Oracle® Retail XBRi Cloud Services

Administration Guide

Release 16.0

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Value-Added Reseller (VAR) Language

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Oracle Retail XBR^i Cloud Services, Administration Guide, Release 16.0

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Preface

This Administration Guide describes user roles and privileges and how these are managed by the customer administrator.

Audience

This guide is for the following audiences:

- Customer administrators

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Related Documents

For more information, see the following documents in the Oracle Retail XBR*i* Cloud Services Release 16.0 documentation set:

- Oracle Retail XBRi Cloud Services Implementation Guide
- Oracle Retail XBRi Cloud Services Release Notes
- Oracle Retail XBRi Cloud Services Web User Guide
- Oracle Retail XBRi Cloud Services Administrator User Guide

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https://support.oracle.com

When contacting Customer Support, please provide the following:

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- Detailed step-by-step instructions to re-create
- Exact error message received
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Oracle Retail product documentation is available on the following web site:

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Conventions

Navigate: This is a navigate statement. It tells you how to get to the start of the procedure and ends with a screen shot of the starting point and the statement "the Window Name window opens."

```
This is a code sample
    It is used to display examples of code
```

1 Administrative Tasks

Overview

This chapter describes these common tasks performed by XBR^i customer administrators:

- XBR^i user roles and privileges and the processes for creating and managing users and groups
- Configuring for Master File Distribution

Comprehensive documentation on XBR^i administration is available in the *Oracle Retail XBR^i Cloud Services Administrator User Guide*, which is available in the Oracle Retail Library on the Oracle Technical Network (OTN), and which can also be invoked from within the Administration areas of XBR^i through online help.

Oracle Support

It is considered to be a best practice to have all Oracle Retail XBR^i Cloud Services support requests submitted through a single point of contact for that customer environment; the client designated administrator is usually designated to perform this role.

The link to use when submitting Service Requests (SR) is:

https://myhelp.oracle.com/app/home

Oracle XBR^i Cloud Services Core User Roles

In Oracle Retail XBR^i Cloud Service, you specify user access to the application by assigning a role to each user. A user can be assigned to one of four security levels, Administrator, Manager, Analyst and Read Only. A user's security level is set up in his or her user profile by the customer Administrator using the User Manager in the XBR^i cloud application.

Table 1.1 XBR^i User Roles

Role	Description
READ ONLY	This is a user role that will only have read only access to reports and documents, excluding Personal data, such as Customer Name, that identifies a specific individual. This data will be masked, unless the Administrator grants the user Personal data access. Read only users cannot create their own reports or customize existing reports. Read only users cannot create subscriptions. Read only users can only modify their own user preferences and have no access to modifying object or data security.
ANALYST	This is a user role that will have read only access to Shared Reports folders (based on object level security) and full access to the reports in their My Reports folders, excluding Personal data, such as Customer Name, that identifies a specific individual. This data will be masked, unless the Administrator grants the user personal data access. Analysts can create subscriptions only for distribution to themselves. Analysts can only modify their own user preferences and have no access to modifying object or data security.
MANAGER	This is an administrator role that has the same permissions and functionality as Admins, except for the access to user creation/management and assignment of data security filters, and access to Personal data, such as Customer Name, that identifies a specific individual. This data will be masked, unless the Administrator grants the user personal data access.

Role	Description
ADMINISTRATOR	This is an administrator role that will have full access to all objects in the customer owned folders, including Personal data, such as Customer Name, which identifies a specific individual. Admins will have write access to Shared Reports as well as full access to all users' My Reports folders in order to publish a report created by an analyst for all users. Admin users can create and manage other shared, reusable objects such as filters, prompts, and x-links. Admins can create and manage subscriptions for multiple recipients, including Master File Distribution. Admins can create new users, delete or deactivate users, or modify existing users' permissions. Admins can set object security and data security filters for other users. Any data security filters that are created for an admin user by XBRADMIN cannot be modified. Only Admin users can modify system preferences. Only Admin users have access to the Data Editor.

User Roles, Privileges, and Feature Access

The following table shows privileges and features assigned to users in XBR^i by user role.

Table 1.2 XBR^i **User Roles, Privileges, and Feature Access**

Privileges	Administrator	Manager	Analyst	Read Only
XBRi Privileges on Reports , Documents, and Dashboards				
Run Reports, Documents, and Dashboards	X	X	X	X
Edit Reports, Documents, and Dashboards	X	X	X	
Create Reports, Documents, and Dashboards	X	X		
XBRi Feature Access				
Smart Links	X	X	X	X
Watch List	X	X	X	X
Linking Reports	X	X	X	
Alerts	X	X	X	X
Controls/Exceptions	X	X	X	X
Video Linking	X	X	X	X
Case Management	X	X	X	X
Subscriptions	X	X	X	
Full Description Data View	X	X (if given by admin)	X (if given by admin)	X (if given by admin)
XBRi Administration				
User Management	X			
Lookup Management	X			
Smart Link Management	X			
Data Editor	X			
Controls / Exception Management – Targets	X	X		
Master File Distribution	X	X		

Privileges	Administrator	Manager	Analyst	Read Only
Oracle XBRi Mobile				
Access Mobile Application	X	X	X	X
Run Reports, Dashboards and Documents	X	X	X	X
Run Quick Lookups	X	X	X	X
Access and Generate Surveys	X	X	X	X

Create New Users and Groups

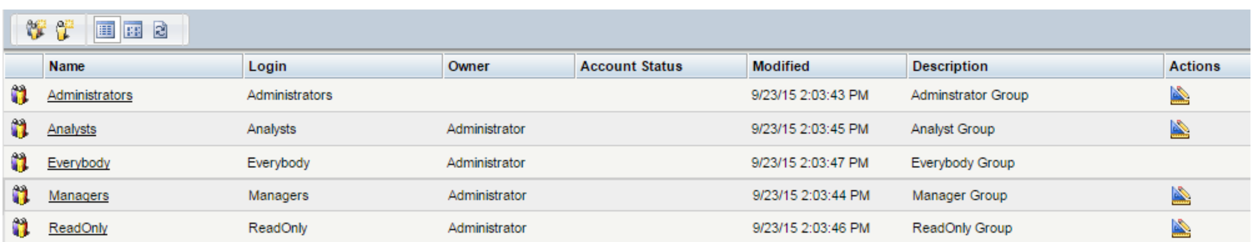
IMPORTANT! Only use a Customer Administrator account to create new users and groups.

The Customer Administrator must create accounts for XBR^{i} users to enable them to log into the application and to grant them access to the features and privileges appropriate to their role. When the user is created, that user is added by default to the Everybody group and to the User Type group that the administrator selects when creating the user. Oracle provides the Everybody group and the User Type groups, which cannot be modified. The Customer Administrator can create additional customizable groups and add users to them.

Creating a New User

To create a user:

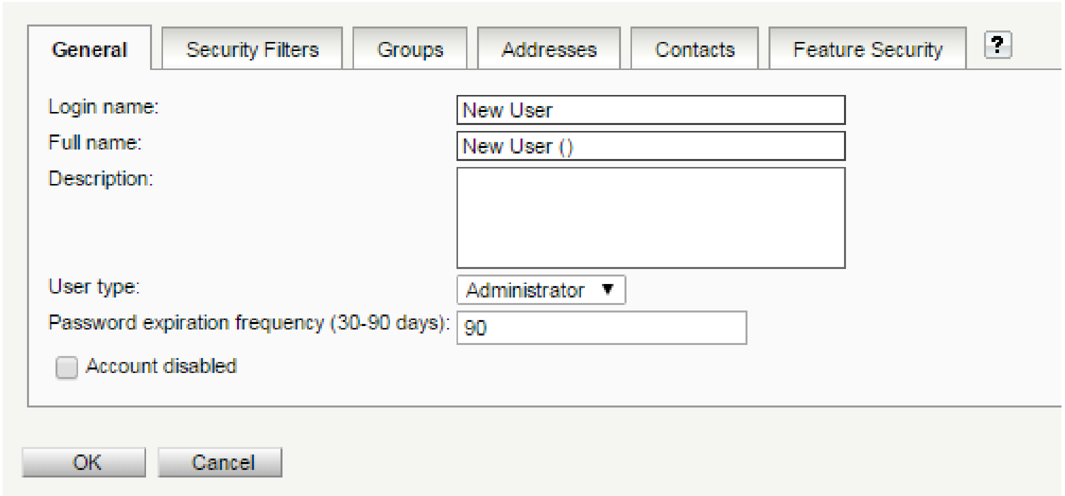
1. Log in to XBR^{i} as the Customer Administrator.
2. From the Admin menu, choose **User Manager**. This displays the User Manager, which lists the user groups.



