

# Oracle® Financial Services IFRS 9 Solution Cloud Service Getting Started Guide



Release 26B

G37837-11

May 2026

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

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# 1

## About This Content

This guide provides information on the newly released Oracle Financial Services IFRS 9 Solution Cloud Service (OFS IFRS9SCS).

### Audience

This document is intended for users of the Oracle Financial Services IFRS 9 Solution Cloud Service (OFS IFRS9SCS) application.

### Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

### Access to Oracle Support

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### Related Resources

See these [Oracle resources](#):

- Getting Started with Oracle Cloud
- Admin Console User Guide
- Oracle Financial Services IFRS 9 Solution Cloud Service User Guide

### Conventions

The following text conventions are used in this document.

Convention	Meaning
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

# 2

## 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).

### 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 the 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 the Oracle Platform as a Service (PaaS) 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 the Oracle Software as a Service (SaaS) offering 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.

### Supported Web Browsers

Oracle Financial Services Cloud Services support the latest version of Google Chrome, Microsoft Edge and Mozilla Firefox.

For more details, see [Oracle Software Web Browser Support Policy](#).

### 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 - .
2. Scroll down and select the Cloud Service that you are subscribed to.
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. Provide a description and click **Request Now**.

After your interaction with the Oracle Sales team to order the Oracle Cloud Application best suited to your requirements, you will receive an email with a link to [activate the service](#) you have ordered.

# 3

## Getting Started with your Cloud Service

To get started, you must activate the subscribed Cloud Service.

After activating the cloud service, you can log in as an administrator and perform the following tasks.

- [Create and Activate New Cloud Account](#)
- [Access the Cloud Account](#)
- [Access Oracle Identity and Access Management \(IAM\) Console](#)
- [Onboard new application users](#) for the subscribed cloud services.

After the administrator successfully adds an application user, they can log in and [activate their cloud account](#) and use the subscribed cloud services provisioned by the administrator.

### Choosing Between a New or Existing Cloud Account

Every administrator in a cloud account (tenancy) has access to all subscriptions within that account. To ensure that new administrators cannot access existing subscriptions, you should activate new subscriptions in a separate tenancy by [creating a new Oracle Cloud Account](#). If separate access controls are not needed, you may [add new subscriptions to an existing Oracle Cloud Account](#).

## Create and Activate New Cloud Account

After you subscribe to the cloud service, you will receive a **Welcome to Oracle Cloud** email with details to create and activate your cloud account.

To create and activate a new cloud account:

1. Click **Create New Cloud Account** in the email.
2. Complete the **New Cloud Account Information** to sign up.

Figure 3-1 New Cloud Account Information page

**What is a Cloud Account?**

When you sign up for Oracle Cloud, you get a cloud account and an Oracle Cloud Infrastructure tenancy. Oracle assigns the same name to the cloud account and the tenancy.

**About Regions**

A region is a localized geographic area, and an availability domain is one or more data centers located within a region. A region is composed of one or more availability domains. Oracle Cloud Infrastructure resources are either region-specific, such as a virtual cloud network, or availability domain-specific, such as a compute instance.

**Your Subscriptions**

Order Number: 21064076  
Subscription ID: 21064076

**New Cloud Account Information**

First Name  Last Name

Email

Password

Confirm Password

Tenancy Name

**ⓘ** A value for Tenancy Name is required.

**ⓘ** This will be assigned to your company's or organization's environment when signing into the Console. You can always [rename](#) it later from the Console.

Home Region

**ⓘ** Your [home region](#) is the geographic location where your account and identity resources will be created. It is not changeable after sign-up. [See Regions](#) for service availability.

**Terms of Use**

By clicking on the button, you understand and agree that the use of Oracle's web site is subject to the [Oracle.com Terms of Use](#). Additional details regarding Oracle's collection and use of your personal information, including information about access, retention, rectification, deletion, security, cross-border transfers and other topics, is available in the [Oracle Privacy Policy](#).

