Oracle®

Financial Services Cloud Configurations Guide

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Contents

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Initial Configurations for Oracle Financial Services Cloud

Getting Started with Oracle Financial Services Cloud

You need to perform a set of configurations immediately after the provisioning of a customer environment. These activities are performed by the default user **OracleFSCloudAdmin**, and are done only on the **Non-Production** tenancy. Once these initial set of configurations are created and tested, they are then moved to the subsequent tenancies (Pre-Production and Production) using Configuration Movement process.

See Getting Started with Oracle Financial Services Cloud for understanding the process of setting up Oracle Financial Services Cloud platform for tenants.

Related Topics

- Default Configurations

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 1-1 Default Configuration Details

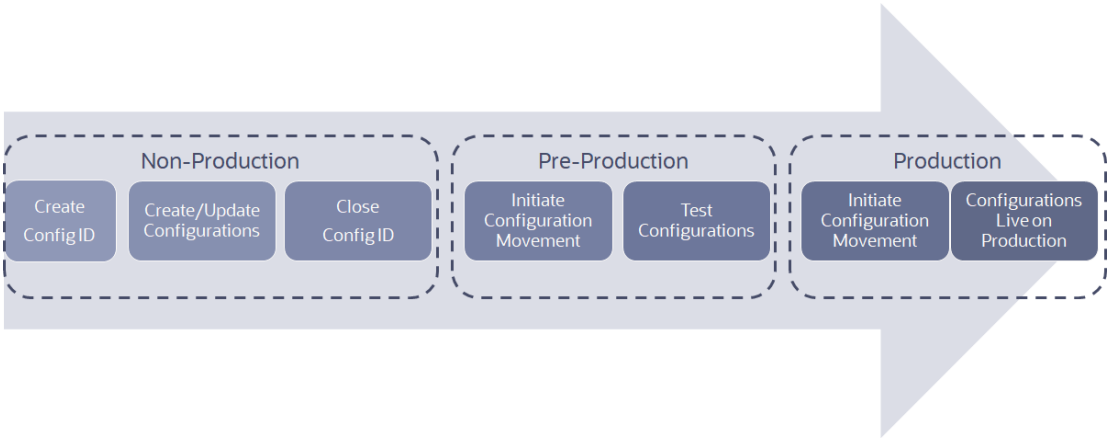
Configuration	Default Value
Tenancy	• Non-Production • Pre-Production • Production
Operator	OracleFSCloudAdmin
Operations Company	OracleOperationsCompany
Marketing Company	OracleMarketingCompany
User Group	OracleUserGroup
Transaction Group	OracleTransactionGroup
Transaction Configurations	List of Preconfigured Transactions

2
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 2-1 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 for perform the tasks. Refer 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

Creating Config ID

Configurations in Oracle Financial Services Cloud are made in the Non-production tenancy, and are done against a **Config ID** and then moved to the Pre-Production tenancy. While creating or making any configuration changes, you need to either create a **Config ID** or use an existing **Config ID** (in **Open** status) to save your configurations.

> **Note:**
>
> You can create Config ID only in Non-Production tenancy, which is identified as the tenancy for maintaining all Configurable Items for a customer.

To create a **Config ID**, follow this procedure:

1. Log in to Oracle Financial Services Cloud application using **OracleFSCloudAdmin** account. If you are using another account, make sure that you have the appropriate entitlements (**Crt Cf** Create Configurations).
2. Select **Config ID** on the top-right corner. By default, the page displays Config ID as **None**.
3. Select **Yes** in the confirmation message that appears. The **Config ID Quick Access** window appears.
4. Select **Create New Config ID**.
5. Select **Continue**. The **Creating Config ID** page appears.
6. In the **Add Identification** section, enter the following details:
    a. **Name**: Enter the name of the Config ID.
    b. **Long Name**: Enter the full name of the Config ID.
    c. **Description**: (Optional) Enter a meaningful description of the Config ID.
7. Select **Continue**. A success message with the newly created **Config ID** appears.

8. (Optional) Select **Go to Details Page** to view the details of the newly created Config ID, including **Name**, **Long Name**, and **Configuration Status Code**, which indicates the current status of the Config ID.
9. Select **Finish**. A message appears stating that the newly created Config ID is now **Active** for the session.
10. Select **Proceed**. The home page displays **Config ID: Active** with a green tick mark.

A newly created **Config ID** is in **Open** status and remains in this status until you manually change the status to **Closed** from **Config ID Manager**.
When you are ready to migrate the configurations bundled in a **Config ID** to Pre-Production tenancy, change the status of **Config ID** to **Closed**. This queues up the **Config ID** for Configuration Movement.

Related Topics

- Configuration ID Management
- Understanding Configuration Movement

Using an Existing Config ID

To use an existing Config ID for a set of configurations, follow this procedure:

1. In the **Dashboard**, click **Config ID** link on the top-right corner. When you log in, the Config ID link displays **None**.
2. Click **Yes** in the message that asks you to set up a Config ID. The **Config ID Quick Access** page appears.
3. Select **Use an Existing Config ID** and select **Continue**. The page displays all Config IDs that are currently in **Open** status.
4. (Optional) Select **Open Snapshot** to view the details of a Config ID.
5. Select the **Config ID** you want to use from the search results and select **Continue**. The page displays the selected Config ID and its description.
6. Select **Done**. A success message appears saying "You now have an active Config ID. <Config ID> You can continue work."
7. Click **Proceed**.

Dashboard displays **Config ID: Active** with a green tick mark.

Deleting Config ID

You can delete a **Config ID** only if you have not done any configurations using it.
You cannot delete a **Config ID** after you have used it for making any configuration changes. That is, once a Config ID is made **Active** AND you have done configuration changes in the application, you cannot delete it.

To delete a Config ID, follow this procedure:

1. From **Application Navigation**, select **Configuration**, and then select **Config ID Manager**.
2. Select **View All**. This displays all the Config IDs created in the non-production tenancy.
3. Select **More Options** against the **Config ID** that you want to delete and select **Delete**. A confirmation message appears and warns that the action cannot be undone.

4. Select **Yes**. A message that says "This record has been deleted successfully." appears.
5. Select **Ok**.

Related Topics

- Understanding Configuration Lifecycle

Closing Config ID

After you finish a set of configurations for a customer in Non-production tenancy and is ready for further testing in Pre-production tenancy, close the Config ID so that all the configurations done using the Config ID are moved to the Pre-production tenancy. Closing a Config ID bundles all the configuration changes that you have made using that Config ID, and the closed Config ID is available in the queue for Configuration Movement.

> **Note:**
>
> Configurations are moved from Non-production tenancy to Pre-production tenancy in the order in which the corresponding Config IDs are closed.

Before trying to close a Config ID, consider the following conditions:

- Close the **Config ID** only if it is used to perform any configurations. If you have not done any configurations using a Config ID, you cannot close it. In this case, delete the **Config ID** instead.
- If any of the configurations done using a **Config ID** is in **In Progress** status, you will not be able to close the corresponding **Config ID**. Once the configuration is promoted from **In Progress** to **Active** status, you can close the corresponding Config ID.
- Do not attempt to close the **Config ID** while it is **Active** for the current login session. Switch to another **Config ID** and close it.

To close a Config ID, perform the following procedure:

1. From **Application Navigation**, select **Configuration**, and then select **Config ID Manager**.
2. Select **View All**. The page lists all Config IDs that are **Open** and those that are **Closed**, but not yet moved to other tenancies.
3. Move the slider against a Config ID to the left to close it. Note that this action cannot be undone. That is, you cannot re-open a closed Config ID.
4. Select **Yes** in the confirmation message asking if you are sure about closing the Config ID.

Once a Config ID is closed, the configuration changes within it are queued up for movement to Pre-Production tenancy, and the Config ID cannot be further used to save any configurations.

Understanding Configuration Movement

Configuration Movement is the process through which one or more Config ID, and thereby all the underlying configuration changes that are being tracked under the Config IDs, are moved or copied from one customer tenancy to another tenancy. For example, from Non-Production to Pre-Production and from Pre-Production to Production.

Customer Tenancies

On Oracle Financial Services Cloud, every customer is provisioned with three tenancies: **Non-Production**, **Pre-Production**, and **Production**. The Non-Production tenancy is where you first create all configurations as per your business needs. These configurations are then moved or copied to the Pre-Production tenancy for business users to test and verify. This is an iterative process until the business users verify the various configurations and thereby provide approval to make the same configurations available to the Production environment.

Bundling and Moving Configuration Changes

Oracle Financial Services Cloud tracks all the configuration changes done in the Non-Production environment through a **Config ID**. OFSC prompts you to select a Config ID before creating, editing, or deleting any configurations in the Non-Production tenancy. One Config ID can track multiple configuration changes and bundles these configuration changes in the Non-Production environment.

Once the configuration changes are completed for a given Config ID, close the Config ID so that it is not used for tracking any further configuration changes. Closing the Config ID makes the configuration updates available for movement (copy) to other customer tenancies on the Oracle Financial Services Cloud.

Configuration Movement Process

Configuration Movement is the process through which a Config ID, and thereby all the underlying configuration changes that are being tracked under the Config ID, are moved from one customer tenancy to another tenancy. For example, from Non-Production to Pre-Production and then from Pre-Production to Production.

The Configuration Movement process is always initiated from the target tenancy. Therefore, to move from the Non-Production tenancy to the Pre-Production tenancy, you need to initiate the movement process from the Pre-Production tenancy. Similarly, for configuration in the Pre-Production tenancy to be moved/copied to the Production tenancy, you need to initiate the movement from the Production tenancy.

