Oracle Fusion Cloud Student Financial Planning

How do I manage users and role access to the administration user interface?

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G26099-03

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1 How do I manage users and role access to the administration user interface?

Manage Roles, Users, and Groups

From **Administration** > **Security Management**, administrators manage groups, roles, and users.

From **Roles Management**, you can create custom roles and give them particular permissions. That's where you can decide what each role can do and access within the application.

Here's what you can do:

- Create roles
- Edit roles
- Create groups
- Assign groups to roles
- Assign roles to groups
- Assign permissions to roles

From **User Management**, you'll be able to:

- View users
- View user's assigned roles

Related Topics

- Manage Users and Groups in OCI IAM

Set Roles and Role Permissions

Administrators can grant permissions to each role and staff member.

Here's what you can do:

- Create a role code and role name
- Create and assign group
- Set general permissions
- Set document permissions

Here are some permissions you can assign to roles.

General Permissions

- Task Queues

- Manual At-Will Actions
- Information displayed on the User Interface
- Editing functions
- Reports
- Workflows

Document Permissions

- Visibility to a documents
- Document Review Tasks
- Non-Federal Funds Forms Task

After creating a role, you can add or remove its permissions as needed.

Student Financial Aid manages permissions based on the institution's configuration, established roles, and role permissions. All users assigned to a role inherit its permissions, and any updates to the role automatically apply to all assigned users.

Related Topics

- Manage Users and Groups in OCI IAM

Manage General Permissions Matrix

From **Administration** > **Roles Management**, administrators can create divisions of labor.

Administrators can create, view, and update all roles based on permission mapping. In addition, they can assign general permissions based on a specific production process and further assign users to roles based on their areas of expertise.

> **Note:** Each general permission other than **Dashboard**, **Task**, **Student**, and **Administration** has a permission dependency. The permission dependency is the highest-level navigation in the General Permissions Matrix table. For example, the permission dependency for the **Match Unmatched ISIRs** permission is the **Administration** permission.

General Permissions Matrix

General Permission	Gives the User Permission to:	Navigation
Administration	Access all Administrative functions including: • FAS Management. • G5 Management. **SFP only**. • Security Management. • System Management.	**Administration**
Administrative Relief	**SFP only**. Override a close-out date for a Non-Federal Fund.	**Administration** > **System Management** > **Administrative Relief** > **Override** button in the **Override Fund Closeout Date** column.

At Will Repackage	**SFP only** Repackage the Student based on current input.	**Student** > **Financial Information** > **Packaging** > **Repackage** button
At Will SAP Status Update	**SFP only**. Change the Current SAP Status or Override SAP Calculation.	**Student** > **Student Record** > **SAP Information** > **Change** link associated with the **Current SAP Status** field and the **Override SAP Calculation** button
COA Adjustment	**SFP only**. Add a Positive or Negative Adjustment to the COA.	**Student** > **Financial Information** > **Packaging** > > **View Details** icon (eye icon) associated with **Package Status**, **Adjustment** button.
Configuration Administration	View the Configuration Administration page. Load Configuration through the SFP user interface. View Configuration Load History. Download Current Configuration. Review the Configuration File Guide, hierarchy, naming standards, and so on.	**Administration** > **System Management** > **Configuration Administration**
Configure QC Hold	**SFP only**. Globally enable configured QC holds.	**Administration** > **FAS Management** > **QC Holds Management**
Create R2T4	**SFP only**. Create and Replace an R2T4 record. Trigger R2T4 Calculation.	**Student** > **Financial Information** > **R2T4 Information** > **Create R2T4** **Student** > **Financial Information** > **R2T4 Information** > **Replace R2T4** button **Student** > **Financial Information** > **R2T4 Information** > **Trigger R2T4 Calculation** button
Credit Balance Creator	**SFP only**. Create a credit balance on a student record.	**Student** > **Financial Information** > **Credit Balance** > **Create Credit Balance** page and button
Credit Balance Modifier	**SFP only**. Change the credit balance amount, recipient, and date at any point.	**Student** > **Financial Information** > **Credit Balance** > **Resulting Credit Balance Information**
Credit Balance Not Sent Modifier	**SFP only**. Change the credit balance amount, recipient, and date only if the credit balance event outbound message hasn't been sent.	**Student** > **Financial Information** > **Credit Balance** > **Resulting Credit Balance Information**
Dashboard	View the Dashboard page. The user only sees **Task Queues** and **Tasks** they've permissions to.	**Dashboard**
Dashboard Supervisor	View the Supervisor View Dashboard:	**Dashboard** > **Supervisor View**

