

**Oracle® Retail Order Broker Cloud
Service**

Administration Guide

Release 15.0

E68433_01

April 2016

E68433_01

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Oracle Retail Order Broker Cloud Service Administration Guide, Release 15.0

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Preface

The Oracle Retail Order Broker Cloud Service Administration Guide describes the process an administrator follows to set up essential data for the Routing Module.

Audience

This Administration Guide is intended for administrators who are responsible for system configuration.

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Related Documents

For more information, see the following documents in the Oracle Retail Order Broker Cloud Service Release 5.3 documentation set:

- *Oracle Retail Order Broker Cloud Service Release Notes*
- *Oracle Retail Order Broker Cloud Service Operations Guide*
- *Oracle Retail Order Broker Cloud Service Online Help*
- *Oracle Retail Order Broker Cloud Service Vendor Portal Online Help*
- *Oracle Retail Order Broker Cloud Service Store Connect Online Help*

See the Oracle Retail Order Broker Cloud Service 15.0 documentation library at the following URL:

<http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html>

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- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

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Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, emphasis, screen names, book titles, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates field labels or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Setting Up Data

Purpose: Follow the steps below to set up data for the Routing Module as part of Oracle Retail Order Broker Cloud Service installation. The Routing Module enables you to search for locations to fulfill orders, create orders across the enterprise, and track order activity.

Other setup steps and options: See the Online Help for more information on setting up data, including steps for configuration of the Routing Engine, as well as steps required for:

- configuring the Supplier Direct Fulfillment module
- configuring the Store Connect module
- additional configuration options, such as probability rules and zone fulfillment
- testing operations, such as searching for locations and creating orders
- details on importing and exporting data, including additional import and export options

In this chapter:

- [Before you start](#) on page 1-1
- [Logging in for the first time](#) on page 1-3
- [Creating each additional system that will integrate with Oracle Retail Order Broker Cloud Service](#) on page 1-3
- [Creating additional user profiles](#) on page 1-5
- [Uploading proximity data](#) on page 1-8
- [Creating location types](#) on page 1-9
- [Creating the default unfulfillable location](#) on page 1-10
- [Setting up a default carrier and, optionally, additional carriers](#) on page 1-11
- [Setting up preferences for your organization](#) on page 1-12
- [Scheduling imports](#) on page 1-15
- [Setting up web service authentication](#) on page 1-18

Before you start

Before you begin configuration of Oracle Retail Order Broker Cloud Service, the cloud administrator:

- **URL:** Provides you with the URL to use when logging into Order Broker.
- **Organization:** Creates your organization in Order Broker. The organization is the second level in the Oracle Retail Order Broker Cloud Service hierarchy, below the tenant. All systems are assigned to a single organization, and locate items searching, order creation, and drop ship fulfillment takes place within the organization. You need at least one organization.

See the **Order Broker Routing Engine Overview** in the Online Help for a discussion of the organization hierarchy.

- **Default system:** Creates the default system for your organization.

About systems: Each system in Oracle Retail Order Broker Cloud Service represents an application, such as CWSerenade, CWDirect, or Xstore, that shares inventory information via Oracle Retail Order Broker Cloud Service and creates cross-channel orders or purchase orders.

About the default system: The default system identifies the application that is the system of record for product creation and naming. The first system that the cloud administrator creates for your organization is automatically flagged as the default. System product codes in other systems are cross references to the products in the default system.

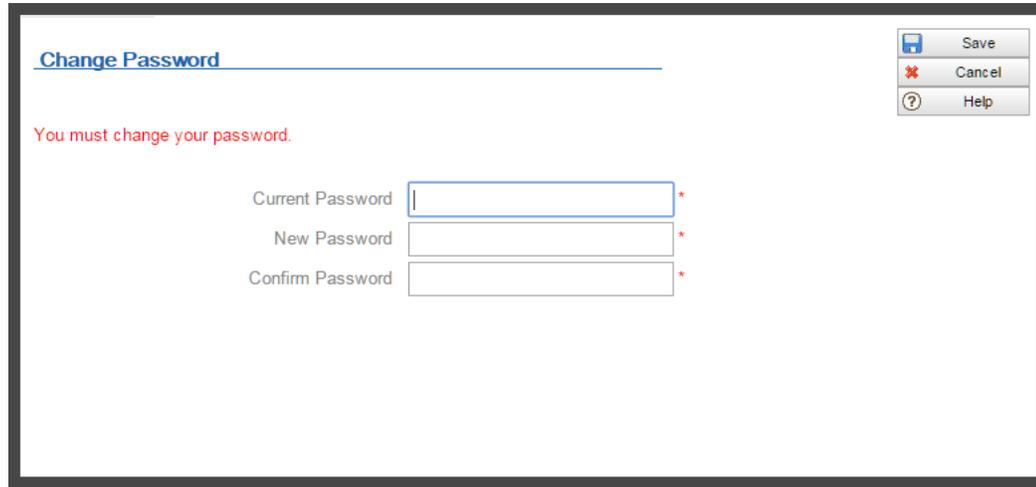
Note: If you integrate with Oracle Retail Order Management System Cloud Service or with CWDirect, the system code should be the same as the company number, without padding zeros: for example, 6 rather than 006. Also, the code for the system must match the setting of the *Locate System (K50)* system control value.

