# **Oracle Financial Services Accounting Foundation Cloud Service**

**Get Started** 

Release 22C

October 2022

F52881-01





#### **Oracle Financial Services Accounting Foundation Cloud Service Get Started**

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### **Document Control**

Version Number	Revision Date	Change Log
3.0	October 2022	Created the Getting Started Guide for Release 22C
2.0	August 2022	Added Using Identity Domain section
1.0	July 2022	Created the Getting Started Guide for Release 22B

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### 1 Get Help

#### Topics:

- Get Help
- Learn About Accessibility
- Get Support
- Get Training
- Join Our Community
- Share Your Feedback
- Before You Begin

### 1.1 Get Help in the Applications

Use help icons to access help in the application.

Note that not all pages have help icons. You can also access the <u>Oracle Help Center</u> to find guides and videos.

### 1.1.1 Additional Resources

- Community: Use <u>Oracle Cloud Customer Connect</u> to get information from experts at Oracle, the partner community, and other users.
- Training: Take courses on Oracle Cloud from Oracle University.

### 1.2 Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the <u>Oracle Accessibility</u> <u>Program</u>. Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

### 1.3 Get Support

You can get support at My Oracle Support.

For accessibility support, visit Oracle Accessibility Learning and Support.

### 1.4 Get Training

Increase your knowledge of Oracle Cloud by taking courses at Oracle University.

### 1.5 Join Our Community

Use <u>Cloud Customer Connect</u> to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, and watch events.

### **1.6** Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to My Oracle Support.

Thanks for helping us improve our user assistance!

### 1.7 Before You Begin

See the following Documents:

- See What's New
- Oracle Financial Services Accounting Foundation Cloud Service Core Functions

### 2 Welcome to Oracle Cloud

Oracle Cloud is the industry's broadest and most integrated cloud provider, with deployment options ranging from the public cloud to your data center. Oracle Cloud offers best-in-class services across Software as a Service (SaaS), Platform as a Service (PaaS), and Infrastructure as a Service (laaS).

### 2.1 About Oracle Cloud

Oracle Cloud is one of the few cloud providers that can offer a complete set of cloud services to meet all your enterprise computing needs.

Use Oracle Infrastructure as a Service (laaS) offering to quickly set up the virtual machines, storage, and networking capabilities you need to run just about any kind of workload. Your infrastructure is managed, hosted, and supported by Oracle.

Use Oracle Platform as a Service offering to provision ready-to-use environments for your enterprise IT and development teams, so they can build and deploy applications, based on proven Oracle databases and application servers.

Use Oracle Software as a Service (SaaS) offerings to run your business from the Cloud. Oracle offers cloud-based solutions for Human Capital Management, Enterprise Resource Planning, Supply Chain Management, and many other applications, all managed, hosted, and supported by Oracle.

### 2.2 Supported Web Browsers

Oracle Financial Services Accounting Foundation Cloud supports the latest version of the following major browsers:

- Google Chrome
- Microsoft Edge
- Mozilla Firefox
- For more details, see Oracle Software Web Browser Support Policy.

When sharing a link to a document or folder, users of Microsoft Edge need to use the **Show Link** button and copy the link shown in the dialog.

### 3 Order Oracle Cloud Applications

You can order Oracle Cloud Applications (Software as a Service) offerings by contacting Oracle Sales. After your order is processed, you can then activate your services.

To order a subscription to Oracle Cloud Applications:

- 1. Go to the Oracle Financial Services Risk and Finance solutions page.
- 2. Scroll down and select **Accounting Foundation**.
- 3. Review the features and capabilities of the service and read the Datasheet.
- **4.** When you are ready to order, scroll up and click **Request a Demo**.
- **5.** You can either write an Email or click **Request Now** to receive a call from Sales.
- 6. Enter your Business Email, select the confirmation check box, and click Continue.
- 7. Describe of your need and click **Request Now**.

