Oracle® Retail Order Broker Cloud Service 19.0

Administration Guide

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Oracle® Retail Order Broker Cloud Service Administration Guide, Release 19.0

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Preface

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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• *Oracle Retail Order Broker Cloud Service Store Connect Online Help*

See the

https://www.oracle.com/documentation/retail.html

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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.
italic	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.

1

Setting Up Data

Purpose: Follow the steps below to set up data for the Routing Module as part of Order Broker 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

- Changing the time zone for screens, reports, emails, and order update history

> **Note:** For a cloud implementation, Oracle staff need to make sure that any external URLs are added to the proxy server's white list.

In this chapter:

Before You Start

Before you begin configuration of Order Broker. you need:

- **URL:** The URL to use when logging into Order Broker.

- **Default user profile:** A default admin user profile for you to use when completing configuration in Order Broker, including creating additional users, configuring systems, setting preferences, and importing data.

Contact your Oracle representative for the user ID of the default admin user. This user needs to exist in both Order Broker and Oracle Identity Cloud Service (IDCS).

You will need to assign the *Default Shipping System* to the user profile once you have completed these configuration steps below.

- New install: You need to create all users in IDCS to map to all users in Order Broker, including Order Broker users, Store Connect users, vendor users, and web service users. See Creating User Profiles for more information.

- Upgrade to release 19.0 or higher: You need to create all users in IDCS before users can begin using Order Broker, including Order Broker users, Store Connect users, vendor users, and web service users, if their records do not already exist in IDCS. Users can use the *Can't sign in?* link at the login page to set their passwords.

See Creating User Profiles for more information on creating users.

Logging in for the First Time

Use IDCS: You need to select the *Use IDCS* flag at the Tenant-Admin screen if it is not already selected. To display this screen, select **Systems > Tenant** while logged in as the default admin user. If the flag is not already selected, select it now.

Creating an Organization

About organizations: The organization is the second level in the Order Broker hierarchy, below the tenant. All systems are assigned to a single organization, and item searching, order creation, and drop ship fulfillment takes place within the organization. You need at least one organization.

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

1. Select **Organizations and Preferences** at the home screen.
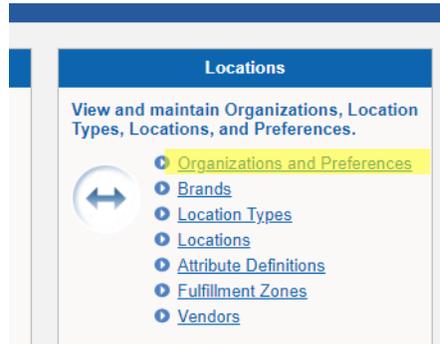
2. At the **Organizations and Preferences** screen:

    -   Enter the organization code in the *Organization* field. The organization code can be 1 to 10 positions long, can include spaces and special characters, and must be unique within Order Broker.

    -   Enter the name for the organization in the *Name* field. The name can be from 1 to 35 positions long, and can include spaces and special characters.

    -   Click **New**.

    -   At the **New Organization** screen:

        *   Confirm your entries in the *Organization* and *Name* fields.

        *   If ship-for-pickup orders will not be enabled, set the *Enable Ship For Pickup* option to **No**.

Important: See the Routing Engine Overview in the Operations Guide or the online help for considerations on enabling ship-for-pickup.

> * Complete the **Data Formats** fields to control the formats for reports, forms, and system-generated emails.

> * Click **Save**.

Creating the Default System

About systems: Each system in Order Broker represents an application, such as Oracle Retail Order Management System Cloud Service, CWDirect, or Xstore, that shares inventory information via Order Broker 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 created 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.

> **Note:** The system flagged as the Vendor Default should not be the default system for the organization.