See the **System** screen in the Online Help for information on additional system configuration options.

- **Default user profile:** Creates a default user profile for you to use when completing configuration in Order Broker, including creating additional users, configuring systems, setting preferences, and importing data. The cloud administrator provides you with the user ID and an initial, temporary password, which you change the first time you log into Order Broker.

Logging in for the first time

Change password: The cloud administrator creates the default user profile with a temporary password. The first time you log in using the default user profile, you need to change the password.



Complete the **Change Password** window:

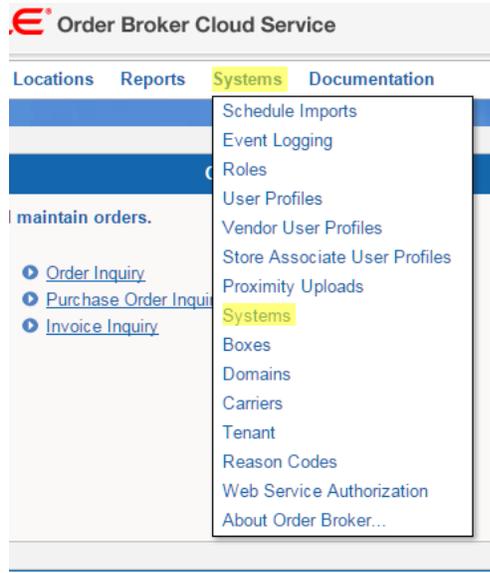
1. **Current Password:** Enter the temporary password assigned by the cloud administrator
2. **New Password** and **Confirm Password:** Enter the new password. Your password:
 - must be from 8 to 25 characters long
 - cannot contain any spaces
 - must include at least 1 numeric character
 - must include at least 1 letter
 - must include at least 1 special character
 - cannot be the same as your user ID
 - is case-sensitive (A is not the same as a)
 - must be changed at least every 90 days, and each new password cannot be the same as your previous 4 passwords
3. Click **Save**.

Creating each additional system that will integrate with Oracle Retail Order Broker Cloud Service

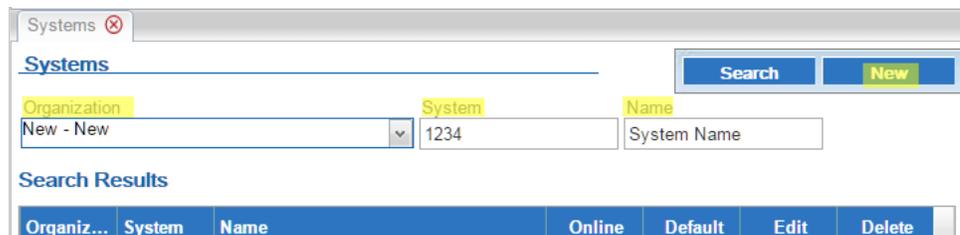
Follow the steps below to create:

- a default vendor system, if you will use the Supplier Direct Fulfillment module
- the Store Connect system, if you will use the Store Connect module
- each additional system, such as a POS system

1. Select **Systems** > **System**.



2. At the **System** screen, select your organization from the *Organization* drop-down box.



3. Enter a system code in the *System* field. System codes can be 1 to 10 positions in length, can include spaces and special characters, and must be unique within the organization.
4. Enter a name in the *Name* field. Names can be 1 to 40 positions in length and can include spaces and special characters. If you do not enter a name here, you need to enter it at the **System** screen when creating a system.
5. Select **New**:
 - if the system already exists in the organization, or if you did not select an organization or enter a system code, Oracle Retail Order Broker Cloud Service displays an error message;

6. otherwise, you advance to the **System** screen, where you can complete the creation of the system.

7. Select **Save**.

Note: Note: If you select **Cancel** at the **System** screen without first selecting **Save**, the system is not created.

See the **System** screen in the Online Help for information on the fields and options available at this screen.

Creating additional user profiles

About user profiles: Follow these steps to enable users to log into Oracle Retail Order Broker Cloud Service, and to set authority levels controlling the screens available to each user.

1. Select **Systems > User Profiles**.



2. At the **User Profiles** screen, enter:
 - a *User ID* of up to 10 position positions.
 - a *Name* of up to 30 positions.
 - optionally, an *Email* address of up to 50 positions.

