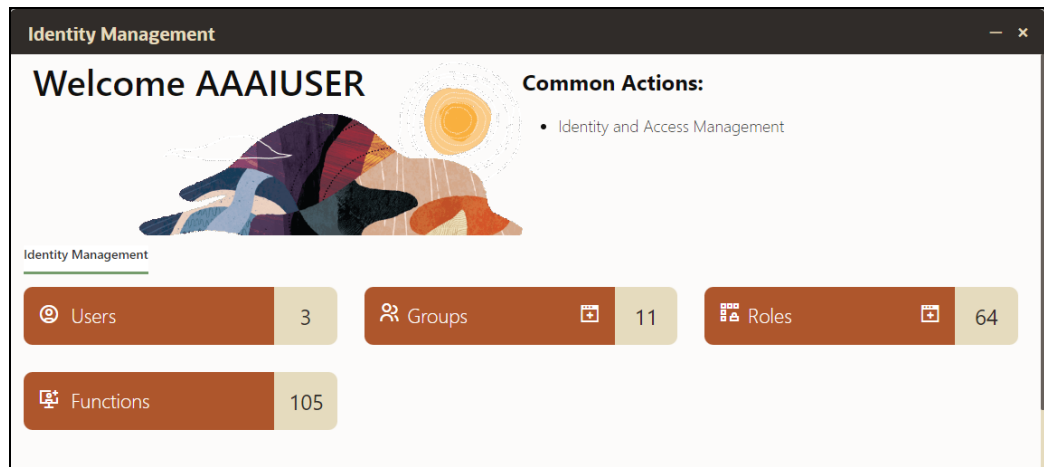
Table 2: Acronyms Used in this Guide

Conventions	Description
BA	Business Analysts
Infodom	Information Domain
Navigation Tree Menu or Navigation Menu	Left-hand side menu
OFS AAI	Oracle Financial Services Analytical Application Infrastructure
OFSAA	Oracle Financial Services Analytical Applications
OFS MMG	Oracle Financial Services Model Management and Governance
Production Infodom	Production Information Domain
Sandbox Infodom	Sandbox Information Domain
SA	System Administrator
URL	Uniform Resource Locator
UI	User Interface

2   How to access the Identity Management?

To access the Admin Console, follow these steps:

1. Enter the application URL in the browser's URL field.

2. Enter your **User ID** and **Password**.

3. Click **Log in**.

4. The Identity Management window is displayed.

Note: For Compliance Studio, click Admin from the User Name at the top of the Financial Services Analytical Applications home page.

Ensure the Administrator who creates your account has granted you administrative privileges to access the Idendity Management.

3 Identity Management

3.1 Using the Identity Management

Use this to perform identity management. It is a single point of access to manage identity functions and view administrative features such as user-role mapping, function mapping and miscellaneous configuration details.

To access the Identity Management, your Administrator must have granted you administrative privileges by mapping your user account to the Identity Administrator and Identity Authorizer user groups. These user groups are seeded in IDCS.

Using Identity Management, Administrators can manage fine-grained and coarse-grained entitlements. Authorizers can authorize the entitlement mappings. The components are as follows:

1. **Users**: A user is a person who has access to and can perform specific actions based on the user group or groups they are mapped to. Before you can map a user to a user group, your administrator must have created and authorised the user. After the user is authorised, they are added in the Users Summary Page. Click Users to view the list of available users in the Users Summary Page.

2. **Groups:** Groups are a set of users that can perform specific activities. For example, the administrator role performs administrative activities. Any user who belongs to a specific user group can access the roles mapped to that user group. Click Add to add a user group or click Groups to view the list of user groups in the Groups Summary page.

3. **Roles:** Roles are a set of functions grouped together and having specific privileges. Any user who belongs to a specific role can access functions mapped to the role. Click Add to add a role or click Roles to view the list of roles in the Roles Summary page.

4. **Functions**: Functions enable users to perform a specific activity. Any user who belongs to a specific function can access the folders mapped to the function. Click Functions to view the list of functions in the Functions Summary page.

   Note: Only those user groups and roles which are authorized are displayed in the Groups Summary Page and Roles Summary Page, respectively.

Topics:

- [Group Definition](#)
- [Role Definition](#)

- [Users Summary Page](#)
- [Groups Summary Page](#)
- [Roles Summary Page](#)
- [Functions Summary Page](#)

Use these tabs to perform the following tasks:

3.1.1 Administrator Tasks

Perform the Identity and access management operations in the Identity Management.

3.1.2 Authorizer Tasks

As an authorizer, use this to authorize the Identity and Access management operations in the Identity Management.

3.1.3 Group Definition

When you click Add , the Group Definition fields appear.

