Oracle Financial Services

Profitability Analytics System Administrator User Guide

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Contents

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Users and Roles

Understand the following terms before you begin performing User Management.

- **Users**: Customers create users in Identity and Access Management (IAM) and can do the following:
  - Map them to existing groups
  - Create new groups to map them

  After users are created, they are synced from IAM to the Cloud Service.
  - **Groups**: Groups are seeded (available out-of-the-box) by your Cloud Service. Customers can also create new groups in IAM. After groups are created, they are synced from IAM to the Cloud Service. Groups are mapped to roles using the Cloud Service by the same user that was created using IAM.
  - **Roles**: Roles are seeded by the Cloud Service. Customers 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. Customers cannot create new functions; however, they can only use the existing functions.

1.1 View List of Application Users

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.

Select the Username in the Users Summary page and then select Details to view the User ID and Username of the selected User.

To search for a specific User, type the first few letters of the Username 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.

You can use the navigation buttons at the bottom of this page to move around in 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 of decrease the number of entries.

Also, you can enter the page number in the **View Bar Control** and jump to the page you want.

1.2 Create Application Users

After you sign in to your IAM console, one of your first tasks 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 team 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, perform the following steps:

1. In the IAM Console, click the **Profile** icon and select **Identity domain** to add the Application Users.
2. In the **Identity Domain** left pane, click **Users** and select **Create user**.
3. Enter the following details:

   To have the user sign in with their email address:

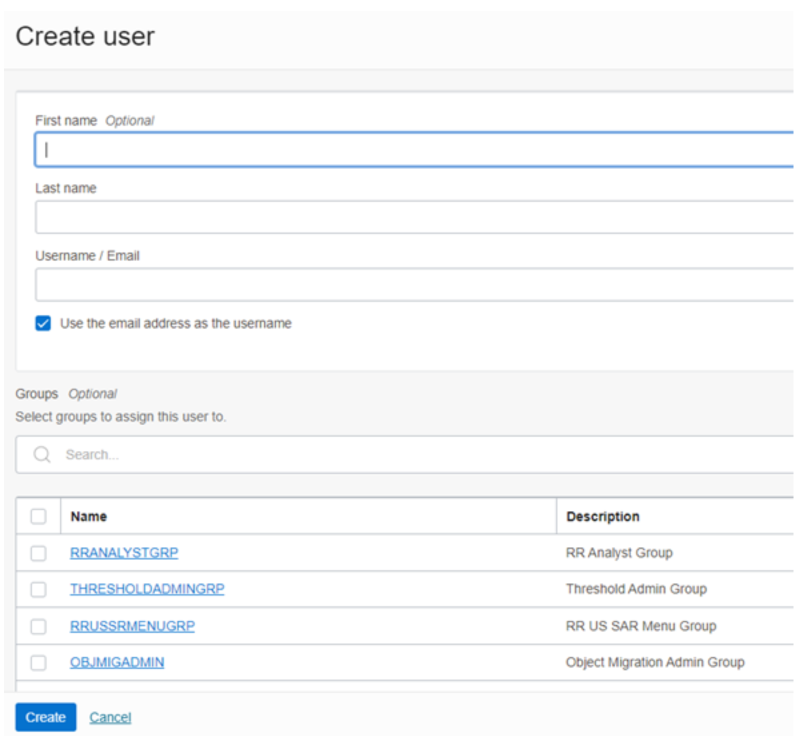
   - Leave the **Use the email address as the username** check box selected.
   - In the **Username / Email** field, enter the email address for the user account.

   Or

   To have the user sign in with their user name:

   - Clear the **Use the email address as the username** check box.
   - In the **First name** and **Last name** fields, enter the user name that the user is to use to sign in to the Console.