- Select New.

3. At the User Profile Configuration screen:

- if not using LDAP authentication, enter and confirm the initial, temporary password for the user to use when first logging into Oracle Retail Order Broker Cloud Service.

Password requirements: The password:

- * must be from 8 to 25 characters long
- * cannot contain any spaces
- * must include at least 1 numeric character
- * must include at least 1 letter
- * must include at least 1 special character
- * cannot be the same as the user ID

The first time the user logs in, Oracle Retail Order Broker Cloud Service requires that the user reset the password, as described above under [Logging in for the first time](#) on page 1-3.

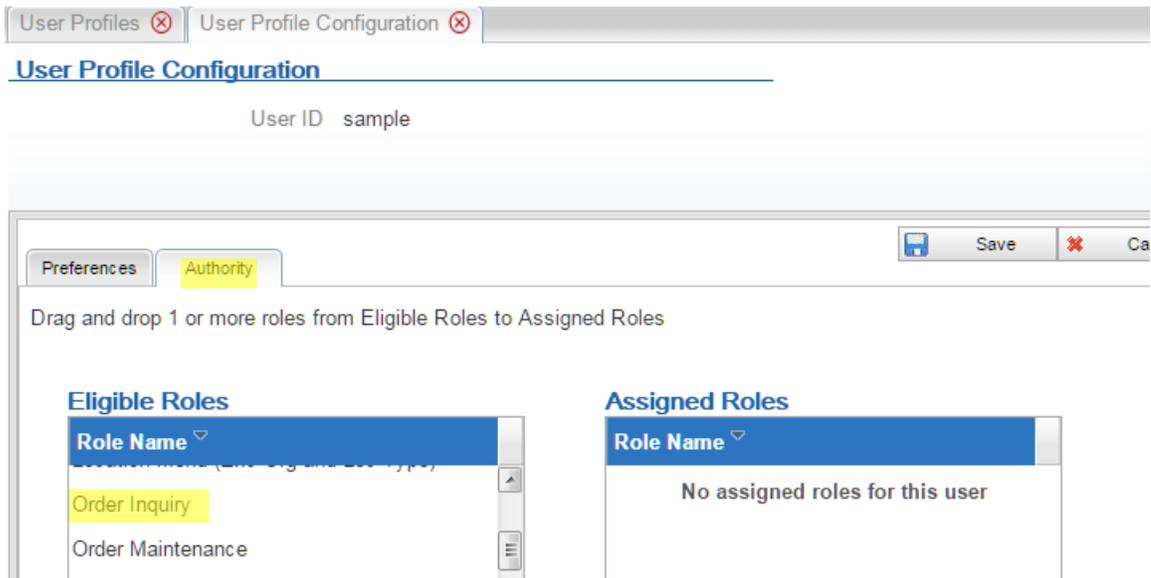
- otherwise, if using LDAP authentication, select the *Use LDAP* flag and confirm the domain and the LDAP user ID, if necessary.

The screenshot shows the 'User Profile Configuration' window with the 'Authority' tab selected. The 'User' section contains the following fields: 'User ID' (sample), 'Name' (Sample), 'Email' (empty), 'Active' (checked), 'Use LDAP' (checked), 'Domain' (dtvdomain), and 'LDAP User Id' (empty). The 'Preferences' section contains 'Default Shipping System' (empty). A 'Save' button is visible in the top right corner.

- under the **Preferences** tab, select the user's *Default Shipping System* to control the system product code to display when the user reviews an order.

The screenshot shows the 'User Profile Configuration' window with the 'Preferences' tab selected. The 'User' section contains the following fields: 'User ID' (sample), 'Name' (Sample), 'Email' (empty), 'Active' (checked), 'Use LDAP' (unchecked), 'Password' (empty), and 'Confirm Password' (empty). The 'Preferences' section contains 'Default Shipping System' (empty). A 'Save' button is visible in the top right corner.

- use the **Authority** tab to select a role that provides the user with required authority.



- Select **Save**.

More options:

- *Create vendor user profiles or store associate user profiles:* See **Vendor User Profiles** in the Online Help if you will use the Supplier Direct Fulfillment module, or see **Store Associate User Profiles** in the Online Help if you will use the Store Connect user profile.
- *Create additional roles:* Oracle Retail Order Broker Cloud Service includes delivered roles for Order Broker, vendor, and store associate user profiles. See **Roles** in the Online Help for details on the delivered roles, and see the **Role Wizard** in the Online Help for instructions on creating new roles that you can assign to users.