> **Note:**
>
> The direction of configuration data flow, that is from Non-Production to Pre-Production, and then from Pre-Production to Production, is fixed and pre-configured by Oracle Financial Services Cloud tenancy automated provisioning process itself. You cannot reconfigure or change the direction of configuration data flow.

Every time a Configuration Movement is initiated, the configuration tracking system identifies a list of all the closed Config IDs that are available in the source tenancy since the last successful movement process completed, and then moves them one after the other to the target tenancy. Thus the Configuration Movement process works in an 'All or None' mode. It

either results in moving the configurations for all the Config IDs identified for movement, or does not move any of it (that is, in case of any unforeseen errors).

Initiating Configuration Movement from Non-Production to Pre-Production

Before you initiate the Configuration Movement process from Pre-Production, ensure the following:

- Create and use a **Config ID** while performing configuration changes in the Non-Production tenancy.
- Close the **Config ID** after finishing the configuration changes, so that it is available for Configuration Movement.
- Generate Security Token for accessing Non-Production.

> **Note:**
>
> You cannot close a **Config ID** until you make configuration changes using it.

Generating Security Token
To initiate Configuration Movement from Non-Production to Pre-Production, you need to first generate a security token that enables access to the Non-Production tenancy. Execute the following Curl script to generate a valid token:

```
curl --location --request POST "https://
ENVIRONMENTNAME.fscloud.oraclecloud.com/non-prod/api/oauth2/v1/access"
--header "Content-Type: application/json" --data-raw
"{\"User\":\"OracleFSCloudAdmin\",\"Password\":\"ADMINPASSWORD\"}"
```

In the above script, replace `ENVIRONMENTNAME` with the customer environment name and `ADMINPASSWORD` with the password for **OracleFSCloudAdmin** user.

Initiating Configuration Movement from Non-Production to Pre-Production
To move configuration changes from Non-Production to Pre-Production, initiate the Configuration Movement process from the Pre-Production tenancy.

1. Log in to the Pre-Production tenancy as an administrator user.
2. From **Application Navigation**, select **Configuration** and then select **Movement**. The **Movement** page shows the result of the previous Configuration Movement process that was initiated from the Pre-Production tenancy, if any.
3. Select **Initiate Movement**.
4. In the **Config ID Movement** page, enter the Security Token generated by running the curl script in **Authentication Code**, and select **Continue**.

   The page lists all closed Config IDs in the Non-Production tenancy that are ready for movement to the Pre-Production tenancy.
5. Select **Continue** to initiate the configuration movement process from Non-Production to Pre-Production. The page displays a confirmation message on successfully initiating the Movement Process.

To verify if the movement is successful, check the **Movement** page. Once the movement is successfully completed, the page does not list any **Config ID**.

Initiating Configuration Movement from Pre-Production to Production

Before you initiate the Configuration Movement process from Production tenancy, ensure the following:

- Successfully complete Configuration Movement process from Non-Production to Pre-Production.
- Generate Security Token for accessing Pre-Production.

Generating Security Token
To initiate Configuration Movement from Pre-Production to Production, you need to first generate a security token that enables access to the Pre-Production tenancy. Execute the following Curl script to generate a valid token:

```
curl --location --request POST "https://
ENVIRONMENTNAME.fscloud.oraclecloud.com/pre-prod/api/oauth2/v1/access" --
header "Content-Type: application/json" --data-raw
"{\"User\":\"OracleFSCloudAdmin\",\"Password\":\"ADMINPASSWORD\"}"
```

In the above script, replace `ENVIRONMENTNAME` with the customer environment name and `ADMINPASSWORD` with the password for **OracleFSCloudAdmin** user.

Initiating Configuration Movement from Pre-Production to Production
To move configuration changes from Pre-Production to Production, initiate the Configuration Movement process from the Production tenancy.

1. Log in to the Production tenancy as an administrator user.
2. From **Application Navigation**, select **Configuration** and then select **Movement**. The **Movement** page shows the result of the previous Configuration Movement process that was initiated from the Production tenancy and was successful, if any.
3. Select **Initiate Movement**.
4. In the **Config ID Movement** page, enter the Security Token generated by running the curl script in **Authentication Code**, and select **Continue**. The page lists all closed Config IDs in the Pre-Production tenancy that are ready for movement to the Production tenancy.
5. Select **Continue** to initiate the configuration movement process from Pre-Production to Production. The Configuration Movement process runs in the background. However, the page displays a progress bar and message indicating that the movement is in progress.
6. Once the configuration movement is complete, try to initiate the movement again and the page displays a confirmation message saying the movement was successful.

To verify if the movement is successful, access the **Movement** page and try initiating movement using the same Authentication Code used previously. If the movement is successfully completed, the **Queued Config IDs** page does not list any data and the **Movement** page displays a message saying the movement was successful.

3
ID Generation

ID Generation is feature that enables automatic generation of identifiers for various entity instances available in Oracle Financial Services Cloud. ID Generator has a uniform methodology for generating IDs across Oracle Financial Services Cloud, along with the capability to define patterns that are specific to requirements of each domain.

When you create entities like an Account or a Company, system generates the identifiers based on the ID Generator pattern configured. This topic explains the pattern of ID generation, along with its various components.

Generation Type

ID Generation configuration can be of two types:

- **Automatic**: When you select automatic ID generation, the application generates the ID automatically, according to the pattern defined in the configuration.
- **Manual**: When you select manual ID generation, the application lets you enter an ID manually, but validates the ID against the pattern defined in the configuration.

ID Generation Pattern

ID Generation configuration of an entity defines the pattern in which an ID is generated (or validated against) for that entity. ID generation pattern is a combination of two or more of these components:

- **Static**: A static value as a component
- **Sequence**: A sequential component
- **Delimiter**: A delimiter between components
- **CheckDigit**: A check digit component that uses either **Mod10**, **Mod11** or **IBAN** algorithms

> **Note:**
>
> An ID generation pattern must have at least two components, one static component and one sequence component. As IDs are generated in the system, the static component remains appended to the ID as it is, while the sequential component increments as per the definition.

ID Generation Configuration

Setting up ID Generator for an entity involves two steps:

1. **Add Identification**
2. **Setup ID Generator**

Add Identification

Adding identification involves collecting three details:

- **Name**
- **Long Name**
- **Description**

Setup ID Generator

Setting up ID Generator involves two steps:

- **Setting up ID Attributes**: This includes configuring **Generation Type** and **Delimiter Type** for the identifier.
- **Setting up ID Components**: This includes choosing more than one **Component Types** and its name or value.

> **Note:**
>
> It is mandatory to configure at least one attribute and two or more components for an identifier.

Setting Up ID Attributes

- **Setting Up Generation Type**: ID Generation Type can be either **Auto** or **Manual**.
- **Setting Up Delimiter Type**: Select the delimiter character that you want to use between components in the ID.

Setting Up ID Components

Configure the various components of the ID. The **Component Type** can be either **Static**, **Sequence**, **Delimiter**, or **CheckDigit**.

> **Note:**
>
> You need to set up a minimum of two components and one of them should be of type **Sequence**.

Configuring ID Generation

To generate identifiers for entities like Company and User Group, you need to configure the **ID Generator** first and then associate it with the tenant (Non-Production).

> **Note:**
>
> This section gives you an overview of the generic steps involved in ID generation configuration. For specific instructions on how to configure ID Generation for a Company or a User Group, refer to the Related Links at the end of this section.

Configuring ID Generator for an entity is done using the **ID Generator** page and involves two steps:

1. **Add Identification**
2. **Setup ID Generator**

Add Identification

Adding identification involves collecting three basic details of the ID Generation configuration:

- **Name**
- **Long Name**
- (Optional) **Description**

Setup ID Generator

Setting up ID Generator involves configuring the pattern for generating ID and involves two steps:

1. **Setting up ID Attributes**: This includes configuring **Generation Type** and **Delimiter Type** for the identifier.
2. **Setting up ID Components**: This includes choosing more than one **Component Types** and its name or value.

> **Note:**
>
> It is mandatory to configure at least one attribute and two or more components for an identifier.

Setting Up ID Attributes

ID attributes decide whether the ID generation should be manual or automatic. It involves selecting the **Generation Type** and **Delimiter Type**.

- Set up **Generation Type** as either **Auto** or **Manual**.
  - **Auto**: ID is generated automatically based on the pattern configured in **ID Generator**.
  - **Manual**: You can enter the ID manually, but it will be validated against the pattern configured in **ID Generator**.

> **Note:**
>
> If you select **Manual**, select the maximum length of the pattern in **Max length / Value**. If you select **Auto**, the maximum length is taken as 16 by default.

- Set up **Delimiter Type** by selecting the **Delimiter** character to be used between various components in the ID.

Setting Up ID Components

ID Components decide the pattern of the ID. Every ID should have two or more components; of which one has to be sequential. The different types of components used in forming the ID pattern are:

- **Static**: Define the static part of the ID in **Static Name / Value**.
- **Sequence**: Define the sequential part of the ID. This involves configurations like:
  - Whether the ID is to be padded to the maximum length or not
  - The number with which the sequence starts
  - The number with which the sequence increments
  - The maximum value of the sequence
- **CheckDigit**: Define the CheckDigit part of ID that uses either **Mod10**, **Mod11** or **IBAN** algorithm

1. From **Application Navigation**, select **Configuration**, and then select **ID Generator**.
2. Select the entity for which you want to configure ID generation. For example, **Company**.
3. Select **Add**. This opens **Creating ID Generator**.
4. In **Add Identification**, perform these steps:
   a. Enter **Name** for the ID Generation configuration.
   b. Enter **Long Name** for the ID Generation configuration.
   c. (Optional) Enter **Description** for the ID Generation configuration.
   d. Select **Continue**.
5. In **Setup ID Generator**, there are two sections: **Attributes** and **Components**. In **Attributes** section, follow these steps:
   a. Select **Add** against **Generation Type**.
   b. In **Generation Type**, select either **Auto** or **Manual**. If you select Auto, the ID Generation is automatic and follows the pattern defined in this configuration. If you select Manual, application lets you generate the identifier, but validates it against this configuration.
   c. (Optional) If you select **Manual** as the **Generation Type**, select **Max length / Value**. If you have selected **Auto**, this field does not appear. In this case, the maximum length is by default **16**.
   d. (Optional) In **Delimiter Type**, select the delimiter character that you want to use between different components of the ID.
   e. Select **Done** to return to **Setup ID Generator**.
6. In **Components** section, select **Add** against **Add Component**.
7. In **Choose Component Type**, select either **Static**, **Sequence**, or **CheckDigit** and tap **Done**.
8. (Optional) If you have selected **Static** as **Component Type**, enter **Static Name / Value** that forms the static component of the ID.

