

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



Release 26A

G32952-07

February 2026

The Oracle logo, consisting of a solid red square with the word "ORACLE" in white, uppercase, sans-serif font centered within it.

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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 Groups 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 Groups 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 [Oracle® Financial Services Data Foundation Cloud Service for Banking 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 Groups 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, user must authenticate before this action.

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 [Oracle® Financial Services Data Foundation Cloud Service for Banking 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 Groups and Privileges

In the Oracle Financial Services Data Foundation Cloud Service (DFCS), user groups are created 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 Mapping

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

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

Table 4-1 User Groups

User Group Name	User Group Description	Functionality
DFBSYSADMIN	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 Market Place, 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.
DFBFILEADMIN	File Administrator	Users assigned to this group have access only to file operations and no additional administrative privileges.

Table 4-1 (Cont.) User Groups

User Group Name	User Group Description	Functionality
DFBDATANALST	Data Platform Data Analyst	Group have view only access for all the modules of data foundation banking cloud service
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 Plaform Process Administrator	Group have all access for Process Orchestration modules like Process Modeller, Process Monitor and Dashboard
DFBQLCNTL	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
IDNTY_ADMN	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)
DPADMIN	FRC Data Platform Administrator	Group has all access for FRC Data Platform
DFBUDGADD	Data Platform Catalog Administrator	This group allows users to add glossaries.
DFBUDGPUB	Data Platform Catalog Administrator	This group allows users to publish the glossaries.
DFBUDGDEL	Data Platform Catalog Administrator	This group allows users to delete the glossaries.
DFBPRCOPERATOR	FRC Process Orchestration Operator	Process Orchestration Operator has access to view and execute data pipelines part of process modelling framework.

Table 4-2 Application Data Services User Groups

USER	ROLE CODE	FUNCTION	Role Name	Role Description
ADMIN	ADS_ADMIN_ROLE	DFBADSSCBR,DFBADSEEXEC,DFBADSVW	Application Data Service Administrator	This role helps to Subscribe, Update, View and Execute the Application Data Service
BATCH EXECUTOR	DFBADSEEXEC_ROLE	DFBADSEEXEC,DFBADSVW	Application Data Service Executor	This role helps to Execute the Application Data Service
BATCH VIEWER	DFBADSVW_ROLE	DFBADSVW	Application Data Service Viewer	This role helps to View the Application Data Service

Note

Unmap DFCS_PBSM_INTEGRATION to any user if mapped to the application after upgrading to 25C.

Data Visualization User Groups

This section lists the additional user groups mapped within the DFCS system associated with data visualization.

Table 4-3 Data Visualization User Groups

User Group Name	User Group Description	Folders & Privileges
DFCS-DATANALYST	Data Analyst	<ul style="list-style-type: none"> Custom Reports → Write Custom Reports / Key Performance Indicators → Write Custom Reports / Results Data → Write Custom Reports / Source Data → Write External Glossary - BIRD → Read
DFCS-DATASTEWARD	Data steward	<ul style="list-style-type: none"> Data 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

Table 4-3 (Cont.) Data Visualization User Groups

User Group Name	User Group Description	Folders & Privileges
DFCS-DVADMIN	Application Administrator	<ul style="list-style-type: none"> • 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
DFCS-INTANALYST	Integration Analyst	<ul style="list-style-type: none"> • Custom Reports → Read • Custom Reports / Key Performance Indicators → Read • Custom Reports / Results Data → Read • Custom Reports / Source Data → Write • External Glossary - BIRD → Read
DFCS-QUALITYCONTROL	Quality Controller	<ul style="list-style-type: none"> • Custom Reports → Read • Custom Reports / Key Performance Indicators → Read • Custom Reports / Results Data → Read • Custom Reports / Source Data → Write • External Glossary - BIRD → Read
DFCS-RECONANALYST	Recon Analyst	<ul style="list-style-type: none"> • Custom Reports → Read • Custom Reports / Key Performance Indicators → Read • Custom Reports / Results Data → Read • Custom Reports / Source Data → Write • External Glossary - BIRD → Read

Table 4-3 (Cont.) Data Visualization User Groups

User Group Name	User Group Description	Folders & Privileges
DFCS-RISKOFFICERS	Risk Officers, CRO	<ul style="list-style-type: none"> • Custom Reports → Read • Custom Reports / Key Performance Indicators → Read • Custom Reports / Results Data → Read • Custom Reports / Source Data → Read • External Glossary - BIRD → Read
DFCS-RTFADMIN	Right to Forget Administrator	<ul style="list-style-type: none"> • Custom Reports → Read • Custom Reports / Key Performance Indicators → Read • Custom Reports / Results Data → Read • Custom Reports / Source Data → Read • External Glossary - BIRD → Read
DFCS-SENIORDATANALYST	Senior Data Analyst	<ul style="list-style-type: none"> • Custom Reports → Write • Custom Reports / Key Performance Indicators → Write • Custom Reports / Results Data → Write • Custom Reports / Source Data → Write • External Glossary - BIRD → Read
DFCS-SENIORINTANALYST	Senior Integration Analyst	<ul style="list-style-type: none"> • Custom Reports → Read • Custom Reports / Key Performance Indicators → Read • Custom Reports / Results Data → Read • Custom Reports / Source Data → Write • External Glossary - BIRD → Read
DFCS-SENIORMGMTEXEC	Senior Management Executives	<ul style="list-style-type: none"> • Custom Reports → Read • Custom Reports / Key Performance Indicators → Read • Custom Reports / Results Data → Read • Custom Reports / Source Data → Read • External Glossary - BIRD → Read