

Oracle® Cloud

Getting Started with Oracle Financial Services Cloud



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Oracle Cloud Getting Started with Oracle Financial Services Cloud,

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Before You Begin

Welcome to Oracle Financial Services Cloud service! To get started with Oracle Financial Services Cloud, you must activate your subscription to the cloud service you purchased. Once activated, you can log in and start your basic configurations.

Activating Your Cloud Service

As the owner of a new cloud service, you need to make a few decisions about activating the new service. The main decision you need to make is whether you would like to keep the new cloud service separate from your other cloud services (if any) or not. If you would like to keep the new cloud service separate from your other cloud services, you need to create a new Cloud Account. Else, you can activate the new service into your existing Cloud Account.

 **Note:**

If you are new to Oracle Cloud services, you need to create a new Oracle Cloud Account anyway.

The person listed as the administrator receives an automated email with directions on how to go ahead with either of these actions. Usually, this is the person who signs the ordering document, or the one listed as the buyer.

 **Note:**

If you opt to activate the new service into an existing Oracle Cloud Account, the owner of that account receives the notification.

Once you have taken this decision, you can refer to the email we sent you for further instructions on how to create a new Oracle Cloud Account, as well as how to activate a new cloud service to an existing Oracle Cloud account.

Email Notifications

Once the order provisioning starts, you will receive a series of emails from Oracle. These emails keep you updated on the progress of the provisioning process. The email that you would receive and the actions expected from you are listed below:

 **Note:**

Though the flow of emails/ events is indicated as sequential, not every step on this journey is mandatory or dependent on the previous step. There are steps that are optional, and emails that are just informational in nature.

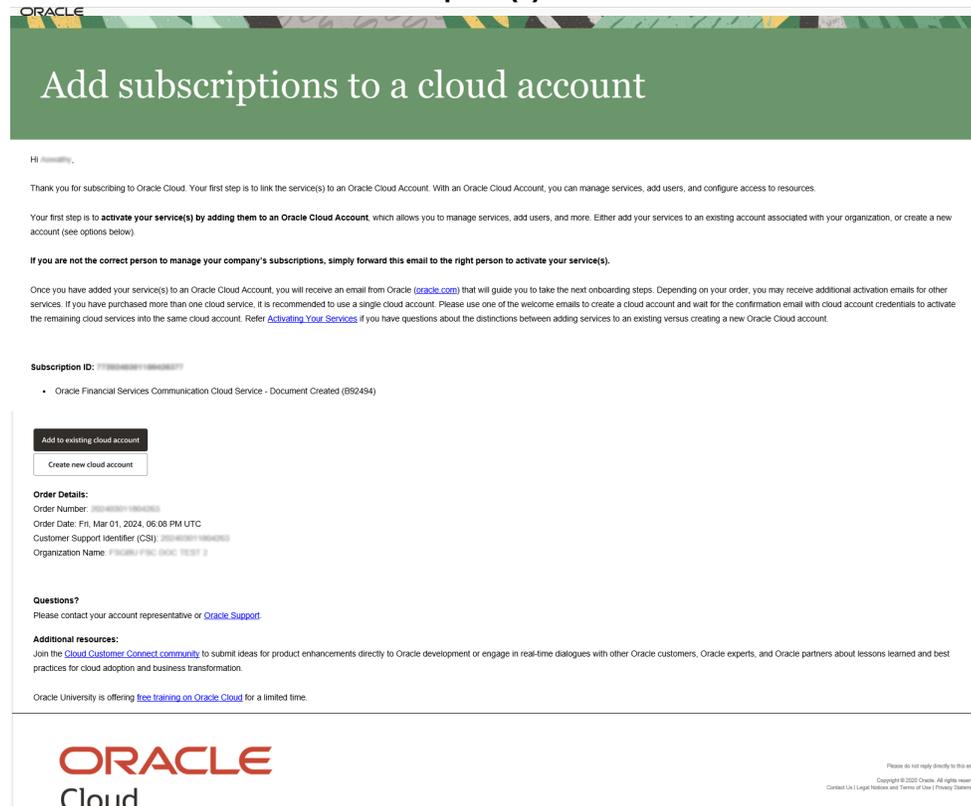
- 1. Welcome to New Oracle Cloud Service Subscription:** This email from Oracle Cloud gives you two options:
 - [Add to existing Cloud Account](#)
 - [Create new Cloud Account](#)
- 2. Welcome to <new cloud account>:** This email asks you to activate your default application user account (OracleFSCloudAdmin). See [Activating the Application User Account](#) for more information.
- 3. Password has been reset for your <cloud account>:** This email informs you about the password reset that happened while activating the account.
- 4. Welcome to Oracle Financial Services Cloud Communications:** This email contains the URL to the three tenant environments, **Non-Prod**, **Pre-Prod**, and **Production**. You can use these URLs to log in to your administrator account. See [Accessing the Cloud Service](#) for details.
- 5. Get Started Now with Oracle Cloud:** This is the final email you would receive as part of order provisioning and lets you know that you are ready to start using the service.

