

# Oracle Health Sciences Empirica Signal

## Managing Oracle Empirica Signal Cloud Users with Oracle Health IAMS



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ORACLE®

Oracle Health Sciences Empirica Signal Managing Oracle Empirica Signal Cloud Users with Oracle Health IAMS, Release 9.2

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# Preface

This preface contains the following sections:

- [Documentation accessibility](#)
- [Related resources](#)
- [Access to Oracle Support](#)
- [Additional copyright information](#)

## 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>.

## Related resources

All documentation and other supporting materials are available on the [Oracle Help Center](#).

## Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through Support Cloud.

Contact our Oracle Customer Support Services team by logging requests in one of the following locations:

- English interface of Oracle Health Sciences Customer Support Portal (<https://hsgbu.custhelp.com/>)
- Japanese interface of Oracle Health Sciences Customer Support Portal (<https://hsgbu-jp.custhelp.com/>)

You can also call our 24x7 help desk. For information, visit <http://www.oracle.com/us/support/contact/health-sciences-cloud-support/index.html> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

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# 1

## Introduction

Starting with Oracle Empirica Signal version 8.0, Oracle Health Sciences Empirica Signal is integrated with Oracle Health Sciences Identity and Access Management Service.

Oracle Health IAMS manages user credentials and controls if a user can log into a particular Cloud application or environment. In Oracle Health IAMS, each user has a single username and password. These are valid across all enabled OHS Cloud Services, regardless of the number of different applications or environments the user has access to.

You can group your federated applications together to work with a specific identity provider, such as grouping the test applications to work with a test identity provider, and grouping the production applications to work with a production identity provider. This also enables you to separate your clinical applications from the safety application. To activate this feature, raise a request to Health Sciences Support.

Each company that uses OHS Cloud Services nominates at least one Customer Delegated Administrator (CDA). This individual can create, enable or disable, or lock user accounts as well as define which applications and Cloud environments a user can access.

Even though Oracle Health IAMS manages the user accounts, application-specific user roles and privileges are still defined in an application's administrative user interface (UI). For Oracle Empirica Signal, the person who assigns roles and privileges to users is typically the Oracle Empirica Signal Customer Administrator.

The Oracle Empirica Signal Customer Administrator can be the same person as the Oracle Health IAMS CDA or a different individual. This guide describes both tasks that require the Oracle Health IAMS CDA role, and tasks that require the **Customer Administrator** or **super-user** Oracle Empirica Signal application role.

The process to create accounts is different for new and upgraded users. As a result, before the CDA creates a new Oracle Health IAMS account, the CDA must determine if that user has used the Oracle Empirica Signal Cloud environment previously.

Upgraded users have existing application accounts in Oracle Empirica Signal. The CDA must review or update the details of the Oracle Empirica Signal accounts to match Oracle Health IAMS naming conventions. For details on how to update existing application accounts, please see [Adjust the user's Oracle Empirica Signal account details](#).

There are two workflows for notifying a user that the Oracle Health IAMS account has been created:

1. **Security questions:** The user receives two emails. One says that the user has an account, and the other provides a temporary password. The user is expected to log in, set the answers to the security questions, and change the password.
2. **Email link:** The user receives one email that contains both the information that the account has been created and a link to set the initial password.

Which workflow is followed depends on how the Oracle Health IAMS tenant has been configured. For example, a newly set-up tenant follows the email link workflow. If you are adding a user to an old tenant, you will likely use the security questions workflow, unless the CDA has opted in to using the email link workflow.

# 2

## Identify or create an Oracle Health IAMS account for a new Oracle Empirica Signal user

To access an Oracle Empirica Signal instance, a user must have both an Oracle Empirica Signal application account and an account in Oracle Health IAMS.

The user can be:

- A new Oracle Empirica Signal user who does not have an existing Oracle Empirica Signal application account.  
For this type of user, follow the steps in this section.
- An existing Oracle Empirica Signal user who has an Oracle Empirica Signal application account.  
For this type of user, proceed to the [Add an existing Oracle Empirica Signal user to Oracle Health IAMS](#) section.
- A federated identity provider, such as grouping the test applications to work with a test identity provider.  
For this type of user, an Oracle Health IAMS account is necessary as a placeholder to retain authorization to live signal versus UAT signal (and other applications).