Create Tenancy

## 3. Enter the following details:

- **First Name** and the **Last Name** of the person who will be the cloud administrator.
- **Email** address of the person who will be the cloud administrator. Instructions to log into the new Oracle Cloud Account will be sent to this email address.
- **Password** to access the new cloud account.
- **Tenancy Name**: New **Tenancy Name** to be associated with the cloud account.

**Note**

You cannot modify the tenancy name after it is created. Hence, ensure to provide a valid tenancy name, based on your organization's requirements and naming conventions.

- **Home Region**: Select the **Home Region**, where the account is located. Check the service availability before selecting the home region. For assistance regarding home region selection, contact Oracle support. Existing customers have to ensure that the identity resources are located in the home region.

**Note**

You can subscribe to additional regions but you cannot modify the home region, after provisioning your tenancy.

4. Click **Create Tenancy** to access the **New Cloud Creation Confirmation** page.

After successful activation, the cloud account administrator will receive a **Get Started Now with Oracle Cloud** email.

## Add to an Existing Oracle Cloud Account

If you already have a cloud account associated with your administrator user name, you can add the newly subscribed cloud service to that account.

To add an existing Cloud account:

1. In the welcome email, click **Add** to add an existing cloud account.
2. Perform the steps as mentioned in the [Access the Oracle Cloud Infrastructure Identity and Access Management \(IAM\) console](#).

## Accessing the Cloud Account

An Administrator can access the Cloud Account activated and associated with their email address.

After your new cloud account is created and activated, you will receive a **Get Started Now with Oracle Cloud** email, to the email address provided while creating the account.

To access your Cloud account:

1. In the **Get Started Now with Oracle Cloud** email, click **Sign In**.
2. Enter the **Tenancy** name and click **Continue**.
3. Enter the **Username** and **Password** to log in to the **OCI Console**.

Use the same **Username** and the **Password** that you provided during activation setup.

4. After successful login, proceed with the [multi-factor authentication](#). Select the configured authentication mode and enter the OTP generated using the [Oracle Mobile Authenticator application](#).

Once the MFA is successfully completed, you can access the **Environment Page**.

## Creating Co-Administrator Users

After you log in to the IAM console, the 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, 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 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, the users will receive a Welcome email. The users must activate their accounts and enter a new password to access the services.

### Note

A co-administrator will have the same privileges as the existing administrator.

To create a co-administrator user in the IAM Console:

1. In the IAM Console, select **Domains** (Identity domain) to view the list existing domains.

2. Click the required **Domain Name**, to access the **Domain Details** page.
3. In the left pane, click **Users** and select **Create user**, to proceed with the user creation.
4. Enter the following details:
  - **First Name, Last Name** and a valid **Username** and the **Email ID**.

#### ① Note

- The username should be alphanumeric and cannot exceed 20 characters. You can enter only hyphen (-) and underscore (\_) as special characters.
- Uncheck the **Use the email address as the username** check box, as you can only set the username as the login ID and currently setting the email address as the login ID is not supported.

5. Select the **Administrator Group**.

#### ① Note

After a user logs in to a specific cloud service, the user to user-group mapping created in the **IAM Console** will onboard into the master and mapping tables. Later, if you deselect (remove) a user from a group in **Assign User to Groups** 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.

6. After entering the required information, click **Create** to create and add the new user to the [User Summary](#).

You can also [batch import several users](#) using a .CSV file.

## Subscribing to a Disaster Recovery Infrastructure Region

In Oracle Cloud Infrastructure (OCI), a Disaster Recovery (DR) region is a secondary, geographically separate region that helps ensure service continuity.

To maintain high availability, you must subscribe to a DR region as part of your disaster recovery strategy.

For information on how to subscribe to a DR Infrastructure region, see [Subscribing to an Infrastructure Region](#).

## Create an Environment

After logging into the Oracle Cloud Infrastructure Console, an Administrator can create one or multiple environments/instances for different user groups.

To create an environment/instance:

1. Log in to **Oracle Cloud Infrastructure Console (OCI)**.

You can view the list of all the environments (instances) provisioned for the one or multiple cloud applications, with the following details:

- **Name:** The cloud application's instance name.