1. Select **Systems > Systems** to advance to the **Systems** screen.
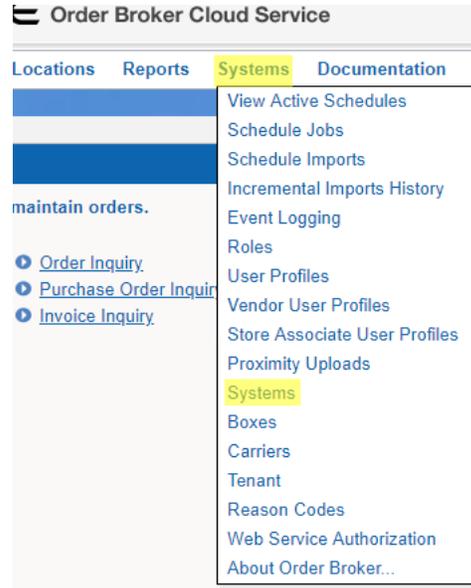
2. At the **System** screen:

3. Select an organization from the *Organization* drop-down box.

   - 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.

   - For Order Management System or CWDirect, the system code should be the same as the company number, without padding zeros.

   - Optionally, 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.

   - Click **New**. If:

      * The system already exists in the organization, or if you did not select an organization or enter a *System* code, Order Broker displays an error message;

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

Note:

- If you click **Cancel** at the **System** screen after clicking **New**, the system is not created.

- The *Organization Default* flag is selected when you create the first system for an organization, and the flag cannot be unselected at this time. To designate a different system as the default, you need to create another system and flag that system as the default; this unflags the first system.

Order Management System or CWDirect integration: The code for the Order Management System or CWDirect system must match the setting of the *OROB System (K50)* or *Locate System (K50)* system control value. However, names for systems do not need to be the same as the Order Management System or CWDirect company descriptions.

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

Creating Each Additional System that will Integrate with Order Broker

Follow the steps below to create:

- A default vendor system, if you will use the Supplier Direct Fulfillment module.

  > **Note:** The system flagged as the Vendor Default should not be the default system for the organization.

- The Store Connect system, if you will use the Store Connect module.

- Each additional system, such as a POS system.

1. Select **Systems** > **System**.
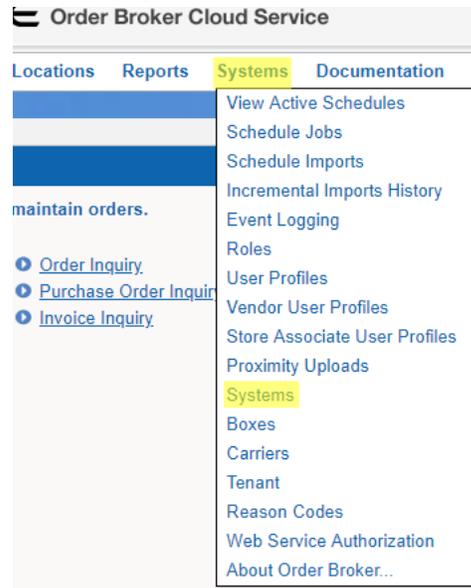
2. At the **System** screen, select your organization from the *Organization* drop-down box.
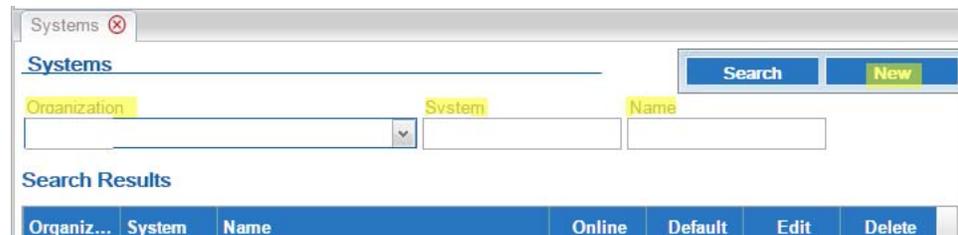
3. Enter a system code in the *System* field. System codes can be 1 to 10 positions in length, can include spaces and special characters, and must be unique within the organization.