To provide access to a new user, you must:

- [Review the default user profile in Oracle Empirica Signal](#)  
Before you add an Oracle Empirica Signal user in Oracle Health IAMS, the Oracle Empirica Signal Customer Administrator must review the user profile configuration in the Oracle Empirica Signal application for all application instances to be accessed through Oracle Health IAMS, such as UAT and PROD.
- [Determine if the user's Oracle Health IAMS account exists](#)  
Before you add an Oracle Empirica Signal user in Oracle Health IAMS, the Oracle Health IAMS CDA must determine if the user's Oracle Health IAMS account exists.
- [Create the user's Oracle Health IAMS account](#)  
If the Oracle single sign-on (SSO) account doesn't exist, create it.
- [Assign an Oracle Empirica Signal role to the user's Oracle Health IAMS account](#)  
When you add an Oracle Empirica Signal user in Oracle Health IAMS, you must assign the Oracle Empirica Signal role to the user's Oracle Health IAMS account.
- [Adjust the user's Oracle Empirica Signal account details if necessary](#)  
The new Oracle Empirica Signal user is created in the application environment with standard permissions according to the default **default** user profile.
- [Add users in bulk using Oracle Health IAMS](#)  
To simultaneously create multiple users and assign the Oracle Empirica Signal role to them in Oracle Health IAMS, you can upload a spreadsheet to Oracle Health IAMS.

## Review the default user profile in Oracle Empirica Signal

Before you add an Oracle Empirica Signal user in Oracle Health IAMS, the Oracle Empirica Signal Customer Administrator must review the user profile configuration in the Oracle Empirica Signal application for all application instances to be accessed through Oracle Health IAMS, such as UAT and PROD.

A new Oracle Empirica Signal user who is provisioned in Oracle Health IAMS automatically receives the default user profile in Oracle Empirica Signal. The details of the profile are based on the **Default User Profile** site option setting. The Oracle Empirica Signal Customer Administrator must perform the following in Oracle Empirica Signal:

- Review the standard Login Group and quota setting.
- Confirm the standard roles and permissions to be assigned to new users.
- Review default user preference settings.

For details on the default user profile, see *Set site options* in the Oracle Empirica Signal *User Guide and Online Help*.

## Determine if the user's Oracle Health IAMS account exists

Before you add an Oracle Empirica Signal user in Oracle Health IAMS, the Oracle Health IAMS CDA must determine if the user's Oracle Health IAMS account exists.

1. Log into Oracle Health IAMS using the URL you received when your CDA account was created.
2. Under Administration, click **Users**.
3. Enter search criteria for the user. For example:  
From the **E-mail** drop-down, select **Contains**, and enter the user's email address.  
or  
From the **Display Name** drop-down, select **Contains**, and enter the user's display name.
4. Click **Search**.
5. Determine if the user's Oracle Health IAMS account appears in the **Search Results** list.
  - a. If the account exists:
    - i. Click the link in the **User Login** column.
    - ii. Complete the [Assign an Oracle Empirica Signal role to the existing user's Oracle Health IAMS account](#) steps.
  - b. If the account does not exist:
    - i. Complete the [Create the user's Oracle Health IAMS account](#) steps.
    - ii. Proceed to the [Assign an Oracle Empirica Signal role to the user's Oracle Health IAMS account](#) steps.



## Create the user's Oracle Health IAMS account

If the Oracle single sign-on (SSO) account doesn't exist, create it.

1. Log into Oracle Health IAMS using the URL you received when your CDA account was created.
2. Under Administration, click **Users**.
3. Under the Search Results heading, from the **Actions** drop-down, select **Create**.
4. Fill in the fields for the new user.
  - **First Name, Last Name**
  - **Email:** Enter the email address that is associated with the new user account. The user receives account notifications at this address.
  - **Organization:** Enter the `ShortOrgId` for your organization.  
If you don't know your `ShortOrgId`:
    - a. Click the search icon at the end of the field.
    - b. Below the search fields and to the right, click **Search** to show all results.
    - c. In the Search Results, select the row for your organization.
    - d. Click **Select**.
  - **User Login:** Enter the username that the user will use for logging in. The name is saved in lowercase characters.
  - **Password, Confirm Password:** Leave these fields blank.
5. Click **Submit**.