9. (Optional) If you have selected **Sequence** as **Component Type**, follow these steps:
    a. Select **Padding Ind** ON or OFF.
    b. Enter the value with which the sequence should start in **Starts With**.
    c. Enter the value with the sequence should increment in **Incremented By**.
    d. Enter the value up to which the sequence should increment in **Max Value**.
10. (Optional) If you have selected **CheckDigit** as **Component Type**, follow these steps:
    a. Select either **Mod10** or **Mod11** in **Algorithm**.
    b. Enter the format for transposing in **Transpose**.
    c. Enter the format for adding weight in **Weight**.
11. Select **Done** in **Choose Component Type**.
12. Select **Continue** in **Set Up ID Generator**.
13. Select **Finish**

Related Topics

- ID Generation
- Configuring Company ID Generation
- Configuring User Group ID Generation

Configuring Company ID Generation

Configuring ID Generation for a Company ensures that the ID generation pattern is applied every time you create a **Company**.
Configuring Company ID Generation involves two steps:

1. **Add Identification**: This step involves configuring basic details of the Company ID like name, description, and so on.
2. **Setup ID Generator**: This step involves setting the pattern that the Company IDs should follow.

To create an ID Generation Configuration for a Company, follow this procedure:

> **Note:**
>
> Select a Config ID before performing the following procedure.

1. From **Application Navigation**, select **Configuration**, and then select **ID Generator**, and then select **Company**.
2. Select **Add**.
3. In the **Add Identification** page, enter the following attributes:
    a. **Name**: Enter the name of the company.
    b. **Long Name**: Enter the full name of the company.
    c. **Description**: (Optional) Enter a meaningful description of the company.
4. Select **Continue**. This opens the **Setup ID Generator** page.

5. In the **Attributes** section, select **Add** to add a new **Generation Type** for the company identifier. The **Generation Type** decides whether the identifier has to be generated automatically or manually.
   a. Select either **Auto** or **Manual** in **Generation Type**.
   b. (Optional) Select the maximum length for the Company ID from the list in **Max Length / Value**. All values from 1 to 16 are available for selection. This field appears only when you select **Manual** in the previous step.
   c. (Optional) Select the delimiter to be used in the Company ID from the list available in **Delimiter Type**. The values available are: **!**, @, **#**, **%**, **&**, *****, and **-**.
   d. Select **Done**. This takes you back to the **Setup ID Generator** page.
6. Under the **Components** section, select **Add** to start adding components for the Company ID.

> **Note:**
>
> A Company ID would require more than one component.

7. From the **Choose Component Type** options, select a value and then select **Continue**. The possible options for component types are:
   - **Static**: Enter **Static Name / Value** and select **Done**.
   - **Sequence**: Turn **Padding Indicator** ON or OFF to choose whether to pad with zeroes on the left. Enter the number with which the sequence starts in **Starts With** and how it is incremented in **Incremented By**. Also enter the maximum value of sequence in **Max Value** and select **Done**.
   - **CheckDigit**: Select **Mod10** or **Mod11** under **Algorithm** section. Enter appropriate values for **Transpose** and **Weight** and select **Done**.
8. Select **Continue**. This validates the ID generation pattern that you configured for the Company and if valid, saves the configuration.

Once you have configured the Company ID Generation, you need to associate this configuration with a tenant (Non-Production). After the Company ID Generation configuration is associated with the tenant, you can start creating companies in the application.

Related Topics

- ID Generation
- Associating Company ID Generation Configuration with Tenant

Configuring User Group ID Generation

Configuring ID Generation for a User Group ensures that the ID generation pattern is applied every time you create a **User Group**.
Configuring User Group ID Generation involves two steps:

1. **Add Identification**: This step involves configuring basic details of the User Group ID like name, description, and so on.
2. **Setup ID Generator**: This step involves setting the pattern that the User Group IDs should follow.

To create an ID Generation Configuration for a User Group, follow this procedure:

> **Note:**
>
> Select a Config ID before performing the following procedure.

1. From **Application Navigation**, select **Configuration**, and then select **ID Generator**, and then select **User Group**.
2. Select **Add**.
3. In the **Add Identification** page, enter the following attributes:
   a. **Name**: Enter the name of the user group.
   b. **Long Name**: Enter the full name of the user group.
   c. **Description**: (Optional) Enter a meaningful description of the user group.
4. Select **Continue**. This opens the **Setup ID Generator** page.
5. In the **Attributes** section, select **Add** to add a new **Generation Type** for the user group identifier. The **Generation Type** decides whether the identifier has to be generated automatically or manually.
   a. Select either **Auto** or **Manual** in **Generation Type**.
   b. (Optional) Select the maximum length for the User Group ID from the list in **Max Length / Value**. All values from 1 to 16 are available for selection. This field appears only when you select **Manual** in the previous step.
   c. (Optional) Select the delimiter to be used in the User Group ID from the list available in **Delimiter Type**.
   d. Select **Done**. This takes you back to the **Setup ID Generator** page.
6. Under the **Components** section, select **Add** to start adding components for the User Group ID.

   > **Note:**
   >
   > A User Group ID would require more than one component.

7. From the **Choose Component Type** options, select a value and then select **Done**. The possible options for component types are:
   - **Static**: Enter **Static Name / Value** and select **Done**.
   - **Sequence**: Turn **Padding Ind** ON or OFF. Enter the number with which the sequence starts in **Starts With** and how it is incremented in **Incremented By**. Also enter the maximum value of sequence in **Max Value** and select **Done**.
   - **CheckDigit**: Select **Mod10** or **Mod11** under **Algorithm** section. Enter appropriate values for **Transpose** and **Weight** and select **Done**.
8. Select **Continue**. This validates the ID generation pattern that you configured for the User Group and if valid, saves the configuration.

Once you have configured the User Group ID Generation, you need to associate this configuration with a tenant (Non-Production). After the User Group ID Generation

configuration is associated with the tenant, you can start creating user groups in the application.

Related Topics

- ID Generation
- Associating User Group ID Generation Configuration with Tenant

Associating Company ID Generation Configuration with Tenant

Follow this procedure to associate a Company ID generation configuration with a tenant.

> **Note:**
>
> Select a **Config ID** before performing the following procedure.

1. From **Application Navigation**, select **Configuration**, and then select **Tenant**.
2. Select the **Associations** tab.
3. Select **Add**.
4. Expand **Required** and then expand **Company ID Generation Configuration** section.
5. In **Company ID Generator**, select **Add**.
6. Select the Company ID Generation Configuration you want to associate and select **Continue**.
7. Select **Finish**.

The Company ID Generation configuration association with the Tenant is complete. If you have already associated a Company ID Generator configuration with the tenant, then the page displays the associated Company ID Generation configuration.

Associating User Group ID Generation Configuration with Tenant

Follow this procedure to associate a User Group ID generation configuration with a tenant.

> **Note:**
>
> Select a **Config ID** before performing the following procedure.

1. From **Application Navigation**, select **Configuration**, and then select **Tenant**.
2. Select the **Associations** tab.

3. Select **Add**.
4. Expand **Required** and then expand **User Group ID Generation Configuration**.
5. In **User Group ID Generator**, select **Add**.
6. Select the User Group ID Generation Configuration you want to associate and select **Continue**.
7. Select **Finish**.

The User Group ID Generation configuration association with the Tenant is complete. If you have already associated a User Group ID Generation configuration with the tenant, then the page displays the associated User Group ID Generation configuration.

4

Managing Companies

Company is an abstract concept that represents statutory companies, business units, or levels of financial consolidation and reporting. The company is an entity in the Tenant's organization structure.

In Oracle Financial Services Cloud, you can set up instances of companies that the Tenant wants to use across their cloud services, as well as organize them into hierarchies.

Company Types

You can create different types of companies in Oracle Financial Services Cloud:

- **Financial**: These companies hold financial or fiduciary responsibilities and are related to Products, Billing Features, and Account Features that are used for all accounting.
- **Marketing**: These are companies that market and brand products. They are related to Products and are used to identify the owner, define branding and other forms of marketing (including mass mailing), along with other details like interest rates. They are used for various forms of marketing reporting and communications.
- **Operations**: These companies have employees and operators, and perform operations. They are used for all forms of administrative processing and roll-up reporting.
- **Sales**: These are companies that sell products and are used to identify who can sell the product within the Company.
- **Legal**: These companies are legal entities and are used for legal contracts, agreements, disclosures, and so on. They are used to define statutory and regulatory policies of various regions where the company's Products are being sold.

Organization Unit Types

Every company should have a **Main** organization unit type and a **Sub** organization unit type. This helps in creating an organizational structure for the company.