Name	Login	Owner	Account Status	Modified	Description	Actions
Administrators	Administrators			9/23/15 2:03:43 PM	Adminstrator Group	
Analysts	Analysts	Administrator		9/23/15 2:03:45 PM	Analyst Group	
Everybody	Everybody	Administrator		9/23/15 2:03:47 PM	Everybody Group	
Managers	Managers	Administrator		9/23/15 2:03:44 PM	Manager Group	
ReadOnly	ReadOnly	Administrator		9/23/15 2:03:46 PM	ReadOnly Group	

User Manager

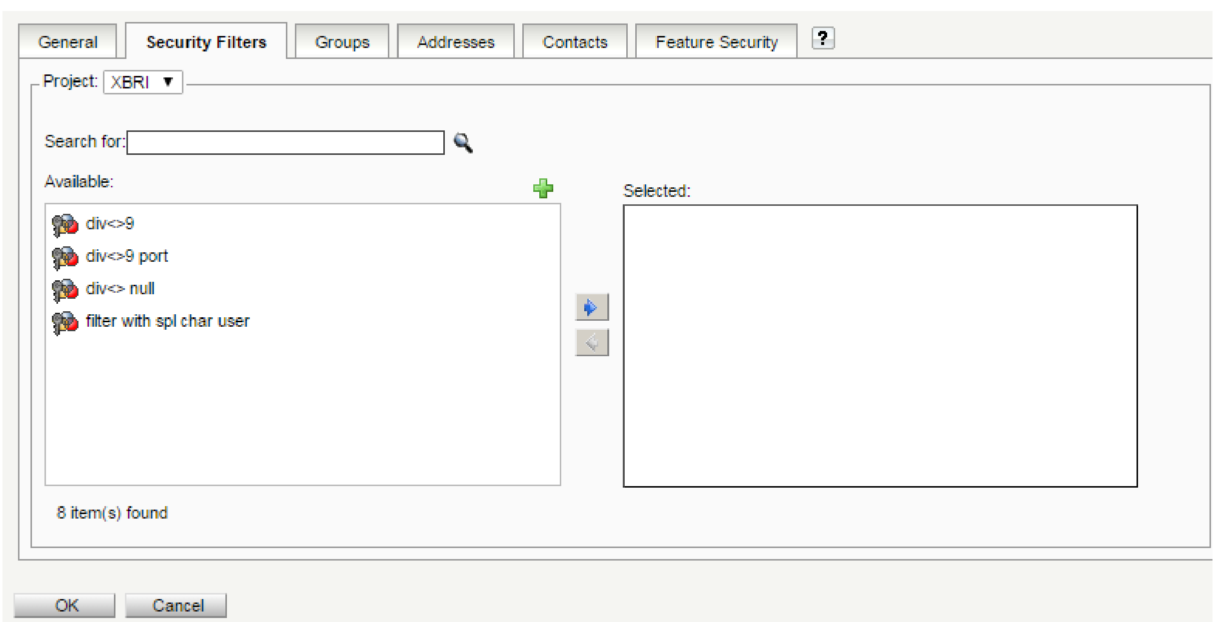
3. Click the **New User** icon  on the toolbar. This displays the User Editor.



User Editor – General

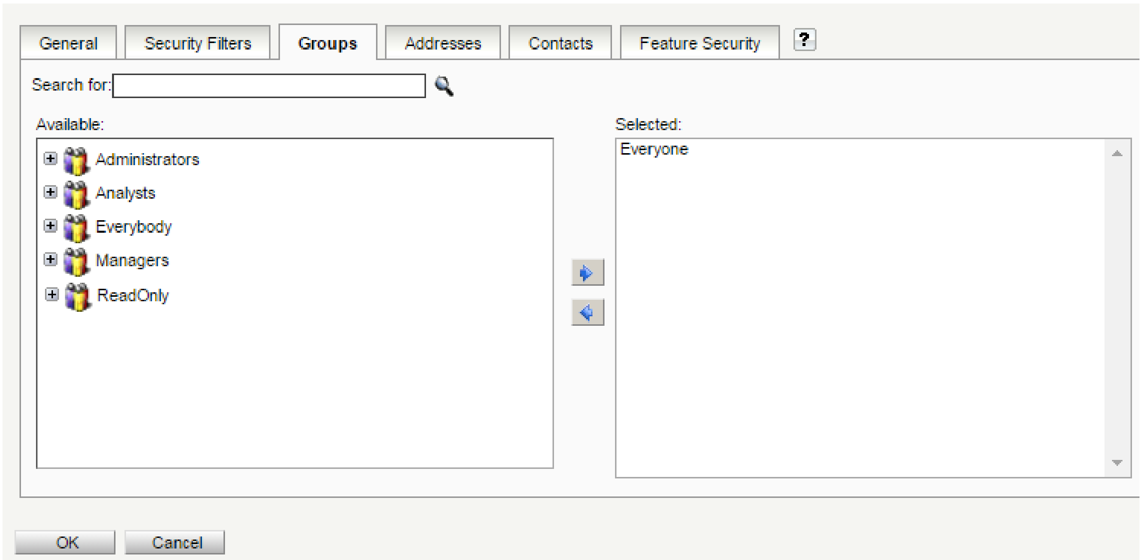
> **Note**: The Contacts tab is not currently used.

4. On the **General** tab, enter the following information:
   - Login name and Full name of the new user, and a Description. Note: The login ID is limited to 50 characters.
   - Set the Password expiration frequency.
   - Select a User Type from the drop-down list. This determines the privileges the user will have, for example on reports, documents and features, as defined in the Table 1.1 XBRi User Roles.
   - Make sure the **Account disabled** check box is cleared.
5. On the **Security Filters** tab, assign a security filter to the user. This restricts the data the user can see displayed in reports. In many cases you will need to create a new security filter for the user. (This step is optional).



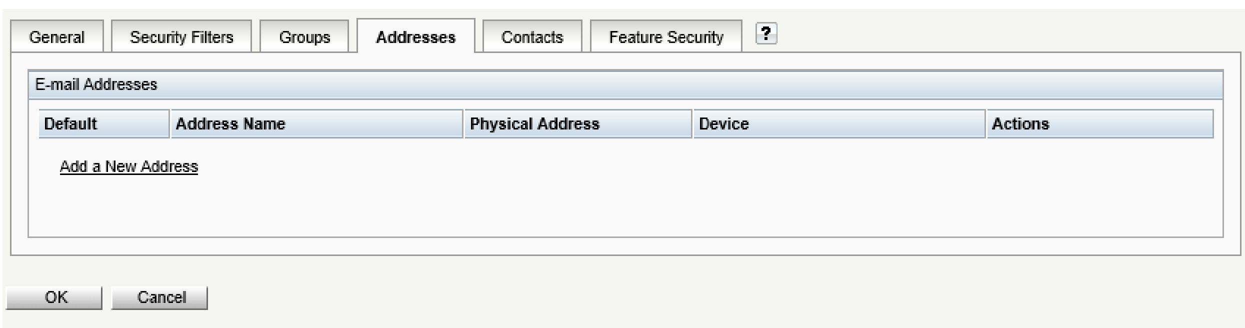
User Editor – Security Filters

6. On the **Groups** tab, select the group(s) to which you want to assign this user. The user inherits any features that are enabled for the group, and inherits any security filter restrictions from security filters assigned to the group to which he or she belongs. The user is automatically assigned to the group associated with the selected user type as well as the Everybody group. (This step is optional).