- **Type:** The instance type.
  - **Life cycle status:** The instance status.
  - **Region:** The region from where the specific instance is active.
  - **Application URL:** The URL to access the instance.
2. From **My Applications**, click the application in which you want to create an environment. Example: Oracle Financial Services Profitability and Balance Sheet Management Cloud Service.
  3. On the **Overview** page, click **Environments**.
  4. From the **Compartments** drop-down list, select the compartment in which you want to create an environment.
  5. From the **Domain** drop-down list, select the domain in which you wish to create an environment.

To use a custom domain, ensure that the custom domain is created before creating the environment. For more information, see the [Creating Custom Domain](#) section.

6. Select **Subscription ID** for your cloud service.  
Click **Show Subscription details** to view the details of all the subscription of your service.
7. (Optional). Select the **Region** to host the OCI environment/instance, from the drop-down list.

If you are not sure about the region, contact [My Oracle Support \(MoS\)](#).

#### Note

You can select the region only for the first environment/subscription and for the additionally added instances, the region cannot be modified.

8. Enter the following **Environment Details**:
  - **Name:** The name of the new environment or instance.

#### Note

You cannot modify the environment name after the environment is created. Hence, ensure to provide a valid environment name, based on your organization's requirements and naming conventions.

- **Admin user name:** The user name of administrator.
- **Instance type:** Select one of the following instances:
  - **Production:** If the environment is used for Production activities.
  - **Non-production:** If the environment is used for testing and development purposes. For example, a sandbox environment.
- **Admin email:** The administrator email ID used to log in to the Cloud Console. You can also enter a different email ID that needs to be 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 Administrator.

- (Optional) Navigate to **Advanced Options** section and select Compartment and Domain from Compartments and Identity Domains tab. To use a custom domain, ensure that the custom domain is created before creating the environment. For more information, see the Creating Custom Domain section.

The environment details are added to the Oracle Cloud Infrastructure Classic Console under the **Environments** tab. It may take a few hours for the status to change to Active. If there are any issues, you can raise a service ticket with [My Oracle Support \(MoS\)](#).

#### 9. Click **Create**

After the environment is set to **Active**, click the environment name to view the **Environment details**. Click the Service console URL under **Environment Information** to create users and groups.

## Access Oracle Identity and Access Management

Oracle Cloud Infrastructure Identity and Access Management (IAM) provides identity and access management features such as authentication, single sign-on (SSO), and identity life cycle management for Oracle Cloud as well as Oracle and non-Oracle applications, whether SaaS, cloud-hosted, or on-premises. Employees, business partners, and customers can access applications at any time, from anywhere, and on any device in a secure manner.

IAM integrates with existing identity stores, external identity providers, and applications across cloud and on-premises to facilitate easy access for end users. It provides the security platform for Oracle Cloud, which allows users to securely and easily access, develop, and deploy business applications such as Oracle Human Capital Management (HCM) and Oracle Sales Cloud, and platform services such as Oracle Java Cloud Service, Oracle Business Intelligence (BI) Cloud Service, and others.

Administrators and users can use IAM 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.

To add users to your Cloud Services, navigate to the **Oracle Identity and Access Management (IAM) Console**.

To access the **IAM Console**:

1. Log in to [Cloud.Oracle.com](#), to view all the details pertaining to your cloud order.  
Access the service link from the console to start using your subscriber cloud service.
2. Enter the **Cloud Account Name** and click **Next** to access the **IAM Console**.
3. Click **Change tenancy** option if you want to use a different tenancy.
4. Ensure that the displayed identity domain matches the expected value.
5. Log in with your **Username** and **Password**.

As an Administrator, you can [create and manage users with different access rights to the Cloud Service](#).

For example, the IAM Administrator has superuser privileges for an Oracle Identity and Access Management Domain. This administrator can create users, groups, group memberships, and so on.

## Activate Application User Account

A user provisioned by their administrator can use the specific cloud services they have subscribed to.

When an administrator completes provisioning an application user, the user receives an account activation email from Oracle.

