

**Oracle[®] Retail Security Manager
User Guide
Release 12.0
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Contents

- Preface..... v**
 - Audiencev
 - Related Documentsv
 - Customer Supportv
- 1 Log in to Oracle Retail Security Manager..... 1**
- 2 Using RSM..... 3**
 - User Administration.....3
 - Assign Users to a Role.....3
 - Add Roles to a User.....5
 - Remove Roles from a User.....6
 - Role Administration.....7
 - Create a Role7
 - Edit a Role8
 - Maintain Roles.....9
 - Add Users to a Role.....9
 - Remove Users from a Role.....9
 - Add Data Permissions to a Role10
 - Delete a Data Permission from a Role12
 - Add Workflow Permissions to a Role12
 - Delete a Workflow and Associated Action from Role.....14
 - Navigate Within a Window15
 - Use a Drop-Down List.....15
 - Sort and Select Information15
- Index 17**

Oracle Retail Security Manager gives you a single point of security management for the applications you use. Users with like functions are grouped together into roles. The roles are then assigned the types of permissions needed for each workflow and data within an application.

Audience

The audience for this document is the Oracle Retail Security Manager users.

Related Documents

You can find more information about this product in these resources:

- Oracle Retail Security Manager Installation Guide
- Oracle Retail Security Manager Release Notes
- Oracle Retail Security Manager Operations Guide
- Oracle Retail Security Manager Online Help
- Oracle Retail Security Manager Data Model

Customer Support

- <https://metalink.oracle.com>

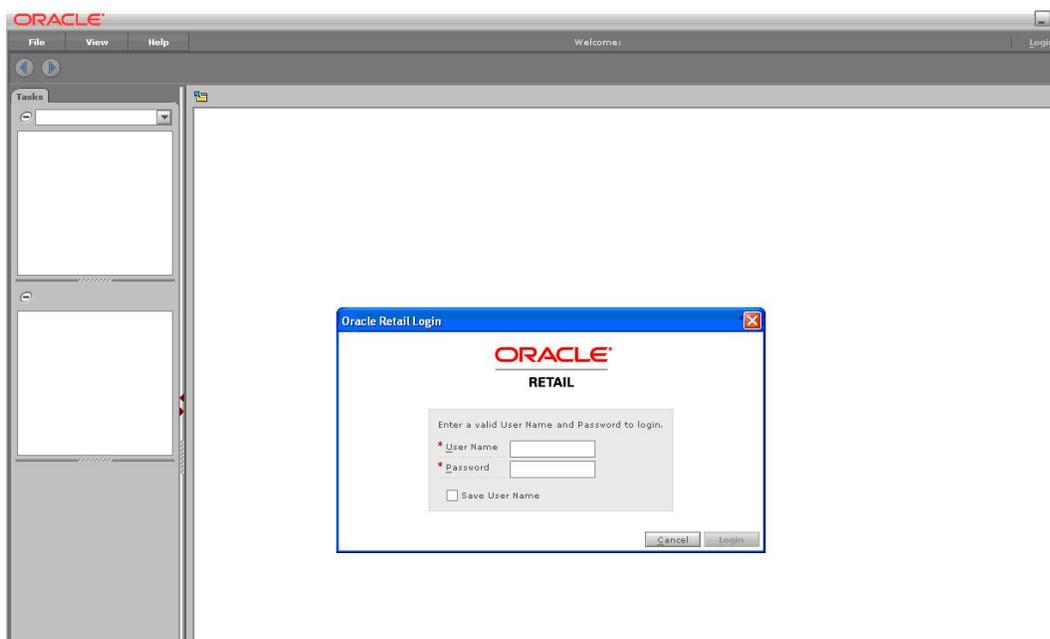
When contacting Customer Support, please provide:

- Product version and program/module name.
- Functional and technical description of the problem (include business impact).
- Detailed step-by-step instructions to recreate.
- Exact error message received.
- Screen shots of each step you take.

Log in to Oracle Retail Security Manager

To access the Oracle Retail Security Manager application:

Navigate: Open Oracle Retail Security Manager. The Oracle Retail Security Manager Login window is displayed.



Oracle Retail Security Manager Login window

1. In the User ID field, enter the user information assigned to you.
2. In the Password field, enter the password assigned to you.
3. Click **Login**. Oracle Retail Security Manager is displayed.