User Editor - Groups

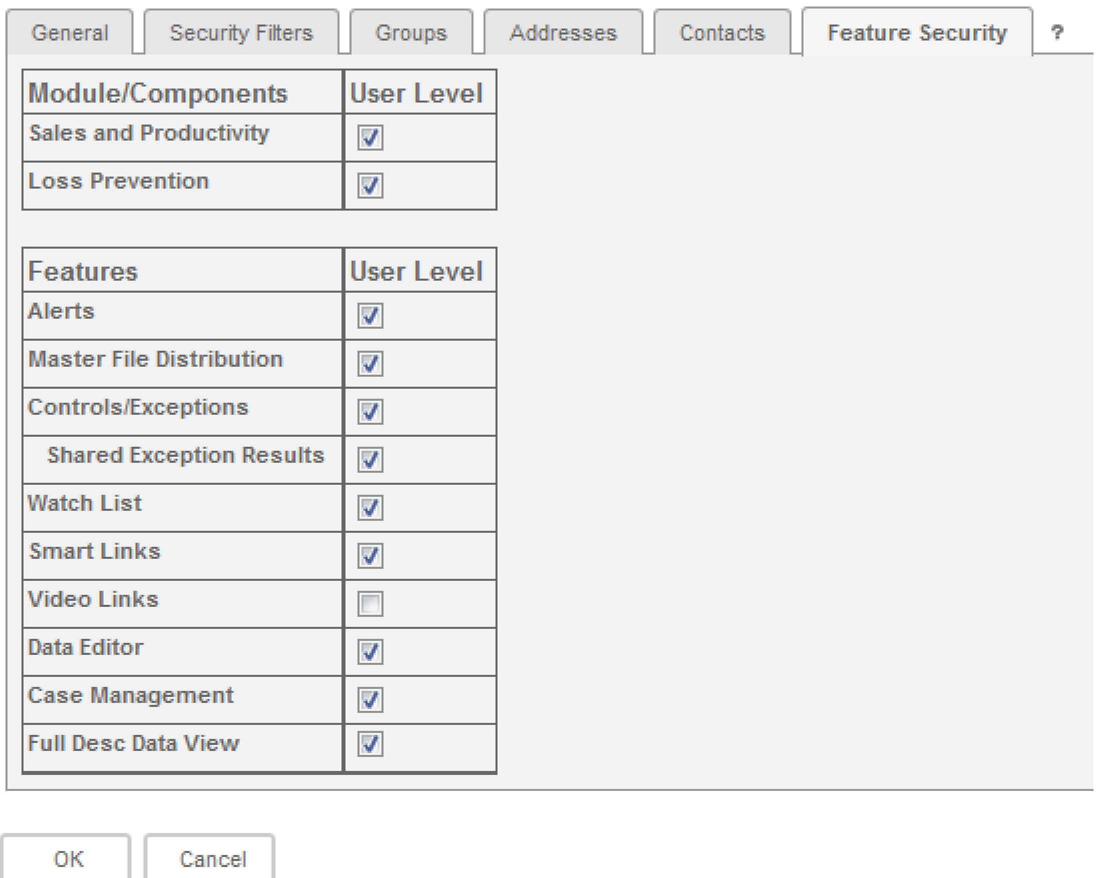
7. On the **Addresses** tab, add email addresses. At least one email address is required. These are used for delivering reports and documents to which this user is subscribed.



User Editor - Addresses

8. On the **Feature Security** tab, select whether to enable either or both of the following modules: Loss Prevention, and Sales and Productivity (if your organization has not purchased the Sales and Productivity module, you will not see this option). Also select the features you want to assign to the user by selecting the check boxes in the **User Level** column.

> **Notes:** All installations include the Loss Prevention module. The Sales and Productivity module is included when the license for it is also purchased by the organization.
>
> If you disable access to a module, the user will not have access to the core reports, controls, metrics, and filters for that module.
>
> The customers' module selection is set by Oracle after installation.



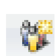
User Editor – Feature Security

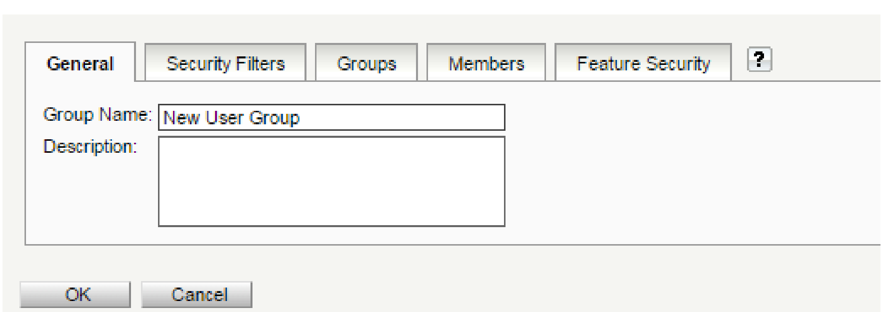
9. Click **OK** to save the new user and return to the User Manager.

After you save the new user, the user is sent an email with a temporary password that is used to log in for the first time.

Creating a New Group

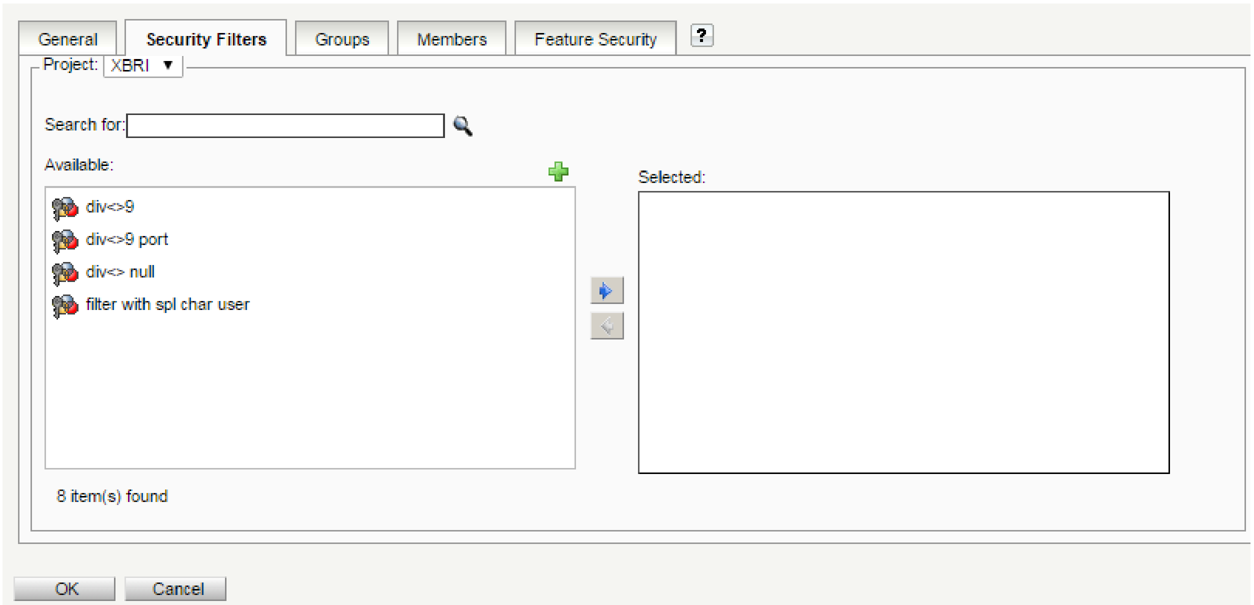
To create a group:

1. Log in to XBR*i* as the Customer Administrator.
2. From the Admin menu, choose **User Manager**. This displays the User Manager, which lists the user groups.
3. Click the **New Group** icon  on the toolbar. This displays the Group Editor.