Related Topics

- [Getting to know Oracle Cloud Console](#)
- [User Credentials FAQ](#)

Creating and Activating A New Cloud Account

If you are new to Oracle Cloud, your Cloud Account Administrator (as designated in the order) would receive a **Welcome to Oracle Cloud** email, with subject **Action Required: Welcome to New Oracle Cloud Service Subscription(s)**.



Follow the instructions in the email to create and activate a new Cloud Account.

 **Note:**

This email can be forwarded to another intended administrator user, who can then go ahead with the process detailed below.

The email offers two course of actions:

- Create new cloud account
- Add to existing cloud account

This topic gives instructions to create and activate a new cloud account. To learn how to add the service to an existing cloud account, see [Adding to Existing Cloud Account](#).

Creating a New Cloud Account

1. Click the **Create new cloud account** link on the email. This opens the **New Cloud Account Information** page where you need to provide the following details:
 - a. **First Name:** Enter the first name for the Cloud Account.
 - b. **Last Name:** Enter the last name for the Cloud Account.
 - c. **Email:** Provide the same email address which you had given to receive the Welcome email. Instructions to log into your new Cloud Account will be sent to this email address.
 - d. **Password:** Enter the password to access the Cloud Account.
 - e. **Confirm Password:** Re-enter the same password to confirm.
 - f. **Cloud Account Name:** Enter an unique identifier for the Cloud Account
 - g. **Region Group:** Select the region group for the account.
 - h. **Home Region:** Select the home region for the account.
2. After entering the details, click **Create Cloud Account**. You will see a confirmation message on the page.

 **Note:**

When you create a new Cloud Account, it gets activated automatically. It also triggers the creation of the default Application User account, **OracleFSCloudAdmin**. Once this process is complete, you will receive an email with subject **Welcome to <Cloud Account> OracleFS CloudAdmin**. Follow the instruction on this email to activate your new Application User account. For assistance, see [Activating the Application User Account](#).

 **Note:**

If you have trouble activating your Oracle Cloud Account, contact [Oracle Support](#) with your Customer Support Identifier (CSI) number.

Adding to Existing Cloud Account

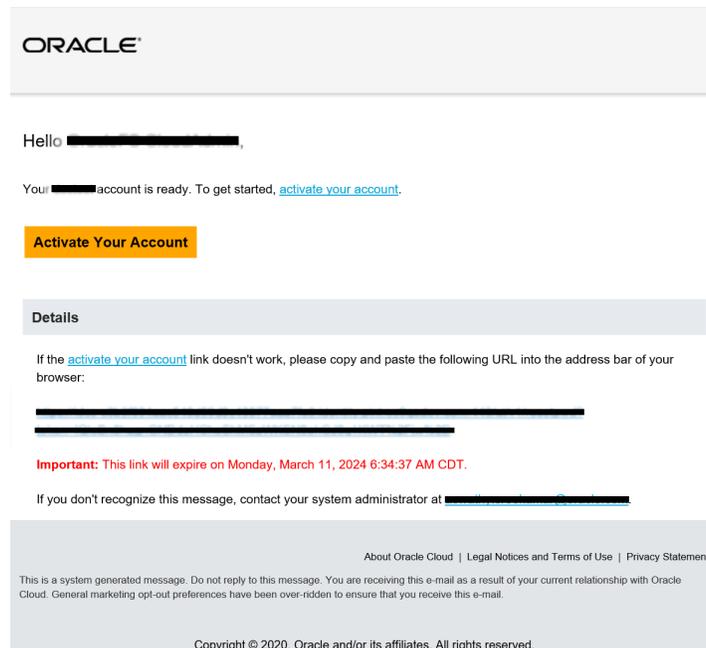
If you currently own an Oracle Cloud account and want to link the newly purchased Oracle Financial Services Cloud service to that account, follow the instructions in this page.