This section describes how to navigate within RSM:

- Log in to Oracle Retail Security Manager
- Navigate within a window
- Sort columns and select information

User Administration

Assign Users to a Role

Users are not created in RSM. Rather, RSM looks up users that exist in a Lightweight Directory Access Protocol (LDAP) compliant directory service. From the LDAP compliant directory, RSM retrieves the user information. You can then assign roles to a user.

Note: For additional information on RSM and LDAP compliant directories, please see the RSM Operations Guide.

Navigate: From the Task Pad, select User Administration > User Administration. The User Administration workspace is displayed.

The screenshot shows the 'User Administration' window. It features a table of users and an 'Edit User' section.

User	Last Name	First Name
Abby.Dawkins	Dawkins	Abby
Alain.Frecon	Frecon	Alain
Alan.Braun	Braun	Alan
Andrew.Cecere	Cecere	Andrew
Billy.Foo	Foo	Billy
Demo5	Demo5	Demo5
Demo6	Demo6	Demo6
Jane.User	User	Jane

Below the table is an 'Edit User' section with a 'Select Roles' dropdown and a table for roles.

Role	Start Date	End Date
------	------------	----------

At the bottom of the 'Edit User' section are input fields for 'Role Name', '* Start Date', and 'End Date', each with a small square icon to its right. A 'Modify' button is located at the bottom right of this section.

At the very bottom of the window are 'Cancel', 'Apply', and 'Done' buttons.

User Administration window

Note: Permissions are assigned to roles, then users are assigned to roles. Permissions are not assigned directly to users.

Add Roles to a User

Note: Permissions are assigned to roles, then users are assigned to roles. Permissions are not assigned directly to users.

Navigate: From the Task Pad, select User Administration > User Administration. The User Administration workspace is displayed.

1. In the User Administration pane, select a role.
2. Click **Edit** or double click on the role you want to edit. The Edit User pane is displayed.

The screenshot shows the 'Edit User Abby.Dawkins' window. At the top, there is a 'Select Roles' field containing 'Administrator Role' and a '+' button. Below this is a table with three columns: 'Role', 'Start Date', and 'End Date'. The table contains the following data:

Role	Start Date	End Date
Administrator Role	11-04-2004	
DJS New Role	11-11-2004	
DoDoDo Role	10-27-2004	11-02-2004
Dougs New Role	11-01-2004	12-28-2004
User Role	10-20-2004	10-15-2027
Viewer Role	11-15-2004	

Below the table are three input fields: 'Role Name', '* Start Date', and 'End Date'. A 'Modify' button is located at the bottom right of the window.

Edit User window

3. Click the LOV button next to the Select Roles field.



LOV button

- a. Select a role from the left column.
- b. Click the right arrow button. The role is displayed in the right, or selected, column.



Right Arrow button

- c. Repeat steps a and b until all the roles assigned to the user are selected.
 - d. Click **Select**. The roles are assigned to the user.
4. Click **Apply** to save any changes.

Remove Roles from a User

Navigate: From the Task Pad, select User Administration > User Administration. The User Administration workspace is displayed.

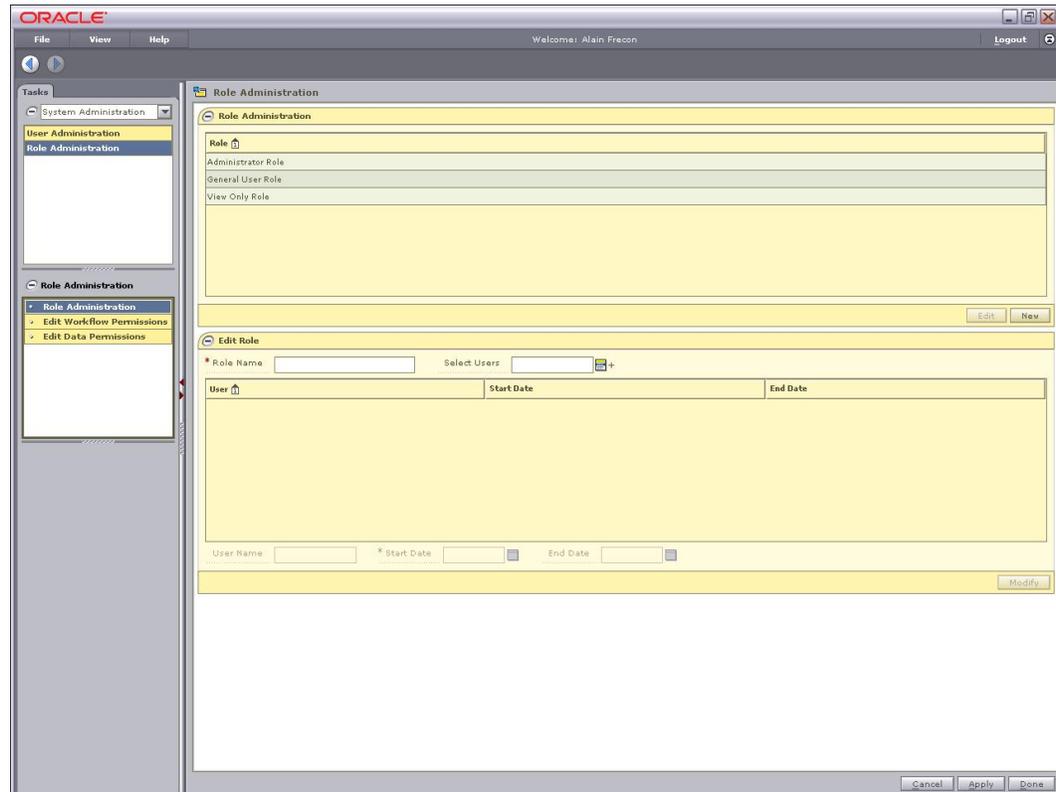
Note: Permissions are assigned to roles, then users are assigned to roles. Permissions are not assigned directly to users.