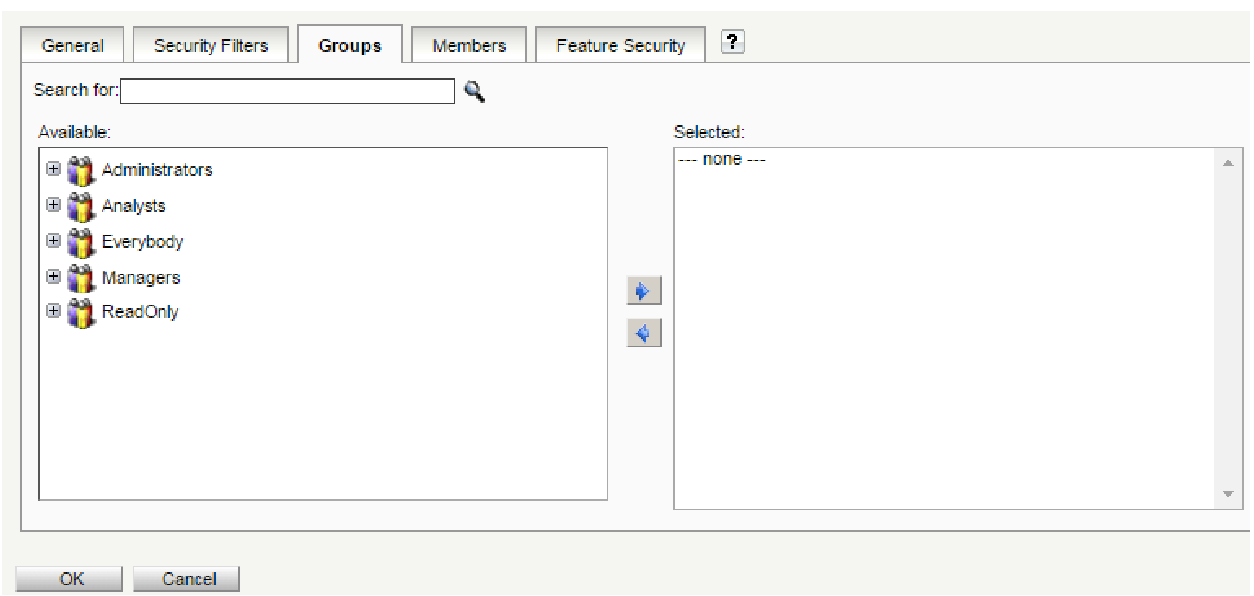
Group Editor - General

4. On the General tab, enter a name and description for the group.
5. On the Security Filters tab, assign security filters. These restrict the data this group can see displayed in reports. (This step is optional).



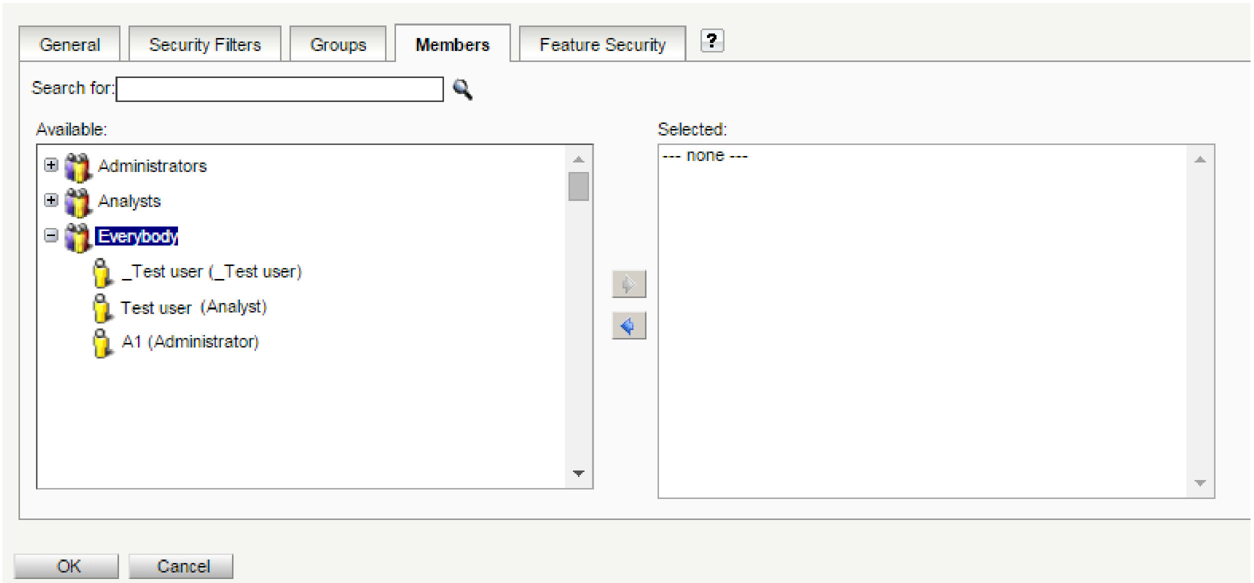
Group Editor – Security Filters

6. On the Groups tab, you can place existing groups within the new group you are creating. Any groups that you select from the list are placed within the new group, and therefore, at a lower level than your new group. You can expand and contract the existing groups to locate specific users, or search for groups using the **Search** field.



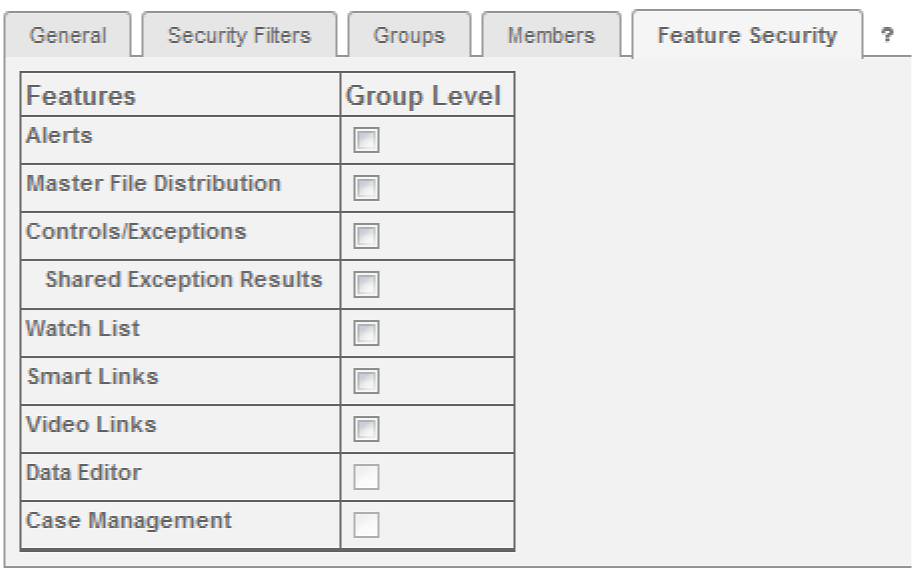
Group Editor - Groups

7. On the Members tab, you can determine which users will belong to your new group. You can expand and contract the existing groups to locate specific users, or search for users using the **Search** field.



Group Editor - Members

8. On the Feature Security tab, select the check box next to each feature you want to enable for the group.



Group Editor – Feature Security

> **Note:** Module/Components features for a group are inherited from the module type set for the organization by the Core XBR^i Administrator during the post-installation steps; therefore, these feature options are not displayed in the Feature Security tab of the Group Editor. If the organization has both the Loss Prevention and Sales and Productivity modules, these options can be enabled or disabled for individual users in the User Editor.

9. Click **OK** to save the new group and return to the User Manager.

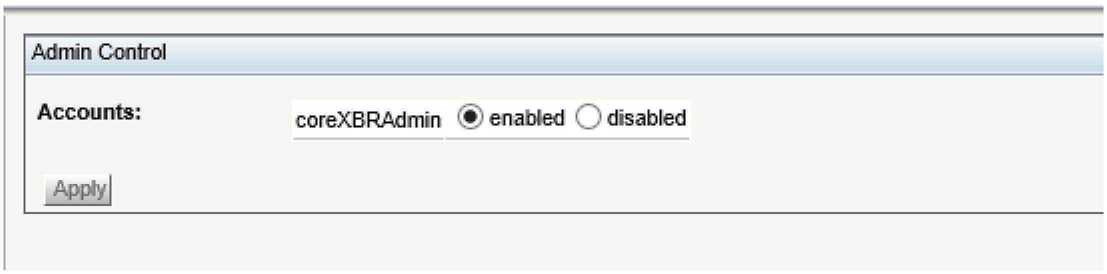
Disable or Enable Admin Control Users

The Project Defaults, Admin Control page lets you enable or disable users on the Admin Control list. The users on this list are those with elevated privileges who performed the installation and configuration of your application.