Open the Welcome email you received from Oracle Cloud with the subject **Action Required: Welcome to New Oracle Cloud Service Subscription(s)** and click on the **Add to existing cloud account** link on it. This opens up the Oracle Cloud Account login page where you can log in to your existing cloud account. This automatically activates the newly purchased cloud service under the same cloud account.

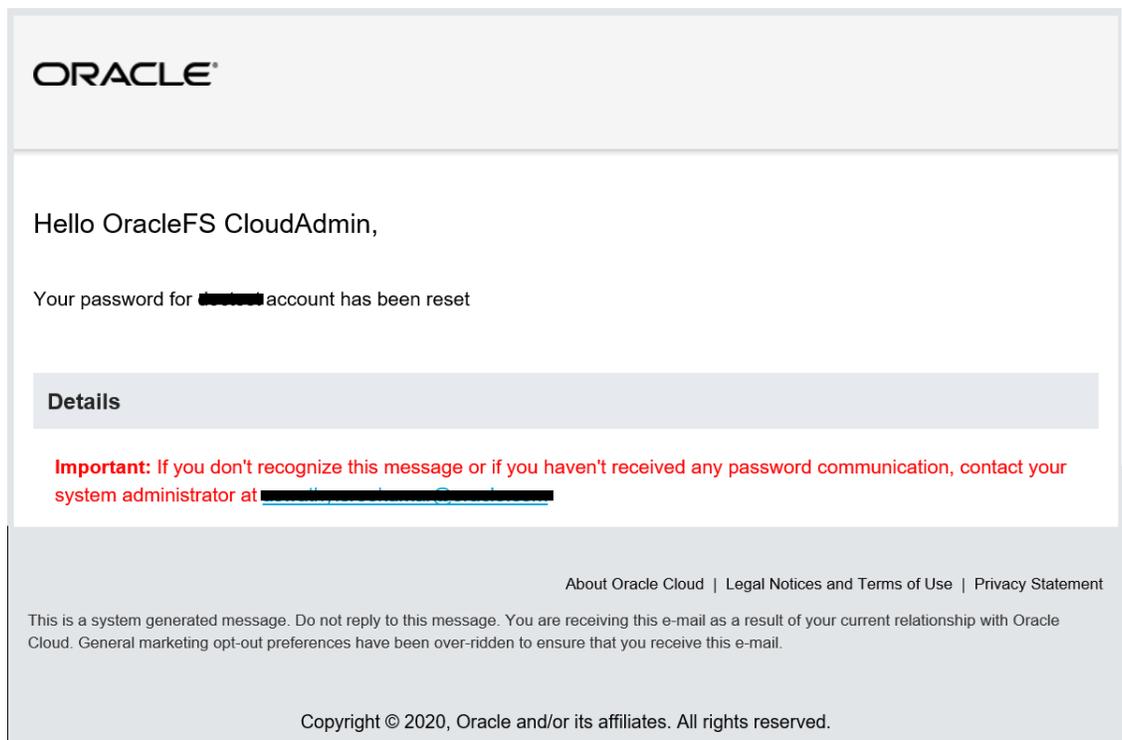
Activating the Application User Account

When you create and activate a cloud account for a Oracle Financial Services Cloud service, system automatically creates a default application user account named **OracleFSCloudAdmin**. The next step is to activate this application user account.

To activate your default application user account, OracleFSCloudAdmin, open the **Welcome to <Cloud Account> OracleFS CloudAdmin** email from Oracle Cloud and click on the **Activate Your Account** link. You will be asked to set a new password for the account.