	• Assign Tasks. • Un-assign Tasks. • Update Priority of Tasks.	
Disbursement Administrator	**SFP only** View Disbursement Administration page and ability to update: • Disbursement Numbers. • Sequence Numbers. • Disbursement Status. • Cancellation Reason. • Cancellation Date. • Total Amount. • Incremental Amount. • Increment Net Amount. • Payment ID. • Return ID. • Delete Disbursement Record. • Save Disbursement Records (doesn't send anything to COD). • Re-Originate by Fund Type. • Send Origination to COD for all Fund Types.	**Administration** > **System Management** > **Disbursement Administration**
Disbursement Override	**SFP only**. Override the Payment Period Disbursement Amount.	**Student** > **Financial Information** > **Disbursing** > **Edit Disb Amt** button
Document Request Canceler	Cancel a document request.	**Student** > **Documents** > **Pending Requests** > **Cancel** button
Document Requester	Request documents.	**Student** > **Documents** > **Received Documents/Pending Requests** > **Request Document(s)** button
Document Review Task	View Review Document for Approval Task Queue.	> **Dashboard** > **Task Overview** > **Review Document for Approval**
DOE File Management	Enable or disable receipt of Award Year based file formats.	**Administration** > **FAS Management** > **DOE File Management** > **Choose Award Year**, select or deselect **File Name**
Edit COA	**SFP only**. Update from Total COA to Actual COA and vice-versa.	**Student** > **Financial Information** > **Packaging** > **COA** button

Edit Comments	Update comments entered by self.	**Student** > **Student History / Comments** > **Comments**
Enable Global Logout	User will be logged out of all applications connected to user session when selecting **Log Out**. See *How do I assign global or local logout permissions?*	**Users** > **Log Out**
Enrollment Overrides	**SFP only**. Override the Enrollment Information. : • Update Current Status. • Update Active Enrollment. • Choose to Hide/Display the Enrollment.	**Student** > **Student Record** > **Enrollment Information**
FA History Request	**SFP only**. Request the NSLDS Financial Aid History.	**Student** > **USDE** > **NSLDS** > **Request NSLDS File** > **New Request** button
FTI Viewer	View Federal Tax Information (FTI) from the ISIR anywhere FTI data is displayed.	**Student** > **USDE** > **ISIR**
Fund Allocation Management	**SFP only**. Add new and edit existing fund allocations for awards that require an allocation schedule.	**Administration** > **FAS Management** > **Fund Allocation Management**
Fund Eligibility Viewer	**SFP only**. View the Fund Eligibility page.	**Student** > **Financial Information** > **Packaging** > **Fund Eligibility** icon; the eye icon associated with the Fund Information link.
G5 Drawdown	**SFP only**. View Available Drawdowns: • Complete a New G5 Transaction. • Complete a New G5 Transaction for Selected. • View Disbursements within an Available Drawdown. View G5 Transaction History: • Add New Control Entry. • View Disbursements. • Edit Drawdown Control Number and/or Amount.	**Administration** > **G5 Management**
General Read-Only	Supersedes all Role permissions and prevents the user from being able to complete any manual overrides. • This permission isn't listed with other General Permissions. Rather, it's activated using the **General Read-Only Permission** toggle switch on the **Roles Management** page.	**Administration** > **Roles Management**