> IMPORTANT: It is recommended that you disable all of the users on the Admin Control list to prevent unauthorized activity. You can enable them as needed if you require assistance from Oracle.

To enable or disable Admin Control users:

1. Log in to XBR^i as the Customer Administrator.
2. From the Admin menu, choose **Project Defaults.**
3. Under Settings, click the **Admin Control** link. This displays the Admin Control page:



Admin Control Page

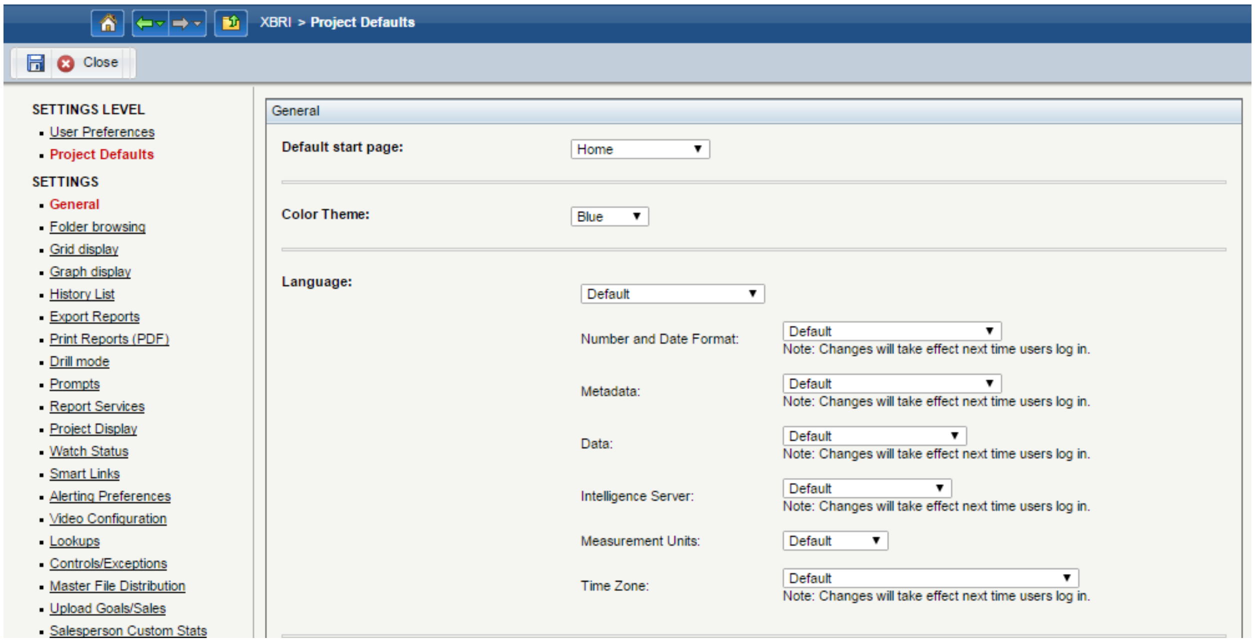
- To disable Admin Control for a user, click the **disabled** button next to the user name.
- To enable Admin Control for a user, click the **enabled** button next to the user name.

4. Click **Apply** to apply the changes.

Set Project Language Defaults

The language defaults for your site are configured during installation according to site requirements. Customer Administrators can change the language defaults at the project level. Individual users can change their language preferences using Admin, User Preferences.

1. Log in to XBR^i as the Customer Administrator.
2. From the Admin menu, choose **Project Defaults.**
3. On the General page, select the default language for the project from each of the drop-down menus:



Project Defaults – General – Language

Language: Specify the language in which to display the screens in the application. You can also specify a number of locale and internationalization options individually, if necessary. Otherwise, the main Language setting is all that you need to set.

Number and Date Format: Specify the language in which to display numbers and dates in the application. This setting, along with the Time Zone setting, ensures that object creation/modification dates and times are converted to your local time if the project information is in another time zone.

> **Note**: The **Number and Date Format** and **Time Zone** settings do not affect the report execution dates and times shown in the History List.

Metadata: Specify the language in which to display the project metadata, such as attribute names.

Data: Specify the language in which to display the project data, such as attribute elements.

Intelligence Server: Specify the language in which all messages from the Intelligence Server are displayed.

Measurement Units: Specify the unit of measurement that should be used for horizontal and vertical rulers, the alignment grid, and the measurement and positioning of objects.

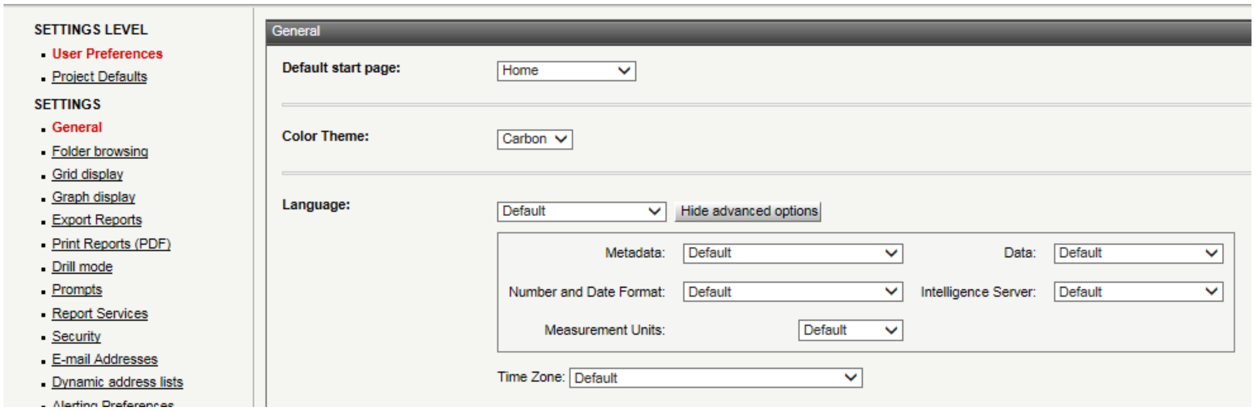
Time Zone: Specify the time zone in which you work.

4. Click **Apply** to apply the changes.

Set User Language Preferences

You can also set language preferences at the individual user level. Any user with the privileges to set General User Preferences can set language preferences that apply to just that user.

1. From the Admin menu, choose User Preferences.
2. On the General page, select the following language preferences:



User Preferences - General - Language

Language: From the drop-down list, select the language in which to display pages.

You can also specify a number of locale and internationalization options individually, if necessary, as shown below. Otherwise, the main Language setting is all that you need to set.

Time Zone: Specify the time zone in which you work. The default setting is Greenwich Mean Time (GMT).

When you click **Display Advanced Options**, the follow options are displayed:

Metadata: Specify the language in which to display the project metadata, such as attribute names.

Data: Specify the language in which to display the project data, such as attribute elements.

Number and Date Format: Specify the language in which to display numbers and dates. This setting, along with the Time Zone setting, ensures that object creation/modification dates and times are converted to your local time if the project information is in another time zone.

Note: The Number and Date Format and Time Zone settings do not affect the report execution dates and times shown in the History List.

Intelligence Server: Specify the language in which all messages from the Intelligence Server are displayed.