1. In the User Administration window, select a role.
2. Click **Edit** or double click on the role you want to edit. The Edit User pane is displayed.
3. Click the LOV button next to the Select Roles field.
 - a. Select a role to remove from the right, or selected, column.
 - b. Click the left arrow button. The role is displayed in the left, or available, column.
 - c. Click **Select**. The user is removed from the role.
4. Click **Apply**. The changes to the user are saved.
Or
Click **Done**. The changes to the user are saved and the workspace is closed.

Role Administration

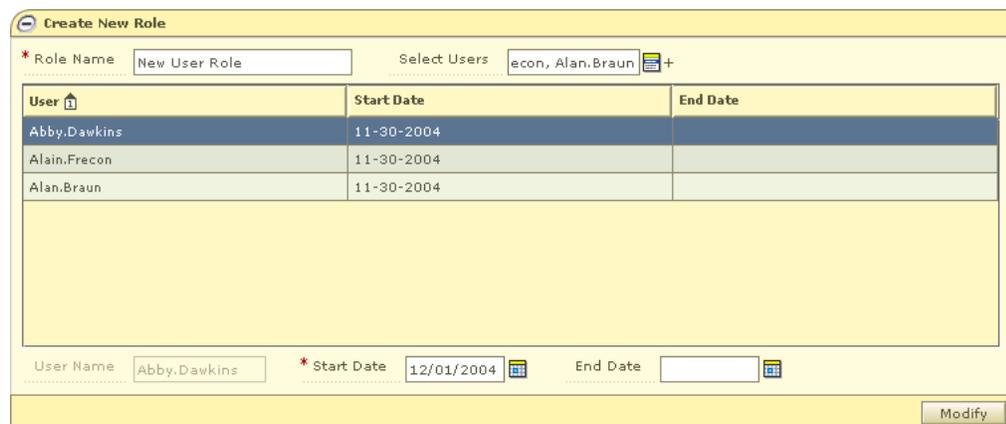
Create a Role

Navigate: From the Task Pad, select Role Administration > Role Administration. The Role Administration workspace is displayed.



Role Administration workspace

1. In the Role Administration workspace, click **New**. The Create Role pane is displayed and the Role Name field is enabled.



Create Role pane

2. In the Role Name field, enter the name of the new role you create.

3. Click the LOV button next to the Select Users field.
 - a. Select a user from the left column.
 - b. Click the right arrow button. The user is displayed in the right, or selected, column.
 - c. Repeat steps a and b until all the users assigned to the role are selected.
 - d. Click **Select**. The user names appear in the table.
4. Modify the end date of a user.
 - e. Select a user name from the table.
 - f. Enter a different start date in the Start Date field, or click the LOV button and select a date if it should be later than today.
 - g. Enter an end date in the End Date field, or click the LOV button and select a date. This field may be left blank.
5. Click **Modify**. The role is added to the list of roles.
6. Click **Apply**. The new role is saved.

Edit a Role

Navigate: From the Task Pad, select Role Administration > Role Administration. The Role Administration workspace is displayed.

