Oracle® Financial Services Data Foundation Cloud Service for Banking

Identity Management

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Primary Authors: (primary author), (primary author)

Contributing Authors: (contributing author), (contributing author)

Contributors: (contributor), (contributor)

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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.

1.1 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.

1.2 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.

1.3 Get Support

You can get support at My Oracle Support.

For accessible support, visit Oracle Accessibility Learning and Support.

1.4 Get Training

Increase your knowledge of Oracle Cloud by taking courses at Oracle University.

1.5 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.

1.6 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!

1.7 Before You Begin

See the following Documents:

- See What's New

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Introduction

2.1 Accessing the IDCS Console

The Identity Cloud Service (IDCS) Console is where you (administrators users) can configure Users and Groups, Oracle Cloud Services and so on.

To access the IDCS Console, follow these steps:

1. Enter the IDCS URL in the Browser's URL Address Bar.

   The Oracle Cloud Account Sign In Window appears.
2. Log in to Oracle Identity Cloud Service (IDCS).
3. Select Oracle Cloud Services.

   For more information, see Accessing the IDCS Console from Administering Oracle Identity Cloud Service.

> **Note:**
>
> - Ensure the AFCS Cloud Administrator who creates your account has granted you administrative privileges to access the IDCS Console.
> - For more information on the privileges available, see User Roles and Privileges.
> - If the AFCS Cloud Administrator has granted you only Identity Management privileges and no other AFCS privilege, you are automatically redirected to the IDCS Console specific to AFCS after logging in successfully.
> - After a User signs in to the AFCS Cloud Service, the User to User-Group Mapping created in the **IDCS Console** will onboard into the Master and Mapping Tables.
> For more information about how to Unmap a User from a Group in the **IDCS Console**, see the **Create Application Users** Section in the Get Started Guide.

2.2 Application User Setup

During implementation, you prepare your Oracle Application's Cloud Service for the Service Users. The decisions made during this phase determine how you manage users by default. Most of these decisions can be overridden. However, for efficient user management, Oracle

recommends that you configure your environment to reflect both enterprise policy and support most or all users.

For more information, see the Users Summary Page and User Roles and Privileges.

2.3 Create Users

During implementation, you can use the Create User task to create Test Service Users. By default, this task creates a minimal person record and a user account. After implementation, you should use the Hire an Employee task to create Service Users. The Create User task isn't recommended after the implementation is complete. This topic describes how to create a test user using the Create User task.

For more information, see the **Create Application Users** Section in the DFCS Get Started Guide.

2.4 Configuring the Instance Name

You must be a part of the Accounting Foundation System Administrator user group to configure the Instance Name. For more information, refer User Roles and Privileges section.

1. In the Home page, click from Top-right corner and select **System Preferences** option.
2. Enter the **Instance Name**.
    - The name should be alphanumeric with spaces and underscores allowed with minimum characters of 3 and maximum of 10.
    - Once the Instance name is added, it cannot be modified.
    - The instance name is displayed in the following UI pages.
        - Home page - Top Left corner within brackets. For Example: (Instance1)
        - About page
        - System Preferences page

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Users Summary Page

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.

To search for a specific User, type the first few letters of the User Name that you want to search in the **Search** box and click **Search**.

The search result displays the names that consist of your search string in the list of available users.

At the bottom of the page, you can enter the number of entries that are available on a single page in the **Records** box. You can increase or decrease the number of entries that are displayed using the up and down arrows. To navigate between pages in the **View** bar, use the following buttons:

- Use the First Page Button to view the entries on the first page.
- Use the Previous Page Button to view the entries on the previous page.
- Use the Next Page Button to view the entries on the next page.
- Use the Last Page Button to view the entries on the last page.

You can also navigate to the desired page. To do this, enter the page number in the **View** Bar Control and press **Enter**.

3.1 Details

Select the User Name in the **Users Summary Page** and then select **Details** to view the User ID and User Name of the selected User.

3.2 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.

> **Note:**
>
> To select a User Group, select the check box corresponding to the User Group. To select all User Groups displayed on the page, select the check box marked **Select All**.

4. Click **New** Mapping to map the User to the selected User Group.
   Or

   Click Unmap to remove the User Group-Role Mapping.

If the Unmap action requires authorization, see the Mapped Groups section for details.

> **Note:**
>
> After a User signs in to DFCS, the User to User-Group Mapping created in the IDCS Console will onboard into the Master and Mapping Tables.
>
> For more information about how to Unmap a User from a Group in the IDCS Console, see the **Create Application Users** section in the Get Started Guide.

After you click **New** Mapping, The list of User Groups you can map the user to appears in the Available Groups Summary page.

5. Select a User Group.

> **Note:**
>
> - To select a User Group, select the check box corresponding to the User Group. To select all User Groups displayed on the page, select the check box marked **Select All**.
> - 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.

6. Click **Map**.

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

1. In **Mapped Groups**, select the User Group Name.

> **Note:**
>
> To select a User Group, select the check box corresponding to the User Group. To select all User Groups displayed on the page, select the check box marked **Select All**.