Table 4: Group Definition Fields

Field	Description
Group ID	Enter the group ID. You can add alphanumeric characters and special characters (only - and _).
Group Name	Enter the group name. You can add alphanumeric characters and special characters (only - and _).
Group Description	Enter the group description. You can add alphanumeric characters and special characters (-, _, ., and ,).

Click Save to save the user group or click Cancel to clear all values and enter new values. After you click Save, the user group is added in the Groups Summary Page.

3.1.4 Role Definition

When you click Add , the Role Definition fields appear.

Table 5: Role Definition Fields

Field	Description

Role Code	Enter the role code. You can add alphanumeric characters and special characters (only - and _).
Role Name	Enter the role name. You can add alphanumeric characters and special characters (only - and _).
Role Description	Enter the role description. You can add alphanumeric characters and special characters (-, _, ., and ,).

Click Save to save the role or click Cancel to clear all values and enter new values. After you click Save, the role is added in the Roles Summary Page.

3.1.5   Users Summary Page

3.1.5.1   Users Summary Page

The Users Summary Page shows the list of available users. Click a user name to view the details of that user and map the user to one or more user groups.

To search for a specific user, type the first few letters of the user name that you want to search in the

Search box and click Search   . The summaries whose names consist of your search string are displayed in the list of available users.

At the bottom of the page, you can enter the number of entries to be viewed on a single page in the Records box. You can increase or decrease the number of entries to view, using the up and down arrows. To navigate easily, use the First Page ⟨ , Previous Page ⟨ , Next Page ⟩ or Last Page ⟩ buttons in the View bar. To navigate to the desired page, type a different page number in the View bar control and press Enter.

Topics:

- Details
- Mapped Groups
- Available Groups Summary Page
- Unmapped Groups

3.1.5.2   Details

Select the user name in the Users Summary Page and then select Details to view the User ID and User Name of the selected user.

3.1.5.3 Mapped Groups

If you are an administrator and want to map a user to a user group, follow these steps:

Select the user name in the Users Summary Page

1. Select Mapped Groups.

2. Select the user group name.

   Note: To select multiple user groups, press Ctrl and select more than one user group.

3. Click Map to map the user to the selected user group.

4. Click Unmap to remove the user mapping.

5. After clicking Map, the list of user groups you can map the user to appears in the Available Groups Summary Page.

   Note: To select multiple groups, press Ctrl and select more than one group.

6. Click Save.

   If you are an authorizer and want to authorize a mapping, follow these steps:

   In Mapped Groups, click the user group name to select the user group.

   Note:

   To select multiple user groups, press Ctrl and select more than one user group.

   If the logged-in user has both administration and authorization entitlements, an Authorization View toggle button is available. Enable this button to complete the authorization process.

7. Click Authorize to authorize the user-user group mapping.

   Click Reject to cancel the authorization request.

3.1.5.4 Available Groups Summary Page

Click Map to view the list of user groups you can map to the user. To select more than one user group, press Ctrl and select another user group.

3.1.5.5 Unmapped Groups

To authorize the unmapping of a user to a user group, follow these steps:

1. Click Unmapped Groups.

2. Click the user group name to select the user group.

3. Click Authorize to authorize the unmapping.

   Click Reject to cancel the authorization request.

3.1.6 Groups Summary Page

3.1.6.1 Groups Summary Page

The Groups Summary Page shows the list of available user groups. Click a user group name to view the details of that user group and map the user group to one or more roles.

To search for a specific user group, type the first few letters of the user group name that you want to

search in the search box and click Search ⬤. The summaries whose names consist of your search string are displayed in the list of available users.

At the bottom of the page, you can enter the number of entries to be viewed on a single page in the Records box. You can increase or decrease the number of entries to view, using the up and down arrows. To navigate easily, use the First Page ⟨ , Previous Page ⟨ , Next Page ⟩ or Last Page ⟩ buttons in the View bar. To navigate to the desired page, type a different page number in the View bar control and press Enter.

Topics:

- Details
- Mapped Roles
- Available Roles Summary Page
- Unmapped Roles

3.1.6.2 Details

Select the user group name in the Groups Summary Page and then select Details to view the Group ID, Group Name, and Group Description of the selected user group.

3.1.6.3 Mapped Roles

If you are an administrator and want to map a user group to a role, follow these steps:

1. Select the user group name in the Groups Summary Page

2. Select Mapped Roles.

3. Select the role name.

   Note: To select multiple roles, press Ctrl and select more than one role.

4. Click Map to map the user group to the selected role.

5. Click Unmap to remove the user group-role mapping.

6. After you click Map, the list of roles you can map to the user group appears in the Available Roles Summary Page.

   To select multiple roles, press Ctrl and select more than one group.