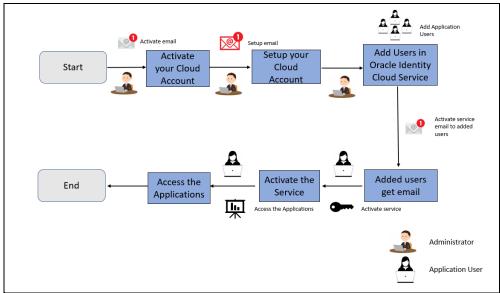
Later, after you have worked with Oracle Sales to order the Oracle Cloud Application best suited to your requirements, you will receive an email, which contains a link you can use to activate the service you have ordered.

To know how to activate, see Create and Activate your Cloud Account.

### 4 Getting Started

To get started, you must activate the Accounting Foundation Cloud Service (AFCS). After activating the Cloud Service, you can onboard Application Users to use the subscribed cloud services.

### Illustration of the Cloud Subscription Workflow



This document describes the set of actions that can be performed by:

- An Administrator to activate the Cloud Account and onboard Applications Users for the subscribed Cloud Services.
  - Create and Activate New Cloud Account
  - Access the Cloud Account
  - Access the Oracle Identity Cloud Service Console
- The **Application Users** to activate and use the Cloud Services that are provisioned by the Administrator.
  - Activate your Account as Application Users

### 4.1 Create and Activate your Cloud Account

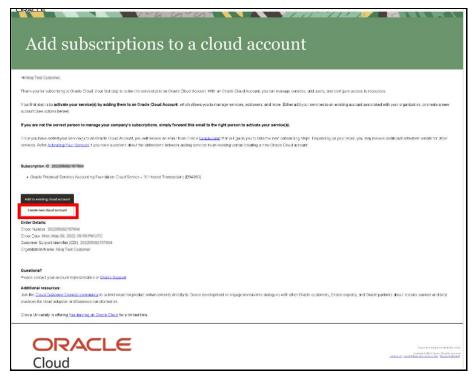
If you are a new Oracle Cloud Applications User, you will receive a **Welcome to Oracle Cloud** email that asks you to activate your Cloud Account. Follow the instructions in the email to create and activate your new Cloud Account.

You will then receive a follow-up email with the information you need to sign in and start using your Cloud Applications.

As an Administrator, to create and activate your new Cloud Account, perform the following steps:

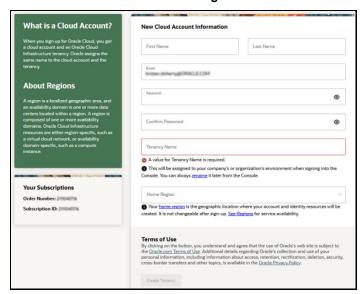
1. Click Create New Cloud Account in the email.

#### Illustration of Welcome to Oracle Cloud - Setup your Account Email



**2.** Complete the **New Cloud Account Information** Form to sign up.

#### **New Cloud Account Information Page**



Enter the following details:

- First Name and the Last Name.
- Email: Provide the same email address which you had given to receive the Welcome email.

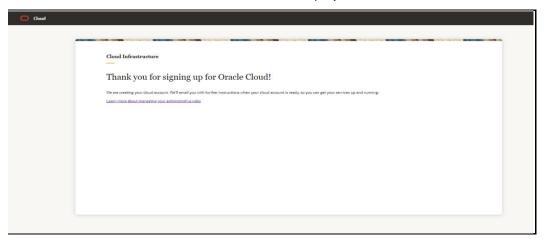
Instructions to log into your new Oracle Cloud Account will be sent to this email address.

- Password to access the New Cloud Account.
- Re-enter the **Password** for confirmation

Make a note of the credentials. The same is required to log in after receiving the Activation email.

- **Tenancy Name**: New Tenancy name to be associated with the Cloud Account.
- Home Region: Select your Home Region, where the Identity Resources and Account are located. Check the service availability before selecting the Home Region.
- Click **Create Tenancy**.

The New Cloud Creation Confirmation Screen is displayed.