Figure 1-1 Add User Details



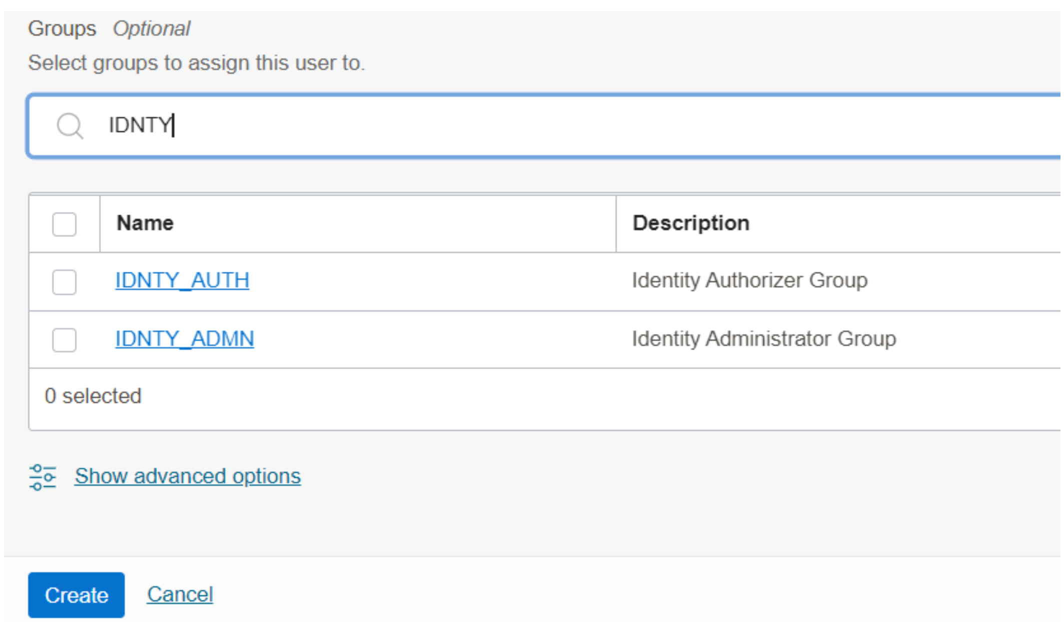
> **Note:**
>
> Ensure that you restrict the User Name to the following:
>
> a. Do not enter your Email ID as the Username and do not select the **Use the email address as the username** check box.
>
> b. Enter a maximum of 20 characters.
>
> c. Enter Alphanumeric Characters.
>
> d. Enter only Hyphen (-) and Underscore (_) Special Characters.

4. In the **Groups (Optional)** section, select the user groups according to your user-specific groups or access.

> **Note:**
>
> After a user sign in to the PBSM 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 the **Assign User to Groups** Window 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.

5. To create an Identity Administrator or Authorizer user, assign the users to the following:
   - **IDNTY_ADMIN**: You can use this option to create an Administrator User.
   - **IDNTY_AUTH**: You can use this option to create an Authorizer User.

Figure 1-2 Assign Users to Groups Window



6. Click **Create**.

For Bulk User Creation, you can batch import User Accounts using a comma-separated values (.CSV) file.

1.3 Create a User Group

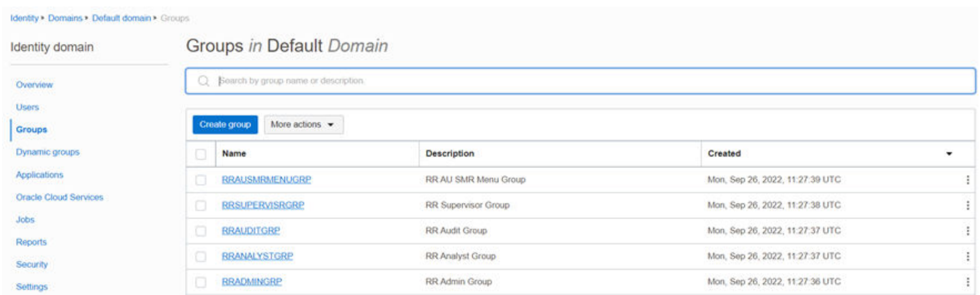
You can create groups to manage user access to applications and resources.
A group has no permissions until you do one of the following:

- Write at least one policy that gives that group permission to either the tenancy or a compartment. When writing the policy, you can specify the group by using either the unique name or the group's OCID.
- Assign the group to an application.

