

Oracle® Financial Services

Admin Console User Guide



Release 22.12.01

F76310-01

January 2023

ORACLE®

Copyright © 2022, 2023, Oracle and/or its affiliates.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software, software documentation, data (as defined in the Federal Acquisition Regulation), or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software," "commercial computer software documentation," or "limited rights data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle®, Java, and MySQL are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

Contents

1 Get Help

1.1	Get Help in the Applications	1-1
1.1.1	Additional Resources	1-1
1.2	Learn About Accessibility	1-1
1.3	Get Support	1-1
1.4	Get Training	1-1
1.5	Join Our Community	1-2
1.6	Share Your Feedback	1-2
1.7	Before You Begin	1-2

2 Introduction to Admin Console

2.1	Administrator Tasks	2-1
2.2	Authorizer Tasks	2-1

3 System Configuration

3.1	Metering	3-1
3.2	Component Details	3-1
3.2.1	OCI Console	3-1
3.2.2	Object Storage Archive	3-2
3.2.3	OAuth Creds	3-2
3.2.4	Object Storage Standard	3-3
3.3	Audit Trail Report	3-4
3.4	Configurations	3-5
3.5	Reports For Download	3-5
3.5.1	Prerequisites	3-6
3.5.2	Access Reports for Download	3-6
3.5.3	Data Entry Window Details	3-6
3.5.4	View the Report Details	3-6
3.5.5	Apply a Custom Filter to the Data View	3-7

4 Identity Management

4.1	Users Summary Page	4-1
4.1.1	User Details	4-2
4.1.2	Mapped and Unmapped Groups	4-3
4.1.2.1	Mapped Groups	4-3
4.1.2.2	Unmapped Groups	4-4
4.1.3	Mapped and Unmapped Roles	4-4
4.2	Groups Summary Page	4-5
4.2.1	Group Details	4-6
4.2.2	Mapped and Unmapped Roles	4-6
4.2.2.1	Mapped Roles	4-6
4.2.2.2	Unmapped Roles	4-7
4.3	Roles Summary Page	4-7
4.3.1	Roles Details	4-8
4.3.2	Mapped and Unmapped Functions	4-9
4.3.2.1	Mapped Functions	4-9
4.3.2.2	Unmapped Functions	4-10
4.4	Folders Summary Page	4-10
4.4.1	Folder Details	4-11
4.4.1.1	Editing Folder Details	4-11
4.5	Functions Summary Page	4-12
4.5.1	Function Details	4-13

1

Get Help

Topics:

- [Get Help in the Applications](#)
- [Learn About Accessibility](#)
- [Get Support](#)
- [Get Training](#)
- [Join Our Community](#)
- [Share Your Feedback](#)
- [Before You Begin](#)

1.1 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.

1.1.1 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 accessibility 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 would 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 Document:

- See [What's New](#)

2

Introduction to Admin Console

Use the Admin Console to perform System Configuration and Identity Management. It is a single point of access to manage identity functions and view administrative features such as Metering, Audit Trail Report and other miscellaneous configuration details in the Profitability and Balance Sheet Management Cloud Service (PBSMCS).

To access the Admin Console, the PBSM Cloud Administrator must have granted you administrative privileges by mapping your user account to the Identity Administrator and Identity Authorizer user groups. These user groups are seeded in Oracle Identity Cloud Service (IDCS).

When you access the Admin Console, you see the System Configuration and Identity Management tabs. Use these tabs to perform the following tasks:

2.1 Administrator Tasks

As an Administrator, use the Admin Console to perform the following tasks:

- View the Metering Report, Audit Trial Report, Object Storage, and Object Authentication (OAUTH) credential details in the System Configuration tab.
- Perform the Identity and Access Management operations in the Identity Management tab.

2.2 Authorizer Tasks

As an Authorizer, use the **Admin Console** to authorize the Identity and Access Management Operations in the **Identity Management** tab.

3

System Configuration

Using System Configuration, Administrators can view how many units of a service have been consumed. You can also view the following:

- The Audit Report to see what actions the users have performed in the application and when they have performed it
- The provisioned object storage details and the OAUTH authentication details.
- The production instance URL and the email ID of the login user.

The components are as follows:

- **Metering**: Click **Metering** to view the usage of services using the Metering Report.
- **Audit Trail Report**: Click **Audit Trail Report** to view the details of the user's login and logout details, the action they performed, the status of the action, and the date and time when the action was performed.
- **Component Details**: Click **Component Details** to view details such as the Object Storage, Pre-Authenticated Request (PAR) URL, and OAUTH authentication details.
- **Configurations**: Click **Configurations** to specify the instance name and the user or users who receive Emails related to operations tasks.

3.1 Metering

Use the **Metering** page to view the monthly unit usage of the number of transactions and the number of report types within the PBSM Cloud Service.

3.2 Component Details

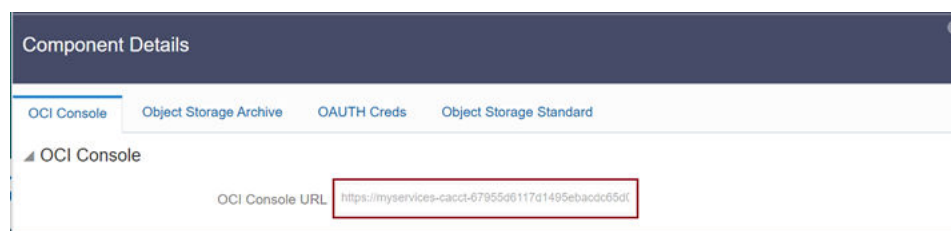
Use the Component Details page to view the OCI Console, Object Storage Standard and Archive details, and OAUTH Authentication details.