The user receives one email message with the username and a second email message with the password.

or

The user receives one email message with the username and a link to set the password.

## Assign an Oracle Empirica Signal role to the user's Oracle Health IAMS account

When you add an Oracle Empirica Signal user in Oracle Health IAMS, you must assign the Oracle Empirica Signal role to the user's Oracle Health IAMS account.

1. Log into Oracle Health IAMS using the URL you received when your CDA account was created.
2. Under Administration, click **Users**.
3. Enter search criteria for the user. For example:  
From the **E-mail** drop-down, select **Contains**, and enter the user's email address.  
or  
From the **Display Name** drop-down, select **Contains**, and enter the user's display name.
4. Click **Search**.

5. Click the link in the **User Login** column to open the User Details page.
6. On the User Details page, select the **Roles** tab.
7. From the **Actions** drop-down located above the table of roles, select **Request**.
8. Choose the Oracle Empirica Signal role for the Oracle Empirica Signal instance that the user will be working in.  
  
The name of the Oracle Empirica Signal role is unique to each Signal instance. For example, role names may be **EmpiricaSignal** and **EmpiricaSignalDev**.
9. Select **Add to Cart**, located to the right of the role.
10. In the upper-right, click **Checkout**.
11. Review the roles in the cart.
12. In the upper-right, click **Submit**.

## Adjust the user's Oracle Empirica Signal account details if necessary

The new Oracle Empirica Signal user is created in the application environment with standard permissions according to the default **default** user profile.

If the individual requires non-standard roles or permissions, the Oracle Empirica Signal Customer Administrator must do the following in Oracle Empirica Signal:

- Change the roles and permissions assigned to the user.
- (Optional) To use the Oracle Empirica Topics feature, add the user to one or more work teams and assign work team permissions to the user.

For details on assigning and changing roles, permissions, and work teams, see *Ways to administer users* in the *Oracle Empirica Signal User Guide and Online Help*.

Before starting to work in the application, users should take training that is relevant to their assigned scope of work in Oracle Empirica Signal. Your organization should implement mechanisms to address regulatory requirements concerning training.

## Add users in bulk using Oracle Health IAMS

To simultaneously create multiple users and assign the Oracle Empirica Signal role to them in Oracle Health IAMS, you can upload a spreadsheet to Oracle Health IAMS.

For details, see the [Perform user operations in bulk](#) section in the *Oracle Health Sciences Identity and Access Management Service Administrator Guide*.

# 3

## Add an existing Oracle Empirica Signal user to Oracle Health IAMS (upgrade only)

To enable access to Oracle Empirica Signal 9.x for a user who already has an Oracle Empirica Signal application account from a previous release of Oracle Empirica Signal, perform steps from the applicable sections below.

### If you are upgrading from Oracle Empirica Signal 7.3x to 9.x

1. [Adjust the existing user's account details](#) in Oracle Empirica Signal to work with Oracle Health IAMS.
2. [Identify or create the existing user's Oracle Health IAMS account](#).
3. [Assign an Oracle Empirica Signal role](#) to the user's Oracle Health IAMS account.

### If you are upgrading from Oracle Empirica Signal 8.0x to 9.x

1. [Assign an Oracle Empirica Signal role](#) to the user's Oracle Health IAMS account.
2. [Remove the role\(s\) that allowed access to the previous version of Oracle Empirica Signal](#).

### If you are upgrading from Oracle Empirica Signal 8.1x to 9.x

No actions are needed.