- A **Main** organization unit type indicates a high level role in organization structure, such as a Head Office or a Zonal Office. The Main organization unit types available in OFSC are:
  - **Head Office**
  - **Regional Office**
  - **Zonal Office**
  - **Area Office**
  - **Business Unit**
- A **Sub** organization unit type indicates a unit that takes additional activities, such as a Shared Service Centre or a Branch. The Sub organization unit types available in OFSC are:
  - **Branch**
  - **Shared Service Centre**
  - **Division**

- **Department**

Creating Companies and Company Hierarchies

To create a Company in Oracle Financial Services Cloud, you need to perform the following prerequisite tasks:

> **Note:**
>
> These configurations ensures that every company created in the tenant follows the same ID pattern. Note that this ID pattern is applied only when you select automatic ID generation while creating a **Company**. In case of manual ID generation, you can enter an ID of your own choice, which is then validated against the pattern set.

1. Create a Company ID Generation configuration: This configuration lets you define the pattern to be followed while creating a Company ID.
2. Associate the Company ID Generation configuration with the Tenant: This configuration lets you associate the above configuration to a tenant, so that every company created in the tenant follows the same pattern.

Once the Company ID Generation configuration is created and associated with the tenant, you can go ahead with the company creation.

Procedure for creating company remains the same for all types of companies. To understand the procedure for creating an 'Operations' type of company, see Creating Operations Company.

To create a hierarchy of companies, associate one company to another, thereby establishing a parent-child relationship between them. See Creating Operations Company Hierarchy.

Creating Operations Company

Follow this procedure to create a new Operations Company.

> **Note:**
>
> Select a **Config ID** before proceeding with this procedure.

1. From **Application Navigation**, select **Configuration** and then select **Company**, and then select **Operations**.
2. Select **Add** to start creating the Company.
3. In the **Add Identification** page, enter the following details:
   a. Enter **Name** and **Long Name** of the company.
   b. Select the **Main** organizational unit of the company. The values available are: **Head Office**, **Regional Office**, **Zonal Office**, **Area Office**, and **Business Unit**.

c. Select the **Sub** organizational unit of the company. The values available are: **Branch**, **Shared Service Centre**, **Division**, **Department**.

d. (Optional) Select the calendar against **Active** and select the date on which the company turns active.

e. (Optional) Select the calendar against **Inactive** and select the date on which the company turns inactive.

f. Select **Continue**.

4. In the **ID Generation** page, you can either view the automatically generated identifier for the company, or manually enter an identifier. This is based on the Company ID Generation configuration that is associated with the tenant.

   While manually entering an identifier, system validates the ID against the Company ID Generation configuration that is associated with the tenant. If the validation fails, an error message appears.

5. Select **Continue**.

6. In the **Setup Contact** page, you can create the contact for the company, or skip it.

   - Select **Create New Contact** to enter contact details like **Phone number**, **Email**, and **Address**.
   - Select **Skip Contact Section for now** to skip creating the contact details.

7. Select **Continue**.

8. (Optional) In the **Manage Associations** page, you can add associations to **Products**, **Operators**, **Employees**, **Supplier Services**, and **Keyword Libraries**.

9. Select **Continue**.

10. Select **Finish**.

Creating Marketing Company

Follow this procedure to create a new Marketing Company, which helps to associate products to your organization structure in Oracle Financial Services Cloud.
Creating a Marketing Company includes four steps:

1. **Add Identification**
2. **ID Generation**
3. **Setup Contact**
4. **Manage Associations**

> **Note:**
>
> Select a **Config ID** before proceeding with this procedure.

1. From **Application Navigation**, select **Configuration** and then select **Company**, and then select **Marketing**.
2. Select **Add** to start creating the Company.
3. In the **Add Identification** page, enter the following details:

a. Enter **Name** and **Long Name** of the company.

b. Select the **Main** organizational unit of the company. The values available are: **Head Office**, **Regional Office**, **Zonal Office**, **Area Office**, and **Business Unit**.

c. Select the **Sub** organizational unit of the company. The values available are: **Branch**, **Shared Service Centre**, **Division**, **Department**.

d. (Optional) Select the calendar against **Active** and select the date on which the company turns active.

e. (Optional) Select the calendar against **Inactive** and select the date on which the company turns inactive.

f. Select **Continue**.

4. In the **ID Generation** page, you can either view the automatically generated identifier for the company, or manually enter an identifier. This is based on the Company ID Generation configuration that is associated with the tenant.

   While manually entering an identifier, system validates the ID against the Company ID Generation configuration that is associated with the tenant. If the validation fails, an error message appears on the page.

5. Select **Continue**.

6. In the **Setup Contact** page, you can create the contact for the company, or skip it.

   - Select **Create New Contact** to enter contact details like **Phone number**, **Email**, and **Address**.
   - Select **Skip Contact Section for now** to skip creating the contact details.

7. Select **Continue**.

8. (Optional) In the **Manage Associations** page, you can add both **Required** associations and **Optional** associations. Required associations are those that need to be configured before closing the **Config ID** and initiating Configuration Movement of the company. Optional associations are not mandatory for Configuration Movement of company records.

   a. Select **Required** and select **Add** under **Product ID Generation Configuration**, to add a Product ID Gen Config for the company.

   b. Select **Add** under **Product Component ID Generation Configuration**, to add a Product Component ID Gen Config for the company.

   c. Select **Optional** and select **Add** under **Product Components**, to add a product component for the company.

   d. Select **Add** under **Product ID Generation Configuration**, to add a Product ID Gen Config for the company.

9. Select **Continue**.

10. Select **Finish**.

Creating Operations Company Hierarchy

A company hierarchy includes a parent (root) company and one or many child companies. In Oracle Financial Services Cloud, you can create a parent-child relationship by associating a child company to the parent company. Currently,

association is limited between companies of same type. That is, you can associate an Operations company with other Operations Companies only.

Follow this procedure to create a hierarchy of companies. This establishes your organization structure or hierarchy in the system.

> **Note:**
>
> Select a **Config ID** before proceeding with this procedure.

1. From **Application Navigation**, select **Configuration** and then select **Company**, and then select **Operations**.
2. Select **View All** to see the list of existing companies.
3. Select **More Options** against the parent **Company** and select **Add Company**.
4. Select **Create New Operations Company** and select **Continue**. This takes you through the steps required to create a new Operations company and then add it as a child to the parent company selected in the previous step.

   > **Note:**
   >
   > The page also displays an option to **Use an Existing Company** whereby you can associate an existing company of another type.

5. Follow instructions in Creating Operations Company to create a child Operations company.

   > **Note:**
   >
   > In the third step of Creating Operations Company, you can inherit the contact details of the parent company by selecting **Use Contact from Company** option.

6. (Optional) In the **Manage Associations** page, under **Optional** add the required associations like **Products**, **Operators**, **Employees**, and **Keyword Libraries**.
7. Select **Continue**. A success message appears.
8. Select **Finish**.

5

Security Management

Security Management provides information on Secure Configurations and generic security recommendations for securing client-side browsers that will access services on the Oracle Financial Services Cloud platform.

Secure Configurations

Secure configurations for Oracle Financial Services Cloud

User Identity Management

Identity management on the Financial Services Cloud platform is provided by Oracle Cloud Infrastructure Identity and Access Management (OCI IAM). See *Oracle Cloud Infrastructure Documentation* to know more about the options for configuring OCI IAM and managing user identities on it. There are also several options for identity federation to enable a robust single sign on (SSO) configuration for services deployed on the Financial Services Cloud platform to securely cooperate with other identity management systems.

User Entitlement Management

Entitlements management for user identities that are granted access to the Financial Services Cloud platform are provided at three levels in the platform:

- Purchased entitlements are managed by the platform based on the services a customer has purchased. The platform only allows access to endpoints that belong to services a customer has purchased
- Course-grained entitlements to each customer tenancy on the platform are managed via the OCI IAM interface where access to customer tenancies on the Financial Services Cloud platform are controlled via OCI IAM Application definitions. There is an OCI IAM application defined per tenancy you have purchased on the Financial Services Cloud platform. Granting user identities in OCI IAM access to the OCI IAM Application for a tenancy also grants them an entitlement to access that tenancy on the Financial Services Cloud platform from the network/web.
- Fine-grained entitlements to specific service endpoints available from the Financial Services Cloud platform are managed via an Entitlement service domain (group of application interfaces and a user interface) that is exposed from the platform itself.

As mentioned above, an OCI IAM application will be set up for each customer tenancy provisioned for you on the Financial Services Cloud platform. By default, new customers are provisioned with three tenancies on the platform:

- Production
- Pre-production
- Non-Production

In addition to the OCI IAM applications, as a convenience, an OCI IAM user group specific to each customer tenancy on the Financial Services Cloud platform will be created and granted access to the tenancy on the platform.

To grant a user the course-grained entitlement to log into one of your tenancies on the Financial Services Cloud platform, the user's OCI IAM identity will need to be granted access to the OCI IAM application for that tenancy, or be added to the OCI IAM user group that has been granted access to the OCI IAM application for that tenancy on the platform. A user who does not have access to the OCI IAM application for a customer tenancy will be unable to access the tenancy on the Financial Services Cloud platform. Granting or revoking access to OCI IAM applications for customer tenancies in this manner may be done as described in *Oracle Cloud Infrastructure* documentation.

Fine-grained entitlement configurations are also available at a minimum down to the endpoint level for services on the Financial Services Cloud platform where control is available to grant or revoke access by HTTP verb on each service endpoint interface exposed from the platform. See Entitlements Management on options for configuring fine-grained entitlements.

Follow the Principle of Least Privilege

The principle of least privilege states that users should be given the least amount of privilege (entitlements for access) to perform their jobs. Over ambitious granting of entitlements, especially early on in an organization's life cycle when fewer people are involved and work needs to be done quickly, can leave an application open for abuse. Therefore, entitlements granted to users should be audited periodically to determine their relevance to the user's current job responsibilities and then adjustments should be made as needed to follow the Principle of Least Privilege.