Once you have activated the application user account, you will receive an email from Oracle Identity and Access Management (OIAM) with subject **Password has been reset for Your <cloud account name> account** informing you about the successful password reset of the default application user account, **OracleFSCloudAdmin**.

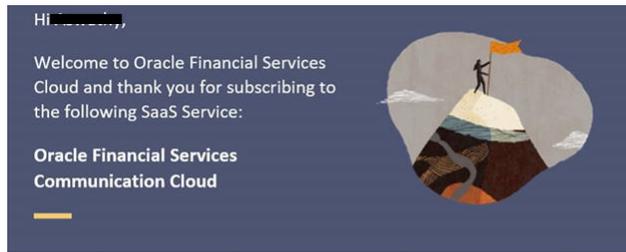


Note:

You are expected to complete this step within 7 days of receiving the email, beyond which the link expires. However, you would still be able to activate and set a password for your application user account using the subsequent emails.

Accessing the Cloud Service

Once you activate the application user account, **OracleFSCloudAdmin**, you would receive an email from Oracle Financial Services Cloud with subject **Welcome to Oracle Financial Services Cloud <Cloud Service>**.



As part of your subscription, we have deployed three tenant environments for your use via the URLs below:

Non-Prod:
<https://<customername>.fscloud.oraclecloud.com/non-prod/ui/Configuration/index.html>

Pre-Prod:
<https://<customername>.fscloud.oraclecloud.com/pre-prod/ui/Configuration/index.html>

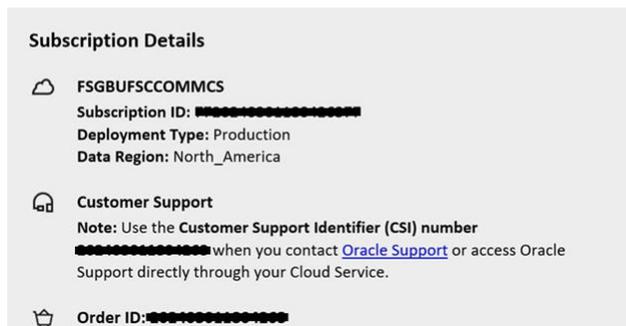
Production:
<https://<customername>.fscloud.oraclecloud.com/prod/ui/Configuration/index.html>

Please retain this information for your reference.

You will be receiving one more e-mail from us indicating the provisioning process has completed.

Upon receipt of the next e-mail, you may begin configuring your SaaS Service in the Non-Prod tenant environment identified by the above URL.

Thank you again for choosing Oracle for your business solution needs.



The email includes URLs to access all three of your tenant environments: **Non-Production**, **Pre-Production**, and **Production**. To log in to each of these tenant environments, click on the respective links. The credentials are:

- **User Name:** OracleFSCloudAdmin
- **Password:** The password you set while activating the application user account.

 **Note:**

If you do not remember the password, select **Click here** link below the **Sign In** button. This allows you to reset the password.

You would also receive another email from Oracle Cloud with the subject line: **Get Started Now with Oracle Cloud**. Click on the **Sign In** link on this email to log in to your Cloud Account.

ORACLE

Your cloud account and services are ready!



Hi [REDACTED],

Your new cloud account [REDACTED] has been created. You can now sign into your cloud account.

This service(s) is ready to use:

- Oracle Financial Services Communication Cloud Service - Document Created

[Sign In](#)

ORACLE
Cloud Infrastructure

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2

Understanding the Basic Concepts

Oracle Financial Services Cloud requires only a minimal set of configurations to get started. Once you have set up the platform, you can go ahead with configurations that are specific to the service you have subscribed to.