To create a User Group in IAM Console, perform the following steps:

1. In the IAM Console, click the **Profile** icon and select **Identity domain** to add a User Group.
2. In the Identity Domain left pane, click **Groups** and select **Create group**.

Figure 1-3 Identity Domain



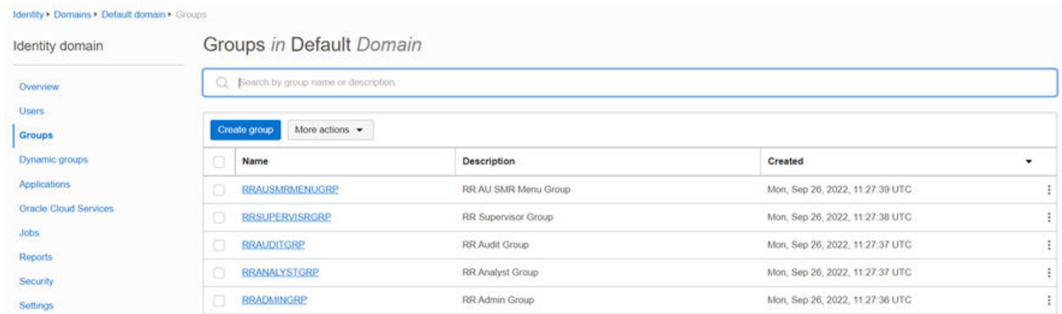
3. Enter the following details:
   - The name of the group. This field is mandatory.
   - Description for the group.
4. To allow users to request access to this group, select **User can request access**.
5. To add users to the group, select the check box for each user that you want to add to the group.
6. Click **Create**.

1.4 Add User to Group

To add a User to Group in IAM Console, perform the following steps:

1. In the IAM Console, click the **Profile** icon and select **Identity domain: Default** to add the User Group.
2. In the Identity Domain left pane, click **Groups** and select the group for which you want to add the users.

Figure 1-4 Groups in Default Domain



3. Click **Assign user to groups**.
4. To add users to the group, select the check box for each user that you want to add to the group.
5. Click **Add**.

1.5 Import Application Users

If you are an Administrator, you can batch import User Accounts using a Comma-separated Values (.CSV) file.

> **Note:**
>
> Before you can import user accounts, you must create a CSV file that is properly formatted for the import process.

To import user accounts, perform the following steps:

1. In the IAM Consoleleft pane, click Users and select More Actions drop down and select Import Users.
2. In the **Import Users** dialog box, click **Browse** to locate and select the CSV file that contains the user accounts to import.

   > **Note:**
   >
   > Click **Download sample file** in the dialog box to download a sample file and carry out your accounts upload.

3. Verify that the path and name of the .CSV file that you selected appear in the **Select a file to import** field.
4. Click **Import**.

> **Note:**
>
> If a user account is missing a required value, such as the user's first name, last name, or username, then Oracle Identity Cloud Service cannot import it. If Oracle Identity Cloud Service cannot import a User Account, then it evaluates the next account in the CSV file.

After Oracle Identity Cloud Service evaluates all User Accounts, the **Jobs** page displays the accounts you have imported. You can also get information related to the successful imports and imports that did not happen due to system errors.

2

User Groups

User Groups are seeded (available out-of-the-box) by the Cloud Service. Customers can also create new groups in IAM. After groups are created, they are synced from IAM to the Cloud Service. Groups are mapped to roles using the Cloud Service by the same user that was created using IAM.

2.1 Map Application with the User

To map the application to a User Group, log in to IAM and follow these steps:

1. Search for the **Domain**.
2. Select the **Default Domain** and then from the LHS menu, select **Oracle Cloud Services**.

   The screen displays the various Oracle Cloud Services.
3. Select the Cloud Services you are subscribed to like, **PBSMCS xxxx-prd** and **PBSMCS xxxx-nprd**.