Keep Software Current

One of the principles of good security practice is to keep all software versions and patches up to date. To access services on the Financial Services Cloud platform please ensure that browsers or other consuming webservices are kept current with support for TLS v1.2 or later encryption.

As of the writing of this document, TLS v1.2 is the minimum encryption standard supported by the Financial Services Cloud platform. Access to interfaces exposed from services on the platform via software that does meet this level of encryption will be rejected by the platform. Also, in the future the platform's minimum encryption standard will be increased to mitigate security vulnerabilities discovered in older encryption standards. Keeping the software you are using to access services on the Financial Services Cloud platform as up to date as possible will help insure that any new minimum encryption standards for the platform will not disrupt your access to the services deployed on it.

Secure Browser Configuration

As stated above, services deployed on the Financial Services Cloud platform are implemented to be secure by default by requiring TLS v1.2 or later encryption support and by enforcing access only for requests that are both authenticated and authorized for the access being attempted. Platform services cannot however enforce security in any facilities such as the browsers being used to access them.

Please follow best practices to secure browsers being used to access services on the Financial Services Cloud platform by following the advice of authorities such as the US government's Cybersecurity and Infrastructure Security Agency (CISA).

Secure Access to Service APIs

Application Programming Interfaces (APIs) from services on the Financial Services Cloud are exposed via URL endpoints implementing Representational State Transfer (REST) protocols. These APIs are implemented to be secure by default by requiring TLS v1.2 or later encryption support and by enforcing access only for requests that are both authenticated and authorized via entitlements.

Secure headless authentication to service APIs is available via an OAuth2 API exposed by the platform that is integrated with OCI IAM facilities (meaning it will also support any SSO configurations made through OCI IAM).

APIs exposed from the platform cannot however enforce security in any facilities such as other webservices or browsers being used to access them. Advice on securing every type of webservice that might access service APIs on the Financial Services Cloud platform is beyond the scope of this guide. Please consult with the provider of any webservices that will be accessing service APIs on the Financial Services Cloud platform on how to configure those webservices to be secure. Please also review advice from US government's Cybersecurity and Infrastructure Security Agency (CISA) on Web Services Integration.

Post Initial Configuration

Change Default User Passwords

The Financial Services Cloud platform provides a default OracleFSCloudAdmin account to support initial configuration. When this configuration is complete, it is a best practice to change the password on the default account to mitigate its potential for misuse.

Lock and Expire Default User Accounts

As stated above, the Financial Services Cloud platform provides a default OracleFSCloudAdmin account to support initial configuration. When this configuration is complete, and specific users have been provisioned with the administrative entitlements granted to the OracleFSCloudAdmin account, lock and expire access for the default OracleFSCloudAdmin account to further mitigate its potential for misuse.

Enforce Password Management

At a minimum, apply basic password management rules, such as password length, history, and complexity, to all user passwords using the features available in Oracle Cloud Infrastructure Identity and Access Management (OCI IAM). See *Oracle Cloud Infrastructure* documentation on options for configuring IAM and managing user identities on it.

6

User Management

User Management in Oracle Financial Services Cloud (OFSC) includes on-boarding of Employees and Operators, along with creating User profiles for them. Once the profiles are created for an Operator, the user credentials are created and further managed using Oracle Cloud Infrastructure Identity and Access Management (OCI IAM).

In Oracle Financial Services Cloud, a person is created as an Employee first, and on-boarded as an Operator. Both Employee and Operator are associated to an Operations Company (either same or different), which is the business division for which they work.

Employee

An Employee is an individual who works for the Company and is associated with a business division.

Operator

An Operator is a person identified in relation to work to be performed in Oracle Financial Services Cloud, like a Business Administrator. An Operator directly interacts with the business services using secure credentials.

An Operator is an Employee with access to Oracle Financial Services Cloud and has the appropriate entitlements for it. Operators are associated with an Operations Company, which could be either same as that of the Employee, or a different one.

Once an Operator sets up their login in OCI IAM, their user profile is created in Oracle Financial Services Cloud, while their credentials are created in OCI IAM itself. A User can have access to multiple tenancies; in which case the user need to be created in each tenancy. OCI IAM manages the login credentials for a user, whereas their Entitlements is specific to each tenancy and is configured by OFSC.

> **Note:**
>
> User Management activities like creating and managing user credentials, locking and unlocking users, resetting passwords etc are handled using OCI IAM.

Creating Employee

An Employee is a person who works for the tenant and is associated with an Operations Company. You need to on-board a person as an Employee prior to on-boarding them as an Operator. Both Employee and Operator must be associated to an Operations Company, which is the business division for which they work.

Creating an Employee in Oracle Financial Services Cloud involves three steps:

1. **Add Identification**
2. **Find Operations Company**

3. **Setup Contact**

To create an employee, follow this procedure:

1. From the **Application Navigation** menu, select **Entitlements** and then select **Employee**.
2. Select **Add**.
3. In **Setup**, select **Employee Only** and select **Continue**.
4. In the **Add Identification** page, enter the following details:
    a. Enter the employee's email ID in **Email**.
    b. (Optional) Select either **Mr.**, **Mrs.**, or **Miss** in **Prefix**.
    c. Enter **First Name** and **Last Name**of the employee.
    d. (Optional) Enter **Middle Name/Initial** of the employee.
    e. (Optional) Select either **Sr** or **Jr** in **Suffix**.
    f. (Optional) Enter the **Date Of Birth** of the employee.
    g. (Optional) Enter the **Social Security Number**.
    h. (Optional) Enter the **Employee ID**, **Job Code**, and **Job Title** of the employee.
5. Select **Continue**.
6. In **Find Operations Company** page, in **Find and Select**, search and select an operations company and select **Done**.
7. Select **Continue**.
    a. (Optional) In **Add Phone** section, select **Add**. Enter **Phone Number** and select appropriate values in **Phone Type** and select **Continue**.
    b. The **Email** section displays the email address entered. If required, you can edit the email ID provided.
    c. (Optional) In **Add Address** section, select **Add**. Enter **Address Line 1**, , **Country**, **State**, **City**, **Postal Code**, and select the **Address Type** and select **Done**. You can also add additional details like **Address Line 2**, and **Address Identifier**.
    d. Select **Continue**.
8. Select **Finish** in the **Success** page. The page also displays the name of the employee.
9. (Optional)You can select **Go to Details Page** to view the details of the employee.

Related Topics

- Creating Employee as Operator
- Setting Up Employee as Operator
- User Management

Creating Operator

An Operator is a person in Oracle Financial Services Cloud who performs activities within the business services. An Operator directly interacts with the application using

secure credentials and must be an Employee prior to being on-boarded as an Operator.

Oracle Financial Services Cloud offers two ways to create an Operator:

- Create an **Employee** as an **Operator**
- Set up an existing **Employee** as an **Operator**

Creating an Employee as an Operator

Use this option if you want to create an Operator in one go. You can create an employee and then proceed with assigning them Operator privileges. See Creating Employee as Operator.

Setting up an Employee as an Operator

Use this option if you have already created an Employee and want to give them Operator privileges. See Setting Up Employee as Operator.

Creating Employee as Operator

Creating an employee as an Operator involves two steps:

1. **Setup Employee**
2. **Setup Operator**

To create an employee as Operator, follow this procedure:

1. From the **Application Navigation**, select **Entitlements** and then select **Employee**.
2. Select **Add**.
3. In **Setup**, select **Employee as Operator**.
4. Select **Continue**.
5. In the **Setup Operator** page, select **Employee**.
6. In the **Add Identification** page, enter the personal details of the Operator.
    a. Enter **Email** for the Operator.
    b. (Optional) Select the **Prefix** with which the Operator is addressed.
    c. Enter **First Name** and **Last Name** of the Operator.
    d. (Optional) Enter **Middle Name/Initial** of the Operator.
    e. (Optional) Select the **Suffix** to add to the Operator Name.
    f. (Optional) Enter the **Date Of Birth** of the operator in **mm/dd/yyyy** format.
    g. (Optional) Enter the **Social Security Number** of the Operator.
    h. (Optional) Enter the **Employee ID**, **Job Code**, and **Job Title** of the Operator.
7. Select **Continue**.
8. In the **Find Operations Company** page, search and select an **Operations Company** and select **Done**.
9. Select **Continue**.
    a. (Optional) In **Add Phone** section, select **Add**. Enter **Phone Number** and select appropriate values in **Phone Type** and select **Continue**.
    b. The **Email** section displays the email address entered. If required, you can edit the email ID provided.

c. (Optional) In **Add Address** section, select **Add**. Enter **Address Line 1**, , **Country**, **State**, **City**, **Postal Code**, and select the **Address Type** and select **Done**. You can also add additional details like **Address Line 2**, and **Address Identifier**.

d. Select **Continue**.

10. In **Setup Operator**, search and select an **Operations Company** and select **Done**.
11. Select **Continue**.
12. In **Setup**, select either **Needs Login** or **Skip Login For Now** and select **Continue**.

- **Needs Login**: Select this value and select **Continue** to configure login for the Operator. In **Setup Login**, enter **Login Name** and select **Continue**. Note that you cannot change the Login Name after the Operator is created.

> **Note:**
>
> If the Login Name you entered is available in OCI IAM, you have to enter another one.

- **Skip Login For Now**: Select this value and select **Continue** to skip the step and configure login later.

> **Note:**
>
> To create login at a later point of time, follow the instructions in Configuring Login for an Operator.