To access Component Details Window

1. Login to PBSM Admin Console.
2. Go to **System Configuration** tab, and click **Component Details** tile.

3.2.1 OCI Console

Click **OCI Console** tab to view and copy the OCI Console details.

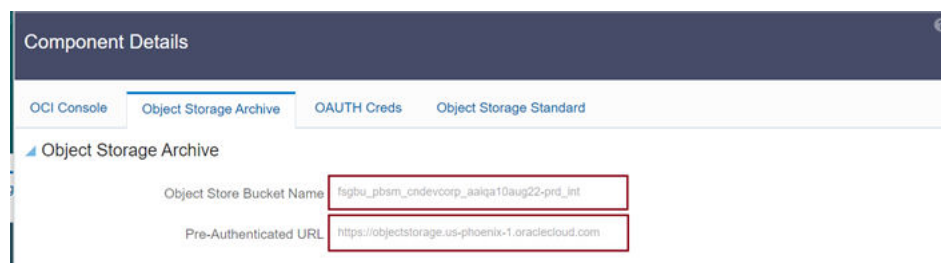
Figure 3-1 OCI Console Page

3.2.2 Object Storage Archive

When you provision an instance of the application, two buckets, a standard storage bucket and an archive storage bucket are automatically provisioned. The objects data that you want to load into the application for processing must be uploaded to the standard storage bucket.

Archive storage is used for storing objects which are not in use but must be retained and preserved for long periods of time. Objects are automatically moved from standard to archive storage, after 7 days.

Click **Object Storage Archive** Tab to view and copy the **Object Store Bucket Name** and the **Pre-Authenticated URL**.

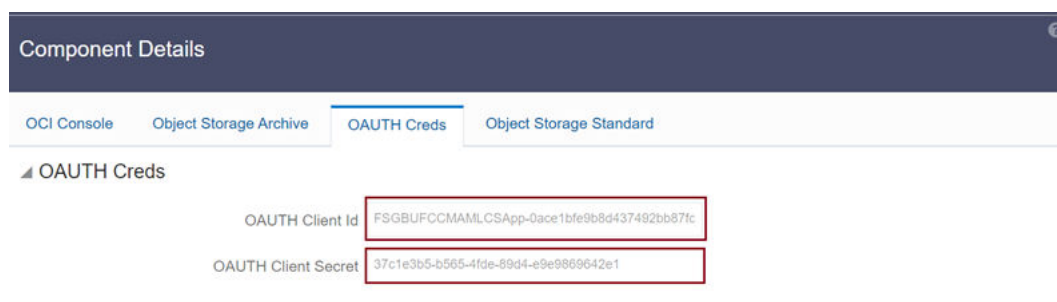
Figure 3-2 Object Storage Archive Page

Field	Description
Object Store Bucket Name	The logical container in which objects are stored
Pre-Authenticated URL (PAR URL)	Request that enables you to access a bucket without providing any credentials.

3.2.3 OAUTH Creds

The OAUTH Creds is used for implementing authentication in cloud services.

Click OAUTH Creds tab to view and copy the OAUTH Client ID and OAUTH Client Secret details.

Figure 3-3 OAUTH Creds Page

Component Details

OCI Console Object Storage Archive **OAUTH Creds** Object Storage Standard

▲ OAUTH Creds

OAUTH Client Id FSGBUFCCMAMLCApp-0ace1bfe9b8d437492bb87fc

OAUTH Client Secret 37c1e3b5-b565-4fde-89d4-e9e9868642e1

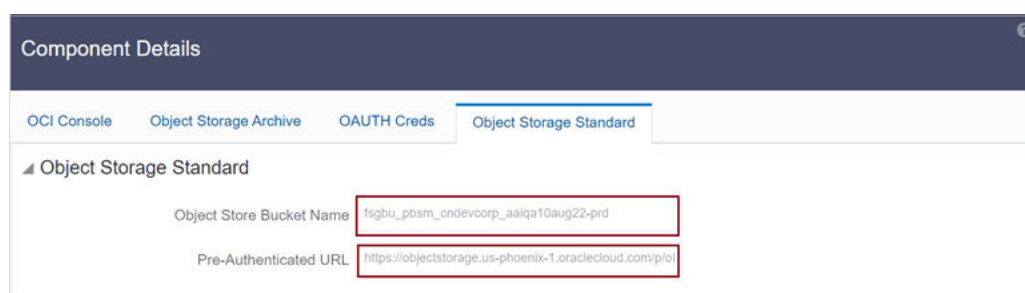
Table 3-1 Field Description

Field	Description
OAUTH Client ID	ID of the OAuth client used for OAuth authentication performed by IDCS while doing any API calls
OAUTH Client Secret	Password of the OAuth client secret used for OAuth authentication performed by IDCS while doing any API calls

3.2.4 Object Storage Standard

Object Storage Standard is used for storing objects which are currently in use and require fast, immediate, and frequent access.

Click Object Storage Standard Tab to view and copy the Object Store Bucket Name and the Pre-Authenticated URL.

Figure 3-4 Object Storage Standards Page

Component Details

OCI Console Object Storage Archive OAUTH Creds **Object Storage Standard**

▲ Object Storage Standard

Object Store Bucket Name fsgbu_pbsm_cndevoorp_aaiqa10aug22-prd

Pre-Authenticated URL https://objectstorage.us-phoenix-1.oraclecloud.com/p/oi

Table 3-2 Field Description

Field	Description
Object Store Bucket Name	The logical container in which objects are stored
Pre-Authenticated URL (PAR URL)	Request that enables you to access a bucket without providing any credentials.