Before beginning the configurations for Oracle Financial Services Cloud, we recommend you to go through the following topics and understand the basic concepts:

- [Understanding Tenancies](#)
- [Understanding Configuration Lifecycle](#)
- [Understanding Configuration Movement](#)
- [Basic Configurations To Get You Started](#)

3

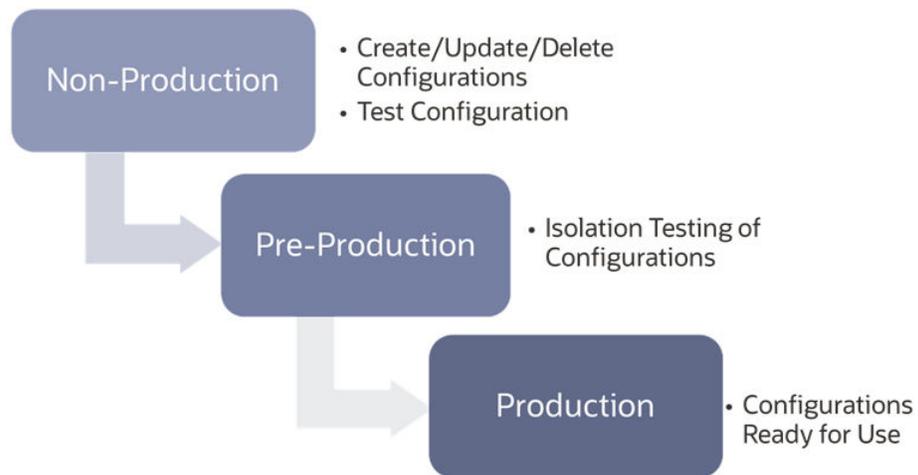
Understanding Tenancies

Tenant on-boarding in Oracle Financial Services Cloud application results in the creation of three tenancies: **Non-Production**, **Pre-Production**, and **Production**.

- **Non-Production:** This is a sandbox environment to create all configurations that address your business needs. Once you create and test the configurations, move the configurations to Pre-Production.
- **Pre-Production:** Perform isolation testing of the configurations here. This is an iterative process until the business users verify all configurations. Once the verification is complete, move the configurations to Production.
- **Production:** This is the working environment where the configurations act as the initial data set to start the operations.

 **Note:**

In general, all configurations are primarily done in **Non-Production** tenancy. You are not allowed to make Configuration changes in **Pre-Production** and **Production** tenancies.



 **Note:**

You can move Configurations from one tenancy to the next using **Configuration Movement**.

Configuring Tenancy

When Oracle processes an order, an automated system provisions the customer environment and creates three tenancies; **Non-production**, **Pre-production**, and **Production**. Additionally,

it creates an initial administrator user in the Oracle Cloud Infrastructure Identity and Access Management (OCI IAM).

As part of auto-provisioning, a set of pre-configured data is loaded by the provisioning system. The initial administrator user must create customer specific configurations as explained in the subsequent steps. See [Default Configurations](#) for the out-of-the-box configurations available in Oracle Financial Services Cloud platform.

You can edit the details of a tenant, as well as add or remove its association to a **Company ID Generation** configuration or **User Group ID Generation** configuration using the **Tenant** page under **Configuration** menu. See [Editing Tenant Details](#) for more information on how to edit Tenant details.

Related Topics

- [Editing Tenant Details](#)

Editing Tenant Details

You can edit the details of a tenancy, like its name and description, along with its associations, if any. Follow the procedure below to edit the tenancy details, including the associations.

Note:

You can edit Tenancy details of all three environments, **Non-Production**, **Pre-Production**, and **Production**. To edit details of a tenancy, ensure that you are logged in to the same environment.

1. Access and log in to the Oracle Financial Services Cloud application.
2. From **Menu**, select **Configuration** and then select **Tenant**.
3. Select **More Options** against the Tenant record.
4. Select **Edit**. This opens the **Edit Tenant** page.
5. Under **Identification** section, you can edit the following details: **Name**, **Long Name**, and **Description**.
6. Select **Continue**. This opens the **Mandatory Association** page.
7. Under **Mandatory Association**, you can either Add an association, or Delete an association.
 - **Add Association:** Select **Add** against an ID Generator (either Company ID Generator or User Group ID Generator). This opens the **Associate ID Generator** page. Select an ID Generator configuration and select Done.
 - **Delete Association:** Select **Delete** under Action menu against an ID Generator configuration. A message saying the association is deleted appears
8. Select **Continue**. This saves the updated tenancy details.