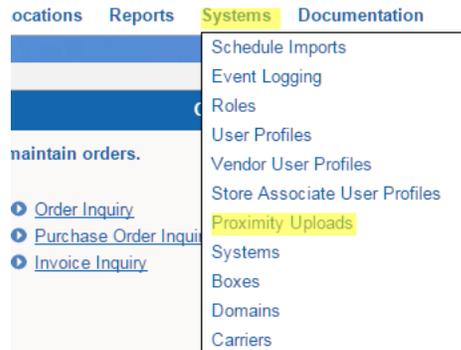
Uploading proximity data

About proximity data: Proximity data enables you to search for merchandise or assign orders based on the approximate distance from a store, warehouse, or customer address.

Note: This step is required only if you are using proximity locator searching for locations through the Routing Engine. You can also perform this step at a later time.

If you are using Proximity Locator searching to restrict locate items searches or order assignment based on geographical location, obtain the required .CSV file of postal code information before you begin the upload:

1. Select **Systems > Proximity Uploads**.



2. At the **Proximity Uploads** screen:

- Select **Canada**, **International**, or **United States** from the *Proximity Data Type* drop-down list.
- Enter the *Country Code* to apply to proximity records.
- Use the **Choose Files...** button below the *File Name* field to select the .CSV file on your local computer.
- Select **Upload**.



3. Wait until the upload status is completed. Optionally, you can select **Refresh** to check the status.

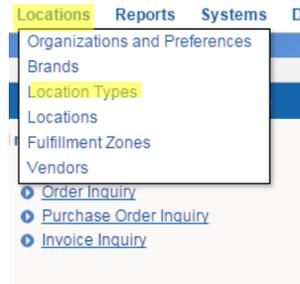
For more information: See the **Proximity Uploads** screen in the Online Help for more information, including the file layout and troubleshooting. Also, see the **Order Broker Routing Engine Overview** in the Online Help for a discussion of proximity locator searching and preferences.

Creating location types

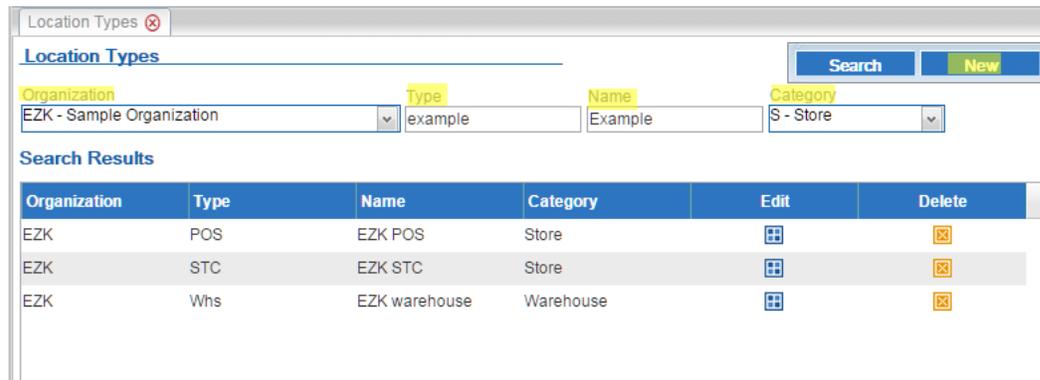
About location types: Location types identify a group of locations based on the system to which they belong, such as your order management system or your POS system, as well as their function, such as distribution center or retail store.

At least one location type is required for you to create locations.

1. Select **Locations > Location Types**.



2. At the **Location Types** screen, select your organization at the *Organization* drop-down box, if necessary.



3. In the *Type* field, enter a code to represent the location type. The code cannot exceed 10 positions.
4. In the *Name* field, enter a name for the location type. The name cannot exceed 40 positions.
5. Select the correct category from the *Category* drop-down box.
6. Select **New**.

Creating the default unfulfillable location

About the default unfulfillable location: The Routing Engine assigns an order to the default unfulfillable location when it cannot find a location to fulfill the order. You need to specify a default unfulfillable location at the **Preferences** screen.

1. Select **Locations > Locations**.
2. At the **Locations** screen:
 - Select your organization if necessary.
 - In the *Type* field, select the location type. The default unfulfillable location is ordinarily a warehouse or distribution center type.
 - In the *Location* field, enter a location code. The code cannot exceed 10 positions.
 - In the *Name* field, enter a name for the location. The name cannot exceed 40 positions.

- In the *System* field, select the default system for your organization.
 - Select **New**.
3. At the **New Location** screen, enter any additional information about the default unfulfillable location, and select **Save** to save your entries.

For more information: See [Setting up preferences for your organization](#) on page 1-12 for information on identifying the default unfulfillable location for the Routing Engine.

Setting up a default carrier and, optionally, additional carriers

About carriers: A carrier is required on each order. At a minimum you need to set up a default carrier, specified at the **Preferences** screen.