	• The **General Read-Only Permission** can't be assigned to the System Administrator role.	
Grant Overpayment Resolution Task Review	**SFP only**. View the "Report Grant Overpayment Resolution to NSLDS and DRS" Task Queue.	**Dashboard** > **Task Overview** > **Report Grant Overpayment Resolution to NSLDS and DRS**
Grant Overpayment Task Review	**SFP only**. View the "Review Grant Overpayment and Notify NSLDS and DRS" Task Queue.	**Dashboard** > **Task Overview** > **Review Grant Overpayment and Notify NSLDS and DRS**
Grant Overpayment Create	**SFP only**. Create a new Grant Overpayment on the student record. The button appears in the following cases: • There's packaging data available. • At least one Title IV Grant fund is disbursed and doesn't already Grant Overpayment created. • If an R2T4 has occurred for that student Program Enrollment Status = W. • For the current academic year. The button **doesn't** appear in the following cases: • No Packaging data available. • None of the current Title IV Grant funds are disbursed. • All available disbursed Title IV Grant funds already have Grant Overpayments created for full amounts; either through a task or manual intervention. • If an R2T4 hasn't occurred for that student.	**Student** > **Financial Information** > **Grant Overpayment** > **Create Grant Overpayment** button
Hide R2T4	**SFP only**. Hide an R2T4 Record.	**Student** > **Financial Information** > **R2T4 Information** > **Hide R2T4** button
ISIR Review Task	View "Complete ISIR Review" Task Queue.	**Dashboard** > **Task Overview** > **Complete ISIR Review**
ISIR Status Override	Update the status of the Active ISIR.	**Student** > **USDE** > **ISIR**, pencil icon associated with **Status** field
ISIR Verification Task	View "Complete ISIR Verification" Task Queue.	**Dashboard** > **Task Overview** > **Complete ISIR Verification**
ISIR Corrector	Make and Submit ISIR Corrections to the "Valid" and "Active" ISIR.	**Student** > **Financial Information** > **ISIR** > **Make Corrections** button

Load ISIRs	Load ISIR files.	**Administration** > **System Management** > **Load ISIRs**
Load Message File	View the Load Message File page and load XML files to the MPG.	**Administration** > **System Management** > **Load Message File**
Manage Summer Term	**SFP only**. Add or remove Summer Terms from an Academic Year.	**Student** > **Financial Information** > **Packaging** > **Manage Summer Term** button
Match Unmatched ISIRs	Select IDs to which Unmatched ISIRs can be matched.	**Administration** > **FAS Management** > **Unmatched ISIRs**
NFF Eval Review Task	**SFP only**. View the "Re-Evaluate NFF Fund" Task Queue.	**Dashboard** > **Re-Evaluate NFF Fund**
NFF Forms Task Review	**SFP only**. View the "Process an NFF Document" Task Queue.	**Dashboard** > **Task Overview** > **Process an NFF Document**
NFF Workflow	**SFP only**. Add or edit Non-Federal Funds on a Student Record.	**Student** > **Financial Information** > **Non-Federal Funds** > **Select Fund Type** button
Origination File Update Review	**SFP only**. View the "Origination File Update" Task Queue.	**Dashboard** > **Task Overview** > **Origination File Update**
Over Award Review Task	**SFP only**. View the "Evaluate Over Award Packages" Task Queue.	**Dashboard** > **Task Overview** > **Evaluate Over award Packages**
Override Academic Years	**SFP only**. Override Academic Year and Payment Period start and end dates.	**Student** > **Financial Information** > **Packaging** > **Override Academic Years** button
Override Anticipated Disbursement Date	**SFP only**. Override the Anticipated Disbursement Date by Fund Type.	**Student** > **Financial Information** > **Disbursing** > **Payment Period** > **Anticipated Disbursement Date** column, pencil icon
Override Disbursement Date	**SFP only**. Override the Disbursement Date by Fund Type.	**Student** > **Financial Information** > **Disbursing** > **Payment Period** > **Date** column, pencil icon
Override Disbursing Criteria	**SFP only**. Override Disbursement Criteria between **Not Met** and **Met** by Fund Type: • Override individual criterion. • Override all criteria.	**Student** > **Financial Information** > **Disbursing** > **Payment Period** > **Sequence #** > **Override** > button and **Override All** button
Override G5 Disbursement	**SFP only**.	**Student** > **Disbursing** > **G5 Details** > **Override**

