

# Oracle® Cloud

## Getting Started with Oracle Financial Services Cloud



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Oracle Cloud Getting Started with Oracle Financial Services Cloud,

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# 1

## Before You Begin

Have you purchased a new Oracle Financial Services Cloud service? We are delighted to let you know that the automatic provisioning of the service starts as soon as you sign your order with us.

As the owner of a new cloud service, you need to make a few decisions about activating the new service. The main decision you need to make is whether you would like to keep the new cloud service separate from your other cloud services (if any). If you would like to keep the new cloud service separate from your other cloud services, you need to create a new Cloud Account. Else, you can activate the new service into your existing Cloud Account.

 **Note:**

If you are new to Oracle Cloud services, you need to create a new Oracle Cloud Account anyway.

The person listed as the administrator receives an automated email with directions on how to go ahead with either of these actions. Usually, this is the person who signs the ordering document, or the one listed as the buyer.

 **Note:**

If you opt to activate the new service into an existing Oracle Cloud Account, the owner of that account receives the notification.

Once you have taken this decision, you can refer to the email we sent you for further instructions on how to create a new Oracle Cloud Account, as well as how to activate a new cloud service to an existing Oracle Cloud account.

### Accessing Oracle Financial Services Cloud

Once you create an Oracle Cloud account and activate your cloud service, you would receive an email with URLs to access all three of your three tenant environments: **Non-Production**, **Pre-Production**, and **Production**.

Following this, you would receive another email with your administrator login credentials for each of the tenancies. Use these credentials to log in to the tenancies, upon which you will be prompted to change your password.

 **Note:**

If you have trouble accessing the tenancies or activating your Oracle Cloud Account, contact [Oracle Support](#) with your Customer Support Identifier (CSI) number.

### Understanding the Basic Concepts

Oracle Financial Services Cloud requires only a minimal set of configurations to get started. Once you have set up the platform, you can go ahead with configurations that are specific to the service you have subscribed to.

Before beginning the configurations for Oracle Financial Services Cloud, we recommend you to go through the following topics and understand the concepts:

- [Understanding Tenancies](#)
- [Understanding Configuration Lifecycle](#)
- [Understanding Configuration Movement](#)
- [Basic Configurations To Get You Started](#)

### Related Topics

- [Getting to know Oracle Cloud Console](#)
- [User Credentials FAQ](#)

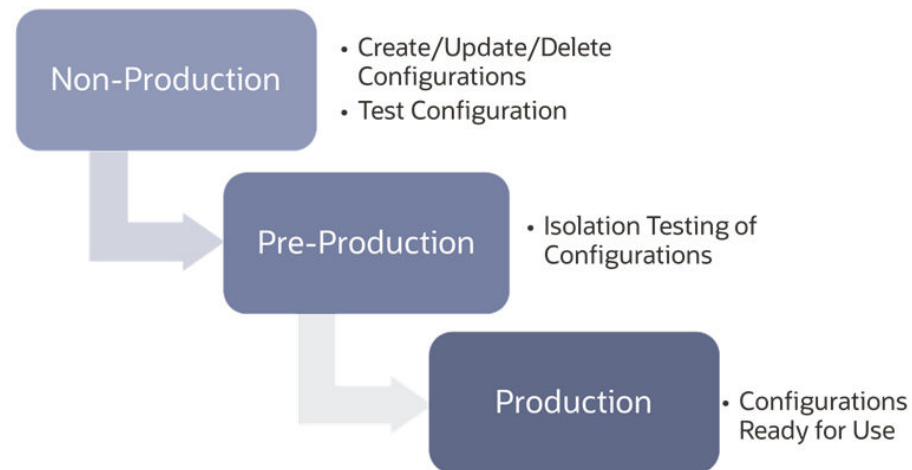
## Understanding Tenancies

Tenant on-boarding in Oracle Financial Services Cloud application results in the creation of three tenancies: **Non-Production**, **Pre-Production**, and **Production**.

- **Non-Production:** This is a sandbox environment to create all configurations that address your business needs. Once you create and test the configurations, move the configurations to Pre-Production.
- **Pre-Production:** Perform isolation testing of the configurations here. This is an iterative process until the business users verify all configurations. Once the verification is complete, move the configurations to Production.
- **Production:** This is the working environment where the configurations act as the initial data set to start the operations.