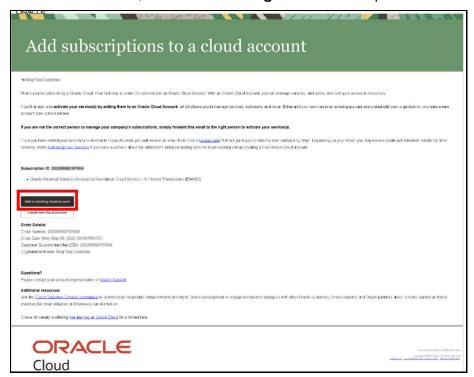


After successful activation, you'll receive a Setup Complete Email.

### 4.2 Add to Existing Cloud Account

As an Administrator, if you already own a Cloud Account and need to use the Accounting Foundation Cloud Service (AFCS), perform the following steps:

1. In the Welcome email, click **Add to existing cloud account** option.



**2.** Perform the steps as mentioned in the <u>Access the Oracle Identity Cloud Service</u> Console section.

### 4.3 Access the Cloud Account

As an Administrator, to access the Cloud Account:

- 1. In the Setup Complete email, click **Sign In**.
- Enter the Username and Password to access the Oracle Cloud Console URL.
   Use the same Username and Password that you provided during activation setup.
- **3.** Reset the Password.
- 4. Re log in to Oracle Cloud Infrastructure Classic Console using the new Password.
- **5.** Navigate to the **Oracle Cloud Infrastructure Classic Console**, the Application URLs are displayed.

### 4.4 Access the Oracle Identity Cloud Service Console

The Oracle Identity Cloud Service integrates directly with existing directories and Identity Management Systems and makes it easy for users to get access to applications. It

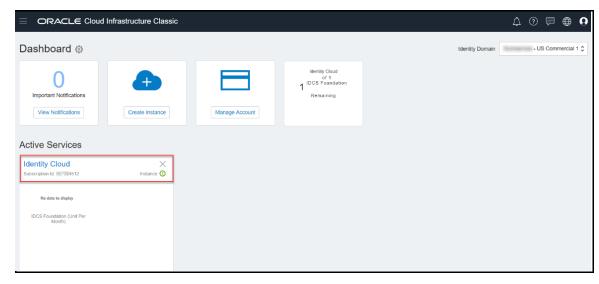
provides the Security Platform for Oracle Cloud, which allows users to securely and easily access, develop, and deploy business applications such as Oracle Human Capital Management (HCM) and Oracle Sales Cloud, and Platform Services such as Oracle Java Cloud Service, Oracle Business Intelligence (BI) Cloud Service, and others.

Administrators and Application Users can use Oracle Identity Cloud Service to help them effectively and securely create, manage, and use a Cloud-based Identity Management Environment without worrying about setting up any infrastructure or platform details.

To access the Identity Console, perform the following steps:

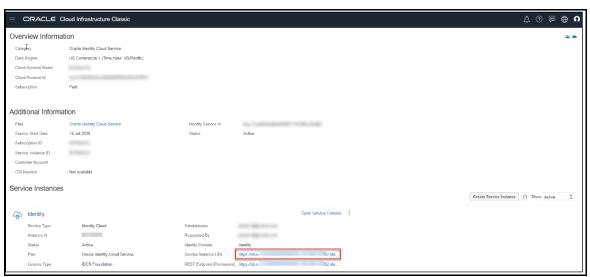
1. In the Oracle Cloud Infrastructure Console Window, under the Active Services, click **Identity Cloud**.

#### **Oracle Cloud Infrastructure Console**



**2.** Click the Service Instance URL from the Service Instances pane to access your Identity Console.

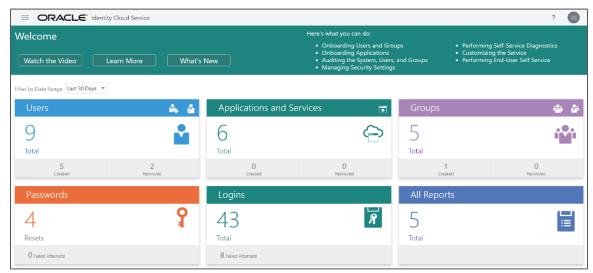
#### **Service Instance Pane**



The Identity Console is displayed. In the Identity Console, you can create Application Users and map the Users to Groups.

To know more about creating users, see **Create Application Users**.