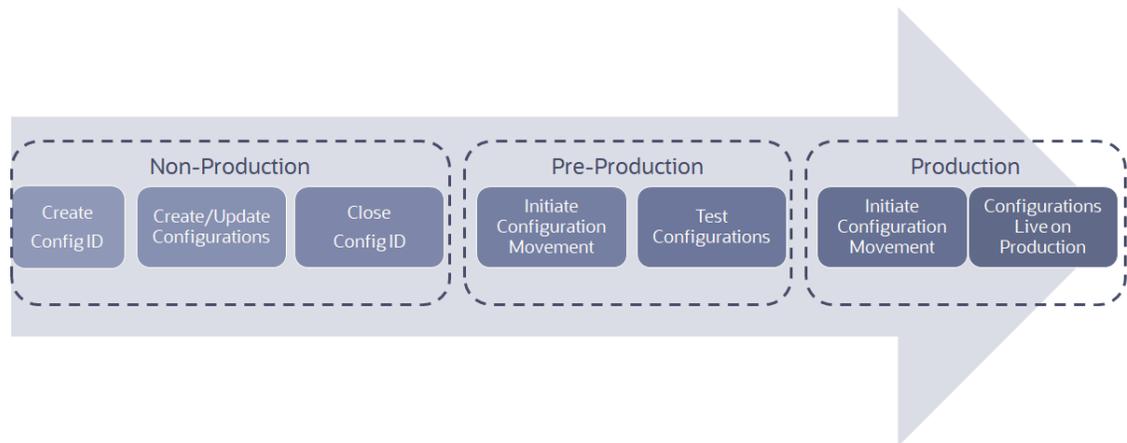
4

Understanding Configuration Lifecycle

Most of the configuration changes in Oracle Financial Services Cloud require testing before making them available for customers to start using. To facilitate this, all configurations in Oracle Financial Services Cloud are first created in the **Non-Production** tenancy and are then moved to **Pre-Production** tenancy for isolation testing, from where they are finally moved to **Production** tenancy where the users can start using the configurations. Movement of configurations from one tenancy to other is using the **Configuration Movement** process.

All configurations in Oracle Financial Services Cloud are configured under a **Config ID** in Non-Production. The **Config ID** tracks the configuration lifecycle of an entity and facilitates the movement of configurations across the three tenancies. Thus, it is imperative that all configurations pertaining to an entity are bundled under the same Config ID, thereby simplifying the Configuration Movement process.

Figure 4-1 Lifecycle of Configurations in Oracle Financial Services Cloud



Stages in Configuration Lifecycle

The list below outlines the various stages in a Configuration lifecycle. For each stage of the lifecycle, you would need appropriate entitlements to perform the tasks. Refer Entitlements Management section to know more about configuring entitlements.

1. Configuration Lifecycle starts with the creation of a **Config ID** in **Non-Production** tenancy. The **Config ID** essentially wraps your configurations together, making it convenient to move across tenancies.
2. Once you create a **Config ID** (or select an already existing Config ID), you can go ahead and start creating configurations in **Non-Production**.
3. After creating and testing your configurations, close the **Config ID** in **Non-Production**, thereby freezing the configuration changes.
4. Initiate the movement of configuration from **Non-Production** to **Pre-Production** using **Configuration Movement** process, initiated from the target tenancy; in this case, **Pre-Production**.

5. Continue testing the configurations in **Pre-Production**, but note that you cannot make any configuration changes at this point.
6. Once you are satisfied with your isolation testing in **Pre-Production**, initiate the **Configuration Movement** from **Pre-Production** to **Production**.
7. Once the **Configuration Movement** process completes successfully, your configurations are available at the **Production** tenancy.

Related Topics

- [Creating Config ID](#)
- [Using an Existing Config ID](#)
- [Closing Config ID](#)
- [Initiating Configuration Movement from Non-Production to Pre-Production](#)
- [Initiating Configuration Movement from Pre-Production to Production](#)

5

Understanding Configuration Movement

Configuration Movement is a process that helps you move business configurations across different tenancies on Oracle Financial Services Cloud, without needing to rebuild the business configurations in each tenancy. It also helps implement a verification process while promoting various configurations across the tenancies.