	Edit G5 information from the Disbursement page.	
Override Plus Application Default Overpay Code	**SFP only**. Override the Default Overpay Code in the borrower details section of the application.	**Student** > **USDE** > **Plus Application** > **Parent/ Grad PLUS Applications** > **Borrower Details** > **Override Default Overpay Code** button
Package Fund Edit	**SFP only**. Add/Edit/Remove Fund Types.	**Student** > **Financial Information** > **Packaging** > **Fund Information Table**
Password Policy	Enter parameters for creating passwords.	**Administration** > **Security Management** > **Password Policy**
Professional Judgment Review Task	View the "Review Professional Judgment" Task Queue.	**Administration** > **Security Management** > **Review Professional Judgment**
R2T4 Override Edit	**SFP only**. Override R2T4 data or cancel R2T4.	**Student** > **Financial Information** > **R2T4** > **Override R2T4 Data** button and **Terminate R2T4 Data** button
Re-Trigger SAP Evaluation	**SFP only**. Re-evaluate a SAP period record.	**Student** > **SAP Information** > **Trigger New SAP Evaluation** button
Regulatory Management	Set FAFSA Completion Start and End dates by Award Year.	**Administration** > **FAS Management** > **Regulatory Management**
Role ISIR Code Updater	Update the Status of an ISIR Code.	**Student** > **USDE** > **ISIR** > **ISIR Codes** > **Change** link
Roles Management	Create and manage Roles.	**Administration** > **Security Management** > **Roles Management**
SAIG Errors	View SAIG Error Details.	**Administration** > **System Management** > **SAIG Errors** > **View Detail** button
SAP Appeal Review Task	**SFP only**. View the "Review SAP Appeal" Task Queue.	**Dashboard** > **Review SAP Appeal**
SAP Review Task	**SFP only**. View the "Review SAP Evaluation" Task Queue.	**Dashboard** > **Review SAP Evaluation**
SSN Viewer	View the student's full Social Security Number.	**Student** > **View** link, anytime the SSN field is displayed on page.
SAP Appeals Override	**SFP only**. Update the Number of Approved Appeals on File.	**Student** > **Student Record** > **SAP Information** > **Change** link
Student	View any Student Record.	**Student** Enter search terms in the **Search Student** box.

Student History	View the Student History or Comments tab and associated pages.	**Student** > **Student History/Comments** > **Student History** or **Comments**
Student Holds	View the Student Holds page: • QC Holds. • Student Records Hold.	**Student** > **Student Holds** > **QC Holds** or **Student Record Holds**
Student Holds Modify	Modify Holds (for example, Release, Update): • QC Holds. • Student Records Hold.	**Student** > **Student Holds** > **QC Holds** or **Student Record Holds** **Note:** Requires Student Holds permissions.
Student Letters	View Student Letters.	**Student** > **Student Record** > **Student Letters**
Student Summary	View the Student Summary page.	**Student** > **Student Record** > **Student Summary**
System Management	View and use of all items contained within System Management: • SAIG Errors. • Load ISIR File. • Load Message File. • Disbursement Administration.**SFP only** • Administration Relief. **SFP only**	**Administration** > **System Management**
Task	View the contents of a Task.	**Dashboard** > **Task Overview** Select a Task Queue, Click **Start** or **Resume** button for any Task.
TD Client and VUG	Enable or disable TD Client.	**Administration** > **System Management** > **TD Client Management**
Transfer Change of Program Evaluator	**SFP only**. View the "Evaluate Student Change of Program" Task Queue.	**Dashboard** > **Evaluate Student Change of Program**
Transfer Overlapping Academic Years Evaluator	Don't use. Deprecated.	Not Applicable.
Update Fund Award Year Closeout	**SFP only**. View the "Update Fund Award Year Close Date" Task Queue.	**Dashboard** > **Update Fund Award Year Close Date**
Updating Manual SAP Indicator	**SFP only**. Update the manual SAP review mark in the Student Record.	**Student** > **Student Summary** select Student Name and ID number down chevrons to expand Student information and expose the **Override Manual SAP Indicator** link.

Updating Professional Judgment Decision Status	Manually override the Professional Judgment Decision Status.	**Student** > **Financial Information** > **Professional Judgment**
User Management	You can add and manage system users manually.	**Administration** > **Security Management** > **User Management**
View Hidden R2T4	**SFP only**. View Hidden and Canceled R2T4 records.	**Student** > **Financial Information** > **R2T4** > **View Hidden R2T4**
View Unmatched ISIRs	View unmatched ISIRs.	**Administration** > **FAS Management** > **Unmatched ISIRs**
XML Viewer	View COD Response XML File.	**Student** > **Financial Information** > **Common Record Information** > **Origination Response / Disbursement Response** > **Fund Type** > **Award Year** > **Date/Time (received response)** > **View Complete COD XML** button

Create a New Role

From **Administration** > **Roles Management**, administrators can create specific roles and manage which general permission and document permissions are enabled for each role. They can configure roles and assign users to those new roles within Student Financial Aid (SFA).