13. Select **Finish** in the **Success** page. The page also displays the name of the Operator.

Once the operator, along with their login credentials, is created, an email with **Activation Link** is sent. Select the link in the email to create a new password. Once the operator sets the password, they can log in to OFSC application using their credentials.

> **Note:**
>
> You can edit the Operator details to change the associated Operations Company, provided you have not configured entitlements for the Operator.

Setting Up Employee as Operator

Setting up an employee as an Operator involves two steps:

1. **Setup Operator**: Search and select an **Employee** and an **Operations Company**.
2. **Setup**: Select whether to create login credentials for the Operator or not.

To set up an employee as an Operator, follow this procedure:

1. From **Application Navigation**, select **Entitlements** and then select **Operator**.

2. Select **Add**.
3. In **Setup Operator**, search and select an **Employee** and select **Done**.
4. In **Setup Operator**, search and select an **Operations Company** and select **Done**.
5. Select **Continue**.
6. In **Setup**, specify whether you need to set up login or skip it:
   - **Needs Login**: Select this value and select **Continue** to configure login for the Operator. In **Setup Login**, enter **Login Name** and select **Continue**. Note that you cannot change the Login Name after the Operator is created.

     > **Note:**
     >
     > If the Login Name you entered is available in OCI IAM, you have to enter another one.

   - **Skip Login For Now**: Select this value and select **Continue** to skip the step and configure login later.
7. Select **Finish**.

Once the operator is created, they will receive an email with **Activation Link**. Select the link in the email to create a new password. Once the operator sets the password, they can log in to OFSC application using their credentials.

> **Note:**
>
> You can edit the Operator details to change the associated Operations Company, provided you have not configured entitlements for the Operator.

Configuring Login for an Operator

To configure login for an Operator, follow this procedure:

1. From the **Application Navigation**, select **Entitlements** and then select **Employee**.
2. Select **View All**.
3. From the list of operators, select **More Options** and select **Go to Details**.
4. Expand **Login** and you will see the message **You haven't setup the login yet. Click on pencil icon to to create/update one**.
5. Select **Edit Login** and enter **Login Name**.
6. Select **Continue**.

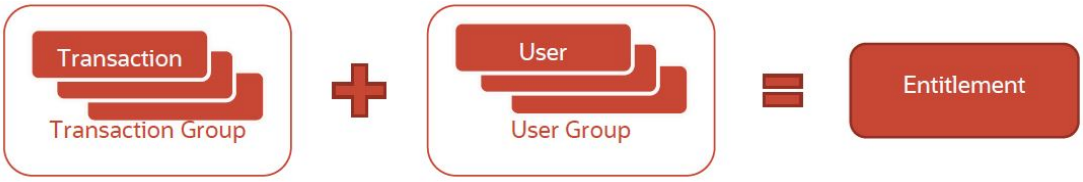
You will receive an email with **Activation Link**. Select the link in the email to create a new password. Once the operator sets the password, they can log in to OFSC application using their credentials.

7

Entitlements Management

Entitlements represents the process of validating whether a user is allowed to perform a business function in Oracle Financial Services Cloud application or not. This involves both authentication of users and authorization of their transactions. Entitlements enables fine-grained access control of the service capabilities (API end-points). You can grant or revoke access to a service capability by adding or removing the users from the user groups.

In Oracle Financial Services Cloud, users are grouped into User Groups and related transactions are grouped into Transaction Groups, and then associate the User Groups and Transaction Groups to configure the necessary entitlements.



Follow the steps below to configure entitlements for various users of OFSC:

1. Configure Transaction: A Transaction represents a public business function in Oracle Financial Services Cloud that a user needs to access. Follow this procedure to configure Transactions for all API end-points that Operators would need access to.

   > **Note:**
   >
   > Oracle Financial Services Cloud offers a set of pre-configured Transactions that covers the basic system capabilities. You need not configure Transactions for these Transaction Types. See List of Pre-configured Transactions.

2. Create Transaction Group: A Transaction Group bundles one or more Transaction Configurations that can be administered as a convenient single unit. Follow this procedure to create Transaction Groups, thereby enabling fine-grained entitlement provisioning.
3. (Optional) Create Transaction Group Hierarchy: You can create a hierarchy of Transaction Groups for ease of maintenance.
4. Create User Group: A User Group bundles one or more users who can be administered as a convenient single unit. Follow this procedure to create a user group and add users (Operators) to it.
5. (Optional) Create User Group Hierarchy: You can create a hierarchy of User Groups for ease of maintenance.
6. Associate Transaction Group with User Group: Allow all users in a User Group to access all Transactions in a Transaction Group by associating them to each other. Follow this procedure to associate a Transaction Group with a User Group.

Related Topics

- Transaction Type Grouping and Entitlement Approach

Configuring Transaction

A Transaction represents a public business function in Oracle Financial Services Cloud that a user needs to access. You need to configure Transactions for all API end-points that your operators would need access to. Else, the service request is aborted with the standard `HTTP code of 403 Forbidden` message, as the server does not process the request due to lack of client access entitlements.

> **Note:**
>
> Oracle Financial Services Cloud comes with a set of pre-configured transactions that provide the basic functions that a user would need access to. You can add these to your Transaction Groups to provide the required entitlements.

Configuring a Transaction includes two steps:

1. **Select Transaction Type**
2. **Add Identification**

> **Note:**
>
> Transaction configurations can be moved from one tenancy to another using Configuration Movement. Hence select a **Config ID** before proceeding with this procedure.

Follow this procedure to configure a new transaction.

1. From **Application Navigation**, select **Entitlements**, and then select **Transaction**.
2. Select **Add**. This opens the **Creating Transaction** page.
3. In **Select Transaction Type**, select a Transaction Type and select **Continue**. The **Add Identification** page opens with details of the selected Transaction Type.

   > **Note:**
   >
   > All Transaction Types that are not yet configured as a Transaction are available for selection in this page.

4. (Optional) Edit the details in **Add Identification** page:
   a. **Name**: Enter a new name for the Transaction.
   b. **Long Name**: Enter a new long name for the Transaction.
   c. **Description**: Enter a new description for the Transaction.
   d. **Set Status Dates**: Select the date on which the Transaction turns active.
5. Select **Continue**. A success message appears with the name of the newly created Transaction.

6. Select **Finish**.

You can delete a Transaction configuration from the same page. Search for the transaction you want to delete and select **More Options**, and then select **Delete**.

> **Note:**
>
> You cannot delete a transaction that is already associated with a Transaction Group.

List of Pre-configured Transactions

Transaction Types that are necessary to perform the initial set up of Oracle Financial Services Cloud services are available out-of-the-box. A total of 86 transactions, across various domains and transaction categories are available for selection in Oracle Financial Services Cloud. You need not configure Transactions for these transaction types.

The following table lists all the transactions that are available as part of Day 0 configurations:

Table 7-1 Transactions

Transaction Short Name	Transaction Name	Description	Transaction Category
Crt Operator	Create Operator	Create an Operator	Party
Rd Operator	Read Operator	Read an Operator	Party
Upd Operator	Update Operator	Update an Operator	Party
Rd Operator Rls	Read Operator Relationships	Read Operator Relationships	Party
Crt Cmp Hierarchy	Create Company Hierarchy	Create a Company Hierarchy	Company
Rd Cmp Hierarchy	Read Company Hierarchy	Read a Company Hierarchy	Company
Upd Cmp Hierarchy	Update Company Hierarchy	Update a Company Hierarchy	Company
Crt Cmp	Create Company	Create a Company	Company
Rd Cmp	Read Company	Read a Company	Company
Upd Cmp	Update Company	Update a Company	Company
Rd Cmp Rls	Read Company Relationships	Read Company Relationships	Company
Crt Employee	Create Employee	Create an Employee	Party
Rd Employee	Read Employee	Read an Employee	Party
Upd Employee	Update Employee	Update an Employee	Party
Crt Cf	Create Configuration	Create a Configuration	Configuration
Rd Cf	Read Configuration	Read a Configuration	Configuration
Upd Cf	Update Configuration	Update a Configuration	Configuration
Del Cf	Delete Configuration	Delete a Configuration	Configuration
Crt Cf Tnt Movement	Create Configuration Tenant Movement	Create a Configuration Tenant Movement	Configuration

Table 7-1 (Cont.) Transactions

Transaction Short Name	Transaction Name	Description	Transaction Category
Rd Cf Movement	Read Configuration Movement	Read a Configuration Movement	Configuration
Crt Cf Unload	Create Configuration Unload	Create a Configuration Unload	Configuration
Rd Cf Rls	Read Configuration Relationships	Read Configuration Relationships	Configuration
Crt Cmp Id Gn Pw	Create Company Id Generation Preview	Create a Company Id Generation Preview	Tenant
Rd Cmp Id Gn Pw	Read Company Id Generation Preview	Read a Company Id Generation Preview	Tenant
Crt Cmp Id Gn Cf	Create Company Id Generation Configuration	Create a Company Id Generation Configuration	Tenant
Rd Cmp Id Gn Cf	Read Company Id Generation Configuration	Read a Company Id Generation Configuration	Tenant
Upd Cmp Id Gn Cf	Update Company Id Generation Configuration	Update a Company Id Generation Configuration	Tenant
Del Cmp Id Gn Cf	Delete Company Id Generation Configuration	Delete a Company Id Generation Configuration	Tenant
Crt User Grp Id Gn Cf	Create User Group Id Generation Configuration	Create a User Group Id Generation Configuration	Tenant
Rd User Grp Id Gn Cf	Read User Group Id Generation Configuration	Read a User Group Id Generation Configuration	Tenant
Upd User Grp Id Gn Cf	Update User Group Id Generation Configuration	Update a User Group Id Generation Configuration	Tenant
Del User Grp Id Gn Cf	Delete User Group Id Generation Configuration	Delete a User Group Id Generation Configuration	Tenant
Crt User Grp Id Gn Pw	Create User Group Id Generation Preview	Create a User Group Id Generation Preview	Tenant
Rd User Grp Id Gn Pw	Read User Group Id Generation Preview	Read a User Group Id Generation Preview	Tenant
Rd Employee Rls	Read Employee Relationships	Read Employee Relationships	Party
Rd Tnt	Read Tenant	Read a Tenant	Tenant
Upd Tnt	Update Tenant	Update a Tenant	Tenant
Crt Tnt	Create Tenant	Create a Tenant	Tenant
Crt Tnt Cmp Id Gn Cf Rl	Create Tenant Company Id Generation Configuration Relationship	Create a Tenant to Company Id Generation Configuration Relationship	Tenant