#### **Oracle Identity Cloud Service Console**



As an Administrator, you can create users to have different access rights to the Cloud Service.

For example, the Identity Console Administrator has Super User Privileges for an Oracle Identity Cloud Service Identity Domain, and can create users, groups, group memberships, and so on.

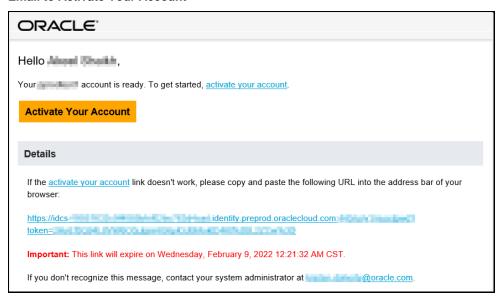
### 4.5 Activate Application User Account

After an Application User has been provisioned by their Administrator, they will receive an Account Activation email.

As an Application User, perform the following steps to login and activate your account:

**1.** Open the email you received from Oracle Cloud.

#### **Email to Activate Your Account**



- **2.** Review the information about your service in the email.
- 3. Click Activate Your Account.

You will be prompted to change your Password on the initial login.

**4.** Specify your new credentials in the **Reset Password** window to activate your account.

After the Password is successfully reset, the **Congratulations** window is displayed.

- 5. Access the Application URL that your Application Administrator shared with you.
- **6.** Specify your credentials to sign into your account.

The **Welcome** page is displayed.

### 4.6 Setup your Cloud Account

After successful activation of your cloud account, you will receive a Setup Complete Email with your login credentials.

#### NOTE:

You need to access the Oracle Cloud Console and create your user account before you access the application URL.

### ORACLE



Hi Nirai.

Your new cloud account prod has been created. You can now sign into your cloud account. This service(s) is ready to use:

• Oracle Financial Services Accounting Foundation Cloud Service - 1K Hosted Transactions

Sign In



Please do not reply directly to this email

Click the Sign In link provided in the Email. Use the Username and the temporary Password to access the Oracle Cloud Console URL and reset your credentials to navigate to the Oracle Cloud Infrastructure Classic Console Window and access the Oracle Identity

Cloud Service (Identity Console) for onboarding the cloud service users.

For more information about how to access the Identity Cloud, see Access the Oracle Identity Cloud console.

The Application URL provided in the Email is for the production instance. To access the non-production instance, you need to remove the -prd from the URL and replace it with nprd. For example, the URLs are as follows:

#### **Production**

https://ofsaa.<REGION>.ocs.oraclecloud.com/<TENANT ID>-prd/afc

#### Non-Production

https://ofsaa.<REGION>.ocs.oraclecloud.com/<TENANT ID>-nprd/afc

You must share the Application URL details with your application users, which they

can use to log in to the application.

### 5 Users and Access Privileges

Oracle Financial Services Accounting Foundation Cloud Service (AFCS) Users are assigned roles through which they gain access to functions and data. Users can have any number of roles.

To create Users, login to Identity Console with Admin Privileges.

The access Privilege of a User is set based on the mapped group. There are pre-defined groups provided in the AFCS. You can map the newly created users to any pre-defined group, based on the user's access requirements.

For more information about managing users, refer to Managing Users.

### **5.1** Role Based Access Control

Role-based security in Oracle Financial Services Accounting Foundation Cloud Service (AFCS) Controls who can do what and to which data.

The following table provides examples of role-based access.

Role Assigned to a User	Functions which Users with the Role can Perform	Set of Data which Users with the Role can Access when performing the Function
Application Administrators	Perform Application Administrator activities	User Group with Administration Roles across all Service Features
Business Users	Access to the Application to perform tasks	User Group with Business Tasks' Roles across all Service Features

### 5.2 User Group and User Role Mapping

The following table provides the User Group and User Role Mapping:

User Groups	Activities
Identity Administrator	<ul> <li>View Reports</li> <li>View Object Storage</li> <li>View OAuth Credentials</li> <li>Perform Identity and Access Management Operations</li> </ul>
Identity Console Administrator	<ul><li>Create Users</li><li>Map Users to the Instance</li></ul>
Accounting Foundation Administrator	<ul> <li>User Group with Setup Roles</li> <li>View all content</li> <li>AFCS Service Administration Activities</li> </ul>
AFCS-BIAdministrator	Administer Data Visualization Content
AFCS-BIContentAuthor	Author Data Visualization Content
AFCS-BIConsumer	Access Data Visualization Content

User Groups	Activities
Accounting Foundation Business User	<ul> <li>Use the AFCS Service</li> <li>Register, modify, or delete Entity-maps, Rules, Look-up, Adjustments, Corrections and so on</li> <li>Register, modify, or delete EDD, Connector and so on</li> <li>Register, modify or delete SLA, Source Registration, Event Grouping, Segment Code - Dimension Mapping and so on</li> <li>Configure and Manage Pipelines</li> <li>Execute Pipelines</li> </ul>
Accounting Foundation System Administrator	<ul> <li>Perform System Administration activities</li> <li>For Example: Configuring Instance name</li> </ul>
Accounting Foundation Approver	Approver across all service features
Accounting Foundation Data Access	View data using API
AFCS-DVConsumer	Access Data Visualization Content for Catalog
AFCS-DVContentAuthor	Author Data Visualization Content for Catalog

### **5.3** Create Application Users

After you sign into your Identity Console, your first task is to create additional user accounts. You should assign specific User Groups to the User Accounts that you are creating. There are seeded User Groups available with the respective services, the users must be mapped to one or more of the User Groups, depending on the role that they perform.

For example, you can create a user for each member of your team. Each team member can then sign into the account with their credentials. You can also assign each user to specific User Groups and apply specific Security Policies or Roles to each Group.

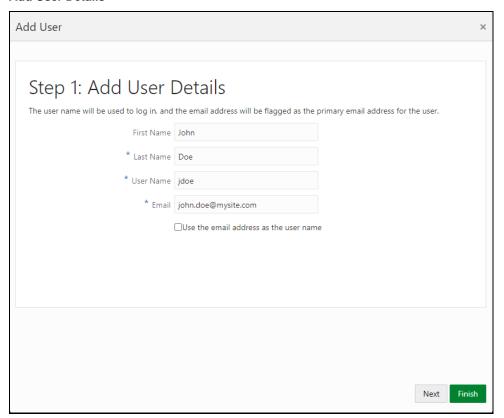
You can create the users and map the users to groups for your service. After creating the users, they will receive a Welcome email. The users must activate their accounts and enter a new Password to access the services.

### **5.3.1** Using Identity Console (IDCS)

To create users in Identity Console, perform the following steps:

- 1. In the Identity Cloud Service Console, click from the **Users** tile, to add the Application Users.
- **2.** In the **Add User** page, enter the following information:
  - The First Name and Last Name of the user.
  - The user's Email Address and the User Name.

#### **Add User Details**



#### **NOTE**

- 1. Do not enter your email address as the Username and do not select the **Use the email address** as the username check box.
- 2. Enter a maximum of 20 characters.
- Enter Alphanumeric Characters.
- Enter only Hyphen (-) and Underscore (\_) Special Characters.
- 3. Click Next.
- 4. In the Assign User to Groups (Optional) window, select the User Groups according to your user-specific groups or access.

#### **ATTENTION**

After a User signs in to AFCS, the User to User-Group Mapping created in the **IDCS Console** will onboard into the Master and Mapping Tables. Later, if you deselect (remove) a User from a Group in the Assign User to Groups Window after provisioning, ensure that you also unmap the User from the corresponding User- Group in the **Admin Console**. This is a mandatory step to complete the unmapping process.

5. To create an Identity Administrator or Authorizer User, assign the users to the following:

- **IDNTY\_ADMIN**: You can use this option to create an Administrator User.
- **IDNTY\_AUTH**: You can use this option to create an Authorizer User.