1. Navigate to **Administration** > **Security Management** > **Roles Management**.
2. Click **New**.
3. Provide a role code that contains alphanumeric characters only.
4. Provide a role name.
5. Enable group mappings by selecting the checkboxes.
6. Enable general permissions by selecting the checkboxes for user access or visibility.
7. Enable document permissions by selecting the checkboxes for user access or visibility.
8. Click **Save**.

Related Topics

- Manage General Permissions Matrix
- Manage Users and Groups in OCI IAM

Create Group Mappings

From **Administration** > **Roles Management**, administrators can create groups, assign roles to groups, assign groups to roles, and manage which permissions are enabled for each role.

Related Topics

- Manage General Permissions Matrix
- Manage Users and Groups in OCI IAM

Add a Group

1. Navigate to **Menu Bar** > **Administration** > **Security Management** > **Roles Management**.
   The Group Mappings tab lists all groups that are synchronized from the OCI IAM integrated with your SFA environments.

   Note:

   By default, the following groups will be listed
   - OCI IAM created groups
     - All Domain Users
     - Domain_Administrators
   - SFA created groups
     - Admin (Default administrator credentials for the Self-Service portal)
     - SYS_ADMIN (Default administrator credentials for the Administration user interface)
     - Membership in these groups gives you the administrator rights to all corresponding Administration interface or Portal instances in all your SFA environments
2. Click **Add Group.**
3. Provide a name for the group and a brief description of its purpose.
4. Click **Save**.

When you create a new group, you can assign it to an existing role also. After a group is created, you can't delete it from Group Mappings section. You can delete it from OCI IAM console only.

Assign Groups to Roles

You can assign roles to multiple groups. Also, you can assign groups to multiple roles. Users in a group with multiple roles get all the permissions from each role combined.

If you're trying to log in, but you're part of a different group or environment than expected, you'll see an error message. To avoid this, it's a good practice to name your groups clearly, including information about the environment and application they're related to.

Map a Group to a Role

Make sure you select the correct group when doing the mapping. Therefore, name your groups clearly, including information about the environment and application they're related to.

1. Navigate to **Administration** > **Security Management** > **Roles Management**.
2. Select one or more groups from the Group Mappings tab.
3. Select the required role from the Roles list to associate the group mapping.

4. Click **Save**.

Synchronize Groups

You can manually synchronize groups from the OCI IAM domain with the SFA environment. This updates the group listings and displays any changes, like if a group was removed from the OCI Cloud Console but still linked to a role in SFA.

Every night, a synchronization process automatically checks and validates the connections between groups and roles to ensure everything works correctly.

Administration > **User Management** gets updated to show different user types. It'll display the source of each user's login, like whether they used an older local login method or a newer one through a third-party provider. This helps track how users access their accounts, especially with the new OCI identity integration. For example, if a user logs in with both the old and new methods, the application will show both, allowing customers to see the login sources.

In this scenario, if a conflict arises, the role is highlighted in red within the SFA group management interface to alert administrators and prompt action. The SFA administrator can resolve the issue by:

- Mapping the role to an existing or new OCI IAM Group
- Leaving the role unmapped to an OCI IAM Group

If a user is assigned only the affected role and attempts to log into the SFA administration interface before the issue is resolved, they will receive an error message indicating that an issue has occurred while signing in and to contact the financial aid office for assistance.

Manage Users

From **Administration** > **User Management**, administrators can view, create, edit, and remove the users.

Related Topics

- Manage General Permissions Matrix

View a User

1. Navigate to **Administration** > **Security Management** > **User Management**.
2. View the user type that denotes where the user logged in from:
   - External (OCI SAML): Logged in using OCI Identity and Access Management Integration
   - External (SAML): Logged in using your External IDP not via IAM Integration
   - Internal: Accounts previously created via the Admin UI before IAM integration
3. Click a user account to view associated account details and roles based on their last login.

Create, Edit, and Disable User Access

New user accounts and updates to existing user accounts are managed via the OCI Cloud Console. See *Manage Users and Groups in OCI IAM* for more information.

When you delete a user account in the OCI (Oracle Cloud Infrastructure) Cloud Console, the user account isn't permanently erased from the application. Instead, the user account record is retained in the User Management interface for audit and compliance purposes.