

Oracle® Financial Services Accounting Foundation Cloud Service

Get Started



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ORACLE®

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Contents

1	Revision History	
2	Get Help in the Applications	
2.1	Additional Resources	2-1
2.2	Learn About Accessibility	2-1
2.3	Get Support	2-1
2.4	Get Training	2-1
2.5	Join Our Community	2-1
2.6	Share Your Feedback	2-1
2.7	Before You Begin	2-2
3	Welcome to Oracle Cloud	
3.1	About Oracle Cloud	3-1
3.2	Supported Web Browsers	3-1
4	Order Oracle Cloud Applications	
5	Getting Started	
5.1	Create and Activate your Cloud Account	5-1
5.2	Add to Existing Cloud Account	5-3
5.3	Access the Cloud Account	5-4
5.4	Create an Environment	5-4
5.5	Access the Oracle Identity Cloud Service Console	5-5
5.6	Activate Application User Account	5-6
5.7	Setup your Cloud Account	5-6
6	Users and Access Privileges	
6.1	Role Based Access Control	6-1
6.2	User Group and User Role Mapping	6-1

6.3	Create Application Users	6-2
6.3.1	Using Identity Console (IDCS)	6-3
6.3.2	Using Identity Domain	6-5

7 Configuring Session Timeout

7.1	How to Configure Session Lifetime Timeout	7-1
7.2	How to Configure Browser Inactivity Timeout	7-2

8 FAQs

Index

1

Revision History

Table 1-1 Document Control

Release and Version Number	Revision Date	Change Log
R 24C, V 1.0	October 2024	Created document for the 24C release.
R 24C, V 2.0	November 2024	Added How to Configure Browser Inactivity Timeout section in the document.

2

Get Help in the Applications

Use help icons to access help in the application.

Note that not all pages have help icons. You can also access the [Oracle Help Center](#) to find guides and videos.

2.1 Additional Resources

- Community: Use [Oracle Cloud Customer Connect](#) to get information from experts at Oracle, the partner community, and other users.
- Training: Take courses on Oracle Cloud from [Oracle University](#).

2.2 Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program](#). Videos included in this guide are provided as a media alternative for text-based topics, and are also available in this guide.

2.3 Get Support

You can get support at [My Oracle Support](#).

For accessible support, visit Oracle Accessibility Learning and Support.

2.4 Get Training

Increase your knowledge of Oracle Cloud by taking courses at [Oracle University](#).

2.5 Join Our Community

Use [Cloud Customer Connect](#) to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, and watch events.

2.6 Share Your Feedback

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

You can email your feedback to [My Oracle Support](#).

Thanks for helping us improve our user assistance!

2.7 Before You Begin

See the following Documents:

- See [What's New](#)
- [Oracle Financial Services Accounting Foundation Cloud Service Core Functions](#)

3

Welcome to Oracle Cloud

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

3.1 About Oracle Cloud

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

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

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

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

3.2 Supported Web Browsers

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

- Google Chrome
- Microsoft Edge
- Mozilla Firefox

For more details, see [Oracle Software Web Browser Support Policy](#). When sharing a link to a document or folder, users of Microsoft Edge need to use the **Show Link** button and copy the link shown in the dialog.

4

Order Oracle Cloud Applications

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

To order a subscription to Oracle Cloud Applications:

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

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

To know how to activate, see [Create and Activate your Cloud Account](#)