Table 7-1 (Cont.) Transactions

Transaction Short Name	Transaction Name	Description	Transaction Category
Rd Tnt Cmp Id Gn Cf Rl	Read Tenant Company Id Generation Configuration Relationship	Read a Tenant to Company Id Generation Configuration Relationship	Tenant
Upd Tnt Cmp Id Gn Cf Rl	Update Tenant Company Id Generation Configuration Relationship	Update a Tenant to Company Id Generation Configuration Relationship	Tenant
Del Tnt Cmp Id Gn Cf Rl	Delete Tenant Company Id Generation Configuration Relationship	Delete a Tenant to Company Id Generation Configuration Relationship	Tenant
Crt Tnt User Grp Id Gn Cf Rl	Create Tenant User Group Id Generation Configuration Relationship	Create a Tenant to User Group Id Generation Configuration Relationship	Tenant
Rd Tnt User Grp Id Gn Cf Rl	Read Tenant User Group Id Generation Configuration Relationship	Read a Tenant to User Group Id Generation Configuration Relationship	Tenant
Upd Tnt User Grp Id Gn Cf Rl	Update Tenant User Group Id Generation Configuration Relationship	Update a Tenant to User Group Id Generation Configuration Relationship	Tenant
Del Tnt User Grp Id Gn Cf Rl	Delete Tenant User Group Id Generation Configuration Relationship	Delete a Tenant to User Group Id Generation Configuration Relationship	Tenant
Crt User Grp Id Gn	Create User Group Id Generation	Create a User Group Id Generation	Tenant
Rd User Grp Id Gn	Read User Group Id Generation	Read a User Group Id Generation	Tenant
Crt Cmp Id Gn	Create Company Id Generation	Create a Company Id Generation	Tenant
Rd Cmp Id Gn	Read Company Id Generation	Read a Company Id Generation	Tenant
Rd Tnt Rls	Read Tenant Relationships	Read Tenant Relationships	Tenant
Crt Txn Grp Cf Txn Cf Rl	Create Transaction Group Configuration Transaction Configuration Relationship	Create a Transaction Group Configuration to Transaction to Group Configuration Transaction Configuration Relationship	Transaction

Table 7-1 (Cont.) Transactions

Transaction Short Name	Transaction Name	Description	Transaction Category
Rd Txn Grp Cf Txn Cf Rl	Read Transaction Group Configuration Transaction Configuration Relationship	Read a Transaction Group Configuration to Transaction to Group Configuration Transaction Configuration Relationship	Transaction
Upd Txn Grp Cf Txn Cf Rl	Update Transaction Group Configuration Transaction Configuration Relationship	Update a Transaction Group Configuration to Transaction to Group Configuration Transaction Configuration Relationship	Transaction
Del Txn Grp Cf Txn Cf Rl	Delete Transaction Group Configuration Transaction Configuration Relationship	Delete a Transaction Group Configuration to Transaction to Group Configuration Transaction Configuration Relationship	Transaction
Crt Txn Grp Cf	Create Transaction Group Configuration	Create a Transaction Group Configuration	Transaction
Rd Txn Grp Cf	Read Transaction Group Configuration	Read a Transaction Group Configuration	Transaction
Upd Txn Grp Cf	Update Transaction Group Configuration	Update a Transaction Group Configuration	Transaction
Del Txn Grp Cf	Delete Transaction Group Configuration	Delete a Transaction Group Configuration	Transaction
Crt Txn Grp Cf Hierarchy	Create Transaction Group Configuration Hierarchy	Create a Transaction Group Configuration Hierarchy	Transaction
Rd Txn Grp Cf Hierarchy	Read Transaction Group Configuration Hierarchy	Read a Transaction Group Configuration Hierarchy	Transaction
Upd Txn Grp Cf Hierarchy	Update Transaction Group Configuration Hierarchy	Update a Transaction Group Configuration Hierarchy	Transaction
Del Txn Grp Cf Hierarchy	Delete Transaction Group Configuration Hierarchy	Delete a Transaction Group Configuration Hierarchy	Transaction
Rd Txn Type	Read Transaction Type	Read a Transaction Type	Transaction
Crt Txn Cf	Create Transaction Configuration	Create a Transaction Configuration	Transaction
Rd Txn Cf	Read Transaction Configuration	Read a Transaction Configuration	Transaction
Upd Txn Cf	Update Transaction Configuration	Update a Transaction Configuration	Transaction

Table 7-1 (Cont.) Transactions

Transaction Short Name	Transaction Name	Description	Transaction Category
Del Txn Cf	Delete Transaction Configuration	Delete a Transaction Configuration	Transaction
Rd Txn Grp Cf Rls	Read Transaction Group Configuration Relationships	Read Transaction Group Configuration Relationships	Transaction
Rd Txn Cf Rls	Read Transaction Configuration Relationships	Read Transaction Configuration Relationships	Transaction
Crt User Grp	Create User Group	Create a User Group	Entitlements
Rd User Grp	Read User Group	Read a User Group	Entitlements
Upd User Grp	Update User Group	Update a User Group	Entitlements
Crt User Grp User Rl	Create User Group User Relationship	Create a User Group to User Relationship	Entitlements
Rd User Grp User Rl	Read User Group User Relationship	Read a User Group to User Relationship	Entitlements
Upd User Grp User Rl	Update User Group User Relationship	Update a User Group to User Relationship	Entitlements
Del User Grp User Rl	Delete User Group User Relationship	Delete a User Group to User Relationship	Entitlements
Crt User Grp Hierarchy	Create User Group Hierarchy	Create a User Group Hierarchy	Entitlements
Rd User Grp Hierarchy	Read User Group Hierarchy	Read a User Group Hierarchy	Entitlements
Upd User Grp Hierarchy	Update User Group Hierarchy	Update a User Group Hierarchy	Entitlements
Del User Grp Hierarchy	Delete User Group Hierarchy	Delete a User Group Hierarchy	Entitlements
Crt User Grp Txn Grp Cf Rl	Create User Group Transaction Group Configuration Relationship	Create a User Group to Transaction Group Configuration Relationship	Entitlements
Rd User Grp Txn Grp Cf Rl	Read User Group Transaction Group Configuration Relationship	Read a User Group to Transaction Group Configuration Relationship	Entitlements
Upd User Grp Txn Grp Cf Rl	Update User Group Transaction Group Configuration Relationship	Update a User Group to Transaction Group Configuration Relationship	Entitlements
Del User Grp Txn Grp Cf Rl	Delete User Group Transaction Group Configuration Relationship	Delete a User Group to Transaction Group Configuration Relationship	Entitlements
Rd User Grp Rls	Read User Group Relationships	Read User Group Relationships	Entitlements

Creating Transaction Group

A Transaction Group is a group that bundles one or more Transaction configurations that can be administered as a convenient single unit. Operators with appropriate entitlements need to create, setup, and manage Transaction Groups to enable fine-grained entitlement provisioning.

You can bundle similar service capabilities together by adding the related Transactions to a Transaction Group (as needed by specific job roles).

Creating Transaction Group in Oracle Financial Services Cloud includes two steps:

1. **Add Identification**
2. **Select Transactions**

> **Note:**
>
> Transaction Group configuration can be moved from one tenancy to another using Configuration Movement. Hence select a **Config ID** before proceeding with this procedure.

Follow this procedure to create a new transaction group.

1. Select **Application Navigation** and select **Entitlements**, and then select **Transaction Group**.
2. In the **Transaction Group** page, select **Add**.
3. In the **Add Identification** page of **Creating Transaction Group**, enter the following details:
   a. Enter **Name** of the Transaction Group.
   b. Enter **Long Name** of the Transaction Group.
   c. (Optional) Enter **Description** of the Transaction Group.
   d. (Optional) In **Set Status Dates** section, select **Active** date for the Transaction Group.

   > **Note:**
   >
   > If you do not select a date, the Transaction Group becomes active on the same day.
4. Select **Continue**.
5. In the **Select Transactions** page, select the transaction configurations to bundle in the Transaction Group and select **Continue**.

> **Note:**
>
> All transactions that are configured using Transaction page are available for selection in the list. If a Transaction is configured under a different Config ID, you are not allowed to select it in this step.

6. Select **Finish** in the Success message displayed.

You can associate a Transaction Group to other Transaction Groups, thereby creating a hierarchy of Transaction Groups. See Creating Transaction Group Hierarchy.
If no longer required, you can delete a Transaction Group from the same page. Search for the Transaction Group you want to delete, and select **More Options**, and then select **Delete**.

> **Note:**
>
> You cannot delete a Transaction Group under following conditions:
>
> - If the Transaction Group is part of a Transaction Group hierarchy
> - If the Transaction Group is associated with a User Group
> - If the Transaction Group has associated Transaction Configurations

Creating Transaction Group Hierarchy

You can create a hierarchy of Transaction Groups by associating one Transaction Group to another.

