Oracle Financial Services

Admin Console User Guide

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1 Preface

This preface provides information for the Oracle Financial Services Admin Console User Guide.

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Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit: My Oracle Supportor Oracle Accessibility Learning and Support if you are hearing impaired.

Audience

This document is intended for the system administrators and users configuring the IDCS.

Conventions Used

The following table lists the conventions used in this guide.

Convention	Meaning
Italics	• Names of books, chapters, and sections as references • Emphasis
Bold	• The object of an action (menu names, field names, options, button names) in a step-by-step procedure • Commands typed at a prompt • User input
Monospace	• Directories and subdirectories • File names and extensions • Process names • Code sample, including keywords and variables within the text and as separate paragraphs, and user-defined program elements within the text
Hyperlink	Hyperlink type indicates the links to external websites, internal document links to sections.

Acronyms Used

The following table lists the acronyms used in this guide.

Conventions	Description
BA	Business Analysts
Infodom	Information Domain
Navigation Tree Menu or Navigation Menu	Left-hand side menu
OFS AAI	Oracle Financial Services Analytical Application Infrastructure
OFSAA	Oracle Financial Services Analytical Applications
OFS MMG	Oracle Financial Services Model Management and Governance
Production Infodom	Production Information Domain
Sandbox Infodom	Sandbox Information Domain
SA	System Administrator
URL	Uniform Resource Locator
UI	User Interface

2 How to access the Identity Management?

To access the Admin Console, follow these steps:

1. Enter the application URL in the browser's URL field.
2. Enter your **User ID** and **Password**.
3. Click **Log in**.

   The **Identity Management** window is displayed.

   For **Compliance Studio**, click **Admin** from the User Name at the top of the Financial Services Analytical Applications home page.

   

   Ensure the Administrator who creates your account has granted you administrative privileges to access the Idendity Management.

3 Identity Management

Using the Identity Management

Use this to perform identity management. It is a single point of access to manage identity functions and view administrative features such as user-role mapping, function mapping and miscellaneous configuration details.

To access the Identity Management, your Administrator must have granted you administrative privileges by mapping your user account to the Identity Administrator and Identity Authorizer user groups. These user groups are seeded in IDCS. Using Identity Management, Administrators can manage fine-grained and coarse-grained entitlements. Authorizers can authorize the entitlement mappings. The components are as follows:

1. **Users**: A user is a person who has access to and can perform specific actions based on the user group or groups they are mapped to. Before you can map a user to a user group, your administrator must have created and authorised the user. After the user is authorised, they are added in the **Users Summary** page. Click **Users** to view the list of available users in the page.
2. **Groups**: Groups are a set of users that can perform specific activities. For example, the administrator role performs administrative activities. Any user who belongs to a specific user group can access the roles mapped to that user group. Click **Add** to add a user group or click **Groups** to view the list of user groups in the **Groups Summary** page.
3. **Roles**: Roles are a set of functions grouped together and having specific privileges. Any user who belongs to a specific role can access functions mapped to the role. Click **Add** to add a role or click **Roles** to view the list of roles in the **Roles Summary** page.
4. **Functions**: Functions enable users to perform a specific activity. Any user who belongs to a specific function can access the folders mapped to the function. Click **Functions** to view the list of functions in the **Functions Summary** page.

   Only those user groups and roles which are authorized are displayed in the **Groups Summary** and **Roles Summary,** respectively.

Administrator Tasks

Perform the Identity and access management operations in the Identity Management.

Authorizer Tasks

As an authorizer, use this to authorize the Identity and Access management operations in the Identity Management.

Group Definition

Groups are a set of users that can perform specific activities. To create user groups, perform the following steps:

1. Click **Add** and provide details for the following **Group Definition** fields.

- **Group ID**: Enter a unique group ID. Only alphanumeric characters and special characters (only - and _) are allowed.
- **Group Name**: Enter a unique group name. Only alphanumeric characters and special characters (only - and _) are allowed.
- **Group Description**: Enter a description for the group. Only alphanumeric characters and special characters (-, _, ., and ,) are allowed.