5

Getting Started

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

Figure 5-1 Illustration of the Cloud Subscription Workflow

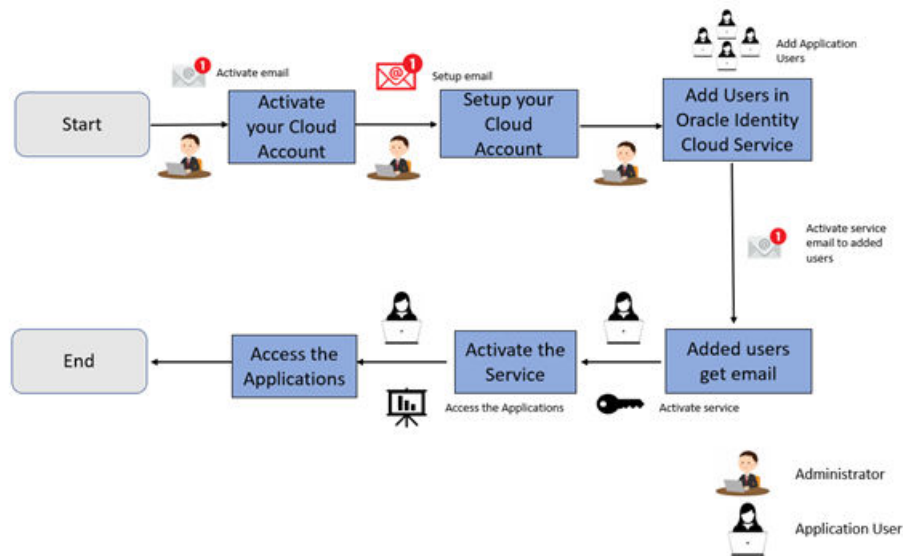


Illustration of the Cloud Subscription Workflow

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

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

5.1 Create and Activate your Cloud Account

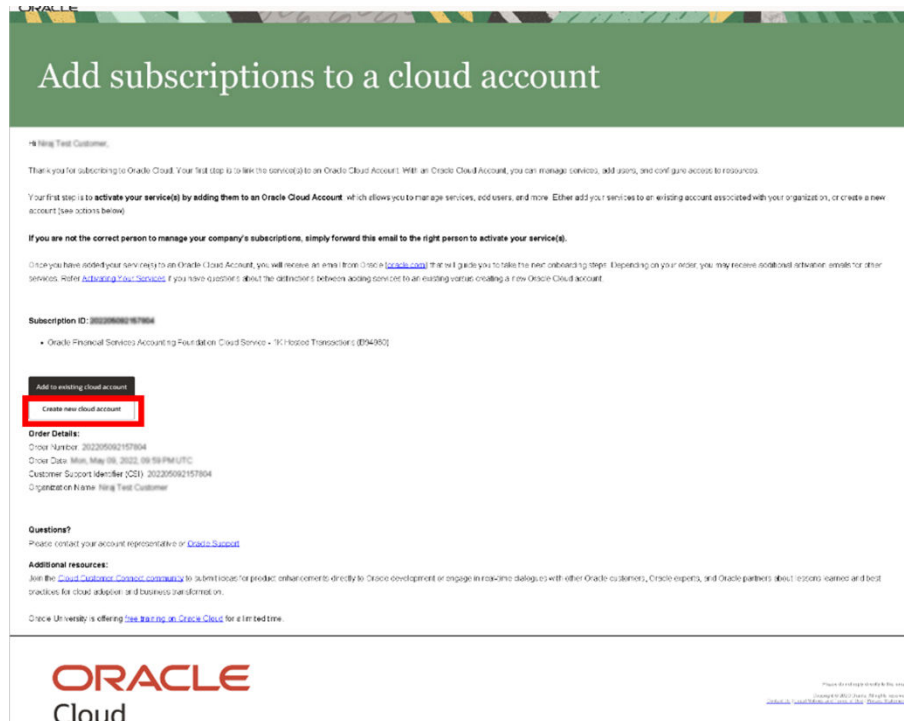
If you are a new Oracle Cloud Applications User, you will receive a Welcome to Oracle Cloud email that asks you to activate your Cloud Account. Follow the instructions in the email to create and activate your new Cloud Account.