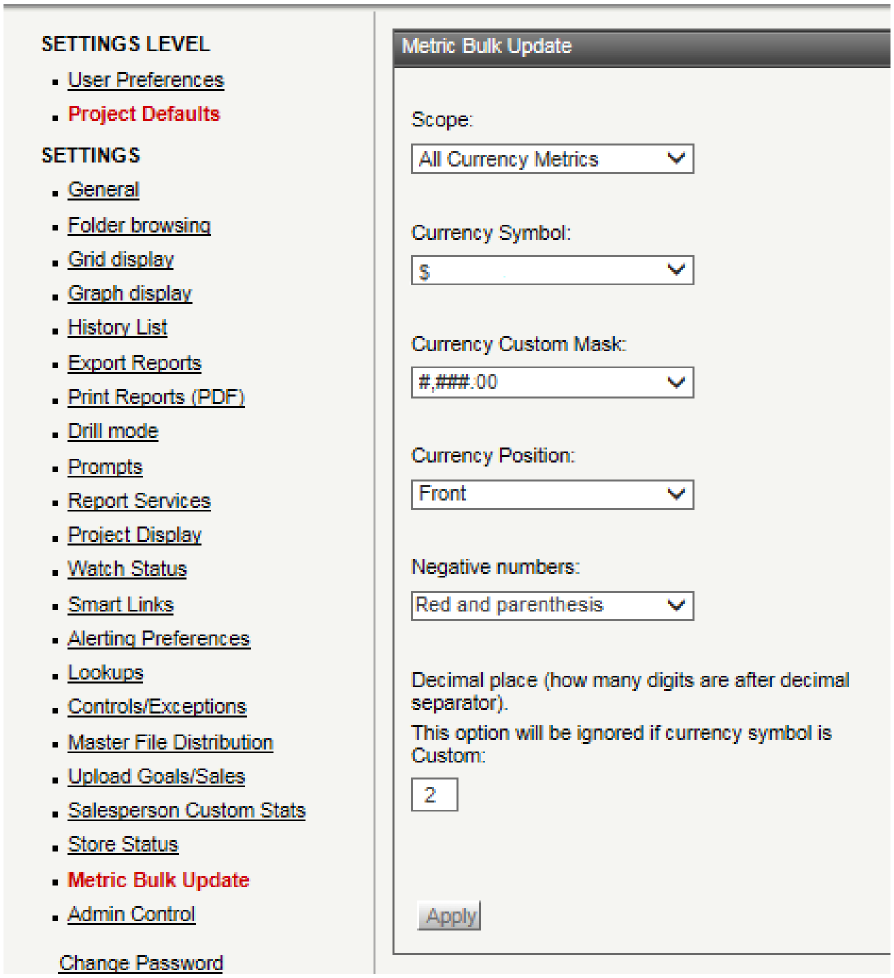
Measurement Units: Specify the unit of measurement that should be used for horizontal and vertical rulers, the alignment grid, and the measurement and positioning of objects.

Apply Updates for Currency Metrics

If you are using multiple currencies in your project, set the defaults applied to currency metrics in the Project Defaults, Metric Bulk Update page. This lets you set default formats for local, common or all currency metrics. This includes defaults for symbol, custom mask, position, negative numbers, and decimal place. The changes are displayed wherever currency is shown in the application, such as in reports, documents, dashboards, and control points.

Note: XBR^i is updated with currency exchange rates on a schedule determined by the customer. The customer data feed is provided by the customer. The schedule for updating the database with the customer exchange rate data is implemented by the Oracle Enablement team.

1. Log in to XBR^i as the Customer Administrator.
2. From the Admin menu, choose Project Defaults**.**
3. Under Settings, choose Metric Bulk Update.



Project Defaults – Metric Bulk Update

4. Make selections for the following options:

   Scope

   Select the group of metrics to which you want to apply bulk updates from the drop-down list.

   Available options are:

      All Currency Metrics - Applies to both Local and Common Currency Metrics.

      Local Metrics only - Applies to the metrics based on amounts that will display a currency except for those in the Common Currency folder.

      Common Metrics only - Applies to the metrics based on amounts that will display a currency only for those in the Common Currency folder.

   Currency Symbol

   From the drop-down list, select the symbol associated with the metric currency. The list of symbols is determined by the languages available for your project.

   > **Note:** If you choose Custom as the currency symbol, the symbol is based on the selection for Number and Date Format in User Preferences. For example, if the Number and Date Format is Italian, the Custom Currency symbol will be for the Euro. See: General Preferences in the XBR^{i} Administrator online help for more information on setting the Number and Date Format preferences.

Currency Custom Mask

From the drop-down list, select the characters to use to mask currency amounts. Available options are:

#,###.00

#,###.##

#.###,##

Currency Position

From the drop-down list, select the currency position to apply to the metric currency. Available options are:

Front - For example, $123.45

Back - For example, 123.45$

Front and space - For example, $ 123.45

Back and space - For example, 123.45 $

Negative Numbers

From the drop-down list, select a format for displaying negative numbers. Available options are:

Red and parentheses

Red

Black and parentheses

Decimal Place

In the box below the Decimal Place label, enter the number of digits to display after the decimal separator.

Note: This option will be ignored if the Currency Symbol is Custom.

Click **Apply** to apply the settings.

Configure for Master File Distribution

The Master File Distribution feature allows customers to send subscription reports to recipients who are not defined users in XBR*i*. This is done through dynamic address lists that are derived from reports based on the core master tables for Store, District, and Region for Retail installations and District and Location for Food and Beverage installations. When you create a dynamic address list, it becomes available on the Recipients list for creating email subscriptions.

The reports used for creating dynamic address lists are stored in the Shared Reports > Master File Distribution folder. They include columns for Email, Device ID and Linked User ID. The Device ID column is initially populated when the application is installed or when new rows are added to the master files.

The Linked User ID columns are updated in the master files when the MFD nightly update process runs. For master files with fewer than 30 rows of data, you can update these columns through the application.

This section contains the steps from enabling master file distribution through using dynamic address lists.

- Step A: Give access to the correct users and groups
- Step B: Verify that key columns and security filter key attributes are correct
- Step C: Create Dynamic Address Lists
- Step D: Populate the Master File tables
- Step E: Use Dynamic Address Lists in Subscriptions

Step A: Give Access to the MFD Feature:

In the XBR*i* User Manager, turn on the Master File Distribution feature for the administrator users.

To give users and groups access to the Master File Distribution feature:

1. Log in to XBR*i* as a customer administrator.
2. From the Admin menu, choose **User Manager**. This displays the User Manager.
   - If you want to give access at the group level, click the **Edit** icon in the Group row.
   - If you want to give access at the user level, expand the group, and click the **Edit** icon in the user row.
3. This displays the Group Editor for a group or the User Editor for a user.
4. Click the **Feature Security** tab.
5. Select the check box next to **Master File Distribution**.
6. Click **OK**.

> **Note:** By default, this feature will be On.

Step B: Verify that Key Columns and Security Filter Key Attributes are Correct

Several attributes are used specifically for Master File Distribution. For Retail, they are Store MFD, District MFD and Region MFD. These attributes are used in the reports on which the dynamic address lists are based.

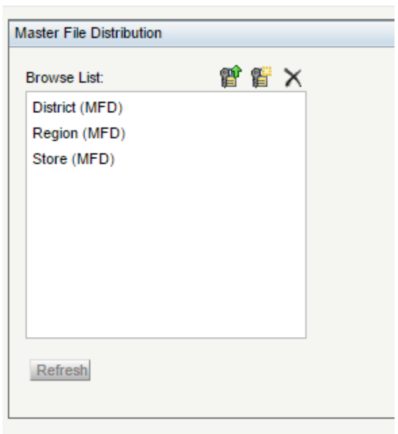
After XBR*i* is installed and MFD is enabled for the project, you need to review the Master File Distribution settings in Project Defaults and verify that MFD mapping matches the key columns for each of the master tables. For example, if Store is not unique, Store and Division should be selected as keys.

Also, each of the mappings has a security filter associated with it. The security filter ensures the data sent is only for that one store or one district, and so on. These also need to be correct for the customer site. If not, contact, your Oracle representative to have them modified.

> **Note:** If you change the security filter after an MFD update has already run, the new change will not take place until the previous MFD users and MFD filters have been deleted and the process is run again. If you need to delete MFD users or filters, use the Delete function in the Project Defaults – Master File Distribution page. See the steps that follow for more information.

To verify key columns are correct:

1. Log in to XBR^{i} as a customer Administrator.
2. From the Admin menu, choose **Project Defaults**.
3. Under Settings, choose **Master File Distribution**. This displays the Master File Distribution page.



Project Defaults – Master File Distribution Page

4. For each table in the Browse List, select the table and click the **Define key columns in database table** icon.
5. Verify that the key columns are correct.
6. When you are done verifying the key columns, click **OK**.

To verify key attributes in the security filter are correct and modify if needed:

1. Log in to XBR^{i} as a customer Administrator.
2. From the Admin menu, choose **Project Defaults**.
3. Under Settings, choose **Master File Distribution**.
4. For each table in the Browse List, select the table and click the **Define key attributes for Security Filter** icon.
5. Verify that the key attributes are correct. Note: These attributes must exist in the master table you are modifying, such as Store and Division in the Store Master table.
6. When you are done verifying the key attributes, click **OK**.