#### **Assign User to Groups Window**

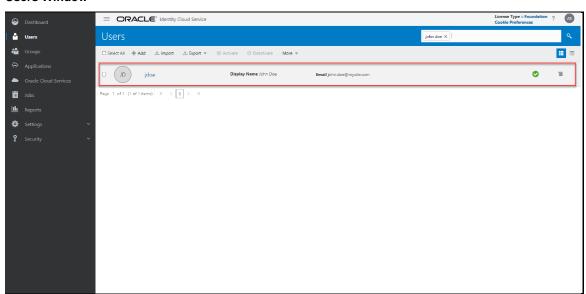


#### 6. Click Finish.

After the successful creation of the user, the added users receive an email to activate their account. The user must activate the account to use the service.

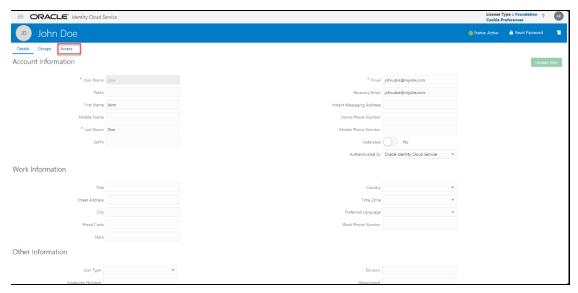
7. From the **Users** window, you can access the newly created user and edit the user details.

#### **Users Window**



8. Select the User that you want to edit the details. In the User Details Window, select the **Access** tab.

#### **User Details Window**



- 9. Click Assign.
- 10. In the Assign Application Window, select the appropriate Application Instance to grant access to your user as mentioned below.

For example:

- AFCS xxxxx-prd (For Production)
- AFCS xxxxx-nprd (For Non-Production)

#### **NOTE**

Based on this mapping the users will be able to access the appropriate

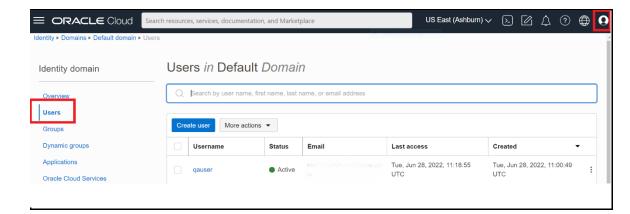
#### 11. Click **OK**.

For more information, see **Create User Accounts**.

#### **Using Identity Domain** 5.3.2

To create users in Identity Domain, perform the following steps:

- 1. Click the **Profile** Icon and select **Identity Domain: default**.
- 2. From the LHS menu, select the Users option and click Create user to add the Application Users.



- **3.** In the **Create User** page, enter the following information:
  - The First Name and Last Name of the user.
  - The user's Email Address or the User Name.

#### **NOTE**

- Do not enter your email address as the Username and do not select the Use the email address as the username check box.
- Enter a maximum of 20 characters.
- Enter Alphanumeric Characters.
- Enter only Hyphen (-) and Underscore (\_) Special Characters

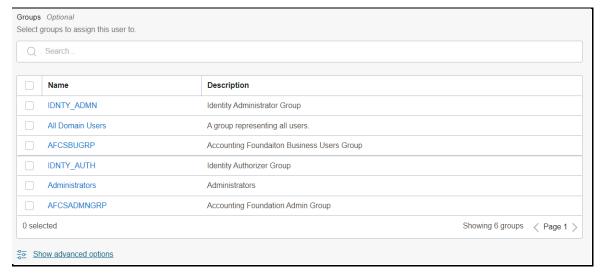
#### **Create User Page**



- **4.** In the **Groups (Optional)** section, select the User Groups according to your user-specific groups or access.
- **5.** To create an Identity Administrator or Authorizer User, assign the users to the following:

- **IDNTY\_ADMIN**: You can use this option to create an Administrator User.
- **IDNTY\_AUTH**: You can use this option to create an Authorizer User.