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, Order Broker 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:** 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 User Profiles

In this section:

- Before You Start: Background on IDCS Integration

- IDCS User Synchronization

    - Required Setup in Order Broker for Identity Cloud Service User Synchronization

    - User Creation in IDCS

    - Importing Users through the Identity Cloud User Synchronization Job

    - Creating Vendor Users

    - Creating Store Associate Users

- Scheduling the Identity Cloud User Synchronization Job

Before You Start: Background on IDCS Integration

Background on user mapping with IDCS and user setup:

- Authentication for all users takes place using the password defined for the user in Oracle Identity Cloud Service (IDCS); however, if OAuth authentication is enabled, the user ID defined in Order Broker for a Web Service user maps to a client ID defined in IDCS, and IDCS defines a token for web service authentication, rather than a password.

About OAuth: OAuth is a standard for web service authentication through the use of access tokens rather than passwords.

- Role assignments in Order Broker control the user's screen and feature authority at Order Broker, Store Connect, and Vendor Portal screens. You can change the role assignments for existing users through the **Role Wizard**. See the *Role Wizard* in the online help for more information.

- No role authority is required for web service users.

- Since Order Broker requires a lower case user ID, you should create lower case user IDs in IDCS for validation into Order Broker.

- When the user logs into Order Broker or Store Connect, the user ID entered at the login screen must match the user ID in IDCS. If the user ID in IDCS is the Cloud Service User ID, then the user enters the Cloud Service User ID at the login screen.

- User ID matching is case-sensitive, whether through the Order Broker user ID or the Cloud Service User ID.

- Order Broker, Store Connect, and vendor users can use the *Can't sign in?* link at the login page to reset their passwords.

Multiple omni-channel systems: You can use the same IDCS user records for multiple omni-channel systems. You can use the Cloud Service User ID as a cross-reference to Order Broker users and Store Connect users, but this option is not available for Vendor Portal users or web service users. You can also use the same user ID for any user type, except that Order Broker requires a lowercase user ID, as noted above.

Although Order Management System uses an uppercase user ID, user validation is not case-sensitive, so a lowercase user ID from IDCS passes validation.

Authentication for outbound web service requests: Use IDCS to set up users for the authentication of web service requests across omni-channel systems, such as Order Management System Cloud Service or Customer Engagement Cloud Services if the omni-channel systems use the same instance of IDCS.

IDCS User Synchronization

About identity cloud service user synchronization: Use IDCS to create users for omnichannel applications, including Order Broker and Oracle Retail Order Management System Cloud Service. Users that exist in IDCS and are configured there for Order Broker access are then created in Order Broker:

- Through the **Identity Cloud User Synchronization** job, available through the **Schedule Jobs** screen, or,

- Automatically, when the user logs into Order Broker.

Users are created in Order Broker with the default authority defined from IDCS, described below.

If you need to create Store Associate users and/or Vendor users in addition to Order Broker users, see Creating Vendor Users or Creating Store Associate Users, below.

The **Identity Cloud User Synchronization** job does not delete, deactivate, or update authority for any user records, including vendor users and store associates, in Order Broker. Use the related screen in Order Broker to update users once they have been created.

Web service authentication: The **Identity Cloud User Synchronization** job does not create web service users. See Setting up Web Service Authentication for information on creating web service users.

Required Setup in Order Broker for Identity Cloud Service User Synchronization

The following steps describe creating Order Broker (retailer) user profiles.

Setup at the Tenant (admin) screen: Complete the **Identity Cloud Service** settings at the **Tenant** screen:

• **User IDCS:** This flag must be selected.

• **Client ID:** The Name identifying Order Broker as an application in IDCS. Typically formatted as `RGBU_OBCS_ENV_APPID` where `OBCS` identifies Order Broker and `ENV` identifies the environment, such as production.

• **Endpoint URL:** The URL to use for requests to IDCS.

• **Client Secret:** The client secret assigned by IDCS and used for authentication. Select **Show Secret** in the Configuration tab in IDCS to display the secret.

See the **Tenant (admin)** screen in the online help for more information.

About the default user: The `default` user is created automatically, with a user name of Identity Cloud Default User. This is not an actual user record that can log into Order Broker; instead, it serves as a template for creating actual users. You cannot delete the `default` user.