> **Note:** Only Oracle XBRAdmin Core Administrators can modify key columns and security filters.

If the key columns or security filters are modified, you must delete and refresh the data.

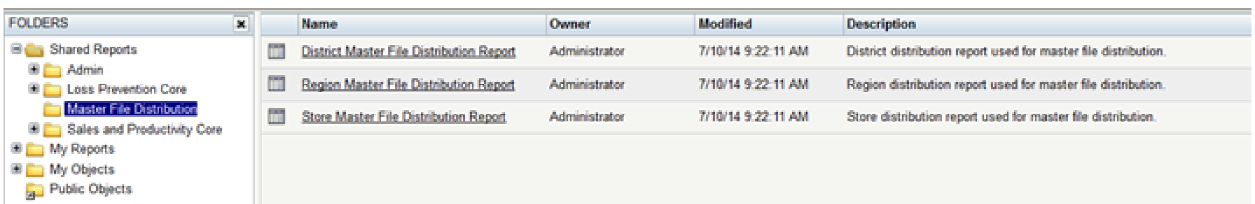
To delete MFD users and Linked User IDs already set up by the program:

1. Log in to XBR*i* as a customer Administrator.
2. From the Admin menu, choose **Project Defaults**.
3. Under Settings, choose **Master File Distribution**.
4. Select each attribute in the Browse List that you want to delete, and click the **Delete** icon.
5. When you are done deleting attributes, click **OK**.

Master File Distribution Reports

The reports used for creating dynamic address lists are stored in the Shared Reports > Master File Distribution folder. They each contain the MFD attributes that are derived from core master tables for Store, District, and Region for Retail installations. They include columns for Email, Device ID and Linked User ID. The Device ID column is populated when the application is installed or upgraded. The Linked User ID column is updated when the nightly MFD update process is run or for master files with fewer than 30 rows of data, when you run the **Refresh table** option in the Project Defaults > Master File Distribution page.

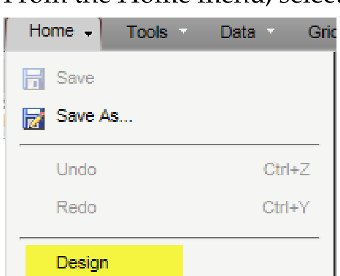
The dynamic address lists that you create in the next step use the addresses associated with the Linked User IDs from the Master File Distribution reports in the Shared Reports > Master File Distribution folder.



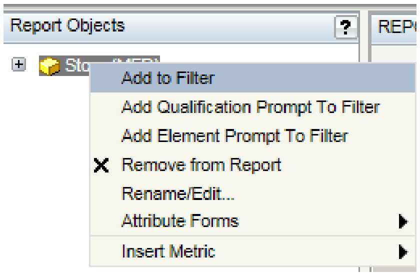
- You can create copies of these reports to add filters to create a smaller distribution subset of the Master file, such as all stores in a particular state.
- Each report must have one of the Master File key attributes, for example, Region, MFD, linked user ID, and email.
- Any security filters that are applied to the contact's linked user are also applied to any reports and documents that are sent to the address.

Example: Modifying a Store Master File Distribution report

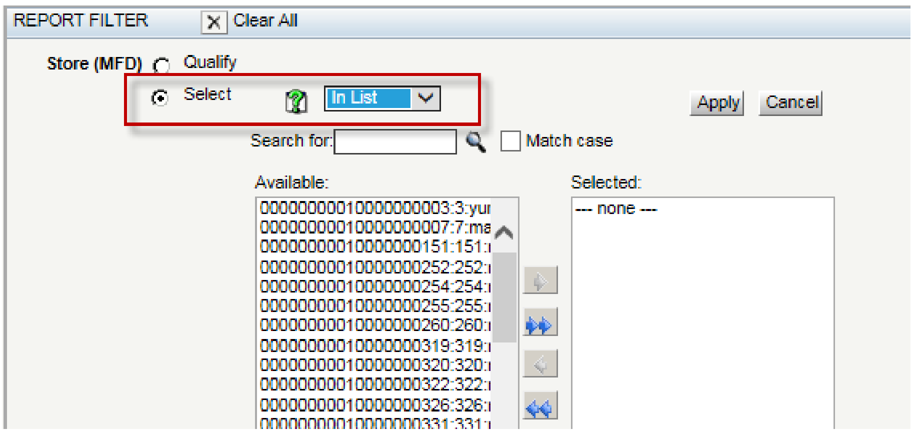
1. Go to the Shared Reports > Master File Distribution folder.
2. Open the Store Master File Distribution report.
3. From the Home menu, select **Design**.



4. If the Report Filter panel is not displayed above the report, click the **Filter** icon.
5. From the Report Objects panel, locate the Store attribute.



6. Right click on the Store attribute and click **Add to Filter** from the menu. This displays a Report Filter panel:



Report Filter panel

To create the list of elements which the filter will use to filter data:

1. Click **Select**.
2. From the In List drop-down list, select one of the following:
   - To define what attribute elements the filter should include data for, select **In List**.
   - To define what attribute elements the filter should exclude data for, select **Not In List**.
3. The Available pane displays the elements that belong to the store attribute chosen for this filter.
4. Select a store and then click the right arrow to move it to the Selected pane. Press **CTRL** to select multiple individual stores or **Shift + click** to select a series of stores. If the Available list contains a large number of stores, use the Search for field to locate the elements to select.
5. Click **Apply** to apply the filter.
6. Click the **Save As** icon. 
7. In the Save As dialog, enter a new name for the report, and click **OK**.

Step C: Create Dynamic Address Lists

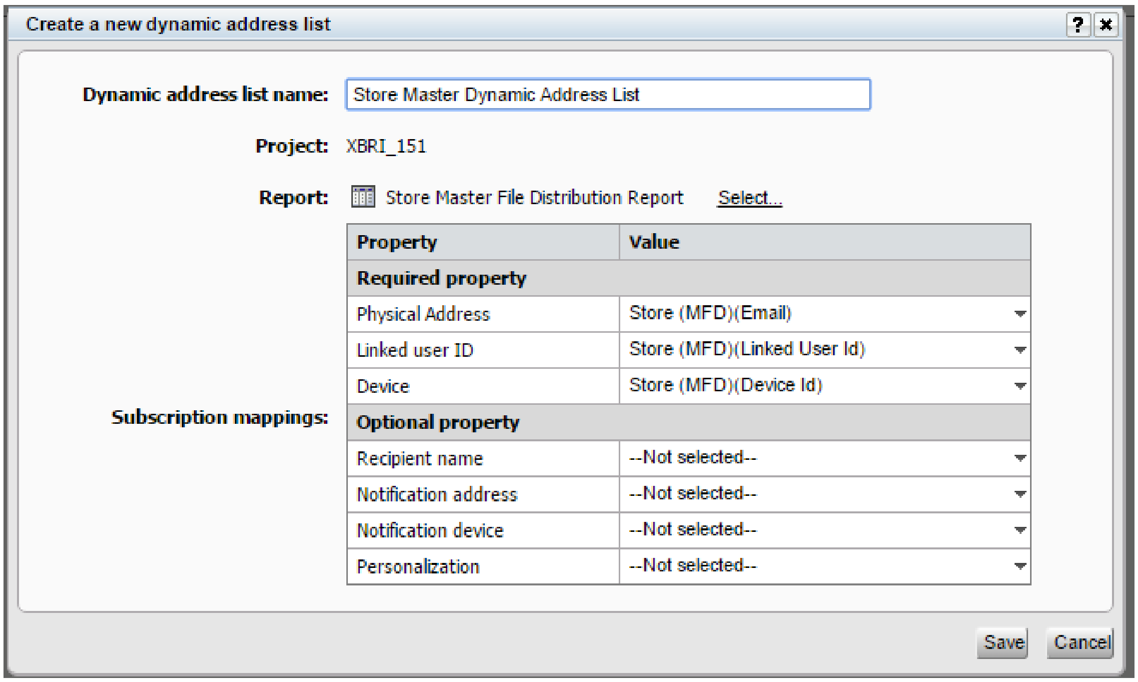
This step explains how to create Dynamic Address lists for the customer. Each Dynamic Address list is linked to one of the reports in the Shared Reports > Master File Distribution folder.