   Where **Description** is mentioned as PBSM Cloud Service.
4. From the LHS menu, select **Users**.
5. Click **Assign Users**, and then select the user.
6. Click **Assign**.

2.2 Map Application with the Groups

To map the application to a User Group, log in to IAM and follow these steps:

1. Search for **Domain**.
2. Select the **Default Domain** and then from the LHS menu, select **Oracle Cloud Services**.

   The screen displays the various Oracle Cloud Services.
3. Select the Cloud Services you are subscribed to like, **PBSMCS xxxx-prd** and **PBSMCS xxxx-nprd**

   Where **Description** is mentioned as PBSM Cloud Service.
4. From the LHS menu, select **Groups**.
5. Click **Assign Groups**, and then select the relevant **Group**.
6. Click **Assign**.

2.3 Map Users to Groups

If you are an Administrator and want to map a User to a User Group, log in to IDCS and 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 Unmap User from Group section for details.

> **Note:**
>
> User-Group mapping changes from IDCS 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 IDCS 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 the Assign User to Groups Window. 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 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**.

> **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.

2.4 Unmap User from Groups

To authorize the unmapping of a User to a User Group, log in to IAM and 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.

   Or

   Click **Reject** to cancel the Authorization Request.

2.5 Create a User Group

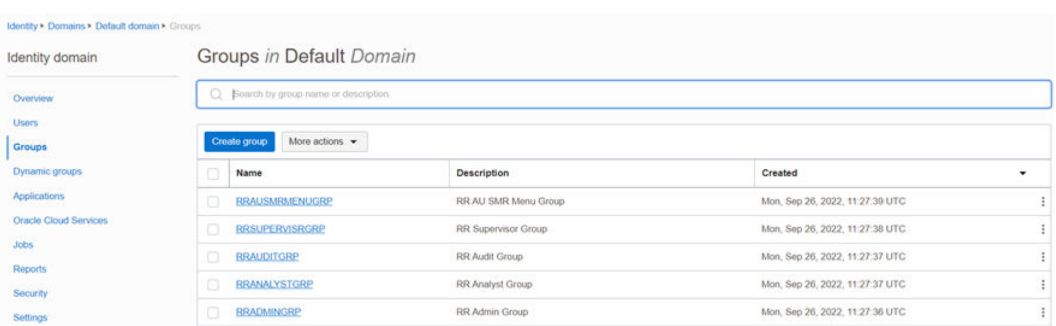
You can create groups to manage user access to applications and resources.
A group has no permissions until you do one of the following:

- Write at least one policy that gives that group permission to either the tenancy or a compartment. When writing the policy, you can specify the group by using either the unique name or the group's OCID.
- Assign the group to an application.

To create a User Group in IAM Console, perform the following steps:

1. In the IAM Console, click the **Profile** icon and select **Identity domain** to add a User Group.
2. In the Identity Domain left pane, click **Groups** and select **Create group**.

Figure 2-1 Identity Domain



3. Enter the following details:

- The name of the group. This field is mandatory.
- Description for the group.

4. To allow users to request access to this group, select **User can request access**.
5. To add users to the group, select the check box for each user that you want to add to the group.
6. Click **Create**.

3
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.

3.1 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.

3.2 User Roles and Privileges

Oracle Financial Services Profitability Analytics Cloud Service (PACS) Users are assigned roles through which they gain access to functions and data. Users can have any number of roles.

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

Figure 3-1 User Personas and Tasks

Note:

- User-Group mapping changes from IDCS will take five minutes to sync with the application. If these changes are made during the active user session then it will be reflected on the next login.
- You can create and manage Application users as required. For example, you can map the Pipeline Admin Group and PACS Admin Group to one user.

3.2.1 Role Based Access Control

Role-based security in Oracle Financial Services Profitability Analytics Cloud Service Controls who can do what and to which data.

The following table provides examples of role-based access.