1. In the Role Administration pane, select a role.
2. Click **Edit** or double click on the role you want to edit.
3. In the Role Name field, edit the name of the role as necessary.

Save Changes to a Role

- Click **Apply**. The changes to the role are saved.
- Or
- Click **Done**. The changes to the role are saved and the workspace is closed.

Maintain Roles

A role is a way of grouping workflows and actions for the functionality in each application supported by RSM. When you create a role, you assign a name to a role. Each role can be used to give different levels of permissions to like users. After you create the role, you can define the workflows for a role, define the data permissions for a role, and assign users to a role.

Note: Permissions are assigned to roles, then users are assigned to roles. Permissions are not assigned directly to users.

Add Users to a Role

Navigate: From the Task Pad, select Role Administration > Role Administration. The Role Administration workspace is displayed.

1. Click the LOV button next to the Select Users field.
 - a. Select a user to add from the left, or available, column.
 - b. Click the right arrow button. The user is displayed in the right, or selected, column.
2. Click **Select**. The users are added to the role.

Remove Users from a Role

Navigate: From the Task Pad, select Role Administration > Role Administration. The Role Administration workspace is displayed.

1. Click the LOV button next to the Select Users field.
 - a. Select a user to remove from the right, or selected, column.
 - b. Click the left arrow button. The user is displayed in the left, or available, column.
2. Click **Select**. The users are removed from the role.

Add Data Permissions to a Role

Use the Edit Data Permissions workflow to add data level permissions to user roles. You may also set end dates for the permissions.

Note: Permissions are assigned to roles, then users are assigned to roles. Permissions are not assigned directly to users.

Navigate: From the Task Pad, select Role Administration > Edit Data Permission. The Edit Data Permissions workspace is displayed.

The screenshot displays the 'Edit Data Permissions' workspace, which is organized into three main sections:

- Role Administration:** A list of roles including Administrator Role, General User Role, and View Only Role. An 'Edit' button is located at the bottom right of this section.
- Edit Data Permissions:** A table with columns for Application, Data Element, Values, Start Date, and End Date. Below the table is a summary row with columns for Data Element, Values, Start Date, and End Date. 'Remove' and 'New' buttons are positioned at the bottom right of this section.
- Edit Data Permission Details:** A form with dropdown menus for 'Application' and 'Data Element', and input fields for '* Start Date' and 'End Date'. Each input field has a '+' icon to its right. A 'Modify' button is located at the bottom right of this section.

At the bottom of the workspace, there are 'Cancel', 'Apply', and 'Done' buttons.

Edit Data Permissions workspace

1. In the Role area, select a role.
2. Click **Edit** or double click on the role you want to edit. Information is displayed on the Edit Data Permission pane.

Edit Data Permissions pane

3. Click **New**. The Edit Data Permission Details pane is enabled.

Edit Data Permissions Details pane

4. Select an application from the Application drop-down.
5. Select an element from the Data Element drop-down.
6. Enter a date in the Start Date field, or click the LOV button and select a date.
7. Enter a date in the End Date field, or click the LOV button and select a date.

Note: The End Date field may be left blank.

8. Enter information in the rest of the enabled fields as required.
9. Click **Apply**. Your changes are saved and displayed in the view area.
10. Delete a Data Permission from a Role

Delete a Data Permission from a Role

Navigate: From the Task Pad, select Role Administration > Edit Data Permission. The Edit Data Permissions workspace is displayed.

1. In the Role area, select a role.
2. Click **Edit** or double click on the role you want to edit. Information is displayed on the Edit Data Permission pane.
3. Select the application from the Application table.
4. Select the data permission you wish to remove from the Data Element table.
5. Click **Remove**. The data permission is removed from the list.
6. Click **Apply**. Your changes are saved and displayed in the view area.

Add Workflow Permissions to a Role

A workflow is a secured task or group of tasks that exist in an application. An action is the type of ability that users associated with a role have access to in an application's workflow. Once the role, workflow, and action are associated, users assigned to the role can complete their work.

Each application associated with RSM provides a list of workflows and actions that a user assigned to the appropriate role can access through RSM.