Select the procedures you need to follow from this list:

- [Adjust the existing user's Oracle Empirica Signal account details](#)  
An existing Oracle Empirica Signal user who has recently upgraded from Oracle Empirica Signal 7.3x to version 8.x or higher already has an Oracle Empirica Signal application account. Some adjustments might be required.
- [Determine if the existing Oracle Empirica Signal user's Oracle Health IAMS account exists](#)  
Before you add an existing Oracle Empirica Signal user in Oracle Health IAMS, the Oracle Health IAMS CDA must determine if the user's Oracle Health IAMS account exists.
- [Create the existing Oracle Empirica Signal user's Oracle Health IAMS account](#)  
If the Oracle single sign-on (SSO) account doesn't exist, create it.
- [Assign an Oracle Empirica Signal role to the existing user's Oracle Health IAMS account](#)  
When you add an Oracle Empirica Signal user in Oracle Health IAMS, you must assign the Oracle Empirica Signal role to the user's Oracle Health IAMS account.
- [Remove the role\(s\) that allowed access to the previous version of Oracle Empirica Signal](#)  
When granting an existing Oracle Empirica Signal user access to a new version of the application, remove the roles that allowed access to the previous version of Oracle Empirica Signal.

- [Add users in bulk using Oracle Health IAMS](#)  
To simultaneously create multiple users and assign the Oracle Empirica Signal role to them in Oracle Health IAMS, you can upload a spreadsheet to Oracle Health IAMS.

## Adjust the existing user's Oracle Empirica Signal account details

An existing Oracle Empirica Signal user who has recently upgraded from Oracle Empirica Signal 7.3x to version 8.x or higher already has an Oracle Empirica Signal application account. Some adjustments might be required.

For an existing Oracle Empirica Signal user, the Oracle Empirica Signal Customer Administrator must do the following in Oracle Empirica Signal before adding the Oracle Health IAMS account or role:

1. Edit the user's account name (User Name) to match the Oracle Health IAMS account username.
2. Edit the user's selected Authentication method to **SSO**.

For details on editing a user's account details, see *Add or edit a user in an Oracle-hosted environment* in the Oracle Empirica Signal User Guide and Online Help.

If the user's account name (User Name) already matches the Oracle Health IAMS account username and the user's selected Authentication method is **SSO**, the new Oracle Health IAMS account is automatically linked to the user's Oracle Empirica Signal account.

## Determine if the existing Oracle Empirica Signal user's Oracle Health IAMS account exists

Before you add an existing Oracle Empirica Signal user in Oracle Health IAMS, the Oracle Health IAMS CDA must determine if the user's Oracle Health IAMS account exists.

1. Log into Oracle Health IAMS using the URL you received when your CDA account was created.
2. Under Administration, click **Users**.
3. Enter search criteria for the user. For example:  
From the **E-mail** drop-down, select **Contains**, and enter the user's email address.  
or  
From the **Display Name** drop-down, select **Contains**, and enter the user's display name.
4. Click **Search**.
5. Determine if the user's Oracle Health IAMS account appears in the **Search Results** list.
  - a. If the account exists:
    - i. Click the link in the **User Login** column.

- ii. Complete the *Assign an Oracle Empirica Signal role to the existing user's Oracle Health IAMS account* steps.
  - b. If the account does not exist:
    - i. Complete the steps in *Create the user's Oracle Health IAMS account*.
    - ii. Proceed to the *Assign an Oracle Empirica Signal role to the user's Oracle Health IAMS account* steps.

## Create the existing Oracle Empirica Signal user's Oracle Health IAMS account

If the Oracle single sign-on (SSO) account doesn't exist, create it.

1. Log into Oracle Health IAMS using the URL you received when your CDA account was created.
2. Under Administration, click **Users**.
3. Under the Search Results heading, from the **Actions** drop-down, select **Create**.
4. Fill in the fields for the new user.
  - **First Name, Last Name**
  - **Email:** Enter the email address that is associated with the new user account. The user receives account notifications at this address.
  - **Organization:** Enter the `ShortOrgId` for your organization. If you don't know your `ShortOrgId`:
    - a. Click the search icon at the end of the field.
    - b. Below the search fields and to the right, click **Search** to show all results.
    - c. In the Search Results, select the row for your organization.
    - d. Click **Select**.
  - **User Login:** Enter the username that the user will use for logging in. The name is saved in lowercase characters.
  - **Password, Confirm Password:** Leave these fields blank.
5. Click **Submit**.

The user receives one email message with the username and a second email message with the password.

or

The user receives one email message with the username and a link to set the password.