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

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

1. Click **Create New Cloud Account** in the email.

Figure 5-2 Illustration of Welcome to Oracle Cloud - Setup Your Account Email



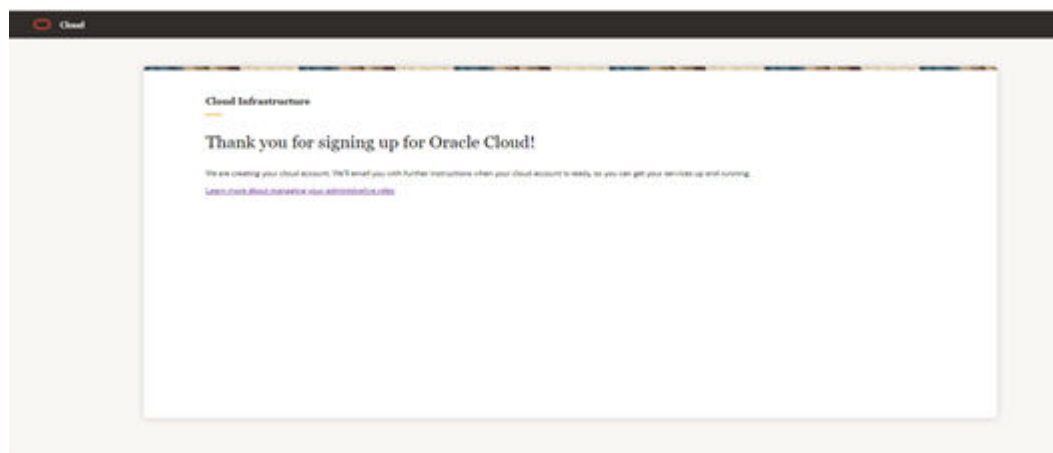
2. Complete the **New Cloud Account Information** Form to sign up.

Figure 5-3 New Cloud Account Information Page

Enter the following details:

- **First Name** and the **Last Name**.
- **Email:** Provide the same email address which you had given to receive the Welcome email.
Instructions to log into your new Oracle Cloud Account will be sent to this email address.
- **Password** to access the New Cloud Account.
- Re-enter the **Password** for confirmation.
Make a note of the credentials. The same is required to log in after receiving the Activation email.
- **Tenancy Name:** New Tenancy name to be associated with the Cloud Account.
- **Home Region:** Select your Home Region, where the Identity Resources and Account are located. Check the service availability before selecting the Home Region.
- Click **Create Tenancy**.
The New Cloud Creation Confirmation Screen is displayed.

Figure 5-4 Oracle Cloud Creation Confirmation Screen

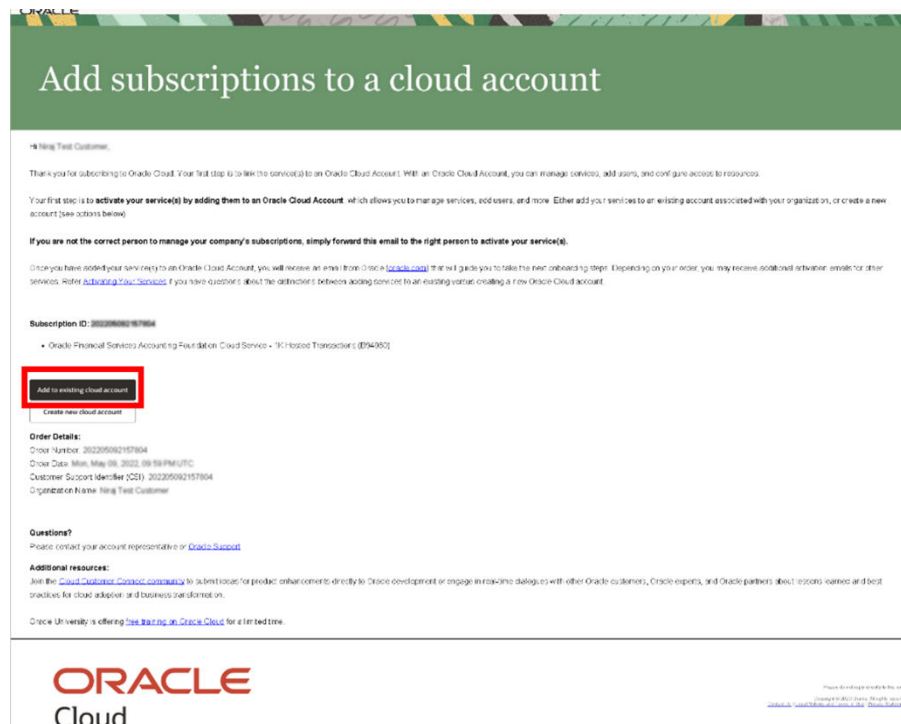


After successful activation, you'll receive a Setup Complete Email.

5.2 Add to Existing Cloud Account

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

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



2. Perform the steps as mentioned in the [Access the Oracle Identity Cloud Service Console](#) section.

5.3 Access the Cloud Account

As an Administrator, to access the Cloud Account:

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

5.4 Create an Environment

After logging into Oracle Cloud Infrastructure Console, you need to create an instance or multiple instances that can be used by different user groups as a self-service.