To log in and activate your application user account:

1. Open the email received from Oracle and review the information about your service in the email.
2. Click **Activate Your Account**. You will be prompted to change your password on the initial log in.
3. Enter your new credentials in the **Reset Password** window to activate your account. After the password is successfully reset, a **Congratulations** message is displayed.
4. Access the Application URL shared by the administrator.
5. Enter your credentials to sign in to your account and access the **Welcome Page**.

# 4

## Managing Application Users

An application user can access the subscribed cloud services, based on the roles and groups assigned to them

An administrator can create application users using IAM. They can also [batch import several users](#) using a .CSV file.

After users are created, they are synced from IAM to the Cloud Service.

You can map the application users to existing groups based on the roles that they require and their access levels. The access level provided to an application user is based on the following:

- **Groups:** Groups are seeded (available out-of-the-box) by your cloud service. Administrators can also create new groups in IAM. After groups are created, they are synced from IAM to the cloud service. You can map the groups to roles using the subscribed cloud service.
- **Roles:** Roles are seeded by the cloud service. Administrators can also create new roles using the cloud service and assign existing functions to these new roles.
- **Functions:** Functions are seeded by the cloud Service. Administrators cannot create new functions; however, they can use the existing functions.

### User Summary- Application Users

View the list of existing application users in the User Summary.

You can view the details of a user and map the user to one or more user groups.

- To view the **User ID** and **Username** of the selected User - Select the **Username** in the **User Summary** page and select **Details**.
- To search for a specific User, type the first few letters of the required **Username** in the **Search** box and click **Search**.
- Using the navigation buttons at the bottom of the summary page, you can browse to the different pages. Also, you can enter the number of entries to be listed on a single page in the **Records** box or use the buttons to increase or decrease the number of entries.
- Enter the page number in the **View Bar Control** and jump to the required page.

### Creating New Application Users

After you log in to the IAM console, the 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, 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 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, the users will receive a Welcome email. The users must activate their accounts and enter a new password to access the services.

To create users in the IAM Console:

1. In the IAM Console, select **Domains** (Identity domain) to view the list existing domains.
2. Click the required **Domain Name**, to access the **Domain Details** page.

**Note**

If you are using a custom domain, select the custom domain name before proceeding with the steps below. For more information, see the [Creating Custom Domain](#) section.

3. On the details page, perform one of the following actions depending on the option that you see:
  - Select the **User management** tab, and then go to the **User** section of the tab.
  - Under **Identity domain** on the left side of the page, select **Users**.
4. Under **Users** and select **Create**, to proceed with the user creation.
5. In the **First name** and **Last name** fields enter the user's name.
6. To have the user sign in with their email address, follow these steps:
  - a. Leave the **Use the email address as the username** checkbox selected.
  - b. In the **Username / Email** field, enter the email address for the user account.
7. To have the user sign in with their username, follow these steps:
  - a. Clear the **Use the email address as the username** checkbox.
  - b. Enter the unique name for the user. You cannot change this value later.

**Note**

The name must meet the following requirements: No spaces. Only Basic Latin letters (ASCII), numerals, hyphens, periods, underscores, +, and @.

- c. In the **Email** field, enter the email address for the user account.

**Note**

If the **Primary email address required** checkbox is selected on the **Domain settings** page, then you must provide an email address in the **Email** field to create the user account.

If the **Primary email address required** checkbox is not selected, then you can create the account without entering an email address in the **Email** field.

8. Select the user groups according to your user-specific groups or access, in the **Groups (Optional)**.

**Note**

After a user logs in to a specific cloud service, the user to user-group mapping created in the **IAM Console** will onboard into the master and mapping tables. Later, if you deselect (remove) a user from a group in **Assign User to Groups** 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.

9. After entering the required information, click **Create** to create and add the new user to the [User Summary](#).

You can also [batch import several users](#) using a .CSV file.

## Creating a New User Group

Create groups to manage user access to applications and resources.

To create a user group :

1. In the IAM Console, select **Domains** (Identity domain) to view the list existing domains.
2. Click the required **Domain Name**, to access the **Domain Details** page.

**Note**

If you are using a custom domain, select the custom domain name before proceeding with the steps below. For more information, see the [Creating Custom Domain](#) section.