## Assign an Oracle Empirica Signal role to the existing user's Oracle Health IAMS account

When you add an Oracle Empirica Signal user in Oracle Health IAMS, you must assign the Oracle Empirica Signal role to the user's Oracle Health IAMS account.

1. Log into Oracle Health IAMS using the URL you received when your CDA account was created.
2. Under Administration, click **Users**.
3. Enter search criteria for the user. For example:  
From the **E-mail** drop-down, select **Contains**, and enter the user's email address.  
or  
From the **Display Name** drop-down, select **Contains**, and enter the user's display name.
4. Click **Search**.
5. Click the link in the **User Login** column to open the User Details page.
6. On the User Details page, select the **Roles** tab.
7. From the **Actions** drop-down located above the table of roles, select **Request**.
8. Choose the Oracle Empirica Signal role for the Oracle Empirica Signal instance that the user will be working in.  
The name of the Oracle Empirica Signal role is unique to each Signal instance. For example, role names may be **EmpiricaSignal** and **EmpiricaSignalDev**.
9. Select **Add to Cart**, located to the right of the role.
10. In the upper-right, click **Checkout**.
11. Review the roles in the cart.
12. In the upper-right, click **Submit**.

## Remove the role(s) that allowed access to the previous version of Oracle Empirica Signal

When granting an existing Oracle Empirica Signal user access to a new version of the application, remove the roles that allowed access to the previous version of Oracle Empirica Signal.

1. Log into Oracle Health IAMS using the URL you received when your CDA account was created.
2. Under Administration, click **Users**.
3. Enter search criteria for the user. For example:  
From the **E-mail** drop-down, select **Contains** and enter the user's email address.  
or  
From the **Display Name** drop-down, select **Contains** and enter the user's display name.
4. Click **Search**.
5. Click the link in the **User Login** column to open the User Details page.
6. Select the **Roles** tab.
7. Click **Remove Roles**.

8. In the dialog box, select the checkboxes corresponding to the roles you want to remove, and click **Revoke**.

The message *Selected Roles are removed successfully* appears if the operation succeeded.

## Add users in bulk using Oracle Health IAMS

To simultaneously create multiple users and assign the Oracle Empirica Signal role to them in Oracle Health IAMS, you can upload a spreadsheet to Oracle Health IAMS.

For details, see the [Perform user operations in bulk](#) section in the *Oracle Health Sciences Identity and Access Management Service Administrator Guide*.

# 4

## Modify an Oracle Empirica Signal user in Oracle Health IAMS

As part of ongoing user management, you can use Oracle Health IAMS to edit or update user information and access levels as required.

Specifically, you can:

- [Change the user's login ID, name, or e-mail address](#)  
As part of ongoing user management, you may have to change or correct the user's login ID, user name, or email address.
- [Reset the password for the user's Oracle Health IAMS account](#)  
As part of ongoing user management, you might have to reset the password for the user's Oracle Health IAMS account.
- [Disable or enable the user's Oracle Health IAMS account](#)  
Oracle recommends that you disable a user account when the user is no longer employed by your company.
- [Lock or unlock the user's Oracle Health IAMS account](#)  
An account automatically becomes locked as a result of multiple failed login attempts. The user can then unlock the account by clicking **Trouble Signing In**.

### Change the user's login ID, name, or e-mail address

As part of ongoing user management, you may have to change or correct the user's login ID, user name, or email address.

1. Log into Oracle Health IAMS using the URL you received when your CDA account was created.
2. Under Administration, click **Users**.
3. Enter search criteria for the user. For example:  
From the **E-mail** drop-down, select **Contains**, and enter the user's email address.  
or  
From the **Display Name** drop-down, select **Contains**, and enter the user's display name.
4. Click **Search**.
5. In the Search Results list, select the user's record, and click **Edit**.
6. Update the user's User Login, First Name, Last Name, or E-mail as needed.

 **Tip:**

Updated User Login names are saved in lowercase only.

7. In the upper-right, click **Submit**.



## Reset the password for the user's Oracle Health IAMS account

As part of ongoing user management, you might have to reset the password for the user's Oracle Health IAMS account.