 **Note:**

In general, all configurations are primarily done in **Non-Production** tenancy. You are not allowed to make Configuration changes in **Pre-Production** and **Production** tenancies.



**Note:**

You can move Configurations from one tenancy to the next using **Configuration Movement**.

### Configuring Tenancy

When Oracle processes an order, an automated system provisions the customer environment and creates three tenancies; **Non-production**, **Pre-production**, and **Production**. Additionally, it creates an initial administrator user in the Oracle Cloud Infrastructure Identity and Access Management (OCI IAM).

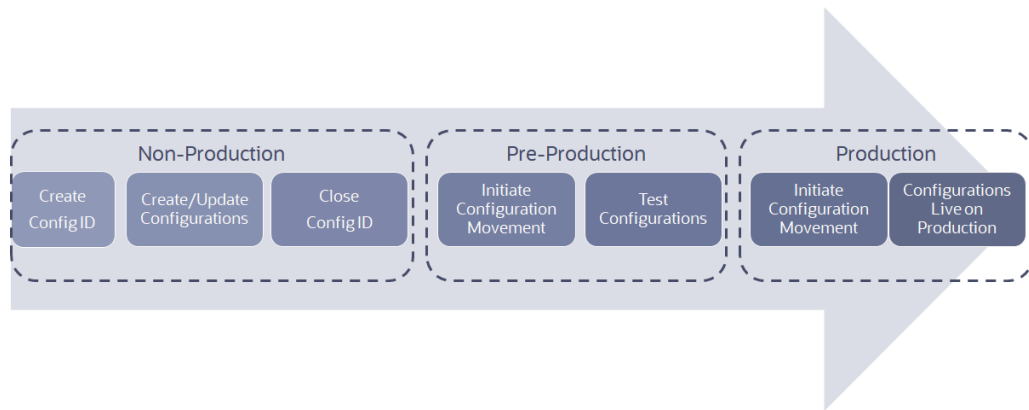
As part of auto-provisioning, a set of pre-configured data is loaded by the provisioning system. The initial administrator user must create customer specific configurations as explained in the subsequent steps. See [Default Configurations](#) for the out-of-the-box configurations available in Oracle Financial Services Cloud platform.

## Understanding Configuration Lifecycle

Most of the configuration changes in Oracle Financial Services Cloud require testing before making them available for customers to start using. To facilitate this, all configurations in Oracle Financial Services Cloud are first created in the **Non-Production** tenancy and are then moved to **Pre-Production** tenancy for isolation testing, from where they are finally moved to **Production** tenancy where the users can start using the configurations. Movement of configurations from one tenancy to other is using the **Configuration Movement** process.

All configurations in Oracle Financial Services Cloud are configured under a **Config Id** in Non-Production. The **Config ID** tracks the configuration lifecycle of an entity and facilitates the movement of configurations across the three tenancies. Thus, it is imperative that all configurations pertaining to an entity are bundled under the same Config ID, thereby simplifying the Configuration Movement process.

**Figure 1-1 Lifecycle of Configurations in Oracle Financial Services Cloud**



### Stages in Configuration Lifecycle

The list below outlines the various stages in a Configuration lifecycle. For each stage of the lifecycle, you would need appropriate entitlements to perform the tasks. Refer to the Entitlements Management section to know more about configuring entitlements.

1. Configuration Lifecycle starts with the creation of a **Config ID** in **Non-Production** tenancy. The **Config ID** essentially wraps your configurations together, making it convenient to move across tenancies.
2. Once you create a **Config ID** (or select an already existing Config ID), you can go ahead and start creating configurations in **Non-Production**.
3. After creating and testing your configurations, close the **Config ID** in **Non-Production**, thereby freezing the configuration changes.
4. Initiate the movement of configuration from **Non-Production** to **Pre-Production** using **Configuration Movement** process, initiated from the target tenancy; in this case, **Pre-Production**.
5. Continue testing the configurations in **Pre-Production**, but note that you cannot make any configuration changes at this point.
6. Once you are satisfied with your isolation testing in **Pre-Production**, initiate the **Configuration Movement** from **Pre-Production** to **Production**.
7. Once the **Configuration Movement** process completes successfully, your configurations are available at the **Production** tenancy.