3. On the details page, perform one of the following actions depending on the option that you see:
  - Select the **User management** tab, and then go to the **Groups** section of the tab.
  - Under Identity domain on the left side of the page, select Groups.
4. Under Groups select **Create group**.
5. Enter the **Group Name** and the **Group Description**.
6. Select **User can request access**, to allow users to request access to this group.
7. To add users to the group while creating the group, select the checkbox for each user that you want to add to the group.

**Note**

To search for a user, select the text box, enter all or part of the beginning of the username, first name, or last name of the user, and then press **Enter**.

8. (Optional) In the **Tags** section, add one or more tags to the group. If you have permissions to create a resource, then you also have permissions to apply free-form tags to that resource. To apply a defined tag, you must have permissions to use the tag namespace. If you're not sure whether to apply tags, skip this option or ask an administrator. You can apply tags later.

9. Click **Create** to create the new user group with the selected users.

After creating the user group, you must assign various permissions to the group, using one of the following methods:

- Write at least one policy to give group permission to either the tenancy or a compartment. While writing the policy, specify the group using the unique group name or the group's OCID.
- Assign the group to an application.

## Assign Groups to Users

Assign a specific group to a user, based on the roles required for the user.

Ensure to [create a group](#), before assigning users to the group.

To map a user to a group using the IAM Console :

1. In the IAM Console, select **Domains** (Identity domain) to view the list existing domains.
2. Click the required **Domain Name**, to access the **Domain Details** page.

### Note

If you are using a custom domain, select the custom domain name before proceeding with the steps below. For more information, see the [Creating Custom Domain](#) section.

3. On the details page, perform one of the following actions depending on the option that you see:
  - Select the **User management** tab.
  - Under Identity domain on the left side of the page, select **Groups**.
4. Find the **Groups** table listing and select the group to which to add users.
5. On the group details page, perform one of the following actions depending on the option that you see:
  - Select the **Users** tab.
  - Under Resources, select **Users**.
6. Click **Assign User to Groups** to view the list of available groups.
7. To add users to the group, select the checkbox for each user that you want to add to the group

### Note

To search for a user, select the text box, enter all or part of the beginning of the username, first name, or last name of the user, and then press **Enter**.

8. After selecting all the required Groups, click **Add**.

The user is assigned to the selected groups. You can access the list of groups associated with a user, in the respective **User Details** page.

To dissociate an user from a group, select the group and click **Remove User from the Group**.

## Bulk Import Application Users

As an administrator, you can batch import user accounts using a .CSV file.

### Note

Before importing the user accounts, create a .CSV file that is properly formatted for the import.

To import user accounts :

1. In the IAM Console left pane, click **Users** and select **More Actions** and select **Import Users**.
2. Click **Browse** to locate and select the .CSV file containing the user accounts to import.

### Note

Click **Download sample file** in the dialog box to download a sample file and perform the accounts upload.

3. Verify that the path and name of the selected .CSV is updated in the **Select a file to import**, and click **Import**.

### Note

Oracle IAM cannot import a user account if a mandatory value such as user's first name, last name, or username, is missing. In such cases, Oracle IAM will skip the incomplete account and proceed to the next account in the .CSV file.

When Oracle IAM evaluates and imports the user accounts, the imported accounts are updated in the **Jobs**. You can also get information related to the successful/incomplete imports if the import was not completed due to system errors.

For information on how to import and export users, groups, and Oracle application roles into and out of an identity domain, see [Transferring Data](#).

# 5

## Managing User Groups

User groups are seeded (available out-of-the-box) by the cloud service. Groups are mapped to roles using the cloud service by the same user that was created using IAM.

Administrators can also create new groups in IAM. After groups are created, they are synced from IAM to the cloud service. You can map the groups to roles using the subscribed cloud service.

### Map Application to the User Groups

After creating a group, you can map the required applications with the group.

To map the application to a user group, log in to IAM and follow these steps:

1. Go to the Navigation menu in the enter the **Domains** in the Search bar to view the **Domains** list.
2. Select the **Domain** and then from the LHS menu,

#### Note

If you are using a custom domain, select the custom domain name before proceeding with the steps below. For more information, see the [Creating Custom Domain](#) section.