1. Log into Oracle Health IAMS using the URL you received when your CDA account was created.
2. Under Administration, click **Users**.
3. Enter search criteria for the user. For example:

From the **E-mail** drop-down, select **Contains**, and enter the user's email address.

or

From the **Display Name** drop-down, select **Contains**, and enter the user's display name.

4. Click **Search**.
5. In the Search Results list, select the user's record.
6. Click **Reset Password**.

What happens next is determined by how the tenant is configured.

- If you are using [security questions](#), select **Auto-generate the Password**, and then click **Reset Password**. The user receives an email containing a temporary password.

### Note:

Although it is not recommended, you can manually define a new password without emailing the new password to the user. Select **Manually change the Password** and fill in the password fields.

or

- If you are using [an email link](#), the Reset Password action generates an email to the user containing a link that allows the user to change the password.

## Disable or enable the user's Oracle Health IAMS account

Oracle recommends that you disable a user account when the user is no longer employed by your company.

1. Log into Oracle Health IAMS using the URL you received when your CDA account was created.
2. Under Administration, click **Users**.
3. Enter search criteria for the user. For example:

From the **E-mail** drop-down, select **Contains**, and enter the user's email address.

or

From the **Display Name** drop-down, select **Contains**, and enter the user's display name.

4. Click **Search**.
5. Click the link in the **User Login** column to open the User Details page.
6. Click **Disable User**, and then **Submit**.

or

Click **Enable User**.

- a. Update the user's information, if necessary. For details, see [Modify an Oracle Empirica Signal user in Oracle Health IAMS](#).
- b. Assign roles to the user. For details, see [Assign an Oracle Empirica Signal role to the existing user's Oracle Health IAMS account](#).
- c. Reset the account password. For details, see [Reset the password for the user's Oracle Health IAMS account](#).

## Lock or unlock the user's Oracle Health IAMS account

An account automatically becomes locked as a result of multiple failed login attempts. The user can then unlock the account by clicking **Trouble Signing In**.

Alternatively, you lock an account to prevent the user from logging in before disabling the account for termination of employment or another reason. When the account is explicitly locked by an administrator, the user cannot use the **Trouble Signing In** link to regain access.

Locking an account in Oracle Health IAMS prevents the user from accessing all single sign-on applications. To prevent the user from accessing just Oracle Empirica Signal, you can edit the user in Oracle Empirica Signal and select **Account disabled**. For details, see [Add or edit a user in an Oracle-hosted environment](#) in the *Oracle Empirica Signal User Guide and Online Help*.

Before you unlock an account, verify that the person asking to have the account unlocked is the owner. To ensure system security, Oracle recommends that you establish a process to confirm the requester's identity.

1. Log into Oracle Health IAMS using the URL you received when your CDA account was created.
2. Under Administration, click **Users**.
3. Enter search criteria for the user. For example:

From the **E-mail** drop-down, select **Contains**, and enter the user's email address.

or

From the **Display Name** drop-down, select **Contains**, and enter the user's display name.

4. Click **Search**.
  5. In the Search Results list, select the user's record.
  6. Click **Lock Account**.
- or
- Click **Unlock Account**.
  7. Confirm the action.

After you unlock an account, Oracle recommends that you also use the **Reset Password** option.

# 5

## Withdraw a user's access to Oracle Empirica Signal in Oracle Health IAMS

An Oracle Health IAMS CDA can withdraw an SSO user's access to Oracle Empirica Signal by removing the Oracle Empirica Signal roles from the user's Oracle Health IAMS account. The username is marked as deleted in Oracle Empirica Signal and the user can no longer log in.

To withdraw a user's access to Oracle Empirica Signal in Oracle Health IAMS:

- [Remove the Oracle Empirica Signal roles from the user's Oracle Health IAMS account](#)  
To eliminate a user's ability to access Oracle Empirica Signal, you must remove the Oracle Empirica Signal roles from the user's Oracle Health IAMS account.
- [Purge a user in Oracle Empirica Signal](#)  
To delete an Oracle Empirica Signal user, you must purge the user from Oracle Empirica Signal.

## Remove the Oracle Empirica Signal roles from the user's Oracle Health IAMS account

To eliminate a user's ability to access Oracle Empirica Signal, you must remove the Oracle Empirica Signal roles from the user's Oracle Health IAMS account.