### Related Topics

- Creating Config ID
- Using an Existing Config ID
- Closing Config ID
- Initiating Configuration Movement from Non-Production to Pre-Production
- Initiating Configuration Movement from Pre-Production to Production

## Understanding Configuration Movement

Configuration Movement is a process that helps you move business configurations across different tenancies on Oracle Financial Services Cloud, without needing to rebuild the business configurations in each tenancy. It also helps implement a verification process while promoting various configurations across the tenancies.

Configuration movement is always initiated from the **target** tenancy. That is, while moving configurations from **Non-Production** to **Pre-Production**, the movement is initiated from **Pre-Production**. Similarly, while moving configuration changes from **Pre-Production** to **Production**, the movement is initiated from **Production**.

Configuration Movement includes the following high level steps:

1. Closing Config ID
2. Initiating Configuration Movement from Non-Production to Pre-Production
3. Initiating Configuration Movement from Pre-Production to Production

### Note:

Configuration Movement is an all-or-none process where either all closed Config IDs that are not yet moved, are moved from one tenancy to the next, or none. That is, there is no partial or selective movement of Config IDs between tenancies.

## Basic Configurations To Get You Started

There are some basic configurations that are required to set up Oracle Financial Services Cloud. You need to perform these configurations prior to going ahead with your Cloud Service specific configurations.

### Note:

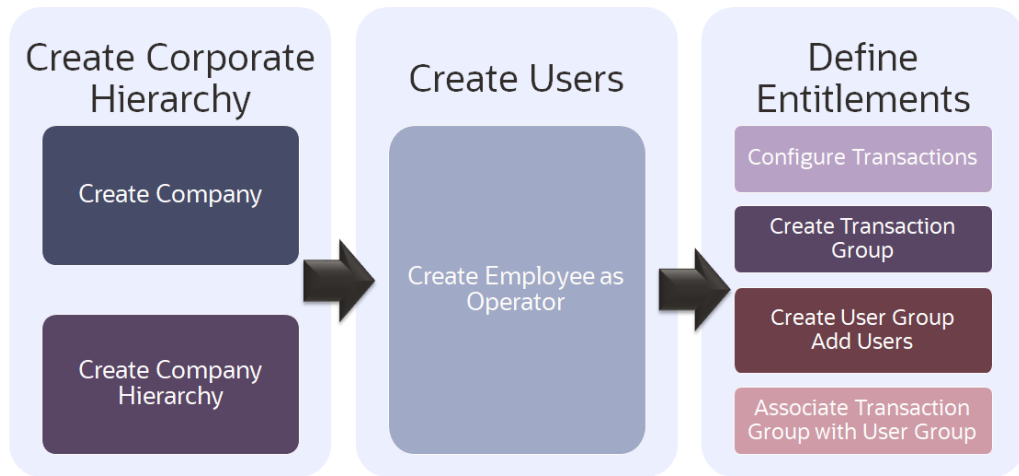
Make all basic configurations on the **Non-Production** tenancy, unless specifically mentioned otherwise.

The three main set of configurations that are required for Oracle Financial Services Cloud, irrespective of the Cloud Service you have subscribed to are:

1. **Creating Corporate hierarchy:** This involves creating a company (or multiple companies) and if needed, a hierarchy of companies.
2. **Creating Users:** This involves creating employees and operators for each of the tenancies
3. **Defining Entitlements for Users:** This involves configuring transactions, creating groups of these transactions, creating groups of users and then associating transaction groups to these user groups.



**Figure 1-2 Basic Configurations**



**Note:**

Follow these instructions while performing each of these configurations:

- Log in to Oracle Financial Services Cloud using **OracleFSCloudAdmin** account.
- Create a new **Config ID**, or select an existing **Config ID** before making configuration changes (except while creating Users).