If the Submit Order message creating a retail pickup, delivery, or ship-to-store order:

- specifies a `ship_via` that matches a carrier you have set up through the **Carriers** screen, Oracle Retail Order Broker Cloud Service uses this carrier on the order and resets the carrier as active, if needed.
- specifies a `ship_via` that does not match a carrier you have set up through the **Carriers** screen, Oracle Retail Order Broker Cloud Service creates the carrier and uses this carrier on the order.
- does not specify a `ship_via`, Oracle Retail Order Broker Cloud Service uses the default carrier you specify at the **Preferences** screen.

Default carriers for other order types:

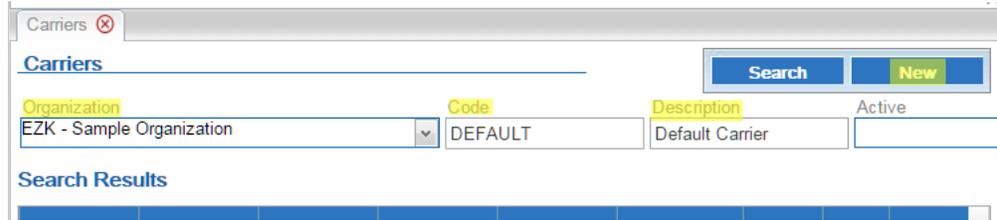
- For a pickup order, Oracle Retail Order Broker Cloud Service uses the default PICKUP carrier it creates automatically, regardless of whether a `ship_via` is passed in the Submit Order message.
- For a ship-to-store order, Oracle Retail Order Broker Cloud Service uses the default SHIP2STORE carrier it creates automatically, regardless of whether a `ship_via` is passed.

The following steps are required to set up the default carrier:

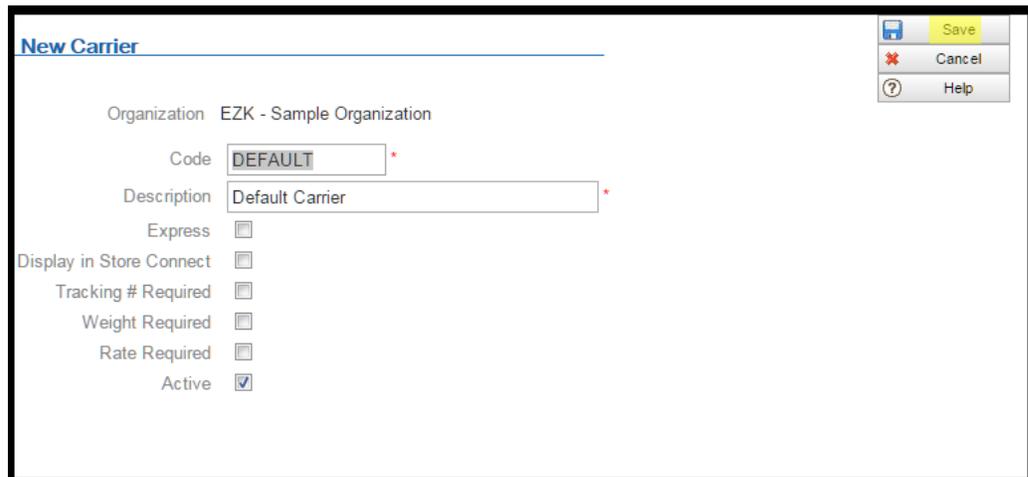
1. Select **Systems > Carriers**.



- At the **Carriers** screen, select your organization if necessary and, optionally, enter a *Code* and *Description*. If you do not enter them here, you can enter them at the **New Carrier** window. Select **New**.



- At the **New Carrier** window, complete any additional fields and select **Save**.



For more information: See the **Carriers** screen in the Online Help.

Setting up preferences for your organization

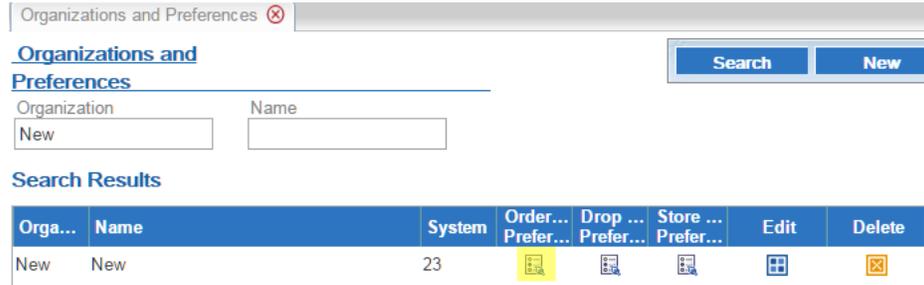
About preferences: Use the **Preferences** screen to set rules governing locate item searching and order assignment. You can set preferences at the organization, location type, and location level.