Role Assigned to a User	Functions which Users with this 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

3.2.2 User Roles and Activities

The following User Roles are seeded in the PBSM Cloud Service to facilitate the activities expected from the users mapped to the seeded User Groups:

- Profitability Analytics Administrator
- Profitability Analytics Application Analyst
- Profitability Analytics Application Auditor
- PA BI Data Steward
- PA BI Analyst
- PA BI Auditor
- PA BI LOB Head

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

The user roles Profitability Analytics Application Administrator, Profitability Analytics Application Analyst, and Profitability Analytics 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 PA Screens and Edit-specific Screens. Similarly, an Admin Persona can view and edit all PA 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 that are mentioned in the below table.

The User Roles of - PA BI Data Steward, PA BI Analyst, PA BI Auditor and PA BI LOB Head - are seeded BI Roles to be used for the users to access the Analytics Menu in the PA Application. These four 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.

3.2.3 User Groups and Activities

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

User Groups	Activities
PA Application Administrator	• Admin Privileges for all modules • Manage Runchart and Batches • Set Preferences • Manage Set Up Configurations
IDCS Administrator	• Create Users • Map Users to the Instance
PA Application Analyst	• Set User and Application Preferences • Set Setup Parameters • Currency and Rate Management • Dimension Management • Data Management: Metadata and Data Loaders • Data Model Extension • Create Filters and Expressions • Create Table Drivers • Create and Execute Allocation Rules • Create and Execute Allocation Models • Schedule Batch Processes • View Allocation Executions • View Profitability Analytics Reports
PA Application Auditor	• View privileges for all application-specific modules: • Review/Analyze Results • Review Process Logs • View Reports

In addition to this, the following user groups are also seeded viz – PA Authorizer, PA BI Analyst and PA Data Analyst. User roles can be mapped to these groups for efficient management of application. Custom User Groups can also be created and managed as per requirement.

3.2.4 User Groups and User Role Mapping

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

User Group	Mapped User Role
Profitability Analytics Application Administrator	Profitability Analytics Application Administrator

User Group	Mapped User Role
Profitability Analytics Application Analyst	Profitability Analytics Application Analyst
Profitability Analytics Application Auditor	Profitability Analytics Application Auditor

The BI User Roles of PA BI Data Steward, PA BI Analyst, PA BI Auditor, PA BI LOB Head 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.

4

Configuring Session Timeout

After you complete your tasks, you can sign out of your application. However, sometimes you might get automatically signed out due to session timeouts.

Let us understand how session timeouts work. When you sign in using your credentials, you're authenticated to use the application, and a session is established. During this session, you don't need to re-authenticate. But, for security purposes, your session is configured to be active for a predefined duration, which is called the session timeout period. Your sessions can expire due to various reasons such as leaving your application idle for a period longer than the timeout period. In such cases, you're automatically signed out of the application. Your timeout periods may vary on certain pages. For example, you may observe a longer timeout period on pages that automatically refresh or UIs that open in separate windows or tabs.

This table lists the various types of session timeouts you may experience. After the specified duration, your session expires, and you need to sign in again to continue your work.

Timeout Type	Description	Configurable	Timeout Duration
Session Lifetime Timeout	After you are authenticated in the application, if you are actively working on it, your session remains active for a predefined duration, referred to as the session lifetime timeout period. Your session ends after this period, even if you're using the application.	Yes	8 Hours (Default value)
Inactive Session Timeout	This type of timeout considers the duration you leave your application idle/inactive. After this duration, System automatically terminates the session, and you are signed out of the session.	No	60 Minutes
Browser Inactivity Timeout	This type of timeout considers the duration you leave your browser idle. After this duration, your session is terminated by the System, which automatically	No	60 Minutes

4.1 How to configure Session Lifetime Timeout?

You can configure the Session Lifetime Timeout using your Identity Domain Settings in OCI Console. You need to have the Security Administrator Role mapped to you, to access and modify the settings.

To configure the session timeout:

1. Login with your Security Administrator Account.
2. Navigate to the Domain page. Click Settings and select Session Settings.
3. Specify the Session Duration under Session Limits. Enter the required value. By default, this is set to 480 Minutes.

Figure 4-1 Session Settings