3. Select **Oracle Cloud Services** tab, to view the list of Cloud Services.  
The screen displays the various Oracle Cloud Services.
4. Select the Cloud Services you are subscribed to (Syntax: **<Cloud\_service\_name>xxxx-prd** and **<Cloud\_service\_name>xxxx-nprd**, where **Description** is mentioned as your registered cloud service).
5. Select **Groups** and click **Assign Groups**.
6. Select the user and click **Assign**.

### Map Users to Groups

Log in to IAM as an administrator, and map users to user groups.

To map a user to a user group:

1. Select the **User Name** in the **Users Summary**.
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 you need to authorize an unmap request, refer to [Unmap User from Group](#).

**Note**

User-group mapping changes from IAM will take some time to sync with your Cloud Service. If these changes are made during the active user session, then it will be reflected on the next login.

After a user signs into the cloud service, the user to user-group mapping created in the IAM Console will onboard into the master and mapping tables. If you unmap a user from a group in the Admin Console, navigate to the associated console and open **Assign User to Groups**. Deselect the user corresponding to the user group and click **Finish**. This is a mandatory step to complete the unmapping process.

For more information, refer to [Unmap User from Group](#).

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

5. Select a **User Group**.

**Note**

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.

6. Click **Map**.

**Note**

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.

## Map Roles to User Group

You can map roles to a user group using Admin Console.

To map roles to the user group:

Before mapping the roles to an user group, ensure that the [roles are created in the Admin console](#).

1. From the **Identity Management** tab, Click **Groups** to access the **Groups Management** page.
2. Search for the specific group.
3. Click the **User Group** and click **New Mapping** under the **Mapped Roles** tab.
4. Search for required role names created in **Roles Management** and click **New Mapping** to map each role.
5. Log in as a user with the authorization role and authorize the mapped roles in the **Authorization View**.

A user group is created in the IAM Portal and is mapped to a role created in the Admin Console.

## Unmap User from Groups

Unmap a user from a specific group to revoke the associated functions.

Log in to IAM as an administrator to authorize and unmap a user from a specific user group.

To authorize the unmapping of a user from a user group:

1. Click **Unmapped Groups**.
2. Click the **User Group Name** to select the User Group.
3. Click **Authorize** or **Reject** to approve or reject an unmapping request.

# 6

## User Management

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 [View List of Application Users](#) and [User Roles and Privileges](#).

### Application 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 is not recommended after the implementation is complete.

For more information, see [Create Application Users](#).

### User Roles and Privileges

Oracle Accounting Standards and Banking (AS CS) Users are assigned roles through which they gain access to functions and data. Users can have any number of roles.

The following table shows the User Personas and the tasks they can perform:

**Table 6-1 User Roles and Privileges**

<b>IAM Administrator</b>	<b>Identity Administrator</b>	<b>Identity Authorizer</b>	<b>Application Users</b>
Create User	Map Users to OOB User Groups	Manage Authorization	Manage AS CS
Map Users to OOB User Groups	Create User Groups and Roles		Set up Dimensions, Rules, Assumptions, and Processes
Create User Groups	Map Users to User Groups		Execute Processes
	Map Roles to User Group		Generate Reports
	Map Functions to Roles		Review and Analysis Reports

### Role Based Access Control

Role-based security in Oracle Accounting Standards Cloud Service Controls who can do what and to which data.

The following table provides examples of role-based access.

**Table 6-2 Examples of Role Based Access**

<b>Role Assigned to a User</b>	<b>Functions which Users with this Role can Perform</b>	<b>Set of Data which Users with the Role can Access when performing the Function</b>
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

## User Roles and Activities

The following User Roles are seeded in AS CS to facilitate the activities expected from the users mapped to the seeded User Groups:

- IFRS 9 Administrator
- IFRS 9 Analyst
- IFRS 9 Auditor
- IFRS 9 Analyst PI
- IFRS 9 BI Data Steward
- IFRS 9 BI Analyst
- IFRS 9 BI Auditor
- IFRS 9 BI Analyst PI
- ECLCS Application Administrator
- ECLCS Application Analyst
- ECLCS Application Auditor
- ECLCS Application Analyst PI
- ECLCS Application BI Data Steward
- ECLCS Application BI Analyst
- ECLCS Application BI Auditor
- ECLCS Application BI Analyst PI

In addition to this, Custom User Roles can be created and managed as per requirement.