Saving again after running imports: After you import locations, products, system products, and product locations, you will need to reopen the **Preferences** screen, make any desired updates, and select **Save** to have your preferences apply to all locations. See [Scheduling imports](#) on page 1-15 for more information.

- Select **Locations > Organizations and Preferences**.



- At the **Organizations and Preferences** screen, select the *Order Broker Preferences* icon () for your organization.



- At the **Preferences** screen:
 - Specify basic Routing Engine options, including whether to use the Proximity Locator, the default distance to use when searching for a location, and whether to use probability rules and zone fulfillment.
 - At the **Order Broker Settings** tab:
 - * Specify whether to group shipment locations in responses to LocateItems requests for delivery or retail pickup orders, simply indicating whether the requested merchandise is available for shipment rather than listing locations in the LocateItems response.
 - * Indicate whether to support splitting orders or lines, or process partial status updates for order lines.
 - * Specify the maximum number of locations to return in a LocateItems response.
 - * Set up the criteria for the Routing Engine to use when selecting locations, including proximity, on-hand count, location priority, and additional, optional criteria.
 - * Specify the default unfulfillable location (set up through [Creating the default unfulfillable location](#) on page 1-10).

Setting up preferences for your organization

- * Specify the default carrier (set up through [Setting up a default carrier and, optionally, additional carriers](#) on page 1-11).

- At the **Fulfillment** tab:

- * Specify whether a location or location type supports picking, delivery (shipping), retail pickup (transfer), or ship-to-store orders, and whether backorder processing is available.
- * Specify the priority to use for order assignment, and the maximum number of orders to assign per day.

- * At the organization level, you also specify the maximum number of times to reassign (“reshop”) a delivery or retail pickup order if it is rejected by the assigned fulfilling location.

The screenshot shows the 'Organizations and Preferences' window for 'EZK - Sample Organization'. The 'Whs - EZK warehouse' is selected in the tree view. The 'Preference Options' section includes:

- Use Proximity Locator: Yes No Not Defined
- No Offline Response Action:
- Fulfillment**
 - Pickup Available: Yes No Not Defined *
 - Shipping Available: Yes No Not Defined *
 - Transfer Available: Yes No Not Defined *
 - Backorder Available: Yes No Not Defined *
 - Ship To Store Available: Yes No Not Defined *
 - Location Priority: *
 - Maximum Daily Orders: is Unlimited Not Defined

For more information: See the **Preferences** screen in the Online Help for complete field descriptions and background.

Important: You need to set all Order Broker preferences at the organization level before integrating any external systems with Oracle Retail Order Broker Cloud Service. See the description of the **Preferences** screen for complete information on setting preferences.

Preference overrides: Optionally, you can set up overrides at the order type and system level for the Routing Engine to use when searching for fulfilling locations. For example, you can have the Routing Engine sort locations for pickup orders by proximity, while it sorts locations for delivery and retail pickup orders by available quantity. Unless you set up overrides, each level “inherits” the settings from the **Preferences** screen. See the **Order Broker Preference Overrides** screen in the Online Help for more information.

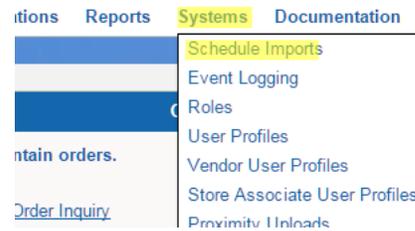
Scheduling imports

About imports: The automated import process enables you to import and update locations, products, system products, product locations, and product barcodes from an integrated system.

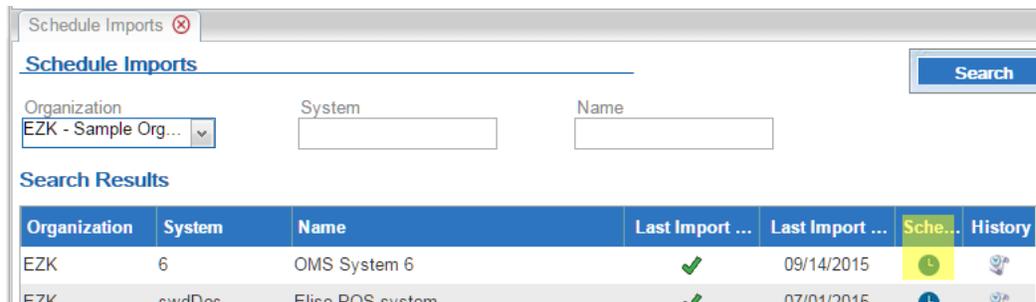
Import from default system first: Because you need to create product records in the default system before you can create system product records in any other systems, it is important that you run the import for the default system before the other systems.