There are six types of actions that may be assigned to a role and workflow:

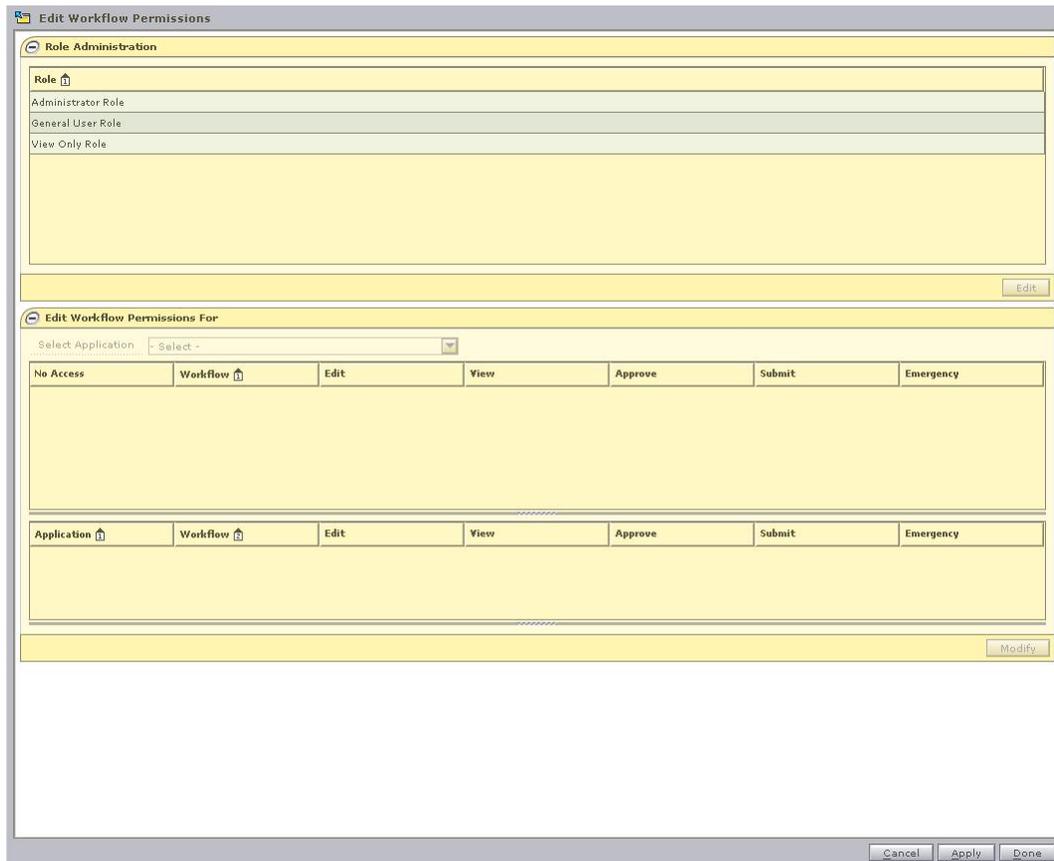
- **Access:** Users associated with the role have access to the application, but are not allowed see any secured information within a workflow. Users must have access to an application in order to have any of the other permission types.

Note: This action is the lowest level of permission a user associated with a role can have. You must assign Access to a role before any of the other permissions are available.

- **Edit:** Users associated with the role are allowed to create, update, and save any changes to a workflow.
- **View:** Users associated with the role are allowed to see to all secured information in a workflow, but not make any changes to the data in the workflow.
- **Approve:** Users associated with the role are allowed to change the status of a workflow to Approved.
- **Submit:** Users associated with the role are allowed to change the status of a workflow from Worksheet to Submitted.
- **Emergency:** Users associated with the role are granted special access that goes beyond normal day-to-day access to functionality. This allows users to bypass normal delays in processing.

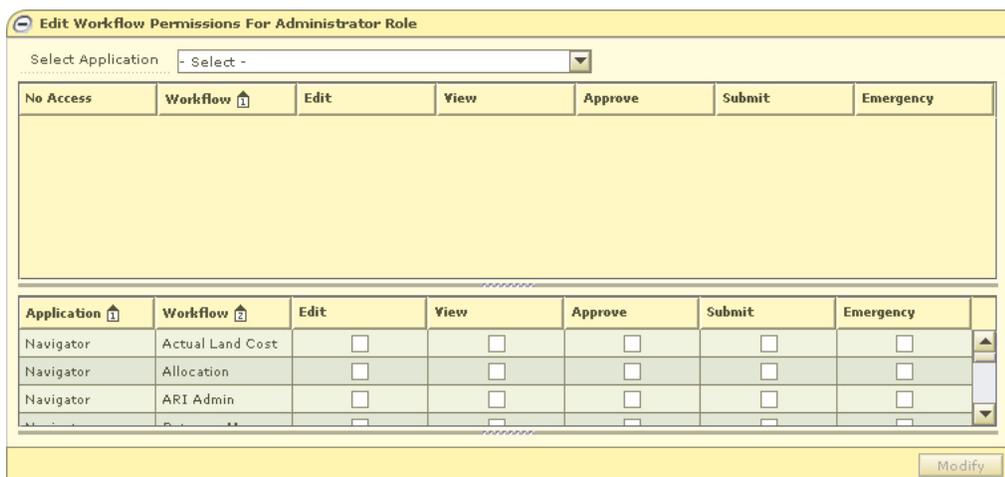
Note: Permissions are assigned to roles, then users are assigned to roles. Permissions are not assigned directly to users.