### IFRS 9 User Roles

The user roles IFRS 9 Administrator, IFRS 9 Analyst, and IFRS 9 Auditor are required to access the main application for view, edit and other purposes, based on the User Persona accessing the same. An Analyst User Persona can view all ASCS Base Cloud Service Screens and Edit-specific Screens. Similarly, an Admin Persona can view and edit all AS CS screens. These different Persona tasks are facilitated by the User Roles. Thus, these three User Roles facilitate the accesses and activities for the corresponding User Groups.

The User Roles of - IFRS 9 BI Data Steward, IFRS 9 BI Analyst, and IFRS 9 BI Auditor - are seeded BI Roles to be used for the users to access the Analytics Menu in the AS CS Application. These roles are created to facilitate Analytics access for four different types of User Persona. These roles can be mapped to any User Group to provide the Analytics access to users under the User Group.

## ECL User Roles

The user roles ECLCS Application Administrator, ECLCS Application Analyst, and ECLCS Application Auditor are required to access the main application for view, edit and other purposes, based on the User Persona accessing the same. An Analyst User Persona can view all AS CS screens and Edit-specific screens. Similarly, an Admin Persona can view and edit all AS CS screens. These different Persona tasks are facilitated by the User Roles. Thus, these three User Roles facilitate the accesses and activities for the corresponding User Groups.

The User Roles of - ECLCS Application BI Data Steward, ECLCS Application BI Analyst, and ECLCS Application BI Auditor - are seeded BI Roles to be used for the users to access the Analytics Menu in the AS CS Application. These roles are created to facilitate Analytics access for four different types of User Persona. These roles can be mapped to any User Group to provide the Analytics access to users under the User Group.

## User Groups and Activities

The following table provides the information on the User Groups and related activities.

**Table 6-3 User Groups and Activities**

User Groups	Activities
Identity Administrator Group	<ul style="list-style-type: none"> <li>View Object Storage</li> <li>View OAuth Credentials</li> <li>Perform Identity and Access Management Operations</li> </ul>
IAM Administrator	<ul style="list-style-type: none"> <li>Create Users</li> <li>Map Users to the Instance</li> </ul>
IFRS 9 Analyst Group and ECLCS Application Analyst	<ul style="list-style-type: none"> <li>Set User and Application Preferences</li> <li>Set Setup Parameters</li> <li>Currency and Rate Management</li> <li>Dimension Management</li> <li>Data Management: Metadata and Data Loaders</li> <li>Schedule Batch Processes</li> </ul>
IFRS 9 Auditor Group and ECLCS Application Auditor	<ul style="list-style-type: none"> <li>View privileges for all application-specific modules:</li> <li>Review/Analyze Results</li> <li>Review Process Logs</li> <li>View Reports</li> </ul>
Application Data Service Integration Group	<ul style="list-style-type: none"> <li>Subscribe to Data Services Subscription</li> <li>View and Edit the subscription</li> <li>Execute the Application Data Service</li> </ul>

In addition to this, Custom User Groups can be created and managed as per requirement.

## User Group and User Role Mapping

The following table lists the seeded mapping of User Groups to the User Roles.

**Table 6-4 User Group and User Role Mapping**

<b>User Group</b>	<b>Mapped User Role</b>
IFRS 9 Admin User Group	IFRS 9 Administrator
IFRS 9 Analyst User Group	IFRS 9 Analyst
IFRS 9 Auditor User Group	IFRS 9 Auditor

The BI User Roles of IFRS 9 BI Data Steward, IFRS 9 BI Analyst, and IFRS 9 BI Auditor are not mapped OOTB to any seeded User Group but can be mapped to any User Group to provide the Analytics access to users under than User Group. Customers can custom User Groups and map the seeded or Custom User Roles as it suites the requirement.