Configuring the default user: Before creating additional, actual users, update the `default` user with the settings to apply to actual users when they are created in Order Broker:

• Role assignments with a *Role Type* of **Retailer**, controlling the default authority to Order Broker screens. See the Role Wizard for more information.

• The *Default Shipping System* that controls system product code to display as the **Item** # at the **Order** screen, as well as the organization to default at other screens.

Multiple groups of users: You can modify the configuration of the `default` user if you will import multiple groups of users into Order Broker. For example, you could first configure the `default` user with just order inquiry and maintenance authority, import a group of users, and then reconfigure the `default` user with different authority for the next group of users.

User Creation in IDCS

You can use the following process in IDCS to create users and control their attributes through group assignment, using the application record in IDCS for Order Broker, The application record typically has a *Name* such as RGBU_OBCS_<ENV>_APPID, where ENV represents the environment.

• Create one or more groups to use for assignment of roles to users. For example, create an ob_users group to use for creation of regular users, and an ob_admin group to use for creation of admin users. Assign the group to the appropriate application role in IDCS: either OBCS_Admin or OBCS_User.

• Create each user in IDCS, specifying the user's first name, last name, user name, and email address.

   About defining the user name in IDCS:

- The user name be lower case.

- The user name in Order Broker cannot exceed 10 positions, so the name assigned in IDCS will be truncated in Order Broker f it exceeds 10 positions. If multiple users imported from IDCS share the same first 10 positions of the user name, the import process will use the first 9 positions and assign a unique character as the 10th position. For example, if user names created in IDCS are joanneohjnson and joannejohnston, the first user created in Order Broker is joannejoh1, and the second user created in Order Broker is joannejoh2.

   * Assign each created user to the appropriate group.

   * Assign each group to the Order Broker application in IDCS.

   * Assign each user to the appropriate application role in IDCS.

   * Assign or reset the password for each user in IDCS. This triggers an email to the email address specified for the user, who can log in using either the user name defined in IDCS if it does not exceed 10 positions, or the email address.

Note: If the user logs in after configuration in IDCS, this creates the user record in Order Broker; otherwise, the record is created through the import job, described below.

Importing Users through the Identity Cloud User Synchronization Job

After completing the required setup describe above, Select **Systems > Schedule Jobs** and run the **Identity Cloud User Synchronization** job to import the new users from IDCS.

Each new user is created in Order Broker with the application role assignments from IDCS:

• The user ID, name, email address, and cloud service user ID are from IDCS; however, if the user ID is longer than 10 positions or is a duplicate of an existing user ID of 10 positions, it is truncated as described above.

• The admin flag is selected if the user is assigned to the OBCS_Admin application role in IDCS.

• The role-based authority is from the `default` user's current settings.

After creation: Once users are created in Order Broker, you can maintain them; for example, you can change the email address, date formats, user name, authority, and default shipping system for Order Broker users, and you can flag a user as inactive so that the user cannot log in; however, this does not update the user's record in IDCS. You can also delete the users from Order Broker, although this does not delete the corresponding records in IDCS, and the user would be created again in Order Broker the next time the synchronization job runs.

> **Note:** The synchronization job does not update existing users in Order Broker.

Creating Vendor Users

If you also need to create vendor users in Order Broker, use the following process:

- In Order Broker, create one or more vendors. See the **Vendors** screen in the online help for more information.

- In Order Broker, create one or more role assignments with a *Role Type* of **Vendor**, controlling the default authority to Vendor Portal screens. Select the *Identity Cloud User Default* flag at the **Specify Role Name** step of the **Role Wizard**.

- In Order Broker, run the **Identity Cloud User Synchronization** job to create the vendor user groups in IDCS corresponding to each vendor created in Order Broker. The vendor user group is created as <system>|<vendor>, where <system> is the system code identifying the default vendor system, and <vendor> is the code identifying the vendor. The synchronization job performs this creation in IDCS each time it runs based on the existing roles in Order Broker.

- In IDCS, assign each vendor user group to the OBCS_Vendor_User application role for the Order Broker application.