To create an instance, follow these steps:

1. Log into Oracle Cloud Infrastructure Console.
2. Under **My Application**, select the appropriate Cloud Service for which you wish to create an Environment.
3. Click **Create environment** to display the Create environment screen.
This screen displays a list of Cloud Services with the details like Subscription ID for which the customer is subscribed to and the Region from where these services are operated.

 Note:

By default, the home region of the Cloud Account is displayed and this is the region where the cloud environment is deployed. If you wish to place the Cloud Service environment in a different region, you must subscribe for that specific region. This option is available for the first time you create an environment for the subscription.

4. Enter the following details under Environment Details section of the screen:
 - **Name:** The name of the new environment or instance.
 - **Instance type:** Select from the following options:
 - **Production:** A live environment intended for the users.
 - **Non-production:** An environment that is used for testing and development purposes. For example, a sandbox environment.
 - **Test:** An additional test environment for testing and development purposes.

 Note:

You can have one Production, one Non-Production, and multiple test instances. The number of instances you can create is dependent on the number of contract subscriptions you have purchased.

- **Admin email:** The email ID with which you have logged into the Cloud Console. You can also enter a different email ID that is part of the Cloud tenancy. For more details, see [Managing Users](#).
 - **Admin first name and Admin last name:** The first and last names of the Admin.
5. Click **Create**.

The environment details are added to the Oracle Cloud Infrastructure Console under the Environments tab with Creating state. Once completed, the created environment is Active. If there are any issues, you can raise a service ticket with [My Oracle Support \(MoS\)](#).

After the details are displayed with Active state, you can click on the Name to open the Environment details page, where you can check the details. You can click on the Service URL in the details to proceed with User Creation and User Group Creation which are discussed in the subsequent topics.

For more information on the deployment of the application, see the *Domain* section in the [AFCS Core Functions Guide](#).

5.5 Access the Oracle Identity Cloud Service Console

The Oracle Identity Cloud Service integrates directly with existing directories and Identity Management Systems and makes it easy for users to get access to applications. It provides the Security Platform for Oracle Cloud, which allows users to securely and easily access, develop, and deploy business applications such as Oracle Accounting Foundation Cloud Service (AFCS) and Profitability and Balance Sheet Management Cloud Service (PBSM).

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

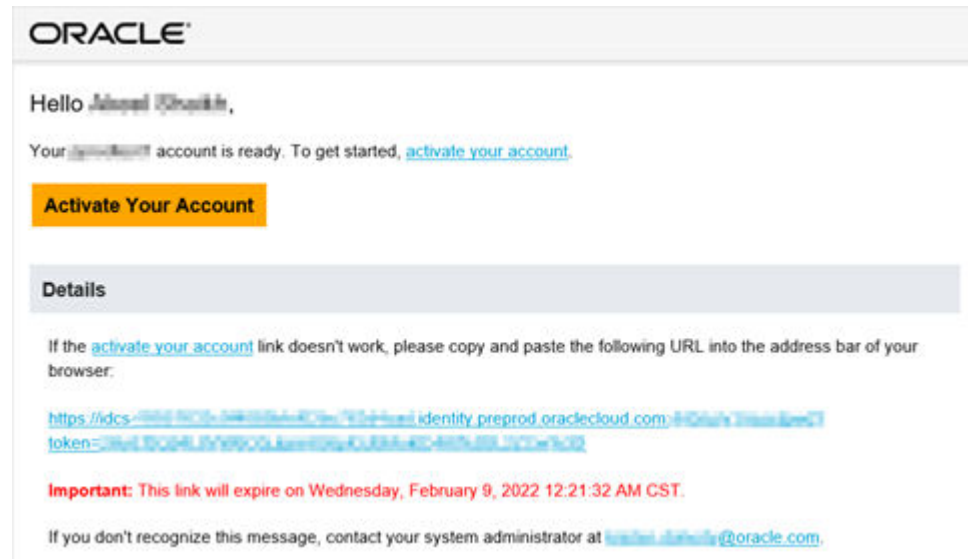
5.6 Activate Application User Account

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

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

1. Open the email you received from Oracle Cloud.

Figure 5-5 Email to Activate Your Account



2. Review the information about your service in the email.
3. Click **Activate Your Account**.
You will be prompted to change your Password on the initial login.
4. Specify your new credentials in the **Reset Password** window to activate your account.
After the Password is successfully reset, a congratulatory message is displayed.
5. Access the Application URL that your Application Administrator shared with you.
6. Specify your credentials to sign into your account.
The **Welcome** page is displayed.