The emails that will be sent to recipients on dynamic address lists are determined by the reports to which they are linked. If you need to create a dynamic address list with a different set of email recipients than those in the MFD reports provided by Oracle, you will need to create or modify the existing MFD reports. See: Master File Distribution Reports for an example of how to modify an MFD report.

IMPORTANT! The subscription processing cannot handle more than 2000 users at one time. If the master file list of recipient users exceeds or comes close to 2000, the distribution reports must be filtered and run at different times.

To create Dynamic Address Lists:

1. Log in to XBR^i as a customer Administrator or Manager.
2. From the Admin menu, choose **User Preferences**.
3. Under Settings, choose **Dynamic address lists**.
4. Click the **Add a new dynamic address list** link.



Dynamic Address list

5. Click the **Select…** link next to **Report:**
6. Navigate to the Shared Reports > Master File Distribution folder.
7. For each of the reports in the folder, create a dynamic address list by completing the steps that follow.
   - **a.** Select the report and click **OK**.
   - **b.** Enter a name for the list in the **Dynamic address list name** field.
   - **c.** Under the Required property settings, make sure the correct values are selected. For example, for the Property, Physical Address, in a list containing the District attribute, the corresponding Value should be District (MFD) (Email).

Note: the lower portion of the screen under the **Subscription mappings, Optional property** settings is not used in XBR^i.

   - **d.** Click **Save**.

The new list will be displayed under Dynamic address lists in User Preferences. Repeat step 7, a-d for all of the reports in the Master File Distribution folder.

Step D: Populate the Master File Tables

In order for Dynamic address to work correctly, the master file tables must be populated with a linked user ID for each row in the master file. The master file tables are updated daily through a process that is scheduled when the application is installed. For master files with fewer than 30 rows of data, you can use XBR*i* Project Defaults, Master File Distribution and run the **Refresh table** option. This option could be used if you wanted to include users that have just been added to master file table to a Dynamic Address list before the daily scheduled MFD update process is run.

> **Note:** If a file has more than 30 rows and you try to use the Refresh Table command in Project defaults, you will see a message that lets you know the file is too large to process.

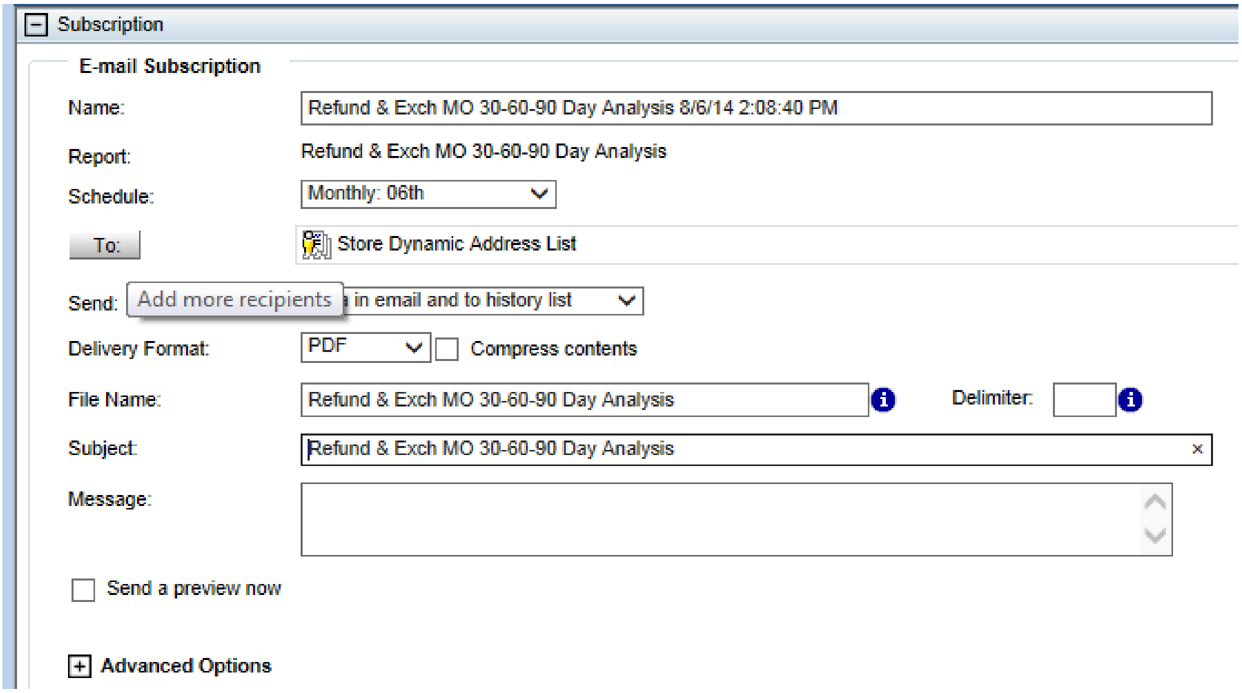
To populate the linked user ID in the Master File tables from Project Defaults:

1. Log in to XBR*i* as a customer Administrator.
2. From the Admin menu, choose **Project Defaults**.
3. Under Settings, choose **Master File Distribution**.
4. Select the master table you want to update in the Browse List and click the **Refresh table <Table name MFD>** button.

Step E: Use Dynamic Address Lists in Subscriptions

After you have completed the steps for configuring Master File Distribution, the dynamic address list will be available as a new recipient in the Add more recipients TO option when creating and editing subscriptions.

> IMPORTANT! When creating the subscription, the attributes (keys) used to define the master file in the project defaults must be in the report or selected in the hierarchy prompt used in the subscription. For example, if store and division are selected keys, these attributes must be included in the report subscription.



E-mail Subscription Window

2

Oracle XBR^i Mobile Configuration

You can install the Oracle XBR^i app on an iPad. The app for iPad is available from the Apple App Store. The steps that follow directly show how the customer can install the app on their mobile device. Prior to installing the device, Oracle must set up the Apple device to connect to the XBR^i Mobile Server and generate the URL for the device.

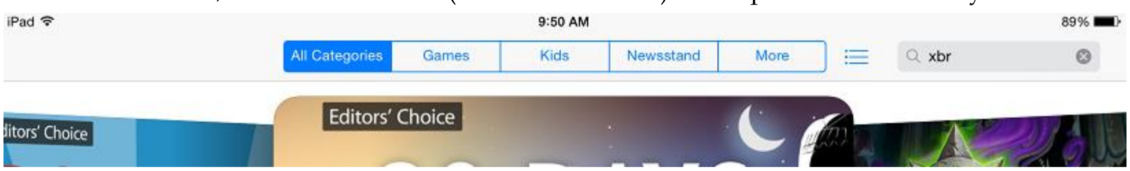
Adding the Oracle XBR^i App for iPad:

Before you begin: locate the email from your customer administrator that contains the URL for the XBR^i Mobile Server.

You can download the Oracle XBRi app for iPad directly from Apple App Store. Follow the steps below to download and log in to the app:

1. On the iPad, tap the App Store icon.

2. In the Search field, enter Oracle XBRi (not case sensitive) and tap **Search** on the keyboard.



App Store Search Field

3. This takes you to the Oracle XBRi app logo. Tap the **OPEN** link.

Oracle XBRI

4. At this point, if you have not already, sign in to the Apple App Store.
5. The Oracle XBRi app icon appears on your tablet when it has finished installing.
6. Open the email from your customer administrator that contains the URL for the XBR^i Mobile Server and copy the URL to the Notes app, which will convert the long URL to a link.
7. Tap the link to connect to XBR^i Mobile Server.
8. Enter your XBR^i login credentials, with your User Name prefixed by xbr. For example, for user JSmith, enter xbr_jsmith. Enter your usual XBR^i password.
9. Either tap the **GO** button on the virtual keyboard, or shrink the keyboard and click **OK** on the login prompt.

   This logs you in to the Oracle XBRi app. Hereafter, when you click the Oracle XBRi icon, the saved credentials are used, and you will not need to re-enter them.