Processing steps: The import checks the *Product Import Files* folder specified at the **Tenant - Cloud** screen for a pipe-delimited file containing each type of information for import (location, product, system product, product location, and product barcode), and uses the records in these files to create or update the related records in the Oracle Retail Order Broker Cloud Service database. The cloud administrator specifies the locations of these folders. Contact your Oracle representative for more information.

1. Select **System > Schedule Imports**.



2. At the **Schedule Imports** screen, select the schedule icon (🕒) for a system.



3. At the **System Import Schedule** screen:

- Select the *Enabled* flag if it is not already selected.
- To schedule the import, select each day of the week when the import should run, or select *Daily* to run the import every day, and enter the time in HH:MM format when the import should run on selected days.
- To run the import on demand, select the *Run Now* flag.
- Optionally, change the *Days to Keep Errors* setting to any number from 1 to 99.

- Select **Save**.

Schedule Imports System Import Schedule

System Import Schedule

Organization EZK - Sample Organization
System 6 - OMS System 6

Confirm Organization Default System is scheduled to execute prior to non-Organization Default Systems.

Schedule Save

Enabled

Days to keep errors 7 *

Schedule Interval

Day of Week Daily Sunday Monday Tuesday Wednesday Thursday Friday Saturday

Time 12:00 *

Last Run

Date 09/14/2015 12:00 PM

Run Now

Last Updated

Date 09/17/2015 01:40 PM

Important: Oracle recommends that you schedule imports daily at a time when demands on the system are limited, and when it does not interfere with the database backup, and that you do not schedule more than one import at a time against the same database.

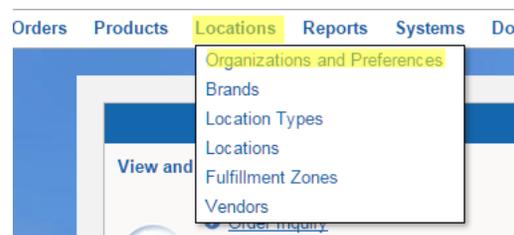
For more information: See the **Order Broker Routing Engine Overview** in the Online Help for a process overview, and see **System Import Schedule** in the Online Help for file layouts, file naming conventions, and mapping details.

Mapping from integrating systems: Consult the integrating system's documentation and complete the **System Import Schedule** screen for systems that support the import process, including CWSerenade.

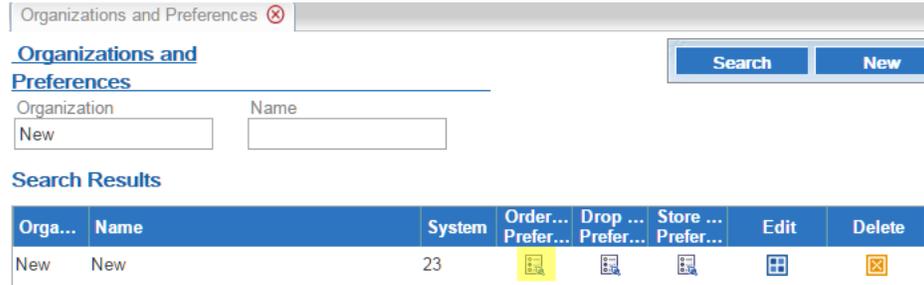
Adjust and save preferences

After importing locations, products, system products, and product locations, you need to return to the **Preferences** screen, make any necessary adjustments, and select **Save** again to apply the preference settings. You also need to save your preference settings after creating a new location to have the settings apply to each new location.

1. Select **Locations > Organizations and Preferences**.



- At the **Organizations and Preferences** screen, select the *Order Broker Preferences* icon () for your organization.



At the **Preferences** screen, make any necessary changes at the organization, location type, or location type level, and select **Save**.

Setting up web service authentication

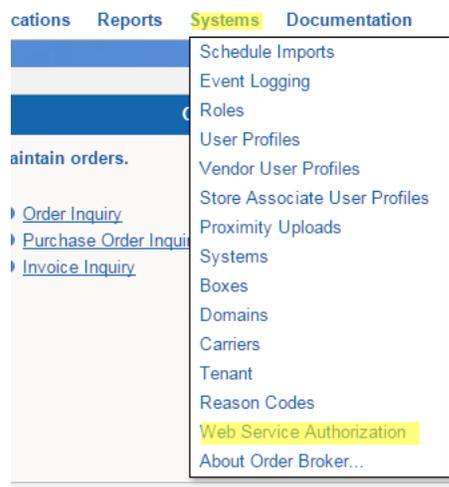
About web service authentication: By setting up and requiring user IDs and passwords for web services, you confirm that Oracle Retail Order Broker Cloud Service authenticates the identify of the system submitting web service messages. If authentication is required and Oracle Retail Order Broker Cloud Service receives a web service request message without a valid web service user and password, the request is refused with an error: *Inbound Message failed validation*.