7. Click Save.

If you are an authorizer and want to authorize the mapping, follow these steps:

1. In Mapped Roles, Click the role name to select the role.

    Note:

    a. To select multiple roles, press Ctrl and select more than one role.

    b. If the logged-in user has both administration and authorization entitlements, an Authorization View toggle button   is available. Enable this button to complete the authorization process.

2.   Click Authorize to authorize the user group-role mapping.

    Click Reject to cancel the authorization request.

3.1.6.4   Available Roles Summary Page

Click Map to view the list of roles you can map to the user group. To select more than one role, press Ctrl and select another role.

3.1.6.5   Unmapped Roles

To authorize the unmapping of a user group to a role, follow these steps:

1. Click Unmapped Roles.

2. Click the role name to select the role.

3. Click Authorize to authorize the unmapping.

    Click Reject to cancel the authorization request.

3.1.7   Roles Summary Pane

3.1.7.1   Roles Summary Page

The Roles Summary Page shows the list of available roles. Click a role name in the Roles Summary Page to view the details of that role and map the role to one or more functions.

To search for a specific role, type the first few letters of the role name that you want to search in the

Search box and click Search   . The summaries whose names consist of your search string are displayed in the list of available users.

At the bottom of the page, you can enter the number of entries to be viewed on a single page in the Records box. You can increase or decrease the number of entries to view, using the up and down arrows. To navigate easily, use the First Page ᴷ , Previous Page ‹ , Next Page › or Last Page ᴽ buttons in the View bar. To navigate to the desired page, type a different page number in the View bar control and press Enter.

Topics:

- [Details](#)
- [Mapped Functions](#)
- [Available Functions Summary Page](#)
- [Unmapped Functions](#)

3.1.7.2   Details

Select the role name in the Roles Summary Page and then select Details to view the Role Code, Role Name, and Role Description of the selected role.

3.1.7.3   Mapped Functions

If you are an administrator and want to map a function to a role, follow these steps:

1.   Select the role name in the Roles Summary Page.

2.   Select Mapped Functions.

3.   Select the function name.

4.   To select multiple functions, press Ctrl and select more than one function.

5.   Click Map to map the role to the selected function.

6.   Click Unmap to remove the function mapping.

7.   After you click Map, the list of functions you can map the role to appears in the Available Functions Summary Page.

8.   To select multiple functions, press Ctrl and select more than one function.

9.   Click Save.

If you are an authorizer and want to authorize the mapping, follow these steps:

1.   In Mapped Functions, click the function name to select the function.

    Note:

    To select multiple functions, press Ctrl and select more than one function.

    If the logged-in user has both administration and authorization entitlements, an Authorization

    View toggle button is available. Enable this button to complete the authorization process.

2.   Click Authorize to authorize the role-function mapping.

    Click Reject to cancel the authorization request.

3.1.7.4   Available Functions Summary Page

Click Map to view the list of functions you can map the role to. To select multiple functions, press Ctrl and select more than one function.

3.1.7.5   Unmapped Functions

To authorize the unmapping of a role to a function, follow these steps:

3. Click Unmapped Functions.

4. Click the function name to select the function.

5. Click Authorize to authorize the unmapping.

   Click Reject to cancel the authorization request.

3.1.8   Functions Summary Page

The Functions Summary Page shows the list of available functions. Click a function name in the Functions Summary Page to view the details of that function.

To search for a specific function, type the first few letters of the function name that you want to search

in the Search box and click **Search** . The summaries whose names consist of your search string are displayed in the list of available users.

At the bottom of the page, you can enter the number of entries to be viewed on a single page in the Records box. You can increase or decrease the number of entries to view, using the up and down arrows. To navigate easily, use the First Page ᴷ , Previous Page ᑉ , Next Page ᑈ or Last Page ᵡ buttons in the View bar. To navigate to the desired page, type a different page number in the View bar control and press Enter.

OFSAA Support

Raise a Service Request (SR) in My Oracle Support (MOS) for queries related to the OFSAA applications.

Send Us Your Comments

Oracle welcomes your comments and suggestions on the quality and usefulness of this publication. Your input is an important part of the information used for revision.

- Did you find any errors?

- Is the information clearly presented?

- Do you need more information? If so, where?

- Are the examples correct? Do you need more examples?

- What features did you like most about this manual?

If you find any errors or have any other suggestions for improvement, indicate the title and part number of the documentation along with the chapter/section/page number (if available) and contact the My Oracle Support.

Before sending us your comments, you might like to ensure that you have the latest version of the document wherein any of your concerns have already been addressed. You can access the My Oracle Support site that has all the revised or recently released documents.