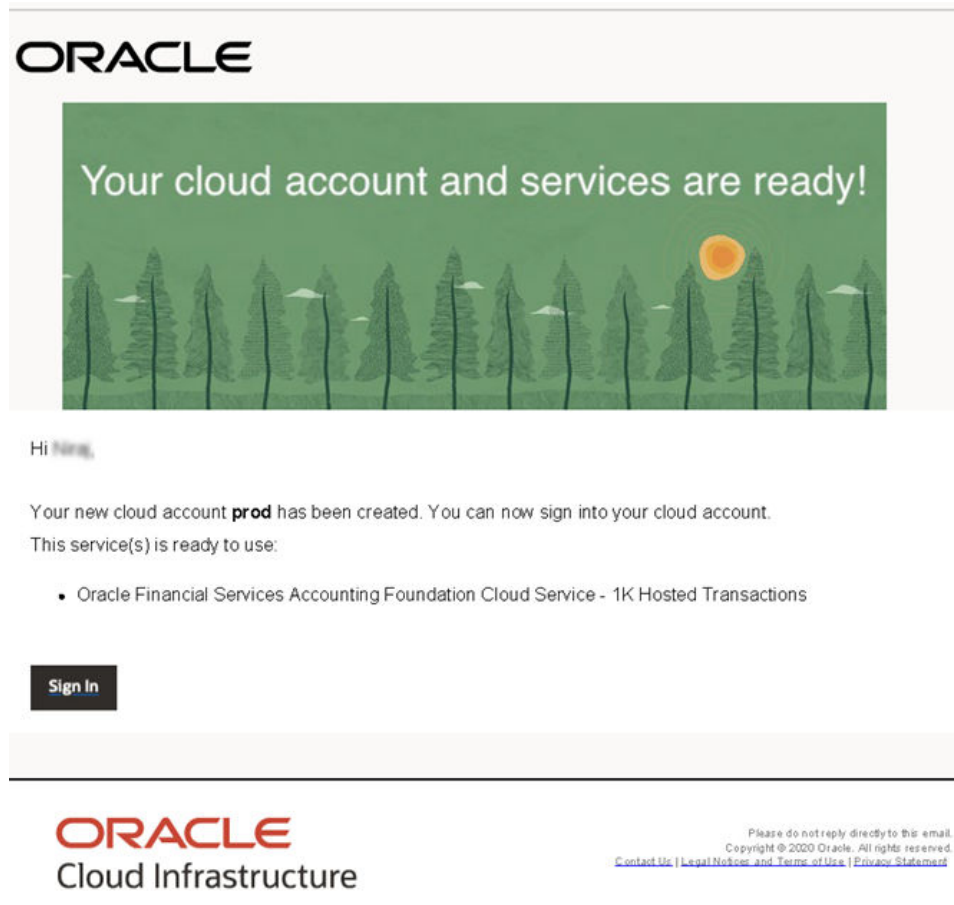
5.7 Setup your Cloud Account

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



Note:

You need to access the Oracle Cloud Console <https://ofsa.<REGION>.ocs.oraclecloud.com/ui/v1/adminconsole> and create your user account before you access the application URL.



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

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

For more information about how to access the Identity Cloud, see [Access the Oracle Identity Cloud console](#).

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

- **Production**
`https://ofsaa.<REGION>.ocs.oraclecloud.com/<TENANT ID>-prd/afc`
- **Non-Production**
`https://ofsaa.<REGION>.ocs.oraclecloud.com/<TENANT ID>-nprd/afc`

 Note:

Ensure you have created the application users and granted privileges to access the application instances. For more details, see [Users and Access Privileges](#). You must share the Application URL details with your application users, which they can use to log in to the application.