2. Click **Authorize** to authorize the User-User Group Mapping.
   Click **Reject** to cancel the authorization request.

3.3 Available Groups Summary Page

Click **New Mapping** to view the list of User Groups you can map to the User. To select a User Group, select the check box corresponding to the User Group. To select all User Groups, select the check box marked **Select All**.

3.4 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.

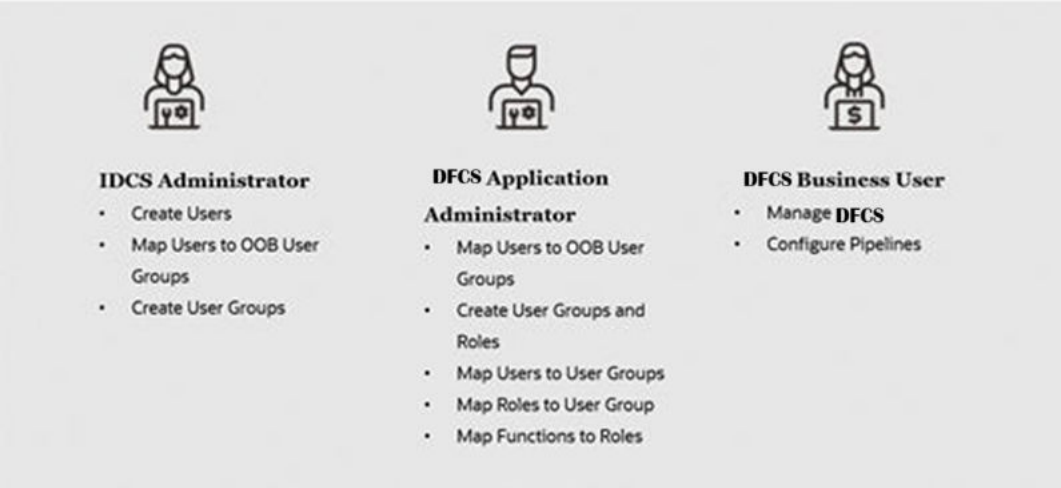
4

User Roles and Privileges

In the Oracle Financial Services Data Foundation Cloud Service (DFCS), users have roles through which they gain access to functions and data. Users can have any number of roles.

The following figure shows the User Persona Details:

Figure 4-1 User Persona Details



Note:

- Modifications to the User-Group Mapping from the IDCS will take a few minutes to take effect in the system. If the modifications are made during an active user session, then it will be reflected on the User's next login.
- You can create and manage Application users as required.
  For example, you can map the Pipeline Admin Group and DFCS Admin Group to one user.

4.1 Role-Based Access Control

Role-based security in Oracle Financial Services Data Foundation Cloud Service controls who can do what and which data.

The following table provides examples of role-based access.

Table 4-1 Role-based Access

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

4.2 User Group and User Role Mapping

The following table provides the User Group and User Role Mapping:

Table 4-2 User Group and User Role Mapping

User Group Code	User Group Name	Activities
DFBSYSADMN	Data Foundation Banking System Administrator	• User Group with Setup Roles • View all content • DFCS Service Administration Activities • Configure PMF Email notification UI
DFCS-BIAdministrator	BIAdministrator group to access Data Visualization	Administer Data Visualization Content
DFCS-BIContentAuthor	BIContentAuthor group to access Data Visualization	Author Data Visualization Content
DFCS-BIConsumer	BIConsumer group to access Data Visualization	Access Data Visualization Content
DFCSBUGRP	Data FoundationBusiness Users Group	• Use the DFCS 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, Source Registration, Event Grouping, Segment Code - Dimension Mapping and so on • Configure and Manage Pipelines • Execute Pipelines
DFCSSYSADMN	Data Foundation System Admin Group	• Perform System Administration activities For Example: Configuring Instance name, Configuring Browser Inactivity Timeout in the application
DFCSAPVRGRP	Data Foundation Approvers Group	Approver across all service features

Table 4-2 (Cont.) User Group and User Role Mapping

User Group Code	User Group Name	Activities
DFCSDTACCGRP	Data Foundation Data Access Group	View data using API
DFCS-DVConsumer	DVConsumer group to access Data Visualization	Access Data Visualization Content for Catalog
DFCS-DVContentAuthor	DVContentAuthor groupto access Data Visualization	Author Data Visualization Content for Catalog
DFCSOPRSGRP	Data Foundation Operations UserGroup	• Configure and Manage Pipelines • Execute Pipelines • Access PMF Dashboard • Perform File Operations • View Issues andActions
DFCSVWGRP	DFCSVWGRP	Able to only **view**configurations, metadata definitions, and executions logs.
DFCSOBJEXPGRP	Data FoundationMetadata Export User Group	Able to export metadata objects
DFCSOBJIMPGRP	Data FoundationMetadata Import User Group	Able to import metadata objects
Able to import metadata objects	Able to import metadata objects	Able to view the redacted PII data.

Glossary

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