Navigate: From the Task Pad, select Role Administration > Edit Workflow Permission. The Edit Workflow Permissions workspace is displayed.



Edit Workflow Permissions workspace

1. In the Role area, select a role.
2. Click **Edit** or double click on the role you want to edit. Information is displayed on the Edit Workflow Permission pane.



Edit Workflow Permission pane

3. Select the application with the workflows you want to add to the role from the Select Workflows drop-down. Workflows for the application are displayed below.
4. Select the check boxes for each type of action you want to assign to the role.

Note: You must assign the Access action for the other assigned actions to be available to users in the role.

5. Click **Apply**. Your changes are saved and displayed in the view area.
6. Delete a Workflow and Associated Action from a Role

Delete a Workflow and Associated Action from Role

Navigate: From the Task Pad, select Role Administration > Edit Workflow Permission. The Edit Workflow Permissions workspace is displayed.

Edit Workflow Permission workspace

1. In the Role area, select a role.
2. Click **Edit** or double click on the role you want to edit.
3. Select the application with the workflows you want to add to the role from the Select Workflows drop-down. Workflows for the application are displayed below.
4. Deselect the check boxes for each type of action you want to remove from the role.
5. Click **Apply**. Your changes are saved and displayed in the view area.

Navigate Within a Window

Use a Drop-Down List

Some fields can accept values only from a predefined list of options. Such fields have a down arrow button on the right side of the field.



Down Arrow

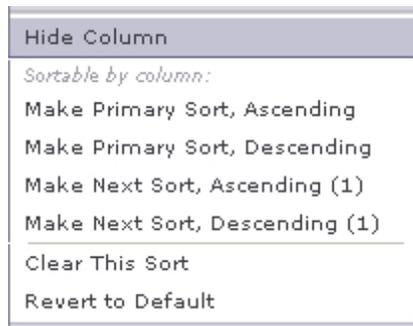
1. Click the down arrow button. A drop-down list of options displays.
2. Select a value from the drop-down list. The selected option is entered in the appropriate field.

Sort and Select Information

RSM allows you to sort data so that you can view the appropriate information.

Sort Information

To sort the list, right click any heading and select from the drop-down menu.



Sort Menu

A sort indicator indicates the column that is currently sorted, as well as the sort order.



Sort Indicator

Note: You can sort two columns at a time. The number in the sort indicator tells you which column is sorted first and which column is sorted second.

Select Information

Multi-select functionality allows you to select multiple rows in a table by using the Shift and Control keys. This is so users can perform a single action on multiple rows. The functionality is analogous to the select functionality of other Windows applications.

Select Continuous Information

1. Click on a row.
2. Press Shift and click on another row to select all the rows in between, inclusively.

Select Non-Continuous Information

1. Click on a row.
2. Control click on rows to select or deselect the individual rows clicked on (depending on whether they are currently selected) while leaving the other selected rows still selected.

Index

A

Add Data Permissions.....	10
Add Roles to a User	5
Add Users to a Role	9
Add Workflow Permissions to Role	12
Assign Users to a Role.....	3

C

Create	9
--------------	---

D

Data Permissions.....	10, 12
Define.....	12
Delete Workflow Permission.....	14

E

Edit a Role.....	8
Edit Data Permissions	10, 12

P

Permissions	10, 12
-------------------	--------

R

Remove Roles from a User	6
Remove Users from a Role	9
Role Administration.....	7, 8, 9, 10
Roles	3, 5, 6, 8, 9, 12
RSM	

Use	3
-----------	---

S

Select Information.....	15
Sort Information.....	15

U

Use a Drop-Down List	15
User Administration.....	3, 5, 6
Users	3, 5, 6, 9
Using RSM.....	3

W

Workflow	12, 14
----------------	--------