6

Users and Access Privileges

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

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

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

For more information about managing users, refer to [Managing Users](#).

6.1 Role Based Access Control

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

Table 6-1 Role Based Access Control

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

6.2 User Group and User Role Mapping

Table 6-2 User Group and User Role Mapping

User Group Code	User Group Name	Activities
AFCSADMNGRP	Accounting Foundation Admin Group	• User Group with Setup Roles • View all content • AFCS Service Administration Activities • Configure PMF Email notification UI
AFCS-BIAdministrator	BIAdministrator group to access Data Visualization	Administer Data Visualization Content
AFCS-BIContentAuthor	BIContentAuthor group to access Data Visualization	Author Data Visualization Content
AFCS-BIConsumer	BIConsumer group to access Data Visualization	Access Data Visualization Content

Table 6-2 (Cont.) User Group and User Role Mapping

User Group Code	User Group Name	Activities
AFCSBUGRP	Accounting Foundation Business Users Group	• Use the AFCS Service • Register, modify, or delete Entity-maps, Rules, Look-up, Adjustments, Corrections and so on • Register, modify, or delete EDD, Connector and so on • Register, modify or delete SLA, Source Registration, Event Grouping, Segment Code - Dimension Mapping and so on • Configure and Manage Pipelines • Execute Pipelines
AFCSSYSADMIN	Accounting Foundation System Admin Group	• Perform System Administration activities For Example: Configuring Instance name
AFCSAPVRGRP	Accounting Foundation Approvers Group	Approver across all service features
AFCSDTACCGRP	Accounting Foundation Data Access Group	View data using API
AFCS-DVConsumer	DVConsumer group to access Data Visualization	Access Data Visualization Content for Catalog
AFCS-DVContentAuthor	DVContentAuthor group to access Data Visualization	Author Data Visualization Content for Catalog
AFCSOPRSGRP	Accounting Foundation Operations User Group	• Configure and Manage Pipelines • Execute Pipelines • Access PMF Dashboard • Perform File Operations • View Issues and Actions
AFCSVWGRP	AFCS View only group	Able to only view configurations, metadata definitions, and executions logs.
AFCSOBJEXPGRP	Accounting Foundation Metadata Export User Group	Able to export metadata objects
AFCSOBJIMPGRP	Accounting Foundation Metadata Import User Group	Able to import metadata objects
AFCSPIVWGRP	AFCSPIVWGRP group to access Data Visualization	Able to view the redacted PII data.

6.3 Create Application Users

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

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

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

6.3.1 Using Identity Console (IDCS)

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

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

 Note:

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

3. Click **Next**.
4. In the **Assign User to Groups (Optional)** window, select the User Groups according to your user-specific groups or access.

 Note:

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

5. To create an Identity Administrator or Authorizer User, assign the users to the following:
 - **IDNTY_ADMIN**: You can use this option to create an Administrator User.
 - **IDNTY_AUTH**: You can use this option to create an Authorizer User.

Assign User to Groups Window

Figure 6-1 Assign User to Groups Window

Step 2: Assign User to Groups (Optional)

☐ Select All

	Name	Description
☐	IDNTY_ADMN	Identity Administrator Group
☐	IDNTY_AUTH	Identity Authorizer Group

6. Click **Finish**.
After the successful creation of the user, the added users receive an email to activate their account. The user must activate the account to use the service.
7. From the **Users** window, you can access the newly created user and edit the user details.

Figure 6-2 Users Window

ORACLE Identity Cloud Service

Users

☐ Select All

☐	ID	jdow	Display Name John Doe	Email john.doe@mysite.com	☒	Edit
--------------------------	----	------	-----------------------	---------------------------	-------------------------------------	-------------------------------------

Page: 1 of 1 (1 of 1 items)

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

Figure 6-3 User Details Window

9. Click **Assign**.
10. In the **Assign Application** Window, select the appropriate Application Instance to grant access to your user as mentioned below.
For example:
 - AFCS xxxxx-prd (For Production)
 - AFCS xxxxx-nprd (For Non-Production)

Note:

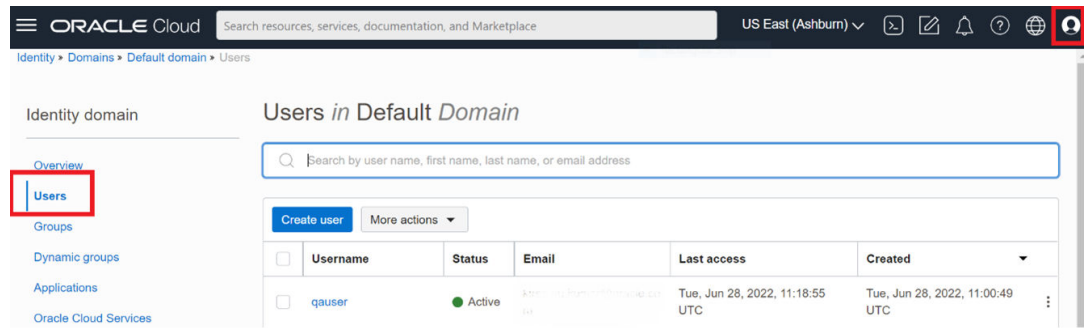
Based on this mapping the users will be able to access the appropriate instance.

11. Click **OK**.
For more information, see [Create User Accounts](#).

6.3.2 Using Identity Domain

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

1. Click the **Profile** Icon and select the appropriate instance.
2. From the LHS menu, select the **Users** option and click **Create user** to add the Application Users.



3. In the **Create User** page, enter the following information:

- The First Name and Last Name of the user.
- The user's Email Address or the User Name.

Note:

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

The 'Create user' form contains the following sections:

- First name:** Optional text input field.
- Last name:** Text input field.
- Username / Email:** Text input field.
- Checkboxes:**
 - ☒ Use the email address as the username
 - ☐ Assign cloud account administrator role (Gives the user the highest level of access, which allows them to create new users, assign services roles, and more.)
- Groups:** Optional section with the text 'Select groups to assign this user to.' and a search bar.

4. In the **Groups (Optional)** section, select the User Groups according to your user-specific groups or access.
5. To create an Identity Administrator or Authorizer User, assign the users to the following:
 - a. **IDNTY_ADMIN:** You can use this option to create an Administrator User.
 - b. **IDNTY_AUTH:** You can use this option to create an Authorizer User.

Figure 6-4 Assign User to Groups Window

Groups Optional
Select groups to assign this user to:

Search...

☐	Name	Description
☐	IDNTY_ADMN	Identity Administrator Group
☐	All Domain Users	A group representing all users.
☐	AFCBUGRP	Accounting Foundation Business Users Group
☐	IDNTY_AUTH	Identity Authorizer Group
☐	Administrators	Administrators
☐	AFCADMGRP	Accounting Foundation Admin Group

0 selected Showing 6 groups < Page 1 >

Show advanced options

6. Click **Create**.

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

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

Figure 6-5 User Details Window

Identity > Domains > Default domain > Users > johndoe123@gmail.com

John Doe

ACTIVE

U

Edit user Reset password Reset factors Edit user capabilities More actions

User information Tags Capabilities

OCID: - pwwing Show Copy
User name: - johndoe123@gmail.com
Prefix: -
First name: John
Middle name: -
Last name: Doe
Suffix: -

Email: - johndoe123@gmail.com
Recovery email: - johndoe123@gmail.com
Instant messaging address: -
Home phone number: -
Mobile phone number: -
Federated: No
My Oracle Support Account: -
Authenticated by: IDCSApp

> Work information
> Other information

Resources

Groups Applications

API keys
Auth tokens
OAuth 2.0 client credentials

Groups

Assign user to groups Remove user from group

☐	Name	Description
☐	IDNTY_ADMN	Identity Administrator Group

0 Selected

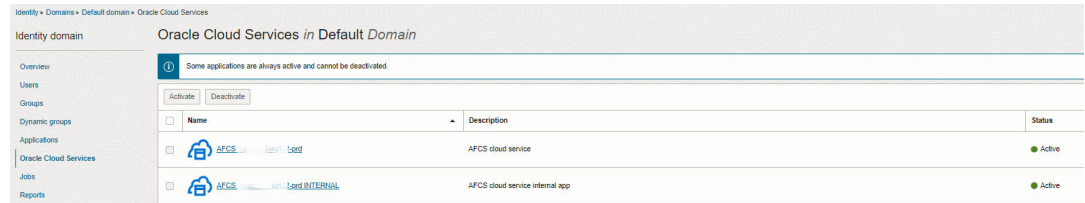
8. From the LHS menu, in the Groups section, select the required group and click **Assign user to groups**.