3.3 Audit Trail Report

You can use Audit Trail Report to view details of the user's activities such as Login, Add Action, Status of the Action, and the Machine Name.

To generate an Audit Trail Report, follow these steps:

1. Login to PBSM Admin Console.
2. Go to **System Configuration** tab, and click **Audit Trail Report** tile. The **Audit Trail Report** page is displayed.

Figure 3-5 Audit Trail Report

The screenshot shows the 'Audit Trail Report' page. It features a 'Search and Filter' section with the following fields: 'User Name' (set to 'All'), 'Action' (set to 'All'), 'From Date' (set to '09/07/2022'), 'To Date' (set to '09/22/2022'), and 'Action Detail' (with a placeholder 'Search Code...'). There are 'Reset' and 'Search' buttons at the top right of the filter section.

3. Enter the following values and click Search to generate the Audit Trail Report for all users or a specific user.

Table 3-3 Audit Trail Report Filters

Field	Description
User Name	Enter or Search for a user name to view the report for the selected user.
Action	Select the Action from the actions. to generate a report for a specific action.
From Date	Select the start date for the report.
To Date	Select the end date for the report.
Action Detail	Enter the string to search and filter the audit trail report for a specific action.

Figure 3-6 OAUTH Creds Page

The screenshot shows the 'Audit Trail Report' page with a single record displayed. The record details are: User Name: Admin User, Action Detail: User: TEST_ADMIN logged in, Action Code: Login, Operation Time: 12-SEP-22 05:05:58.8 33502 +00:00, Status: Successful, and Action Subtype: -. The page shows 'Page 1 of 1 (1 - 1 of 1 items)' and 'Records 1'.

Table 3-4 Audit Trail Report Details

Field	Description
User Name	The user name selected in the User Name filter field.
Action Details	The action selected in the Action Detail filter field.
Action Code	The type of action performed by the user.
Status	The status of the action performed. The values are Successful or Failure.
Action Subtype	The sub type of the action.
Operation Time	The date and time of the action performed.

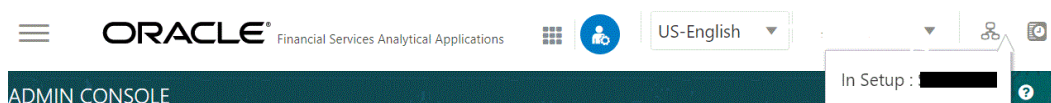
4. Click **Reset** to clear all values from the filter fields and enter new search criteria. The report filters are described in the following table:

3.4 Configurations

Use the Configurations page to specify the values for the instance name and Email ID of the operations user.

To provide the values, follow these steps:

1. Enter the instance name in the Configurations page. For example, UAT, SIT, or PROD. You can provide alphanumeric characters and special characters such as hyphen (-) or underscore (_). The name you specify in this field is displayed when you click In Setup as shown in the following image:

Figure 3-7 Displayed Instance Name

This allows you to know the instance or setup you are working on at the moment, when you have multiple UI windows open simultaneously from different setups.

2. Enter one or more operations user's Email IDs in the Operations User Email-ID field of the Configurations window. The operations user receives Emails about any operations tasks such as batch or task failure. You can enter multiple email IDs separated by a comma (as comma-separated values).
3. Click **Save** after the changes.

3.5 Reports For Download

The Reports for Download tile in the Admin Console consists of a set of pre-defined and pre-configured reports that are available for download. You can use the functions in the interface such as filter and sort to segregate the data and drill down to the details of the reports. You can then investigate the information, analyze, and export the data in CSV format.

In the Admin Console, you can download reports from Reports for Download in the System Configuration tab.

3.5.1 Prerequisites

To use Reports for Download from the Admin Console, your user profile must be mapped to the Data Maintenance Admin group to access the Reports for Download menu.

3.5.2 Access Reports for Download

To access the Data View window, click Reports for Download in the System Configuration tab. The Data Entry window is displayed.

3.5.3 Data Entry Window Details

You can view the list of reports available for download, from the Data Entry window. Use one of the following criteria to view various reports.

- To search reports, click the Search field to display the search criteria pop-up. Enter search terms in the Name, Description, or Created By fields, or use a combination of the fields, and click Search.
The search result displays reports that match the criteria.
- To sort reports, click the Sort By drop-down and select from the options: Name, Description, or Created By.
The reports are displayed in ascending order for the selected option.
- To view the report creation and modification details, click the More Options (three dots) icon of a report to display the pop-up with the details for the following:
 - **Created By** - Displays the User ID of the user who created the report.
 - **Created Date** - Displays the date and time of the creation of the report.
 - **Last Modified By** - Displays the User ID of the user who last modified the report.
 - **Last Modified Date** - Displays the date and time of the last modification of the report.
 - **Authorizer** - Displays the User ID of the authorizer who approved the report to be displayed in the window.
 - **Authorizer Comments** - Displays the comments entered by the authorizer when approving the report to be displayed in the window.
- To view a report, mouse over the record, and the hidden menu appears. Click View from the menu.
The details for the selected report are displayed in the Data Entry window.

3.5.4 View the Report Details

The Data Entry window is the interface where you can apply filter conditions (optional) on the reports and export the details.

You can apply the filter conditions (optional) to the reports in the Attributes Selection tab, and the results are displayed in the Data Preview tab from where you can export the report in the CSV format.