- In IDCS, create each vendor user and assign it to the vendor user group associated with the same vendor. See User Creation in IDCS for background on creating the user in IDCS and notes about defining the user name.

> **Note:** Assign the vendor user only to the vendor user group associated with the correct vendor. Order Broker does not support assigning a vendor user to more than one vendor.

- Run the **Identity Cloud User Synchronization** job again to import new vendor users from IDCS. The vendor users are assigned role-based authority based on the vendor role types set up through the **Role Wizard** with the *Identity Cloud User Default* flag selected.

> **Note:** The synchronization job does not update existing vendor users in Order Broker.

Creating Store Associate Users

If you also need to create store associate users in Order Broker, use the following process:

- In Order Broker, create the default Store Connect system for your organization. See the **Systems** screen in the online help for more information.

- In Order Broker, create one or more role assignments with a *Role Type* of **Store Associate**, controlling the default authority to Store Connect screens. Select the *Identity Cloud User Default* flag at the **Specify Role Name** step of the **Role Wizard**.

- In Order Broker, run the **Identity Cloud User Synchronization** job to create store user groups in IDCS for each system that is flagged as the Store Connect default for an organization. The user group is named STC-SYSTEM, where SYSTEM is the system code of the Store Connect default system in your organization. The synchronization job performs this creation in IDCS each time it runs based on the existing roles in Order Broker.

- In IDCS, assign each store user group to the OBCS_Store_User role.

- In IDCS, create each store associate user and assign it to the store user group associated with the appropriate system. See User Creation in IDCS for background on creating the user in IDCS and notes about defining the user name.

- In Order Broker, run the **Identity Cloud User Synchronization** job again to import new store associate users from IDCS.

- Use the **Edit Store Associate User Profile** screen to finish configuration of the store associate user, including assigning one or more locations and flagging the user as active. The *Requires Location* field at the **Store Associate User Profiles** screen indicates that the store associate user requires location assignment.

> **Note:** The synchronization job does not update existing store associate users in Order Broker.

Scheduling the Identity Cloud User Synchronization Job

Schedule the **Identity Cloud User Synchronization** job to run daily.

Assigning the Default Shipping System to the Admin User Profile

Follow the steps above under Creating User Profiles on page 1-8 to assign the *Default Shipping System* to the Admin user profile. The *Default Shipping System* assigned to a user indicates the system product code to display on Order Broker screens.

> **Note:** The *Default Shipping System* is not a required field at the User Profile screen if you have not yet created any systems in Order Broker.

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, and only if you are not using the Oracle Maps Cloud Service. 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, and if you are not using the Oracle Maps Cloud Service, 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 or the Operations Guide for a discussion of proximity locator searching and preferences, including the use of the Oracle Maps Cloud Service.

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**. The location type is created.

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, Order Broker 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, Order Broker creates the carrier and uses this carrier on the order.

*   does not specify a `ship_via`, Order Broker uses the default carrier you specify at the **Preferences** screen.

Default carriers for other order types:

*   For a pickup order, Order Broker 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, Order Broker 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.**