> **Note:**
>
> You can associate a Transaction Group with a new Transaction Group or with an existing Transaction Group.

Ensure that the Transaction Groups that you want to associate are already created and active, are of the same type, and are not associated to the same Transaction Group as part of another association.
Follow this procedure to associate a Transaction Group with another Transaction Group.

1. From **Application Navigation**, select **Entitlements**, and then select **Transaction Group**.
2. Select **View All** to view a list of all Transaction Groups. If you are looking for a specific Transaction Group, you can use the **Search** facility.

> **Note:**
>
> The list indicates whether a Transaction Group is already a part of a Transaction Group hierarchy or not. In case of a parent Transaction Group, you can expand and view its hierarchy and associate a Transaction Group at any of the levels of the hierarchy.

3. Select **More Options** of the parent Transaction Group and select **Add Transaction Group**.
4. In **Setup** page, select one of the following options and select **Continue**.
   - **Create New Transaction Group**: If you select this option, you can create a new Transaction Group and then associate it with the selected Transaction Group. See Creating Transaction Group.
   - **Using an Existing Transaction Group**: If you select this option, you can select a Transaction Group from the list and select **Continue**.
5. Select **Finish**.

The Transaction Groups are now associated with each other.

Creating User Group

A User Group groups one or more users who can be administered as a convenient single unit. You can associate a User Group to one or more Transaction Groups, thereby allowing all users in the User Group to access all Transactions in all associated Transaction Groups.

> **Note:**
>
> Verify if there is a valid User Group Id Generation Configuration created and associated with the tenant, before proceeding with the creation of a User Group.

User Group creation involves six steps:

1. **Add Identification**
2. **ID Generation**
3. **Select Operations Company**
4. **Select Local User Flag**
5. **Select Users**
6. **Manage Associations**

Follow this procedure to create a user group.

> **Note:**
>
> Select a Config ID before performing the following procedure.

1. From **Application Navigation**, select **Entitlements**, then select **User Group**.
2. Select **Add**.
3. In the **Add Identification** step, enter the following details:
   a. Enter **Name** of the User Group.
   b. Enter **Long Name** of the User Group.

c. (Optional) Enter **Description** of the User Group.

d. (Optional) In **Set Status Dates**, select **Active** date for the User Group.

> **Note:**
>
> If you do not select a date, the User Group becomes active on the same day.

e. Select **Continue**.

4. In the **ID Generation** step, you can either see the automatically generated identifier or manually enter a value based on the User Group ID Generation configuration that is associated with the tenant. If the ID Generation is **Automatic**, the page automatically displays an identifier, whereas if the ID Generation is **Manual**, enter a valid identifier for the User Group.

> **Note:**
>
> While manually entering an identifier, system validates the ID against the User Group ID Generation configuration that is associated with the tenant. If the validation fails, an error message appears. For more information on ID Generation, see **Related Links**.

5. In the **Select Operations Company** step, select the Operations Company to which you want to associate the User Group and select **Continue**.

6. (Optional) In the **Select Local User Flag** step, slide the **Select from local Users** toggle button to the right and select **Continue**. This decides whether you can add operators belonging to the selected Operations Company only, or any operator from the entire hierarchy of the Operations Company.

7. In the **Select Users** step, select the Users to add to the User Group and select **Continue**.

8. (Optional) In the **Manage Associations** step, you can associate one or more **Transaction Group** to the User Group. To do this, follow these steps:

   a. Expand **Transaction Groups** section and select **Add**.

   b. Search and select a Transaction Group to associate with the User Group.

   c. Select **Continue**.

   d. (Optional) If you want to associate more Transaction Groups to the User Group, select **Suggested** tab and repeat this procedure.

9. In the Success message, select **Finish**.

> **Note:**
>
> Once a User Group is created, you can perform the following updates to it:
>
> - Add or remove **Users** to the User Group
> - Add or remove **Transaction Group Associations** to the User Group

Related Topics

- Configuring User Group ID Generation
- Associating User Group ID Generation Configuration with Tenant
- Associating Transaction Group with User Group

Adding Users to User Group

Ensure that the User Groups that you want to associate are already created and in active or in progress state, and are of the same type.
Follow this procedure to associate a User Group with a User.

1. From **Application Navigation**, select **Entitlements**, and then select **User Group**.
2. Select **View All** or type in at least three characters and select **Search** to find the User Group.
3. Select **More Options** of the User Group and then select **Go to Details**.
4. In the **Details** tab, expand **Users**.
5. Select **Edit Users**.
6. In **Updating User Group**, select the users to associate and select **Finish**.

The selected Users are associated with the User Group.

Creating User Group Hierarchy

Ensure that the User Groups that you want to associate are already created and active, and are of the same type. You can associate a User Group with either a new User Group or an existing User Group.

> **Note:**
>
> You cannot associate a User Group to another User group if it has already been associated to another User Group, or is part of another User Group hierarchy.

Follow this procedure to associate a User Group with another User Group.

1. From **Application Navigation**, select **Entitlements**, and then select **User Group**.
2. Select **View All** to view a list of all User Groups. If you are looking for a specific User Group, you can use the **Search** facility.

> **Note:**
>
> The list indicates whether a User Group is already a part of a User Group hierarchy or not. In case of a parent User Group, you can expand and view its hierarchy and associate a User Group at any of the levels of the hierarchy.

3. Select **More Options** of the User Group and then select **Add User Group**.

4. In **Setup** page, select one of the following options and select Continue.
   - **Create New User Group**: If you select this option, you can create a new User Group and then associate it with the selected User Group. See Creating User Group.
   - **Using an existing User Group**: If you select this option, you can select a User Group from the list and select **Continue**.
5. Select **Finish**.

The User Groups are now associated with each other.

Associating Transaction Group with User Group

To grant explicit rights to a User Group, select a Transaction Group and assign it to the User Group. Each Operator or User in the User Group is granted access rights to every Transaction in the assigned Transaction Group.

> **Note:**
>
> Ensure that the **User Group** and **Transaction Group** that you want to associate are already created and active, and are of the same type.

Follow this procedure to associate a Transaction Group with a User Group.

1. From **Application Navigation**, select **Entitlements**, and then select **User Group**.
2. Select **View All** or type in at least three characters and select **Search** to find the User Group.
3. Select **More Options** of the User Group and then select **Go to Details**.
4. Select **Associations** tab and then select **Add**.
5. In the **Suggested** tab, expand **Required**.
6. Expand **Transaction Group Configs**, and under **Transaction Group**, select **Add**.
7. Select the Transaction Group to associate and select **Done**.
8. In **Manage Associations** page, view and manage the new Transaction Group, previously associated Transaction Group, or the company to which the User Group is associated to.
9. Select **Finish**.

The selected Transaction Group is associated with the User Group. All users in the User Group are now able to perform all transactions associated with the Transaction Group.

8

Known Issues in Oracle Financial Services Cloud

The following table lists the known issues and workaround in Oracle Financial Services Cloud:

Table 8-1 Known Issues

Issue	Workaround
Paragraph border styling is applied to every line of the paragraph.	Place the paragraph in a table cell and apply element-based styling to apply border style for the table-cell.
If you define element based border styling to a couple of paragraphs of a content with many paragraphs, then in the PDF output, it leaves extra white space between the paragraphs.	Split the paragraphs across multiple contents instead of defining all the paragraphs in a single content.
The human readable portion of barcode displays in PDF output, but is not displayed in HTML output.	
You must specify **Unit** while setting the **Line Height** Style Attribute. You cannot select **Unit Less** while setting the **Line Height** Style Attribute.	
Empty space is displayed instead of radius when you generate a PDF with components that have border radius and border style set to double, groove, inset or outset.	
An Active Status date cannot be set on a data element if you first edit the data element.	1. Edit the data element. 2. Navigate back to the data element. 3. Set the Active Status Date.
The PDF preview of a Communication Package is not displayed while using Google Chrome in emulator mode.	Disable the emulator mode.
The Configuration Movement screen always displays the status as successful. In the event of a Configuration Movement failure, the Configuration movement screen still shows a successful status from the last successful configuration movement.	
The association of an Operations Company to a User Group is mandatory and irrevocable. Once the association is established, you cannot edit the Operation Company.	

Table 8-1 (Cont.) Known Issues

Issue	Workaround
Company ID Generator issues: • If the Company ID Generator is set to manual, it displays an error. • If the Company ID Generator is set to manual and the Configuration Id is closed, it is not possible for that instance of CompanyIdGenConfig to be changed to Automatic. • Also you cannot change the CompanyIdGenConfig feature associated to the tenant.	When initial tenancy configuration is performed, Company ID Generator pattern should be set to Automatic.
Oracle Financial Services Cloud and Oracle Cloud Infrastructure Identity and Access Management (OCI IAM) do not synchronize automatically.	Administrators must manually perform the following tasks to synchronize changes across Oracle Cloud Infrastructure Identity and Access Management (OCI IAM) and Oracle Financial Services Cloud: 1. Manually remove the accounts from Oracle Financial Services Cloud after they are removed from OCI IAM. 2. Manually replicate the changes such as email addresses and other personal information (phone number; address, employee number etc.) associated with the user when you make the changes in either OCI IAM or Oracle Financial Services Cloud.
When creating an association using existing layouts, a list is presented with check boxes to allow for items to be selected. If an item is selected, then unselected - the association is created anyway.	Select the item and then remove the association from the Associations tab.
Configuration Movement does not show date and time of last successful configuration movement.	
The maximum number of nodes that you can set for Company hierarchy is 1000.	

9
Financial Services Cloud Support

Raise a service request on https://support.oracle.com if you have any queries related to services on the Financial Services Cloud platform.

Send us your comments

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