The procedure to view report details is described as follows:

1. In the **Data View** window, click **Attributes Selection**.
The Attributes Selection tab displays the details for the database table name in View Name and the table columns in Attribute Name. Expand View Name to display the columns in Attribute Name.
2. Click **Apply**.
The Data Preview tab displays the report details. The number of records displayed in the Data Preview tab is pre-configured in the system. However, you can export the details in the CSV format by clicking Download CSV.

3.5.5 Apply a Custom Filter to the Data View

In addition to the reports that you can view, you can also use the filter provided in the Data View window to custom filter the data in the reports for analysis purposes.

To apply a custom filter to the data view, follow these steps:

1. Click **Launch Filter** Condition to display the Filter Condition window.
2. Select **AND** or **OR** from the drop-down.
3. Select the required report column from **Select a Column**.
4. Select the required condition from **Select a Condition**.
5. Click **+ Condition** to add more conditions and click **+ Group** to add more groups.

Repeat the selection procedure to add details. To remove a condition or group, click Remove.

6. Click **Apply** in the **Filter Condition** window to save the custom filter condition.
7. Click **Apply** in the **Attributes Selection** tab.

The Data Preview tab displays the results of the Attributes filtered in the Attributes Selection tab. The number of records displayed in the preview is pre-configured in the system. However, you can export the details in the CSV format by clicking Download CSV.

4

Identity Management

Using Identity Management, Administrators can manage fine-grained and coarse-grained entitlements that consist of fewer functions than fine-grained entitlements) entitlements. Authorizers can authorize the entitlement mappings. The components are as follows:

- **Users:** A user is a person who has access to and can perform specific actions based on the user group or groups they are mapped to. Before you can map a user to a user group, your Administrator must have created and authorized the user. After the user is authorized, they are added in the Users Summary page. Click **Users**  to view the list of available users in the Users Summary page.
- **Groups:** Groups are a set of users that can perform specific activities. For example, the administrator role performs administrative activities. Any user who belongs to a specific user group can access the roles mapped to that user group. Click **Add**  to add a user group or click **Groups**  to view the list of user groups in the Groups Summary page.
- **Roles:** Roles are a set of functions grouped together and having specific privileges. Any user who belongs to a specific role can access functions mapped to the role. Click **Add**  to add a role or click **Roles**  to view the list of roles in the Roles Summary page.
- **Folders:** Folders are used to control access rights on defined list of objects. They are mapped to a specific Information Domain, Click **Folders**  , to view the list of folders and edit the access rights, in the Folders Summary page.
- **Functions:** Functions enable users to perform a specific activity. Any user who belongs to a specific function can access the folders mapped to the function. Click **Functions**  to view the list of functions in the Functions Summary page.



Note:

Only those user groups and roles which are authorized are displayed in the Groups Summary page and Roles Summary page, respectively.

4.1 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 access Users Summary page, complete the following steps:

1. Click **Identity Management** tab in the **Admin Console** page.

2. Click the **Users** tile (👤).
The **Users Summary** page is displayed.

Figure 4-1 Users Summary Page



3. Select a specific User Name in the Users Summary page and then click **Details** to view the associated User ID and User Name.
4. Select a User name and click Mapped Groups to view the list of groups that are mapped to the particular user. For more information about mapped groups, refer to [Mapped and Unmapped Groups](#).
You can also Unmap an user from a specific group. For more information, refer to [Mapped and Unmapped 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 results display the names that consist of your search string in the list of available users.

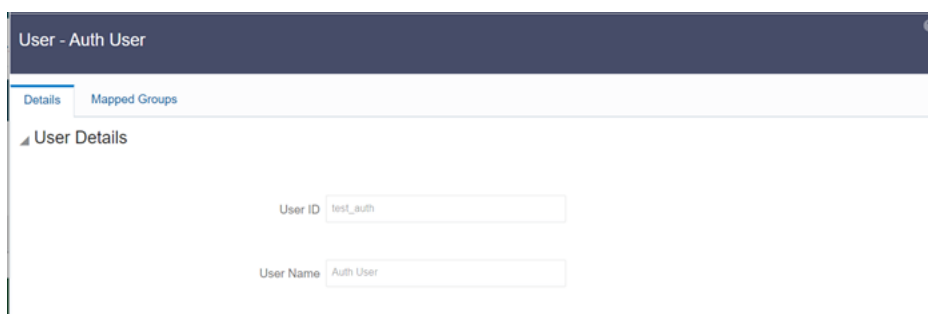
At the bottom of the page, you can enter the number of entries that are available on a single page in the Records box. You can increase or decrease the number of entries that are displayed using the up and down arrows. To navigate between pages in the View bar, use the following buttons:

- Use the First page ⏪ button to view the entries in the first page.
- Use the Previous page ⏩ button to view the entries in the previous page.
- Use the Next page ⏪ button to view the entries in the next page.
- Use the Last page ⏩ button to view the entries in 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.

4.1.1 User Details

Click a specific User listed in the User Summary page and click Details to view the User ID and the User name of that user.

Figure 4-2 User Details Page

The screenshot shows a web interface for a user named 'Auth User'. The title bar at the top says 'User - Auth User'. Below the title bar, there are two tabs: 'Details' (which is active) and 'Mapped Groups'. Under the 'Details' tab, the heading 'User Details' is followed by two input fields. The first field is labeled 'User ID' and contains the text 'test_auth'. The second field is labeled 'User Name' and contains the text 'Auth User'.