#### **Assign User to Groups Window**

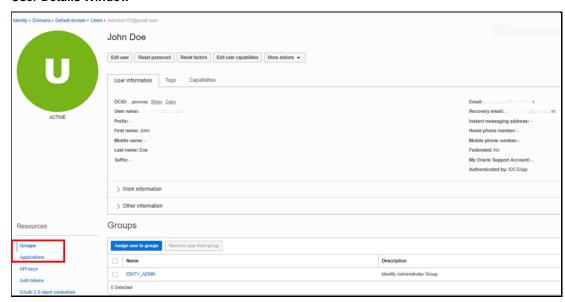


#### 6. Click Create.

After the user is successfully created, they will receive an email to activate their account. The user must activate the account to use the service.

7. From the **Users** window, you can access the newly created user and edit the user details.

#### **User Details Window**



8. From the LHS menu, in the **Groups** section, select the required group and click Assign user to groups.

**9.** From the LHS menu, click **Applications** and then click **Assign Applications**. Select the appropriate Application Instance to grant access to your user as mentioned here.

For example:

- AFCS xxxxx-prd (For Production)
- AFCS xxxxx-nprd (For Non-Production)

#### **NOTE**

Based on this mapping the users will be able to access the appropriate instance.

#### 10. Click Assign.



For more information, see <u>Create User Accounts</u> - **Using the Console** section.

### **6** Configuring Session Timeout

After you complete your tasks, you can sign out of your application. However, sometimes you might get automatically signed out due to session timeouts.

Let's understand how session timeouts work. When you sign in using your credentials, you're authenticated to use the application, and a session is established. During this session, you don't need to re-authenticate. But, for security purposes, your session is configured to be active for a predefined duration, which is called the session timeout period. Your sessions can expire due to various reasons such as leaving your application idle for a period longer than the timeout period. In such cases, you're automatically signed out of the application. Your timeout periods may vary on certain pages. For example, you may observe a longer timeout period on pages that automatically refresh or Uls that open up in separate windows or tabs.

This table lists the various types of session timeouts you may experience. After the specified duration, your session expires, and you need to sign in again to continue your work.

Timeout Type	Description	Configurable	Timeout Duration
Session Lifetime Timeout	Once you are authenticated in the application, if you are actively working on it, your session remains active for a predefined duration, referred to as the session lifetime timeout period.  Your session ends after this period, even if you're using the application.	Yes	8 Hours (Default value)
Inactive Session Timeout	This type of timeout considers the duration you leave your application idle/inactive. After this duration, System automatically terminates the session, and you are signed out of the session.	No	60 Minutes
Browser Inactivity Timeout	This type of timeout considers the duration you leave your browser idle. After this duration, your session is terminated by the system automatically.	No	60 Minutes

### 6.1 How to Configure Session Lifetime Timeout

You can configure the Session Lifetime Timeout using your Identity Domain Settings in OCI Console. You need to have the Security Administrator Role mapped to you, to access and modify the settings.

- 1. Login with your Security Administrator account.
- 2. Navigate to the Domain page. Click **Settings** and select **Session Settings**.
- **3.** Specify the **Session Duration** under **Session Limits**. Enter the required value. By default, this is set to 480 Minutes.



### 7 FAQs

This section lists the Frequently Asked Questions (FAQs).

**1.** What are the Cloud Offerings from Oracle?

<u>Oracle Cloud</u> offers best-in-class services across Software as a Service (SaaS), Platform as a Service (PaaS), and Infrastructure as a Service (laaS).

**2.** What are the Cloud Services available?

You can see the Website to see the Cloud Services available.

**3.** What are the Supported Browsers for the AFCS?

The following are the Supported Browsers for the AFCS:

- Google Chrome
- Microsoft Edge
- Mozilla Firefox
- **4.** How and where can I place my Order for Oracle Financial Services Accounting Foundation Cloud Service?

You can place your order on the <u>Oracle Cloud</u> website. Review the Order Oracle Cloud Applications topic to know more.

**5.** How can I activate my cloud account after I purchased the Oracle Financial Services Accounting Foundation Cloud Service?

If you are a new Oracle Cloud Applications user, you'll likely receive a Welcome email after your order is processed. You'll receive a *Welcome to Oracle Cloud email* that asks you to activate your cloud account. Review the <u>Activate your Cloud Account</u> Topic to know more.

## **AFCS Support**

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

### **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 My Oracle Support site that has all the revised or recently released documents.