Configuration movement is always initiated from the **target** tenancy. That is, while moving configurations from **Non-Production** to **Pre-Production**, the movement is initiated from **Pre-Production**. Similarly, while moving configuration changes from **Pre-Production** to **Production**, the movement is initiated from **Production**.

Configuration Movement includes the following high level steps:

1. Closing Config ID
2. Initiating Configuration Movement from Non-Production to Pre-Production
3. Initiating Configuration Movement from Pre-Production to Production

 **Note:**

Configuration Movement is an all-or-none process where either all closed Config IDs that are not yet moved, are moved from one tenancy to the next, or none. That is, there is no partial or selective movement of Config IDs between tenancies.

6

Basic Configurations To Get You Started

There are some basic configurations that are required to set up Oracle Financial Services Cloud. You need to perform these configurations prior to going ahead with your Cloud Service specific configurations.



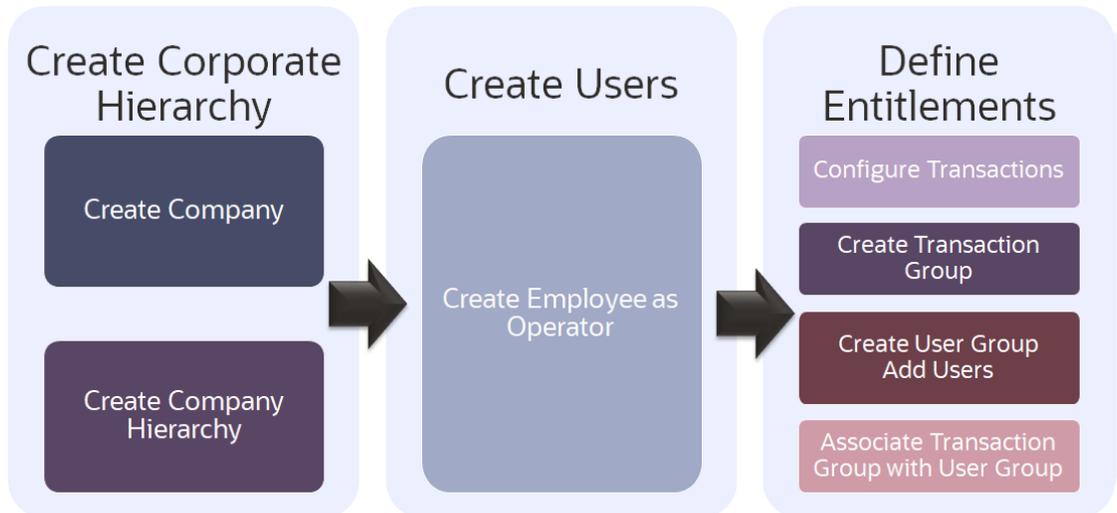
Note:

Make all basic configurations on the **Non-Production** tenancy, unless specifically mentioned otherwise.

The three main set of configurations that are required for Oracle Financial Services Cloud, irrespective of the Cloud Service you have subscribed to are:

1. **Creating Corporate hierarchy:** This involves creating a company (or multiple companies) and if needed, a hierarchy of companies.
2. **Creating Users:** This involves creating employees and operators for each of the tenancies
3. **Defining Entitlements for Users:** This involves configuring transactions, creating groups of these transactions, creating groups of users and then associating transaction groups to these user groups.

Figure 6-1 Basic Configurations



Note:

Follow these instructions while performing each of these configurations:

- Log in to Oracle Financial Services Cloud using **OracleFSCloudAdmin** account.
- Create a new **Config ID**, or select an existing **Config ID** before making configuration changes (except while creating Users).

Table 6-1 List of Basic Configurations

Configuration	Purpose	Prerequisites
Creating Operations Company	Map your organization's corporate hierarchy by creating companies in Oracle Financial Services Cloud. You can add or remove companies at a later point of time; however it is highly recommended to establish the company hierarchy before going ahead with configuring your selected cloud services.	<ol style="list-style-type: none"> 1. Creating Config ID or Using an Existing Config ID 2. Configuring Company ID Generation 3. Associating Company ID Generation Configuration with Tenant
Creating Marketing Company	Map products to a business unit. An Operations Company can support a Marketing Company or the other way around.	<ol style="list-style-type: none"> 1. Creating Config ID or Using an Existing Config ID 2. Configuring Company ID Generation 3. Associating Company ID Generation Configuration with Tenant

Table 6-1 (Cont.) List of Basic Configurations

Configuration	Purpose	Prerequisites
Creating Employee as Operator	Create all employees in your organization who need access to Oracle Financial Services Cloud as Operators.	Creating Operations Company

**No****te:**

You need to create Operators separately in each of the tenancies; that is, in Non-Production, Pre-Production and Production tenancies.