1. Log into Oracle Health IAMS using the URL you received when your CDA account was created.
2. Under Administration, click **Users**.
3. Enter search criteria for the user. For example:  
From the **E-mail** drop-down, select **Contains**, and enter the user's email address.  
or  
From the **Display Name** drop-down, select **Contains**, and enter the user's display name.
4. Click **Search**.
5. Click the link in the **User Login** column to open the User Details page.
6. Select the **Roles** tab.
7. Click **Remove Roles**.
8. In the dialog box, select the checkboxes corresponding to the roles you want to remove, and click **Revoke**.

The message `Selected Roles are removed successfully` appears if the operation succeeded.

## Purge a user in Oracle Empirica Signal

To delete an Oracle Empirica Signal user, you must purge the user from Oracle Empirica Signal.

After you remove the Oracle Empirica Signal role from an Oracle Health IAMS account, if the Oracle Empirica Signal user who owns the account has one or more objects assigned in Oracle Empirica Signal, the Oracle Empirica Signal Customer Administrator must also purge the user in the Oracle Empirica Signal application. For details, see *Purge users* in the Oracle Empirica Signal *User Guide and Online Help*.

# 6

## Use a federated account

You can group your federated applications together to work with a specific identity provider to separate your clinical applications from the safety applications. To activate this feature, raise a request to Health Sciences Support.

For guidelines when using a federated account with Oracle Health Sciences Identity and Access Management Service, see *Federation Guidelines* in the *Oracle Health Sciences Identity and Access Management Service Administrator Guide*.

- [Link your identity provider and Oracle Health IAMS accounts automatically](#)  
The Oracle Health IAMS automatic accounts linking feature is supported only for Oracle Empirica Signal.
- [Request a Custom Role Membership report](#)  
The Custom Role Membership report provides information about when each user had access to a role in Oracle Health IAMS.

## Link your identity provider and Oracle Health IAMS accounts automatically

The Oracle Health IAMS automatic accounts linking feature is supported only for Oracle Empirica Signal.

You can configure this feature for tenants who have opted-in to access federation-enabled Oracle Empirica Signal. It is configured based on either the username or the email address. On the Login page, when you log in using your identity provider credentials and enter the username or email address, your identity provider and Oracle Health IAMS accounts link automatically. This feature works with identity providers that support SAML 2.0.

## Request a Custom Role Membership report

The Custom Role Membership report provides information about when each user had access to a role in Oracle Health IAMS.

For Oracle InForm, a study is a role. For other applications like Oracle Clinical One Platform, Oracle Central Coding, or Oracle Empirica Signal, each application instance is a role. You can request this report through [Support Cloud](#).

# 7

## Reset a password through self-service

End users can access the self-service password reset feature at any time by clicking the **Trouble Signing In** link on any login page of an Oracle Health IAMS-enabled application.

How users reset their passwords and whether or not they need to know their login ID depends on how the tenant is configured.

- If the tenant is configured to send an email with a link to reset the password, the user does not need to know the login ID. The user can retrieve the Login ID by clicking **Trouble Signing In** and then supplying the email address on the Sign In page.
- Otherwise, the user must know the login ID and must also answer three password challenge questions to reset the password.
  - The password challenge questions are first presented to users at their initial login with Oracle Health IAMS. User responses are recorded and matched when resetting the password at a later stage. Hence, the self-service reset is only possible after the user has successfully logged in through Oracle Health IAMS at least once.
  - If the user does not remember the correct answers to the challenge questions, or fails the initial login, an Oracle Health IAMS CDA will need to perform the password reset for the user.

The self-service password reset is available to all users, including CDAs. In case you forget your password, you can ask another CDA to follow the process in [Reset the password for the user's Oracle Health IAMS account](#).

# 8

## Manage the CDA assignment for Oracle Health IAMS

If your company needs to change the CDA assignment, or if you have accidentally locked yourself out of Oracle Health IAMS and were unsuccessful in using the self-service password reset, your company must log a request on the Oracle Health Sciences Customer Support Portal (<https://hsgbu.custhelp.com>).