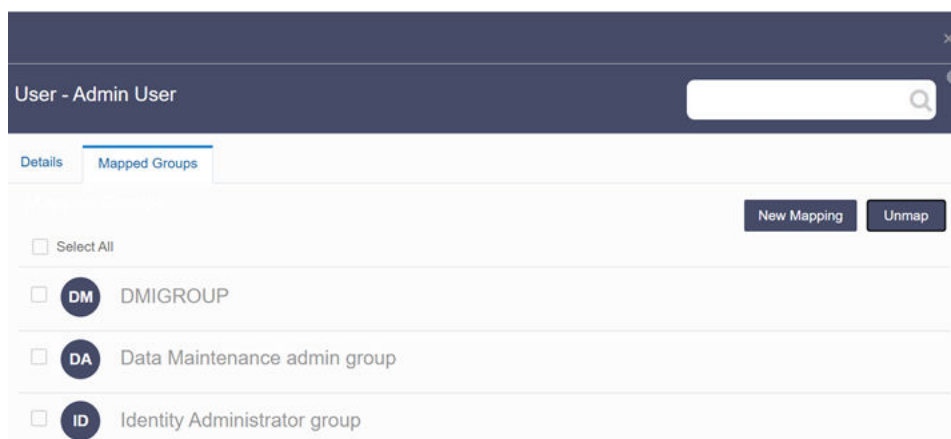
4.1.2 Mapped and Unmapped Groups

If you are an Administrator, you can map and unmap a user to a User group, from the **Users Summary** page.

4.1.2.1 Mapped Groups

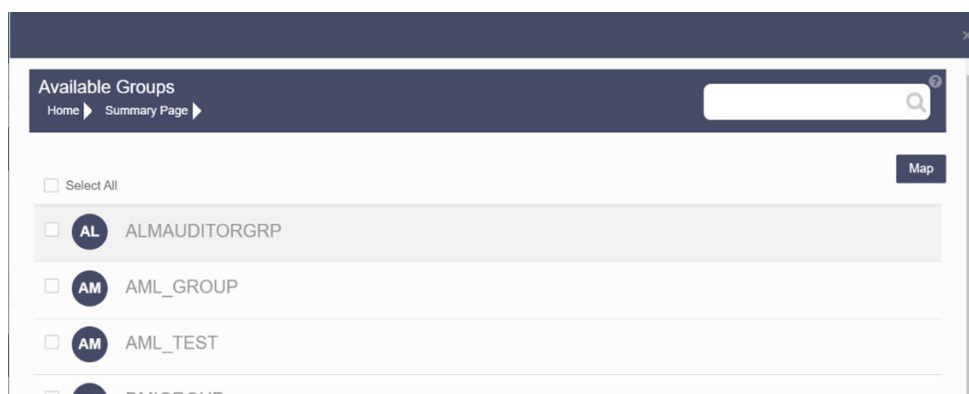
Complete the following steps, to map an user to a User Group.

1. Select the **User name** in the **Users Summary** page.
2. Select **Mapped Groups**.
The list of groups mapped to the specific user is displayed.

Figure 4-3 Mapped Groups

The screenshot shows a web interface for a user named 'Admin User'. The title bar at the top says 'User - Admin User'. Below the title bar, there are two tabs: 'Details' and 'Mapped Groups' (which is active). Under the 'Mapped Groups' tab, there are two buttons: 'New Mapping' and 'Unmap'. Below these buttons, there is a list of groups. Each group entry consists of a checkbox, a circular icon with a letter, and the group name. The groups listed are: 'DMIGROUP' (with icon 'DM'), 'Data Maintenance admin group' (with icon 'DA'), and 'Identity Administrator group' (with icon 'ID').

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

Figure 4-4 Available Groups

4. Select the check box corresponding to a User Group or click **Select All** to select all the available User groups.
5. Click **Map**.
A confirmation message is displayed after successful mapping. The mapping will be completed after authorization.

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

- In **Mapped Groups**, select the user group name.
- Click **Authorize** to authorize the user-user group mapping.
Click **Reject** to cancel the authorization request.

4.1.2.2 Unmapped Groups

To unmap a user from a user group, complete the following steps.

1. Select the User name in the Users Summary page.
2. Select **Mapped Groups**.
The list of groups mapped to the specific user is displayed.
3. Select the check box corresponding to a User Group or click **Select All** to select all the available User groups.
4. Click **Unmap**.
A confirmation message is displayed after successful unmapping. The mapping will be completed after authorization.

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

1. In **Mapped Groups**, select the user group name.
2. Click **Authorize** to authorize the user-user group unmapping.
Click **Reject** to cancel the authorization request.

4.1.3 Mapped and Unmapped Roles

If you are an administrator, you can map and unmap a Group to a User Role, from the Groups Summary page.

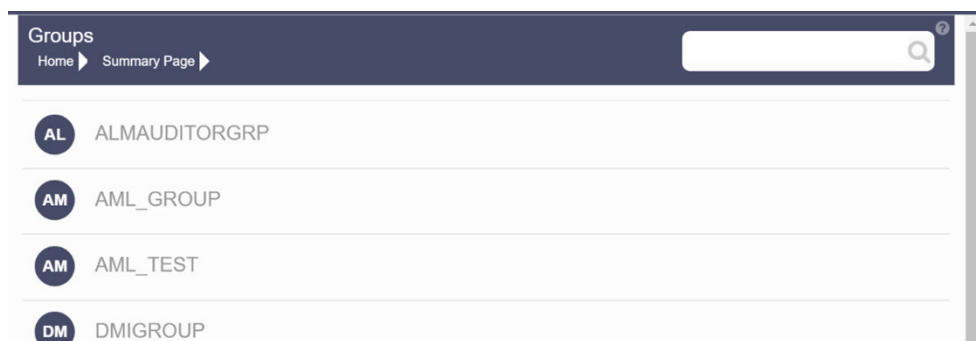
4.2 Groups Summary Page

The Groups Summary page shows the list of available groups. You can view the details of a group and map the group to one or more user Roles.