Table 6-1 (Cont.) List of Basic Configurations

Configuration	Purpose	Prerequisites
Configuring Transaction	Configure all transactions that a user would possibly perform in Oracle Financial Services Cloud. This ensures that each user is given entitlements that are appropriate for their function.	Creating Config ID or Using an Existing Config ID
		 Note: Some of the basic transactions are available pre-configured.
Creating Transaction Group	Group Transactions related to a function for ease in maintenance of entitlements.	<ol style="list-style-type: none"> 1. Creating Config ID or Using an Existing Config ID 2. Configuring Transaction

Table 6-1 (Cont.) List of Basic Configurations

Configuration	Purpose	Prerequisites
Creating User Group Adding Users to User Group	Group Users who perform similar functions for ease of maintenance.	<ol style="list-style-type: none"> 1. Configuring User Group ID Generation 2. Associating User Group ID Generation Configuration with Tenant

 **Note:**

You need to create User Groups separately in each of the tenancies; that is, in Non-Production, Pre-Production and Production tenancies.

Table 6-1 (Cont.) List of Basic Configurations

Configuration	Purpose	Prerequisites
Associating Transaction Group with User Group	This ensures that all users within the user group receives access to all transactions within the transaction group; thereby providing them with appropriate entitlements required for their role.	<ol style="list-style-type: none"> 1. Creating Transaction Group 2. Creating User Group


**No
te:**

You need to associate Transaction Group with User group separately in each of the tenancies; that is, in Non-Production, Pre-Production and Production

Table 6-1 (Cont.) List of Basic Configurations

Configuration	Purpose	Prerequisites
		tenancies.

Basic Configuration for Communication Cloud Service

The following table lists the basic configurations that you must complete to get started with Communication Cloud Service:

Table 6-2 Basic Configurations for Communication Cloud Service

Configuration	Purpose	Prerequisites
Adding Fonts	When designing a document in Communication Cloud Service, to be able display anything in a PDF preview you must define a default font. This default font will be used in case no other font is specified. Maximum file size for each font is - 30 MB Example: <ul style="list-style-type: none"> • <i>Default Regular</i> • <i>Default Bold</i> • <i>Default Italic</i> • <i>Default Bold Italic</i> 	Creating Config ID

Default Configurations

Some of the basic configurations in Oracle Financial Services Cloud come pre-configured with default values. These default configurations enable you to log in and perform the basic platform setup, like creating other users, defining their entitlements, etc.

The available basic configurations and their default values are listed below:

Table 6-3 Default Configuration Details

Configuration	Default Value	Reference
Tenancy	<ul style="list-style-type: none"> • Non-Production • Pre-Production • Production 	
Operator	OracleFSCloudAdmin	
Operations Company	OracleOperationsCompany	To create a new Operations Company, follow instructions in Creating Operations Company.

Table 6-3 (Cont.) Default Configuration Details

Configuration	Default Value	Reference
Marketing Company	OracleMarketingCompany	To create a new Marketing Company, follow instructions in Creating Marketing Company.
User Group	OracleUserGroup	To create a new User Group, follow instructions in Creating User Group.
Transaction Group	OracleTransactionGroup	To create a new Transaction Group, follow instructions in Creating Transaction Group.
Transaction Configurations	List of Preconfigured Transactions	To configure a Transaction, follow instructions in Configuring Transaction
Channel	OracleChannel	
UI Experience	Not available currently	

**Note:**

Channel and **UI Experience** pages are not available currently; they will be introduced in subsequent releases.

Related Topics

- Understanding Tenancies
- User Management
- Managing Companies
- Entitlements Management