9. From the LHS menu, click **Oracle Cloud Services** and then select the appropriate application instance to grant access to your user as mentioned here.

For example:

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

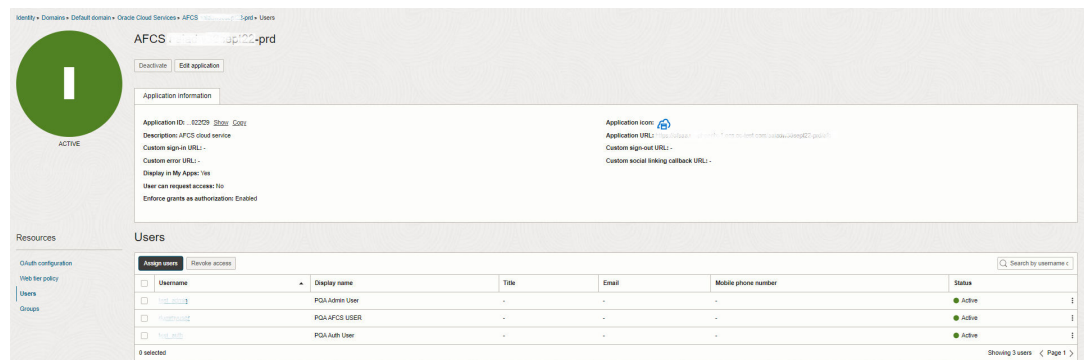
Figure 6-6 Oracle Cloud Services



Clicking on the application instance displays the application information.

10. In the left pane, under **Resources** group, click **Users** and select the users who needs to access the instance and click **Assign users**.

Figure 6-7 Assign Users



Note:

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

7

Configuring Session Timeout

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

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

Table 7-1 Configuring Session Timeout

Timeout Type	Description	Configurable	Timeout Duration
Session Lifetime Timeout	Once you are authenticated in the application, if you are actively working on it, your session remains active for a predefined duration, referred to as the session lifetime timeout period. Your session ends after this period, even if you're using the application.	Yes	8 Hours (Default value)
Browser Inactivity Timeout	This type of timeout considers the duration you leave your browser idle. After this duration, your session is terminated by the System, which automatically	Yes	Min 5 Minutes - Max 480 Minutes

7.1 How to Configure Session Lifetime Timeout

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

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



7.2 How to Configure Browser Inactivity Timeout

You can configure the Browser Inactivity Timeout using AFCS application. You need to have the System Administrator Role mapped to you, to access and modify the settings.

1. Login into the AFCS application.
2. On the **AFCS Home** page, navigate to the **My Profile** and select **System Preferences**.
The System Preferences page is displayed.
3. Enter the **Browser Inactivity Timeout** value, ranging between 5 minutes and 480 minutes.
4. Click **Save**.

8

FAQs

This section lists the Frequently Asked Questions (FAQs).

1. What are the Cloud Offerings from Oracle?
[Oracle Cloud](#) offers best-in-class services across Software as a Service (SaaS), Platform as a Service (PaaS), and Infrastructure as a Service (IaaS).
2. What are the Cloud Services available?
You can see the [Website](#) to see the Cloud Services available.
3. What are the Supported Browsers for the AFCS?
The following are the Supported Browsers for the AFCS:
 - Google Chrome
 - Microsoft Edge
 - Mozilla Firefox
4. How and where can I place my Order for Oracle Financial Services Accounting Foundation Cloud Service?
You can place your order on the [Oracle Cloud](#) website. Review the Order Oracle Cloud Applications topic to know more.
5. How can I activate my cloud account after I purchased the Oracle Financial Services Accounting Foundation Cloud Service?
If you are a new Oracle Cloud Applications user, you'll likely receive a Welcome email after your order is processed. You'll receive a *Welcome to Oracle Cloud email* that asks you to activate your cloud account. Review the [Activate your Cloud Account](#) Topic to know more.

Index