2. Click **Save** to save the user group. You can also click **Cancel** to clear all values and enter new values.

   After saving the user group, it is added in the **Groups Summary** page.

Role Definition

Roles define the privileges available to users and the functions they can perform. To create roles, perform the following steps:

1. Click **Add** and provide details for the following **Role Definition** fields.
   - **Role Code**: Enter a unique role code. Only alphanumeric characters and special characters (only - and _) are allowed.
   - **Role Name**: Enter a unique role name. Only alphanumeric characters and special characters (only - and _) are allowed.
   - **Role Description**: Enter a description for the role. Only alphanumeric characters and special characters (-, _, ., and ,) are allowed.
2. Click **Save** to save the role. You can also click **Cancel** to clear all values and enter new values.

   After saving the role, it is added in the **Roles Summary** page.

Users Summary

Users Summary

The Users Summary page shows the list of available users. You can view the details of a user and map the user to one or more user groups. You can perform the following activities in the Users Summary Page:

1. View user details: Select a specific user name and then select **Details** to view the details of that user.
2. Search for users: In the search box, type the first few letters of user's name and click **Search**.

   The summaries whose names consist of your search string are displayed in the list of available users.

   At the bottom of the page, you can enter the number of entries to be viewed on a single page in the **Records** box. You can increase or decrease the number of entries to view, using the up and down arrows. Use the navigation buttons to navigate through the pages. You can also type a specific page number in the View bar control and press Enter to go to the desired page directly.

Mapped Groups

If you are an administrator and want to map a user to a user group, follow these steps:

1. Select the user name in the **Users Summary** page.
2. Select **Mapped Groups**.
3. Select the user group name. To select multiple user groups, press **Ctrl** and select more than one user group.
4. Click **Map** to map the user to the selected user group. Click **Unmap** to remove the user mapping.

   After clicking **Map**, the list of user groups you can map the user to appears in the **Available Groups Summary** page.
5. To select multiple groups, press **Ctrl** and select more than one group.
6. Click **Save**.

If you are an authorizer and want to authorize a mapping, follow these steps:

1. In **Mapped Groups**, click the user group name to select the user group.
2. To select multiple user groups, press **Ctrl** and select more than one user group.
3. If the logged-in user has both administration and authorization entitlements, an **Authorization View** toggle button is available. Enable this button to complete the authorization process.
4. Click **Authorize** to authorize the user-user group mapping.
   Click **Reject** to cancel the authorization request.

Available Groups Summary

Click **Map** to view the list of user groups you can map to the user. To select more than one user group, press **Ctrl** and select another user group.

Unmapped Groups

To authorize the unmapping of a user to a user group, follow these steps:

1. Click **Unmapped Groups**.
2. Click the user group name to select the user group.
3. Click **Authorize** to authorize the unmapping.

   Click **Reject** to cancel the authorization request.

Groups Summary

Groups Summary

The Groups Summary page shows the list of available users groups. You can view the details of a user group and map the user group to one or more roles. You can perform the following activities in the Groups Summary page:

1. View group details: Select a specific group name and then select **Details** to view the to view the **Group ID**, **Group Name**, and **Group Description** of the selected user group.
2. Search for user groups: In the search box, type the first few letters of the user group's name and click **Search**.

   The summaries whose names consist of your search string are displayed in the list of available users.

At the bottom of the page, you can enter the number of entries to be viewed on a single page in the **Records** box. You can increase or decrease the number of entries to view, using the up and down arrows. Use the navigation buttons to navigate through the pages. You can also type a specific page number in the View bar control and press Enter to go to the desired page directly.