2. 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**.
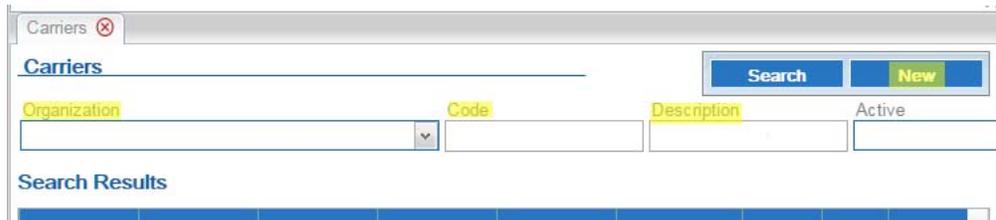
3. At the **New Carrier** window, complete any additional fields and select **Save**.
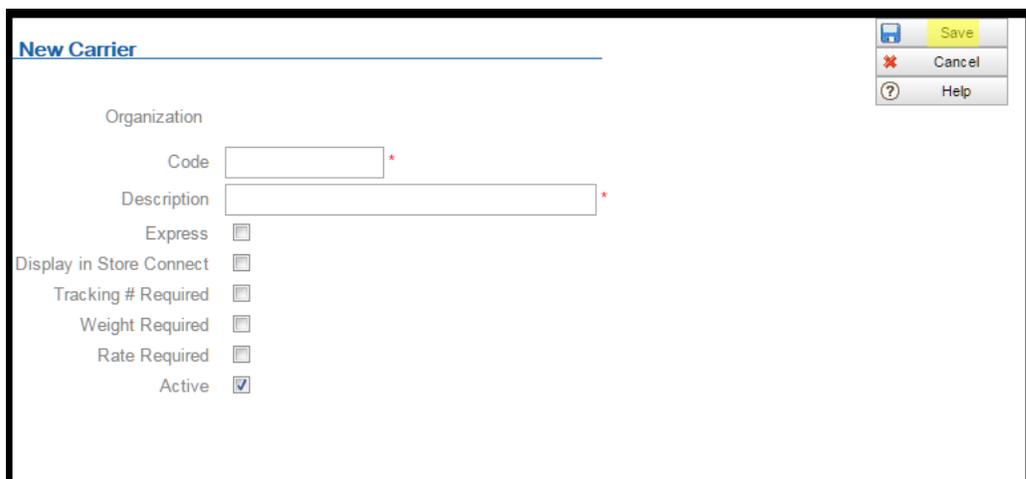
For more information: See the **Carriers** screen in the Online Help.

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 1-17 for information on identifying the default unfulfillable location for the Routing Engine.

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 Jobs on page 1-21 for more information.

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

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

3. 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.
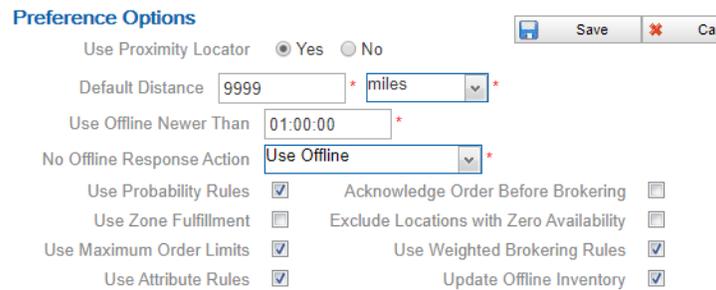
- At the **Order Broker Settings** tab:

    * 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.

    * Specify the default unfulfillable location (set up through Creating the Default Unfulfillable Location on page 1-17). This location needs to have all of the Yes/No options under **Fulfillment** (*Backorder Available, Pickup Available, Delivery Available,* and *Retail Pickup Available,* or *Ship For Pickup Sourcing* and *Ship For Pickup Receiving/Pickup*) set to **No**.

* Specify the default carrier (set up through Setting up a Default Carrier and, Optionally, Additional Carriers on page 1-15).

- At the **Fulfillment** tab:

  * Specify the fulfillment types supported. Note that the options here differ based on whether ship-for-pickup orders are supported.

  * Specify the priority to use for order assignment, and the maximum number of orders to assign per day.

  * At the organization level, specify the maximum number of times to reassign ("reshop") an order if it is rejected by the assigned fulfilling or sourcing location.

  * If your organization supports ship-for-pickup orders, specify the sourcing distance for the Routing Engine to use when shopping for sourcing locations.

* Also at the **Fulfillment** tab, complete the settings related to automatically canceling unclaimed pickup or ship-for-pickup orders.

- At the **Standard Brokering** tab, complete the fields that control brokering orders if you do not use Weighted Brokering.