To access Groups Summary page, complete the following steps:

1. Click **Identity Management** tab in the **Admin Console** page.
2. Click the **Groups** tile (👤).
The Groups Summary page is displayed.

Figure 4-5 Groups Summary Page



3. Select a specific Group Name in the Groups Summary page and then click Details to view the associated Group ID, Group Name and Group Description. For more information refer to [Group Details](#).
4. Select a Group name and click Mapped Roles to view the list of Roles that are mapped to the particular Group. For more information about mapped groups, refer to [Mapped and Unmapped Roles](#).
You can also Unmap a group from a specific Role. For more information, refer to [Mapped and Unmapped Roles](#).

To search for a specific user group, type the first few letters of the user group name that you want to search in the search box and click Search. The search results display 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:

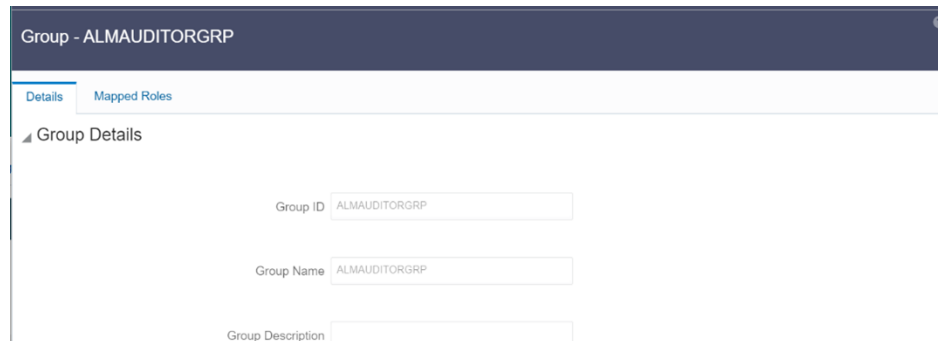
- Use the First page ⏪ button to view the entries in the first page.
- Use the Previous page ⏩ button to view the entries in the previous page.
- Use the Next page ⏪ button to view the entries in the next page.
- Use the Last page ⏩ button to view the entries in the last page.

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

4.2.1 Group Details

Select the Group name in the Groups Summary page and then select Details to view the Group ID, Group Name and Group Description.

Figure 4-6 Group Details Page



The screenshot shows the 'Group - ALMAUDITORGRP' page. It has two tabs: 'Details' (selected) and 'Mapped Roles'. Under the 'Details' tab, there is a section titled 'Group Details' containing three input fields: 'Group ID' with the value 'ALMAUDITORGRP', 'Group Name' with the value 'ALMAUDITORGRP', and 'Group Description' which is empty.

4.2.2 Mapped and Unmapped Roles

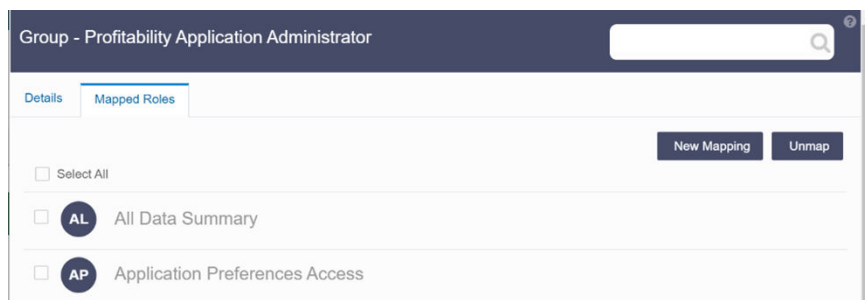
If you are an administrator, you can map and unmap a Group to a User Role, from the Groups Summary page.

4.2.2.1 Mapped Roles

Complete the following steps, to map an user to a User Group.

1. Select the User name in the Groups Summary page.
2. Select Mapped Roles.
The list of Roles mapped to the specific user is displayed.

Figure 4-7 Mapped Roles



The screenshot shows the 'Group - Profitability Application Administrator' page. It has two tabs: 'Details' and 'Mapped Roles' (selected). Under the 'Mapped Roles' tab, there is a 'Select All' checkbox, a 'New Mapping' button, and an 'Unmap' button. Below these, there is a list of roles: 'All Data Summary' (with a circular icon containing 'AL') and 'Application Preferences Access' (with a circular icon containing 'AP'). Each role has an unchecked checkbox to its left.

3. Click **New Mapping**.
After you click New Mapping, the list of user Roles you can map the group to appears in the Available Roles page.

4. Select the check box corresponding to a User Role or click **Select All** to select all the available User Roles.
5. Click **Map**.
A confirmation message is displayed after successful mapping. The mapping will be completed after authorization.

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

1. In **Mapped Roles**, select the user Role name.
2. Click **Authorize** to authorize the user-user group mapping.
Click **Reject** to cancel the authorization request.

4.2.2.2 Unmapped Roles

To unmap a Group from a Role, complete the following steps.