The three web services requiring authentication are:

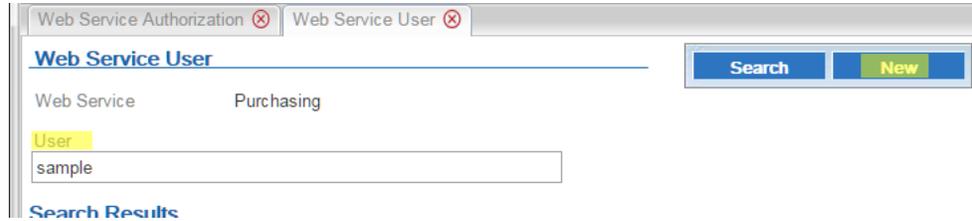
- *Discovery:* Requests include location and system discovery, so an integrating system can obtain a list of locations or systems in Oracle Retail Order Broker Cloud Service.
- *Locate:* Includes all requests related to the Routing Engine.
- *Purchasing:* Includes all requests related to the Supplier Direct Fulfillment module.

To set up users and passwords for web service authentication:

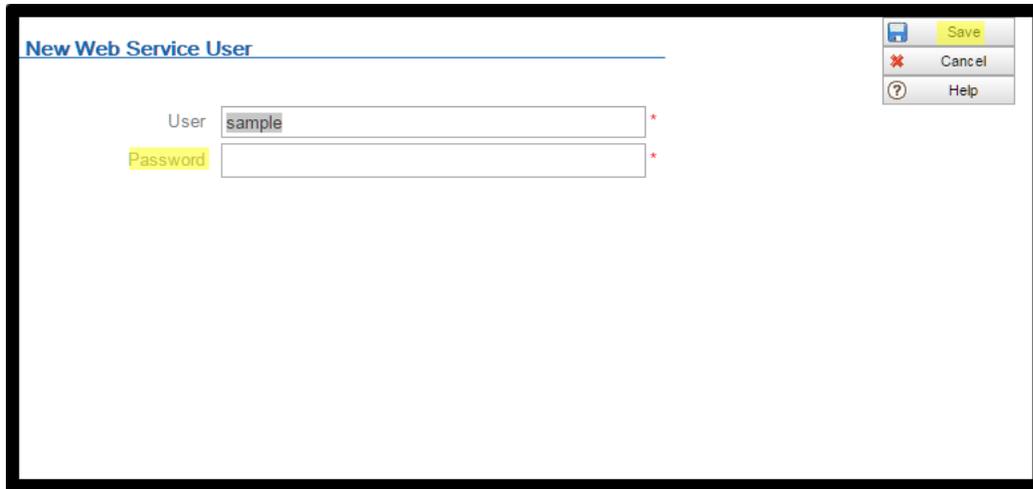
- Select **Systems > Web Service Authorization**.



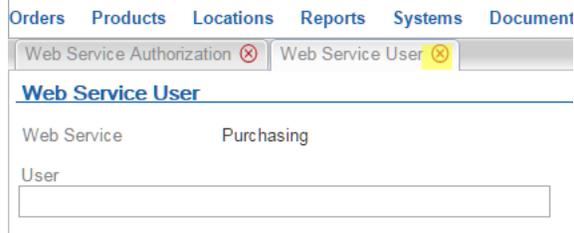
- At the **Web Service Authorization** screen, select the *Edit* icon () for a web service you will be using.
- At the **Web Service User** screen, enter a *User* name to use for web service authentication and select **New**.



- At the **New Web Service User** window, enter the *Password* for the user and select **Save**.



- Close the **Web Service User** screen when you have finished creating each web service user that an integrating system will use to authenticate web service messages.



- At the **Web Service Authorization** screen, select the *Auth Required* icon to change it from locked to a green check mark.

In the image below, the **Purchasing** web service is locked and the **Discovery** and **Locate** web services are checked.

The screenshot shows a window titled "Web Service Authorization" with a search bar and a dropdown menu for "Auth Required". Below the search bar is a "Search Results" table with three rows: Discovery, Locate, and Purchasing. The Discovery and Locate rows have a green checkmark in the "Auth Required" column, while the Purchasing row has a yellow padlock icon.

Web Service	Auth Required
Discovery	<input checked="" type="checkbox"/>
Locate	<input checked="" type="checkbox"/>
Purchasing	<input type="checkbox"/>

7. Repeat the steps above for each web service that you will be using.

For more information: See the **Operations Guide** for more information on supported web services.