- At the **Weighted Brokering** tab, complete the fields that control brokering orders if you do use Weighted Brokering.

| Order Broker Settings | Fulfillment | Standard Brokering | Weighted Brokering |

Maximum Order Splits 2 * 0 is Unlimited

Weighted Percentages

Labor Cost 0 *

Gross Margin 0 *

Proximity 0 *

On Hand Count 100 *

Sales Velocity 0 * Priority Largest To Smallest *

Total Weights 100

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 Order Broker. 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 Jobs

Use the **Schedule Jobs** screen to create schedules for jobs:

- Data Hygiene:
  - Completed Order Private Data Purge
  - Daily Clean Up
- Exports:
  - Fulfilled Inventory Export
  - Probable Quantity Export
  - Sales Order Data Extract
- Imports:
  - Identity Cloud User Synchronization
  - Incremental Inventory Import
  - Product Import
- Orders:
  - Auto Cancel Unclaimed Pickup Orders

- Email Notifications

See the **Schedule Jobs** screen in the online help for more information.

> **Note:** Do not attempt to schedule jobs before creating systems.

About 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.

> **Note:** If you are using the Oracle Maps Cloud Service instead of the proximity upload to support proximity locator searching, you should complete Oracle Maps Cloud Service configuration before importing locations, so that the latitude and longitude of each location can be assigned as it is created. Contact your Oracle representative for information on implementing the Oracle Maps Cloud Service.

Import from default system first? In order to create product records in the default system before you create system product records in any other systems, you need to run the import for the default system before the other systems.

Processing steps: If you use the File Storage API, the import checks the OROB-IMPORTS container in the FILE_STORAGE table for a pipe-delimited file containing each type of information for import (location, product, system product, product location, and product bar code). Otherwise, if you use secure FTP, the import checks the *Product Import Files* folder specified at the **Tenant - Admin** screen for the pipe-delimited files. The cloud administrator specifies the locations of these folders. See *Importing Items/Products, Inventory, Barcodes, and Locations into the Database* in the online help for background on the import process.

> **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.

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

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

Restart All

Use the **Reschedule All** option at the **View Active Schedules** screen to start all scheduled jobs and programs listed above. as well as:

- scheduled report generation

- polling of orders for Store Connect.

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.**

2. 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 or OAuth authentication for web services, you confirm that Order Broker authenticates the identify of the system submitting web service messages. Web service authentication is required. If Order Broker 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 web services requiring authentication are:

- *Admin:* Requests include Product Update, Location Update, and Location Detail.

- *Discovery:* Requests include location and system discovery, so an integrating system can obtain a list of locations or systems in Order Broker.

- *Locate:* Includes all requests related to the Routing Engine.

- *Private Data Request:* Includes requests to inquire on or delete private data.

- *Purchasing:* Includes all requests related to the Supplier Direct Fulfillment module.

- *Storage:* Includes all requests related to inquiring on, importing, exporting, or deleting files when you use the File Storage API.

- *Vendor:* Includes requests submitted by an integrated vendor using the Supplier Direct Fulfillment module.

IDCS: You also need to create each user in IDCS, where you set the user's initial password unless using OAuth.

To create users for web service authentication:

1. Select **Systems > Web Service Authorization**.
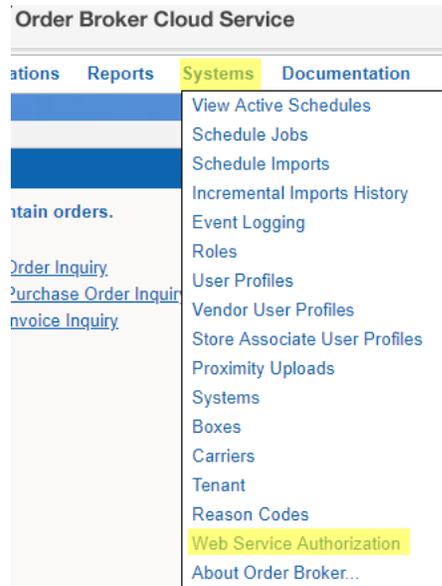
2. At the **Web Service Authorization** screen, select the *Edit* icon ( ) for a web service you will be using.

3. At the **Web Service User** screen, select **New**.

4. At the **New Web Service User** window, enter the *User* ID and select **Save**.

> **Note:** If you use OAuth for authentication of inbound web services, the User specified here is the IDCS Client ID that generates the OAuth token.

5. 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.

6. 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.