1. Select the Group name in the **Groups Summary** page.
2. Select **Mapped Roles**.
The list of Roles mapped to the specific user is displayed.
3. Select the check box corresponding to a User Role or click **Select All** to select all the available User Roles.
4. Click **Unmap**.
A confirmation message is displayed after successful unmapping. The mapping will be completed after authorization.

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

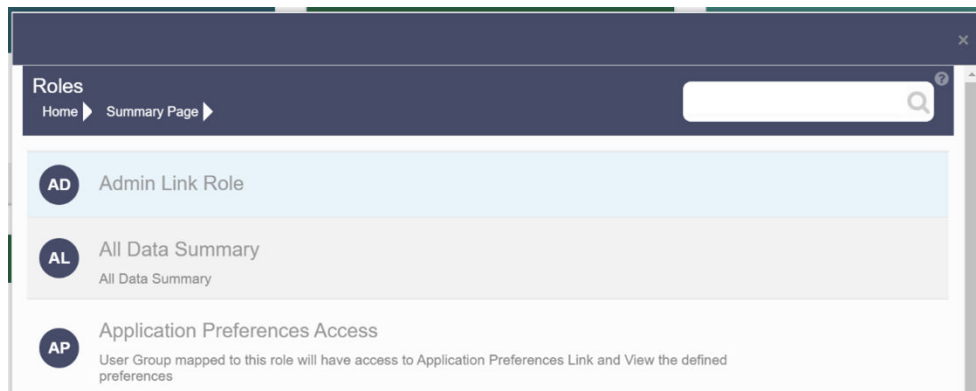
1. In **Mapped Roles**, select the user group name.
2. Click **Authorize** to authorize the user-user Role unmapping.
Click **Reject** to cancel the authorization request.

4.3 Roles Summary Page

The Roles Summary page shows the list of available User Roles. You can view the details of a Role and map the Role to one or more user Functions.

To access Roles Summary page, complete the following steps:

1. Click **Identity Management** tab in the **Admin Console** page.
2. Click the **Roles** tile ().
The **Roles Summary** page is displayed.

Figure 4-8 Roles Summary Page

3. Select a specific Role Name in the Roles Summary page and then click Details to view the associated Role Code, Role Name and Role Description. For more information refer to [Roles Details](#).
4. Select a Role name and click Mapped Functions to view the list of Functions that are mapped to the particular Role. For more information about mapped Functions, refer to [Mapped and Unmapped Functions](#).
You can also Unmap a Role from a specific Function. For more information, refer to [Mapped and Unmapped Functions](#).

To search for a specific role, type the first few letters of the role name that you want to search in the Search box and click Search. The search results display 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 in the first page.
- Use the Previous page  button to view the entries in the previous page.
- Use the Next page  button to view the entries in the next page.
- Use the Last page  button to view the entries in 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.

4.3.1 Roles Details

Click a specific Role listed in the Roles Summary page and click Details to view the Group ID, Group name and the description of that group.

Figure 4-9 Roles Details Page

The screenshot shows the 'Role - Admin Link Role' details page. It has two tabs: 'Details' (selected) and 'Mapped Functions'. Under the 'Details' tab, there is a section titled 'Role Details' with three input fields: 'Role Code' containing 'ADMIN_LINK', 'Role Name' containing 'Admin Link Role', and 'Role Description' which is empty.

4.3.2 Mapped and Unmapped Functions

If you are an administrator, you can map and unmap a User Role to a Function, from the Roles Summary page.

4.3.2.1 Mapped Functions

Complete the following steps, to map a Role to a Function.

1. Select the Role name in the **Roles Summary** page.
2. Select **Mapped Functions**.
The list of Functions mapped to the specific user is displayed.

Figure 4-10 Mapped Functions

The screenshot shows the 'Mapped Functions' tab for the 'Admin Link Role'. It features a search bar at the top right. Below the tabs, there are 'New Mapping' and 'Unmap' buttons. A table lists mapped functions, with one entry 'AD Admin Link' shown. At the bottom, there is a pagination bar indicating 'Page 1 of 1 (1 - 1 of 1 items)' and 'Records 1'.

3. Click **New Mapping**.
After you click New Mapping, the list of user Functions you can map the Role to appears in the Available Functions page.
4. Select the check box corresponding to a Function or click Select All to select all the available Functions.
5. Click **Map**.
A confirmation message is displayed after successful mapping. The mapping will be completed after authorization.

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

1. In Mapped Functions, select the Function Name.
2. Click **Authorize** to authorize the Role Function mapping.
Click **Reject** to cancel the authorization request.

4.3.2.2 Unmapped Functions

To unmap a Role from a Function, complete the following steps.

1. Select the Role name in the **Roles Summary** page.
2. Select **Mapped Functions**.
The list of Functions mapped to the specific Role is displayed.
3. Select the check box corresponding to a Function or click Select All to select all the available Functions.
4. Click **Unmap**.
A confirmation message is displayed after successful unmapping. The mapping will be completed after authorization.

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

1. In **Mapped Functions**, select the Function Name
2. Click **Authorize** to authorize the Role Functions unmapping.
Click **Reject** to cancel the authorization request.

4.4 Folders Summary Page

You can create multiple Folders, store objects and assign access rights based on the security level of the user.

The Folders Summary page shows the list of available groups. You can view the details of a group and map the group to one or more user Roles.

To access Folders Summary page, complete the following steps:

- Click **Identity Management** tab in the **Admin Console** page.
- Click the **Folders** tile ().
The **Folders Summary** page is displayed.

Figure 4-11 Folders Summary Page



Select a specific Folder Name in the Folders Summary page and then click Details to view the associated Folder ID, Folder Name and Folder Type. For more information refer to [Folder Details](#).