**Table 1-1 List of Basic Configurations**

Configuration	Purpose	Prerequisites
Creating Operations Company	Map your organization's corporate hierarchy by creating companies in Oracle Financial Services Cloud. You can add or remove companies at a later point of time; however it is highly recommended to establish the company hierarchy before going ahead with configuring your selected cloud services.	<ol style="list-style-type: none"> <li>1. Creating Config ID or Using an Existing Config ID</li> <li>2. Configuring Company ID Generation</li> <li>3. Associating Company ID Generation Configuration with Tenant</li> </ol>
Creating Marketing Company	Map products to a business unit. An Operations Company can support a Marketing Company or the other way around.	<ol style="list-style-type: none"> <li>1. Creating Config ID or Using an Existing Config ID</li> <li>2. Configuring Company ID Generation</li> <li>3. Associating Company ID Generation Configuration with Tenant</li> </ol>

**Table 1-1 (Cont.) List of Basic Configurations**

Configuration	Purpose	Prerequisites
Creating Employee as Operator	Create all employees in your organization who need access to Oracle Financial Services Cloud as Operators.	Creating Operations Company


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Table 1-1 (Cont.) List of Basic Configurations

Configuration	Purpose	Prerequisites
		ch of the tenancies; that is, in Non-Production, Pre-Production


**Table 1-1 (Cont.) List of Basic Configurations**

Configuration	Purpose	Prerequisites
		a n d P r o d u c t i o n t e n a n c i e s .

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**Table 1-1 (Cont.) List of Basic Configurations**

Configuration	Purpose	Prerequisites
Configuring Transaction	Configure all transactions that a user would possibly perform in Oracle Financial Services Cloud. This ensures that each user is given entitlements that are appropriate for their function.	Creating Config ID or Using an Existing Config ID

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**Table 1-1 (Cont.) List of Basic Configurations**

Configuration	Purpose	Prerequisites
Creating Transaction Group	Group Transactions related to a function for ease in maintenance of entitlements.	<ol style="list-style-type: none"> <li>1. Creating Config ID or Using an Existing Config ID</li> <li>2. Configuring Transaction</li> </ol>

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**Table 1-1 (Cont.) List of Basic Configurations**

Configuration	Purpose	Prerequisites
Creating User Group Adding Users to User Group	Group Users who perform similar functions for ease of maintenance.	<ol style="list-style-type: none"> <li>1. Configuring User Group ID Generation</li> <li>2. Associating User Group ID Generation Configuration with Tenant</li> </ol>

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Table 1-1 (Cont.) List of Basic Configurations

Configuration	Purpose	Prerequisites
		ch of the tenancies; that is, in Non-Production, Pre-Production



**Table 1-1 (Cont.) List of Basic Configurations**

Configuration	Purpose	Prerequisites
		a n d P r o d u c t i o n t e n a n c i e s .

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**Table 1-1 (Cont.) List of Basic Configurations**

Configuration	Purpose	Prerequisites
Associating Transaction Group with User Group	This ensures that all users within the user group receives access to all transactions within the transaction group; thereby providing them with appropriate entitlements required for their role.	<ol style="list-style-type: none"> <li>1. Creating Transaction Group</li> <li>2. Creating User Group</li> </ol>

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Table 1-1 (Cont.) List of Basic Configurations

Configuration	Purpose	Prerequisites
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Table 1-1 (Cont.) List of Basic Configurations

Configuration	Purpose	Prerequisites
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## Default Configurations

Some of the basic configurations in Oracle Financial Services Cloud come pre-configured with default values. These default configurations enable you to log in and perform the basic platform setup, like creating other users, defining their entitlements, etc.

The available basic configurations and their default values are listed below:

**Table 1-2 Default Configuration Details**

Configuration	Default Value
Tenancy	<ul style="list-style-type: none"><li>• Non-Production</li><li>• Pre-Production</li><li>• Production</li></ul>
Operator	OracleFSAdmin
Operations Company	OracleOperationsCompany
Marketing Company	OracleMarketingCompany
User Group	OracleUserGroup
Transaction Group	OracleTransactionGroup
Transaction Configurations	List of Preconfigured Transactions
Channel	OracleChannel
UI Experience	Not available currently



**Note:**

**Channel** and **UI Experience** pages are not available currently; they will be introduced in subsequent releases.

### Related Topics

- [Understanding Tenancies](#)
- User Management
- Managing Companies
- Entitlements Management