Mapped Roles

If you are an administrator and want to map a user group to a role, follow these steps:

1. Select the user group name in the **Groups Summary** page.
2. Select **Mapped Roles.**
3. Select the role name. To select multiple roles, press **Ctrl** and select more than one role.
4. Click **Map** to map the user group to the selected role. Click **Unmap** to remove the user group-role mapping.

   After click **Map**, the list of roles you can map to the user group appears in the **Available Roles Summary** page.
5. To select multiple roles, press **Ctrl** and select more than one group.
6. Click **Save**.

If you are an authorizer and want to authorize the mapping, follow these steps:

1. In **Mapped Roles**, click the role name to select the role.
2. To select multiple roles, press **Ctrl** and select more than one role.
3. If the logged-in user has both administration and authorization entitlements, an **Authorization View** toggle button is available. Enable this button to complete the authorization process.
4. Click **Authorize** to authorize the user group-role mapping.
   Click **Reject** to cancel the authorization request.

Available Roles Summary

Click **Map** to view the list of roles you can map to the user group. To select more than one role, press **Ctrl** and select another role.

Unmapped Roles

To authorize the unmapping of a user group to a role, follow these steps:

1. Click **Unmapped Roles.**
2. Click the role name to select the role.
3. Click **Authorize** to authorize the unmapping.

   Click **Reject** to cancel the authorization request.

Roles Summary

Roles Summary

The Roles Summary page shows the list of available roles. You can view the details of a role and map the role to one or more functions. You can perform the following activities in the Roles Summary page:

1. View role details: Select a specific role name and then select **Details** to view the **Role Code**, **Role Name**, and **Role Description** of the selected role.
2. Search for roles: In the search box, type the first few letters of the role name click **Search.**

   The summaries whose names consist of your search string are displayed in the list of available users.

   At the bottom of the page, you can enter the number of entries to be viewed on a single page in the **Records** box. You can increase or decrease the number of entries to view, using the up and down arrows. Use the navigation buttons to navigate through the pages. You can also type a specific page number in the View bar control and press Enter to go to the desired page directly.

Mapped Functions

If you are an administrator and want to map a function to a role, follow these steps:

1. Select the role name in the **Roles Summary** page.
2. Select **Mapped Functions.**
3. Select the function name. To select multiple functions, press **Ctrl** and select more than one function.
4. Click **Map** to map the role to the selected function. Click **Unmap** to remove the function mapping.

   After clicking **Map**, the list of functions you can map the role to appears in the **Available Functions Summary** page.
5. To select multiple functions, press **Ctrl** and select more than one function.
6. Click **Save.**

If you are an authorizer and want to authorize the mapping, follow these steps:

1. In **Mapped Functions**, click the function name to select the function.
2. To select multiple functions, press **Ctrl** and select more than one function.
3. If the logged-in user has both administration and authorization entitlements, an **Authorization View** toggle button is available. Enable this button to complete the authorization process.
4. Click Authorize to authorize the role-function mapping.
   Click **Reject** to cancel the authorization request.

Available Functions Summary

Click **Map** to view the list of functions you can map the role to. To select multiple functions, press **Ctrl** and select more than one function.

Unmapped Functions

To authorize the unmapping of a role to a function, follow these steps:

1. Click **Unmapped Functions.**
2. Click the function name to select the function.
3. Click **Authorize** to authorize the unmapping.

   Click **Reject** to cancel the authorization request.

Functions Summary

The Functions Summary page shows the list of available functions. You can perform the following activities in the Functions Summary page:

1. View function details: Select a specific function name and then select **Details** to view the details of that function.
2. Search for functions: In the search box, type the first few letters of the function name and click **Search.**

   The summaries whose names consist of your search string are displayed in the list of available users.

   At the bottom of the page, you can enter the number of entries to be viewed on a single page in the **Records** box. You can increase or decrease the number of entries to view, using the up and down arrows. Use the navigation buttons to navigate through the pages. You can also type a specific page number in the View bar control and press Enter to go to the desired page directly.

Glossary

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