To search for a specific user group, type the first few letters of the user group name that you want to search in the search box and click Search. The search results display 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:

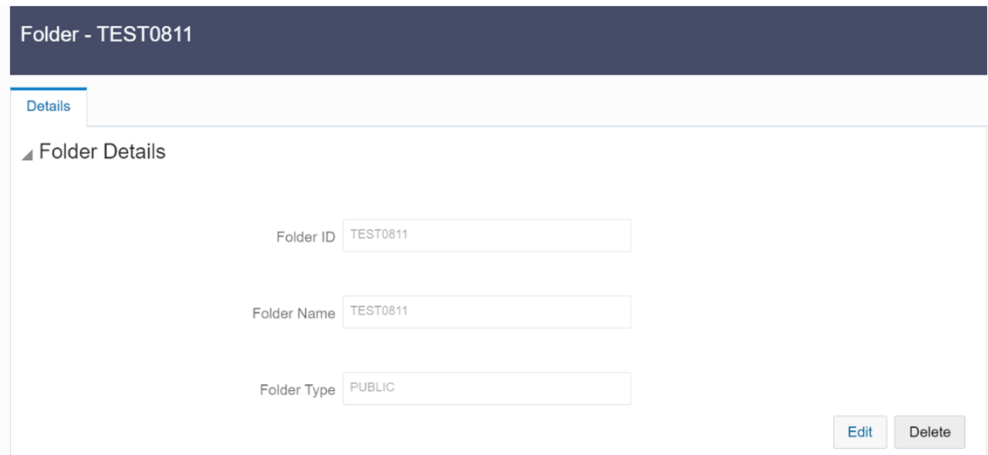
- Use the First page  button to view the entries in the first page.
- Use the Previous page  button to view the entries in the previous page.
- Use the Next page  button to view the entries in the next page.
- Use the Last page  button to view the entries in the last page.

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

4.4.1 Folder Details

Select the Folder name in the Folders Summary page and then select Details to view the Folder ID, Folder Name, and Folder Type of the selected Folder.

Figure 4-12 Folder Details



The screenshot displays the 'Folder Details' page for a folder named 'TEST0811'. The page has a dark header bar with the text 'Folder - TEST0811'. Below the header, there is a tab labeled 'Details'. The main content area is titled 'Folder Details' and contains three input fields: 'Folder ID' with the value 'TEST0811', 'Folder Name' with the value 'TEST0811', and 'Folder Type' with the value 'PUBLIC'. At the bottom right of the form, there are two buttons: 'Edit' and 'Delete'.

4.4.1.1 Editing Folder Details

You can edit the Folder Type from the folder details page.

1. Click **Edit** button on the **Folder Details** page.
2. Set the Folder Type to one of the following options:
 - **Public**- These folders are accessible to all users

- **Private** - These Folders can be viewed only by the users associated with that folder.
- **Shared** - These folders can be accessed by those users mapped to specific User groups. These User groups are mapped to specific roles that are associated with the folder.

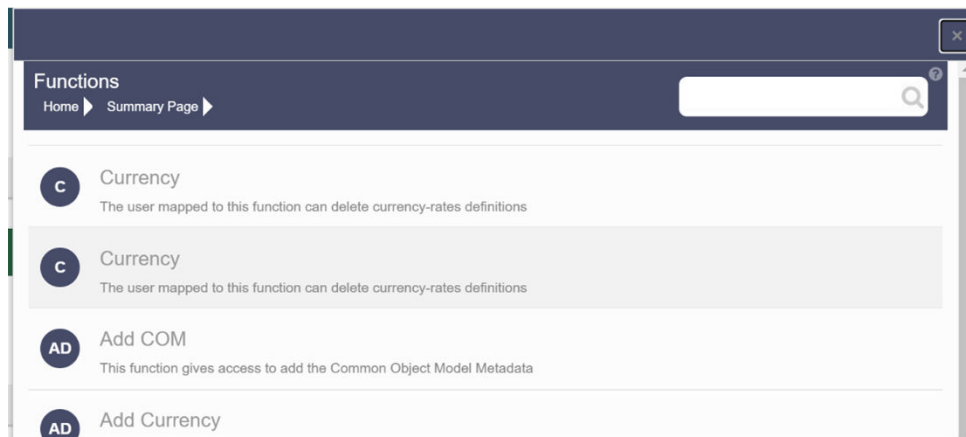
4.5 Functions Summary Page

The Functions Summary page shows the list of available functions. You can view the Function details.

To access Functions Summary page, complete the following steps:

1. Click **Identity Management** tab in the **Admin Console** page.
2. Click the **Functions** tile. The **Functions Summary** page is displayed.

Figure 4-13 Functions Summary page



3. Select a specific Folder Name in the Functions Summary page and then click Details to view the associated Function ID, Function Name and Function Description. For more information refer to [Functions Details](#).

To search for a specific function, type the first few letters of the function name that you want to search in the search box and click Search. The search results display 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 in the first page.
- Use the Previous page  button to view the entries in the previous page.
- Use the Next page  button to view the entries in the next page.
- Use the Last page  button to view the entries in 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**.

4.5.1 Function Details

Select the function name in the Functions Summary page and then select Details to view the Function ID, Function Name, and Function Description of the selected function.

Figure 4-14 Function Details

Function - Currency	
Details	
Function Details	
Function ID	CRRLSL
Function Name	Currency
Function Description	The user mapped to this function can delete currency-rates definitions