

Oracle® Financial Services Data Foundation Cloud Service for Banking Identity Management



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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

- [Accessing the IDCS Console](#)
- [Application User Setup](#)
- [Create Users](#)
- [Configuring the Instance Name](#)

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 DFCS 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 DFCS Cloud Administrator has granted you only Identity Management privileges and no other DFCS privilege, you are automatically redirected to the IDCS Console specific to DFCS after logging in successfully.
- After a User signs in to the DFCS 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 *Getting 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 [Getting Started Guide](#).

2.4 Configuring the Instance Name

You must be a part of the Data Foundation Banking Application 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
5. Click **Unmap** to remove the User Group-Role Mapping.
6. 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 [Getting Started Guide](#).

7. After you click **New Mapping**, The list of User Groups you can map the user to appears in the Available Groups Summary page.
8. 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.

9. 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

1. 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.

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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 groups.

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 User Group and User Role Mapping

This topic provides the User Group, User Role mapping, and activities for DFCS.

This section outlines the available user groups within the DFCS system, their associated codes, access permissions, and role responsibilities. It serves as a reference for assigning user permissions and understanding the scope of each role.

Table 4-1 User Groups

User Group Name	User Group Description	Functionality
DFBSYSADMN	Data Foundation Banking System Administrator	System Administrator group which have access for domain deployment
DFBAPPADMIN	Data Foundation Banking Application Administrator	Application Administrator group which have access to catalog extension, data quality rule extension, data maintenance interface(DMI), EDM Integration
DFBCATLGOWN	Data Platform Catalog Administrator	Group have access for data catalog like catalog extension, data quality rule extension and fact entity creation. Also users mapped to the group has access to application catalog extension, glossary mapping extension and connector extension.
DFBDATANALST	Data Platform Data Analyst	Group have view only access for all the modules of data foundation banking cloud service

Table 4-1 (Cont.) User Groups

User Group Name	User Group Description	Functionality
DFBINTANLST	Data Platform Integration Analyst	Group have all access for data services modules like Data Source Template, Connectors and data extracts
DFBOBJEXPGRP	Data Foundation Object Migration Export Administrator	Group have access for exporting all object of DFCS like PMF, Data Ingestion, Data Extraction, Change Request, GL Adjustments and GL Recon Rules.
DFBOBJIMPGRP	Data Foundation Object Migration Import Administrator	Group have access for import all object of DFCS like PMF, Data Ingestion, Data Extraction, Change Request, Adjustments and Reconciliation Rules.
DFBPRCADMIN	Data Platform Process Administrator	Group have all access for Process Orchestration modules like Process Modeller, Process Monitor and Dashboard
DFBQLTCNTRL	Data Platform Quality Controller	Group have access for Reconciliation module and Data Quality module
DFBRECONADMIN	Data Foundation Banking Recon Administrator	Group have access for Reconciliation module
DFCS_PBSM_INTEGRATION	DFCS PBSM Integration Group	Group has access to PBSMCS integration. User mapped to the group are only allowed for Data Service Subscription from PBSMCS application
IDNTY_ADMIN	Identity Administrator Group	View reports, View object storage, View OAuth credentials, Perform Identity and Access Management operations
IDNTY_ADMIN	Identity Administrator Group	View reports, View object storage, View OAuth credentials, Perform Identity and Access Management operations
Identity Authorizer	Identity Authorizer	Authorize Identity and Access Management operations
DMIADMIN	Data Maintenance Admin Group	Group has all access for data maintenance interface(DMI)

Data Visualization User Groups**Table 4-2 Data Visualization User Groups**

User Group Name	User Group Description
DFCS-DATANALYST	Data Analyst
DFCS-DATASTEWARD	Data steward
DFCS-DVADMIN	Application Administrator
DFCS-INTANALYST	Integration Analyst

Table 4-2 (Cont.) Data Visualization User Groups

User Group Name	User Group Description
DFCS-QUALITYCONTROL	Quality Controller
DFCS-RECONANALYST	Recon Analyst
DFCS-RISKOFFICERS	Risk Officers, CRO
DFCS-RTFADMIN	Right to Forget Administrator
DFCS-SENIORDATANALYST	Senior Data Analyst
DFCS-SENIORINTANALYST	Senior Integration Analyst
DFCS-SENIORMGMTEXEC	Senior Management Executives

Table 4-3 Groups to Folders Mapping Table

Group	Folders & Privileges
DFCS-DVADMIN	• Custom Reports → Full • Custom Reports / Key Performance Indicators → Full • Custom Reports / Results Data → Full • Custom Reports / Source Data → Full • Custom Reports / Source Data Errors → Full • External Glossary - BIRD → Read • Key Performance Indicators → Read • Reports Glossary → Read • Right To Forget → Read • Sample Reports → Read • Source Data → Read • Source Data - PII → Read • Use Case Analysis → Read
DFCSDataAnalyst	• Custom Reports → Write • Custom Reports / Key Performance Indicators → Write • Custom Reports / Results Data → Write • Custom Reports / Source Data → Write • External Glossary - BIRD → Read
DFCSSeniorDataAnalyst	• Custom Reports → Write • Custom Reports / Key Performance Indicators → Write • Custom Reports / Results Data → Write • Custom Reports / Source Data → Write • External Glossary - BIRD → Read
DFCSSeniorMgmtExec	• Custom Reports → Read • Custom Reports / Key Performance Indicators → Read • Custom Reports / Results Data → Read • Custom Reports / Source Data → Read • External Glossary - BIRD → Read

Table 4-3 (Cont.) Groups to Folders Mapping Table

Group	Folders & Privileges
DFCSRiskOfficers	• Custom Reports → Read • Custom Reports / Key Performance Indicators → Read • Custom Reports / Results Data → Read • Custom Reports / Source Data → Read • External Glossary - BIRD → Read
DFCSIntAnalyst	• Custom Reports → Read • Custom Reports / Key Performance Indicators → Read • Custom Reports / Results Data → Read • Custom Reports / Source Data → Write • External Glossary - BIRD → Read
DFCSSeniorIntAnalyst	• Custom Reports → Read • Custom Reports / Key Performance Indicators → Read • Custom Reports / Results Data → Read • Custom Reports / Source Data → Write • External Glossary - BIRD → Read
DFCSQualityControl	• Custom Reports → Read • Custom Reports / Key Performance Indicators → Read • Custom Reports / Results Data → Read • Custom Reports / Source Data → Write • External Glossary - BIRD → Read
DFCSReconAnalyst	• Custom Reports → Read • Custom Reports / Key Performance Indicators → Read • Custom Reports / Results Data → Read • Custom Reports / Source Data → Write • External Glossary - BIRD → Read
DFCSRTRAdmin	• Custom Reports → Read • Custom Reports / Key Performance Indicators → Read • Custom Reports / Results Data → Read • Custom Reports / Source Data → Read • External Glossary - BIRD → Read
DFCSDataSteward	• ata Quality Visualization → Read • External Glossary - BIRD → Read • Key Performance Indicators → Read • Reports Glossary → Read • Right To Forget → Read • Sample Reports → Read • Source Data → Read • Source Data - PII → Read • Use Case Analysis → Read